



# The Southern African Institute of Government Auditors

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**ADVANCING AUDITING AND ACCOUNTABILITY**

2017

## Performance Management in terms of the PFMA

Name of course	Duration	Cost including Vat	Scheduled Dates
Performance Management in terms of the PFMA	5	Available by request (In house training)	Available by request

The concepts of *Performance* and *Management* are the cornerstones of the "quiet revolution" and the paradigm shift introduced by the *Public Finance Management Act* and *Municipal Finance Management Act*. Whilst "Performance" relates to the three E's (efficiency, effectiveness and economy), the concept of "Management" stresses the change of emphasis from administering finances and resources to the management thereof. In fulfilling their functions as public sector managers, a *symbiosis* has to be accomplished between the two concepts.

Since private sector legislation does not support the concept of Performance Management, the public sector is called upon to provide the leading edge on issues of Performance Management. In addition, the necessity for Performance Management increases as communities apply pressure for services to be provided more efficiently and effectively to reduce the demand on taxpayers while maintaining the volume and quality of existing services supplied to the public.

### **This course:**

This course is designed to introduce participants to multidimensional performance management and measurement and to empower them to deal effectively and efficiently with the requirements of the current legislation as well as the information needs of the ever

### **Who should attend:**

The concepts of performance management and measurement are so central to the Public Finance Management Act and Municipal Finance Management Act 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

growing body of stakeholders such as fund-granting bodies. The course strikes a balance between performance management skills and the conceptual knowledge required to understand these concepts. Case studies and the dissemination of international best practices on the topic form an integral part of the learning experience.

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 management and measurement. These functionaries will benefit greatly from attending this five-day short course: Performance Management.

## 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*. International best practices in respect of the topic also forms an integral part of the short course. Topics dealt with in this five-day course include:

Reasons for introducing Performance Management (PM) in the public sector

▶ Legal requirements; ▶ Good organisation management; ▶ Understanding customer requirements; ▶ Benefits of PM; ▶ Limitations of PM; ▶ Relationship of PM and budgeting; ▶ Best practices in PM

Strategic objectives and PM

▶ Interpreting visions and missions; ▶ Strategy analysis; ▶ Determination of strategic objectives  
▶ Measures of success (short and long term)

Type of Performance Measures

▶ Efficiency; ▶ Effectiveness; ▶ Economy; ▶ Outcomes; ▶ Interaction between measures; ▶ Critical success factors; ▶ Characteristics of good metrics (directional, quantitative and worthwhile); ▶ Customer measure and service measures

Designing a PM system

▶ Interpreting objectives; ▶ Behavioural aspects; ▶ Availability of measures (electronically); ▶ Reporting frequencies; ▶ Levels of reporting and measurement; ▶ Identifying customers of the system; ▶ Cost of measurement

Technology

▶ Understanding different technologies; ▶ Linking with legacy systems; ▶ Gathering of data, quality and integrity; ▶ Analytical tools; ▶ Visualisation tools; ▶ Web information portals; ▶ Review of several vendor offerings

Techniques

▶ Critical success factors; ▶ Balanced scorecards; ▶ Performance pyramids; ▶ Stakeholder models; ▶ EP2m model; ▶ Business excellence framework; ▶ Benchmarking; ▶ Activity-based costing; ▶ Total Quality Management (TQM); ▶ Weighted impact structured evaluation

Organisational improvement opportunities

▶ Identifying improvement opportunities; ▶ Business process re-engineering; ▶ Feasibility studies; ▶ Analytical techniques; ▶ The learning organisation; ▶ Continuous improvement

#### Change management

▶ Change agents; ▶ Understanding corporate culture; ▶ Change control procedures; ▶ Behavioural aspects; ▶ Dealing with conflict; ▶ Communication of objectives, results and impacts; ▶ Participation in process; ▶ Creating feedback loops; ▶ Dealing with adverse effects of measurement

#### Performance appraisal

▶ Goal congruence between groups, departments, individuals and organisation; ▶ Accountability for results and empowerment; ▶ Linking individual performance to organisational performance; ▶ Performance incentives (financial and non-financial); ▶ Outputs vs outcomes analysis; ▶ Employee satisfaction indices

#### The PM environment

▶ Organisations; ▶ Training; ▶ Publications; ▶ Websites; ▶ International comparisons

#### Review and evaluation

▶ Analysing impact of PM on organisational performance; ▶ Review of applicability of measures; ▶ Techniques; ▶ Frequency of reviews

The presentation is supported by case studies to effect skills transfers and illustrate practical application. Participants receive complimentary notes to facilitate continued learning even after the course itself has ended. Course content and focus may be adjusted and the emphasis changed based on feed-back from participants.

**Participants have to bring along financial calculators to enable them to do practical examples in class.**

## **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

## **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 /

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 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

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).

### **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