Electronic Quarterly Performance Reports

Community of Practise

March 2021

Microsoft Teams

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BACKGROUND

➢ National departments, provincial departments and public entities have in the past compiled and submitted Quarterly Performance Reports manually using MS Excel based reporting models.

➢ The manual reporting tools for national departments, provincial departments and public entities have limited capabilities, are cumbersome to departments and do not adequately support the oversight of performance information.

➢ In response to these challenges and in the quest to constantly improve monitoring and reporting practices, the DPME has developed an Electronic Quarterly Performance Reporting System (eQPRS) for reporting by all national and provincial institutions of government.

➢ The eQPRS is applicable to National Departments, Provincial departments, Constitutional Institutions, Government Components, and 3A and 3C Public Entities.

➢ The eQPRS is an online system that allows users to access, report, provide oversight and use reported information with ease.

➢ The following roll-out was followed:

▪ The system was piloted in 2017/18 financial year with provincial sphere

▪ In 2018/19 FY national departments started to utilize the eQPRS

▪ In 2018/19 FY DPME did conduct a training with selected national public entities with plan to pilot in 2019/20 fy, however DPME had internal challenges and the pilot did not happen

▪ In 2020/21 FY Constitutional Institutions and Government Components were trained and started using the eQPRS

▪ In 2021/22 All Schedule 3A Public Entities will start using the eQPRS

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➢ The legal requirement for QPRs is reflected in the Treasury Regulations (2005)

➢ Section 5.3.1 states that the Accounting Officer of an institution must establish procedures for quarterly reporting to the Executive Authority to facilitate effective performance monitoring, evaluation and corrective action

➢ In addition, National Treasury Instruction Note 10 of 2020 outlines that the mandatory requirements as set out in the Revised Framework for Strategic and Annual Performance Plans should be fully complied with

➢ The Guidelines are updated each FY by the DPME

➢ The DPME sends the Guidelines to all institutions in May each year to inform and prepare them for the reporting cycle

➢ The guidelines is applicable to all national departments, government components, constitutional institutions and public entities

QUARTERLY PERFORMANCE REPORTING GUIDELINES

➢ The Guidelines for Quarterly Performance Reports provide instructions on how to complete Quarterly Performance Reports (QPRs)

➢ Non-financial information is essential for assessing progress towards predetermined service delivery or performance targets

➢ QPRs are based on the quarterly targets set in the tabled APPs for a specific financial year

➢ QPRs are ultimately consolidated into the performance information section of the Annual Report

➢ <u>Institutions are encouraged to develop internal mechanisms to ensure that by end of 30 days after the quarter the performance information reported is validated, reliable and credible</u>

➢ <u>Used in conjunction with:</u>
  • Technical Indicator Description table
  • Institutions' Performance Information Management Frameworks

➢ The eQPRS allows for users to upload documents to support the QPR such as the Narrative Report

➢ In 2020/21 the guidelines included a section on reporting against COVID-19 interventions. In 2021/22 it is anticipated that COVID-19 interventions are part of the output indicators and will be reported in the eQPRS

➢ The eQPRS users must refer to the eQPRS Training Manual for more detailed explanations on how to use the eQPRS

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➢ There are different types of Users of the eQPRS:

- **Capturer**
  - Capture information onto the eQPRS (targets and Actual performance)
  - Able to add documents the eQPRS

- **Entity Coordinator**
  - The user with overall reporting responsibility for the public entity
  - Approves capturers
  - Configure the budget programme structure and the output indicators
  - Capture information onto the eQPRS (targets and Actual performance)
  - Submits to the Accounting Officer
  - Able to add documents the eQPRS

- **Accounting Officer**
  - Approves and submits QPR on the eQPRS: must upload the sign-off certificate

- **DPME Coordinator**
  - Provide comments on the QPR
  - Access the attached documents on the eQPRS

- **Oversight Department Coordinator**
  - Provide comments on the QPR
  - Access the attached documents on the eQPRS

- **Treasury Coordinator**
  - Provide comments on the QPR
  - Access the attached documents on the eQPRS

REPORTING TIMELINES 2021/22

Reporting Period	Schedule Dates
QPR configuration for 2021/22	**Opening: 01 May 2021** **Closing: 30 June 2021** (Budget programme Structure, Performance indicators and Performance Targets)
Q1: Quarter ending 30 June 2021	**Opening: 01 July 2021** **Closing: 31 July 2021** (Q1-Actual performance)
Q2: Quarter ending 30 September 2021	**Opening: 01 October 2021** **Closing: 31 October 2021** (Q2-Actual Performance)
Q3: Quarter ending 31 December 2021	**Opening: 01 January 2022** **Closing: 31 January 2022** (Q3- Actual Performance)
Q4: Quarter ending 31 March 2022	**Opening: 01 April 2022** **Closing: 30 April 2022** (Q4 -Actual Performance)
2021/22 Pre-Audited Annual Reporting	**Opening: 01 May 2022** **Closing: 31 May 2022** (Actual Pre-Audited Annual reporting)

FEEDBACK ON THE eQPRS TRAINING

➢ DPME has conducted the training from 18 February 2021 until the 11 March 2021

➢ Total of **153 institutions** and **306 officials** were invited for the eQPRS training

Date of Training	Number of sessions	Number of people	Number of Institutions
18 February	1	11	4
23 February	2	27	8
24 February	2	12	8
25 February	2	9	4
02 March	2	19	10
03 March	2	20	9
04 March	2	27	13
09 March	2	17	8
10 March	2	38	12
11 March	2	10	6
Total*	**19**	**190****	**82**

* Preliminary figures

** However, in some cases more than 2 people per institution were trained

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- ➢ The Officials that have not received the training must contact DPME in order to receive the training (Before the 2021/22 FY starts for planning)

- ➢ DPME will issue formal communique that indicates that Public Entities are moving to eQPRS

- ➢ Public Entities must select the users of the eQPRS

- ➢ DPME will train Public Entity Oversight Units on the eQPRS in order to provide comments on the QPRs

- ➢ DPME will issue the QPR Guidelines for 2021/22 FY

- ➢ DPME will host eQPRS War Room Sessions to assist with capturing of the 2021/22 APP on the eQPRS (Refresh Training)

- ➢ For eQPRS Queries: nat.eqprs@dpme.gov.za

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Thank you

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