

GOVERNMENT WIDE PLANNING AND REPORTING CYCLE

DPME – MARCH 2021

LET'S GROW SOUTH AFRICA TOGETHER



planning, monitoring
& evaluation

Department:
Planning, Monitoring and Evaluation
REPUBLIC OF SOUTH AFRICA



Context of the Government Wide Planning and Reporting Cycle

- The **purpose** of the government wide planning and reporting cycle is to:
 - ❑ articulate the planning, budgeting, monitoring, reporting, evaluation and auditing process cycle in the national, provincial and local spheres of government
 - ❑ This cycle will be a formal mapping of the planning budgeting, monitoring, evaluation and auditing processes and timelines in the three spheres of government, which are led by all the departments at the centre of government
 - ❑ Ensure synergy in the government's planning and reporting system, taking into consideration all intergovernmental and interdepartmental planning processes
 - ❑ Ensure alignment between long, medium and short term planning processes
 - ❑ Ensure alignment between national, provincial and local government planning processes
- It is anticipated that the Government Wide Planning and Reporting Cycle will result in the following **outcomes**:
 - ❑ Improved planning, budgeting, monitoring, evaluation, and auditing related processes
 - ❑ Strengthened integration of planning between national, provincial and local government
 - ❑ Improved collaboration of institutions involved in the planning, budgeting, monitoring, evaluation and auditing processes
 - ❑ Contribution to improvement in the quality of plans and improved implementation of government programmes

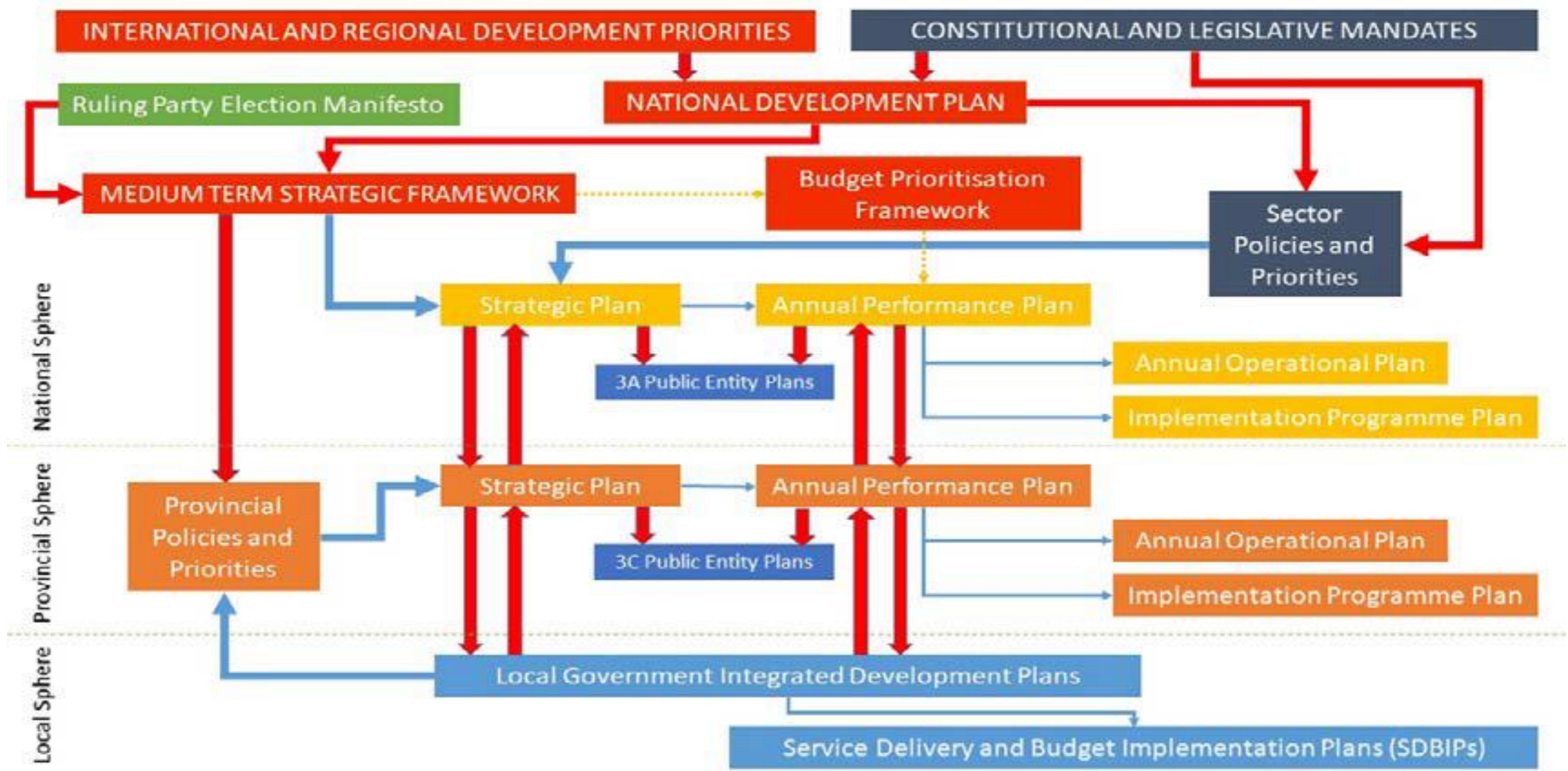
Context of the Government Wide Planning and Reporting Cycle

