

Internal Performance Evaluation and Reporting

measuring and evaluating the 3E's



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A three-day short course of the
Public Finance Management Programme™ presented in Pretoria



25 – 27 September 2012

Background:

Globally there is a trend towards public sector reform that seeks to improve service delivery in the public sector. The *Public Finance Management Act* (PFMA) is a key instrument for facilitating the reform of financial management in the South African government. The PFMA gives effect to various sections of the Constitution of the Republic of South Africa and adopts an approach to financial management that focuses on outputs and responsibilities rather than the input approach previously adopted. Performance management, which serves as a monitoring and controlling function within an organization, is strongly linked to financial management. It is within this context that *performance evaluation and performance reporting* and the value thereof become extremely important.

The PFMA and the Treasury Regulations clearly indicate the need for performance *evaluations* to be able to demonstrate:

- the extent to which measurable objectives have been achieved; and
- that resources were acquired and utilized efficiently and economically.

It further demonstrates the need for performance *reporting* by way of definition of measurable objectives and regular reporting on the achievement thereof.

This course:

The objective of the course is to cover both the areas of *performance evaluation and performance reporting* in detail, not from a theoretical perspective, but from a practical point of view. At the end of the course the participants should be able to understand the meaning of important terminology and processes and be able to apply this in their working environments to ensure compliance with the PFMA and related Treasury Regulations. The course strikes a balance between management *skills* and the conceptual *knowledge* required to understand the concepts. Case studies form an integral part of the learning experience.

Who should attend:

The concepts of performance evaluation and reporting are so central to the *Public Finance Management Act* and related legislation that they do not apply to one particular group only. Appropriate models discounting South African circumstances and characteristics of individual departments and organisations can only be developed in a team context. It is therefore imperative that the widest possible staff component is exposed to these educational and skills transfer opportunities. This course is specifically designed from a public sector perspective and suited for all officials who are involved in performance evaluation and reporting. These functionaries will benefit greatly from attending this three-day short course.

SAIGA can deliver!

Presented by:

SAIGA

ADVANCING AUDITING AND ACCOUNTABILITY

The Southern African Institute
of Government Auditors

www.saiga.co.za



Contents:

As for all courses which form part of the Public Finance Management Programme™, the content is designed around and based on the requirements of the *Public Finance Management Act*. This way SAIGA assists with the implementation of the *Public Finance Management Act*. Topics dealt with in this three-day course include:

Background

- Requirements of The *Public Finance Management Act*, Treasury Regulations and related legislation
- Why performance evaluation and reporting
- Benefits to stakeholders

Principles and Guidelines

- Measures of efficiency
- Indicators of effectiveness
- Difference between performance evaluation and reporting
- Important definitions and the application thereof
- Discussion of different international models
- Application in the South African context

Process of performance evaluation

- Generic framework
- Practical application by way of case study
- Examples of criteria/best practices to be used

Process of performance reporting

- Generic framework
- Practical application by way of case studies.

Course content and focus of discussions may be adjusted and the emphasis changed depending on feed-back from participants. Participants receive detailed complimentary notes to facilitate continued learning even after the course itself has ended.

The venue:

The courses are mostly presented at the UNISA Sunnyside Campus in Pretoria. Maps and details of the lecturing hall/venue will be faxed/posted to participants after payment has been received. Please note that courses may be shifted to other venues due to various circumstances beyond our control and to accommodate the demand as far as possible. The SAIGA Secretariat will only send maps to participants who have provided proof of payment (faxed a copy of the deposit slip) or made explicit arrangements with the Secretariat regarding payment.

Costs:

The course fee of R5,358.00 (R4,700 plus 14% VAT) includes attendance for all *three* days, course file, a certificate, hand-outs, notes, case studies and solutions. The Institute will also provide participants with a free lunch as well as free tea/coffee at 10:00 and 15:00. Staff of corporate members of *The Southern African Institute of Government Auditors* (SAIGA) can claim a discount of R684 (R600 plus 14% VAT).

Course Rating	national & provincial departments	<input checked="" type="checkbox"/>	local authorities	<input checked="" type="checkbox"/>	public entities	<input checked="" type="checkbox"/>
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The Organisation:

NPO registration number: 045-133 NPO

The **Southern African Institute of Government Auditors** is a non-profit organisation. Its constitutional objectives include the advancement of auditing and accountability. Through the presentation of high-quality, affordable courses, the Institute aims to facilitate the sharing of knowledge and the empowerment of South Africa's people. The Institute supports the prioritisation of the concepts of *economy*, *efficiency* and *effectiveness*.

