



# The Southern African Institute of Government Auditors

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**SAIGA**



**ADVANCING AUDITING AND ACCOUNTABILITY**

2017

## Performance Evaluation and Reporting (Managing the 3 Es)(Efficiency, effectiveness and economy)

Name of course	Duration	Cost including Vat	Scheduled Dates
Performance Evaluation and Reporting (Managing the 3 Es)(Efficiency, effectiveness and economy)	3	Available by request(In house training)	<b>Available by request</b>

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.

## **CONTENT**

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.

## **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.

## **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](http://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 25 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 enroll 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

## **Bookings:**

Changes / cancellations: Tax invoices will be issued (faxed and posted) on receipt of your booking. Once a tax invoice has been issued the department will be held liable for payment of the full group course fee. All booking changes or cancellations are charged at R1,539 (R1,350 plus 14% VAT) per 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. illness of the presenters. Clients will receive full refunds in the event of SAIGA cancelling a course (SAIGA's liability in such event is limited to this refund).

suitable quality. The Short Courses of SAIGA's Public Finance Management Programme was all accredited by the National Treasury's Validation Board until it ceased to operate in 2006

### **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 13:00 to accommodate participants' travel arrangements.

### **The venue:**

For in-house courses, the client provides the venue and all refreshments. Venues should be chosen to allow participants to sit comfortably and be able to take notes. An overhead data projector must be installed and the screen visible to all participants.

### **Costs:**

General guidelines for in-house course presentations: Minimum group fees for 20 persons. The Institute charges a group fee per course based on 20 persons. This group fee is payable even if less than 20 persons attend. Should, however, more than 20 attend the extra cost per participant in excess of 20 is considerably lower. Quotations are available on request from the SAIGA Secretariat. Courses are designed to be presented over the number of days as indicated on the first page of this flyer