- The development of the Government-Wide Planning and Reporting cycle is informed by contributions from the following centre of government departments and policy/oversight departments:
 - ❑ Department of Planning, Monitoring and Evaluation (DPME),
 - ❑ National Treasury (NT),
 - ❑ Department of Public Service Administration (DPSA),
 - ❑ Department of Cooperative Governance (DCOG),
 - ❑ Provincial Departments of Cooperative Governance (PDCOG),
 - ❑ Provincial Treasuries (PTs),
 - ❑ Offices of the Premier (OTPs),
 - ❑ Department of Women, Youth and People with Disabilities (DWYPD),
 - ❑ Auditor General South Africa (AGSA)

Challenges with the planning system

- Although there are legislations, policies and frameworks, the following **gaps** are still noted:
 - ❑ Need to strengthen integrated planning processes between national, provincial and local government spheres
 - ❑ Constitutional provisions of autonomy of provinces and municipalities creates a challenge for integrating the planning processes
 - ❑ Gaps in implementation of national priorities of government by provinces and municipalities (e.g. MTSF deliverables) **vs** the constitutional role of provinces and municipalities (province specific priorities and local government priorities)
 - ❑ Inadequate collaboration between the departments at the centre of government and owners of the legislation e.g Revised FSAPPs, MTSF, DDM, DORA requirements, COVID-19 initiatives
 - ❑ Misalignment between political and budget cycles of local government **vs** national and provincial government:
 - Allocation of resources
 - Coherent implementation of programmes and projects

Integrated Planning Framework – make it realist?



Applicable policy frameworks and guidelines

Applicable Policy Frameworks	National	Provincial	Local Government
Planning	<ul style="list-style-type: none"> • NDP 2030 • MTSF 2019 – 2024 • Spatial Planning • NSDF • DDM • Revised FSAPPs • FMPPI • GRPBMEA • SDIP • Guidelines for Standardised Indicators 	<ul style="list-style-type: none"> • PGDS • Provincial SDFs • Revised FSAPPs • SDIP • Guidelines for Standardised Indicators 	<ul style="list-style-type: none"> • Municipal Systems Acts • IDPs • SDBIP • Local Government SDFs
Budgeting	<ul style="list-style-type: none"> • PFMA • Treasury Regulations • Appropriation Bill/Act • Division of Revenue • BPF • MTEF • ENE • AENE 	<ul style="list-style-type: none"> • PFMA • Treasury Regulations • MTEF • EPRE • AEPRE 	<ul style="list-style-type: none"> • MFMA
Reporting	<p>Reports against Plans:</p> <ul style="list-style-type: none"> • MTSF Monitoring Framework • QPR Guidelines • Performance Dialogue Concept Note • Annual Reports Guidelines • Revised FSAPPs (Assessments reports against the SP) • SDIP Reports <p>Financial Reports:</p> <ul style="list-style-type: none"> • Monthly In-Year Reports • Expenditure Reviews • Financial Statements • Conditional Grants Reports 		<p>Reports against Plans:</p> <ul style="list-style-type: none"> • Service Delivery Performance Reports • Back to Basics Reports <p>Financial Reports:</p> <ul style="list-style-type: none"> • Monthly Budget Monitoring Reports

Applicable policy frameworks and guidelines

Applicable Policy Frameworks	National	Provincial	Local Government
Auditing	<ul style="list-style-type: none">• Public Audit Act 25 of 2004• Internal Auditing reports• Auditor- General of South Africa Reports		
Evaluations	National Evaluation Policy Framework, 2020		