The **Public Finance Management Academy™** was founded by SAIGA to provide high quality, affordable continued professional education which is tailor-made for the public financial manager and government auditor. Visit us at: www.saiga.co.za



Certification and accreditation:

This course forms part of the *Public Finance Management Programme*[™]. For more information on the PFM Programme, visit our website: www.saiga.co.za The Public Finance Management Academy[™] will issue course participants with a certificate of attendance under the seal of the Southern African Institute of Government Auditors. Participants earn 20 Educational Credits (EC's) for attending this short course. The Public Finance Management Academy[™] maintains a central register where these credits are administered. The ECs provide participants with focus and clearly stated objectives. This assists employers to monitor the continued professional education and training (CPE) progress, and the manner in which their staff is committed to CPE. The PFM Programme is developed and structured on the outcomes based education (OBE) model. This short course and its Educational Credits form part of the requirements for the *Portfolio of Short Courses*. In order to complete the Portfolio of Short Courses, participants have to meet two basic requirements: earn a minimum of 120 EC's and enrol for and complete an assessment.

SAIGA and the Public Finance Management Academy[™] utilise educational and professional experts to function as quality assurers of this course and the course design, structure and material are subject to quality control and assessment by these experts. National Treasury set up a Validation Board to "accredit" or "validate" short-term training programmes and to address coordination and quality issues which surround the programmes available to existing employees (this Board ceased to operate in 2006). The aims of the validation mechanism were to coordinate activities and to advise departments of relevant programmes which target identified needs and are delivered to a suitable quality. The Short Courses of SAIGA's Public Finance Management Programme[™] were all accredited by the National Treasury's Validation Board until it ceased to operate in 2006.

Bookings:

Since only a limited number of participants can be accommodated, bookings will be handled on a first-come-first-served basis. To avoid disappointment submit your registration as soon as possible.

Changes / cancellations: Tax invoices will be issued (faxed and posted) on receipt of your booking. Once a tax invoice has been issued the department/delegate will be held liable for payment of the full course fee. No refunds can be made, but alternative delegates (substitutes) may attend the same course at no extra cost. All booking changes or cancellations are charged at R1,368.00 (R1,200 plus 14% VAT) per delegate booking. No cancellations or changes in booking will be accepted if not received in writing at least 5 working days before the course. Invoices must be paid before the course starts. No certificates will be issued if payment is outstanding. Outstanding payments incur 2% interest per month. Due to the minimal information which banks provide in respect of direct deposits, participant have to fax their deposit slips / electronic transfer slips to the Secretariat and state the invoice number/(s) to which the deposit refers. As required by recent legislation, VAT numbers have to be provided with registration. The Institute reserves the right to cancel a particular course due to unforeseen circumstances e.g. insufficient bookings or unavailability of venues (in the last few years, only a few courses had to be cancelled). In such event, participants will be informed at least two weeks before the scheduled course date of such cancellations. Participants who have paid their fees will receive full refunds in the event of SAIGA cancelling a course (SAIGA's liability in such event is limited to this refund).

Time schedule:

The daily course program starts at 08:30 and ends at 16:00. On the last day of the course the program ends at 15:00 to accommodate travel arrangements of participants.

Presenters:

Our presenters are a blend of professional managers, chartered accountants and educators with wide experience in the presentation of courses in the public sector. The high esteem of SAIGA courses has been developed over a number of years by involving only experts in the development and presentation of the CPE opportunities. The presenters have been involved with numerous training initiatives in the public sector and the *Public Finance Management Act* in particular. They serve on various professional committees and have years of experience in the field of continued professional education and are supported by senior staff.

Accommodation:

Participants are responsible for arranging their own accommodation. The Secretariat can provide details of accommodation in relative close proximity to the training venues.

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3 day course



Registration & Booking form

This form can be used to book your place on any of the course dates



012 362-1221

SAIGA
PO Box 36303
MENLO PARK 0102



012 362-1418

Please book the following persons for the course as indicated below
(if space insufficient, use a separate page providing the same details)

SURNAME	INITIALS	TITLE	POSITION HELD	DATE FOR WHICH BOOKING IS REQUIRED

Due to the limitation of the number of participants per group, places cannot be guaranteed. The institute will finalise bookings and inform participants of successful booking or communicate alternative dates. VAT invoices will be issued as soon as bookings are finalised and accepted. **Full payment must be received in advance of the course.**

Organisation/Department

Postal address

Code:

Telephone number
(and area code)

Fax number

VAT Registration number

As required by Government Gazette No. 25864
For full details visit the VAT section at sars.gov.za

E-Mail address

Authorised signature _____ Name of signatory _____

SAIGA corporate membership number (if discount is claimed)

On-line registration can also be done through our website at: www.saiga.co.za