The Use of the Government-Wide Planning and Reporting Cycle

- The Government Wide Planning and Reporting Cycle will be used by:
 - ❑ the departments at the centre of government and other policy and oversight institutions to **synchronise the processes and timelines** which are issued to national, provincial and local government institutions
 - ❑ the three spheres of government to ensure alignment of institutional processes to the legislated processes and timelines provided by the centre of government
- The cycle outlines the processes and the key deliverables per month

□ **DPME:**

- Timelines and processes for the development of MTSF, SPs and APPs of national and provincial government
- Timelines and processes for the submission of in-year (quarterly) reports against SPs and APPs
- Timelines and processes for the submission of MTSF Monitoring reports
- Timelines and processes for the submission of Assessment and Annual Reports reports against SPs and APPs
- Timelines and processes for the tabling and reporting to the relevant legislatures
- Timelines and processes for submission of evaluation reports
- Timelines and processes for engagements between DPME and national, provincial and local government on planning and reporting issues e.g. (forums and purposes of forums)
- Timelines and processes for engagement with other departments at the centre of government
- Timelines and processes for the DPME local government planning and reporting processes aligned to the DCoG 's timelines and processes

Roles and Responsibilities

❑ **Offices of the Premier:**

- Timelines and processes for the development of the Provincial Growth and Development Strategies (PGDS)
- Timelines and processes for the submission of in-year (quarterly) reports against APPs
- Timelines and processes for engagements between OTPs and provincial and local government on planning and reporting issues e.g. (forums and purposes of forums)

❑ **DCOG:**

- Timelines and processes for the development of IDPs and SDBIPs of local government
- Timelines and processes for the submission of in-year (quarterly) reports against IDPs and SDBIPs
- Timelines and processes for the submission of Annual Reports reports against IDPs and SDBIPs
- Timelines and processes for the tabling and reporting to the relevant legislatures
- Timelines and processes for engagements between DCOG and provinces and local government on planning and reporting issues e.g. (forums and purposes of forums)
- Timelines and processes for engagement with other departments at the centre of government

Roles and Responsibilities

□ **Provincial Department of Cooperative Governance:**

- Timelines and processes for supporting municipalities in developing and reviewing their IDPs
- Timelines and processes for supporting municipalities in developing the spatial development plans
- Processes for ensuring alignment between local, provincial and national government priorities
- Timelines and processes for engagements between PDCOG and local government on planning and reporting issues e.g. (forums and purposes of forums)

□ **National Treasury:**

- Timelines and processes for the national, provincial and local government budgeting
- Timelines and processes for the submission of in-year (monthly/quarterly) reports against budgets of national, provincial and local government
- Timelines and processes for the submission of Annual Reports against the budget
- Timelines and processes for the tabling and reporting to the relevant legislatures
- Timelines and processes for engagements between NT with PTs and with provinces and local government
- Timelines and processes for engagement with other departments at the centre of government

Roles and Responsibilities

□ **Provincial Treasuries:**

- Timelines and processes for the provincial and local government budgeting which are aligned to national
- Timelines and processes for the submission of in-year (monthly/quarterly) reports against budgets of provincial and local government
- Timelines and processes for engagements between provincial treasuries (PTs) with provincial and local government institutions

□ **DPSA:**

- Timelines and processes for the development of Service Delivery Improvement Plans (SIDPs) and personnel plans of national, provincial and local government
- Timelines and processes for the submission of in-year (quarterly) reports against SIDPs and personnel plans
- Timelines and processes for the submission of Annual Reports against SIDPs and personnel plans
- Timelines and processes for the tabling and reporting to the relevant legislatures
- Timelines and processes for engagements between DPSA and national, provincial and local government on planning and reporting issues e.g. (forums and purposes of forums)
- Timelines and processes for engagement with other departments at the centre of government

Roles and Responsibilities

□ **AGSA:**

- Timelines and processes for submission for Public Finance Management Act (PFMA) audits
- Timelines and processes for submission for Municipal Finance Management Act (MFMA) audits

Process of developing the document

- ❑ DPME sourced inputs from departments at the centre of government – national
- ❑ OTPs have been requested to provide inputs into the document, especially the timelines and process
- ❑ Recommendations can also be provided
- ❑ Refer to the tables in the main document; for timelines and processes for national, provincial and local government planning, budgeting, reporting, evaluation and auditing

NGIYATHOKOZA

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Thank You