



planning, monitoring
& evaluation

Department:
Planning, Monitoring and Evaluation
REPUBLIC OF SOUTH AFRICA



FRONTLINE MONITORING AND SUPPORT OPERATIONAL GUIDELINES FRAMEWORK 2018-2019

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ACRONYMS AND ABBREVIATIONS

CBM	Citizen-based Monitoring
COGTA	Department of Cooperative Governance and Traditional Affairs
DDG	Deputy Director-General
DPME	Department of Planning, Monitoring and Evaluation
DPSA	Department of Public Service and Administration
FMPPI	Framework for Managing Programme Performance Information
FMS	Frontline Monitoring and Support
FSDM	Frontline Service Delivery Monitoring
GWMES	Government-wide Monitoring and Evaluation System
JAP	Joint Annual Plan
MTSF	Medium-term Strategic Framework
NDP	National Development Plan
NEPF	National Evaluation Policy Framework
OTP	Office / Department of the Premier
PH	Presidential Hotline
SASQAF	South African Statistical Quality Assurance Framework
SOE	State-owned Enterprises
SONA	State of the Nation Address
SP	Special Projects
StatsSA	Statistics South Africa

EXECUTIVE SUMMARY

The Frontline Monitoring and Support (FMS) programme of the Department of Planning, Monitoring and Evaluation (DPME) is a key monitoring mechanism that provides government not only with relevant, reliable information on the quality of service delivery on the ground, but also to facilitate improvements in service delivery. The Frontline Monitoring systems of DPME are being implemented across all provinces in a holistic manner that focuses on the achievement of service delivery objectives in line with the National Development Plan, in order to improve the quality of services delivered to the citizens of the Republic.

The 2018/2019 financial year will focus on the development of the best approaches and methodologies of the integrated Frontline Monitoring and Support (FMS) programme. An iterative approach will be utilised to continuously reflect on and improve the existing mechanisms. The Offices of the Premier will be part of this development are the key implementing partners in the FMS programme. The implementation of the various frontline monitoring activities will be done in line with the NDP, as well as the service delivery priorities as identified by the provincial government in building a capable and developmental state. Another key focus of the new approach will be to develop methods and protocols for the monitoring of newly emergent issues and sectors. Included in this, is the focus on State-owned Enterprises and the impact these have on the communities in which they operate.

As part of the DPME's strategic reorganisation, the FMS Programme is being streamlined with Chapter 13 of the NDP and to enhance its processes. It should be noted that during the 2018/19 financial year, monitoring activities will still be undertaken to improve the quality of frontline service delivery.

1. INTRODUCTION

The Department of Planning, Monitoring and Evaluation (DPME) has undergone a strategic reorganisation and streamlining of its programmes in line with the dynamic service delivery landscape to improve the efficiency and ability to deliver on its mandate. This resulted in the reconfiguration of the Frontline Monitoring Systems of DPME namely (i) Presidential Hotline (PH); (ii) Frontline Service Delivery Monitoring (FSDM); (iii) Citizen-based Monitoring (CBM); and (iv) Special Project/ Izimbizo (SP) to strategically facilitate, augment, and verify other routine monitoring systems in DPME and in government, as well as unblocking service delivery challenges. These programmes have been identified as vital in the achievement of a capable state and developmental state that is responsive to the service delivery challenges as they are encountered at the coalface of service delivery.

2. BACKGROUND AND PURPOSE

The Department of Planning, Monitoring and Evaluation's (DPME) Frontline Monitoring and Support (FMS) programme, is a collection of programmes that monitor the quality of service delivery to the users of government services. The four (4) frontline monitoring programmes of the DPME have been rationalised to streamline its processes and enhance the efficiency of its various programmes and activities. The adoption of this service delivery monitoring approach marked the beginning of a process for improving government performance and supporting service delivery plans, also contributing to the strengthening of intergovernmental relations. Despite the emergence of many best practices, more work still needs to be done to improve the pace of delivery, efficiency and sustainability of projects on the ground.

This framework sets-out the operationalisation of the frontline monitoring and support programme, and aims to provide a comprehensive set of guidelines and processes that will assist in the implementation of the frontline monitoring programme of the DPME together with the OTPs

3. LEGISLATIVE AND POLICY FRAMEWORK

3.1 The Constitution

The Constitution of the Republic of South Africa, Chapter 10, talks to the following key principles for service delivery by government institutions:

- i. A high standard of professional ethics must be promoted and maintained;
- ii. Efficient, economic and effective use of resources must be promoted;
- iii. Services must be provided impartially, fairly, equitably and without bias;
- iv. People's needs must be responded to, and the public must be encouraged to participate in policy-making;
- v. Public administration must be accountable; and
- vi. Transparency must be fostered by providing the public with timely, accessible and accurate information.

3.2 The National Development Plan

The National Development Plan (NDP) points out that the creation of a developmental and capable state is a prerequisite for addressing South Africa's development challenges. The NDP stipulates that the State must be "capable in that it has the capacity to formulate and implement policies that serve the national interest; developmental in that those policies focus on overcoming the root causes of poverty and inequality," and build "the State's capacity to fulfil this role." Further, on page 474, the NDP talks to the need for an active citizenry and strong leadership. All spheres of government "can enhance citizen's participation through a variety of two-way information gathering and sharing forums and platforms between citizens and government. While these platforms can enable government to inform, they also enable citizens to give feedback to government and monitor performance... Active citizenship requires inspirational leadership at all levels of society."

The NDP continues to talk to "an efficient, effective and development oriented public service and an empowered, fair and inclusive citizenship". The capability of government institutions remains weak in terms of management practices, quality of frontline service delivery, effective complaints management and community/citizen involvement in monitoring. This results in service delivery failures and drives citizen dissatisfaction and poor staff morale.

3.3 Government Wide M&E System

In 2005 Cabinet adopted the Government-Wide M&E System (GWMES) and in 2007 the Presidency released the Policy Framework on the GWMES. The GWMES framework is supported by the National Treasury's Framework for Management of Programme Performance Information (FMPPI); Statistics South Africa's South African Statistical Quality Assessment Framework (SASQAF); and the 2011 National Evaluation Policy Framework (NEPF) produced by DPME.

3.4 Medium-term Strategic Framework

Outcome 12 of the MTSF emphasises the importance of improving management practices and the quality of services provided to citizens. In addition, a number of other outcomes (such as outcomes 1, 2 and 3, focusing on basic education, health and crime respectively) contain targets for the improvement of the quality of services provided to citizens. The work of Frontline Monitoring and Support Programme contributes towards the achievement of these targets to drive improvements in service delivery, and ensuring existing mechanisms for citizen participation are used effectively.

3.5 Batho Pele Principles

The South African government has displayed a tireless commitment to achieving universal access to public services. In the first two decades of democracy, emphasis was placed on redressing the historical inequalities in service delivery, improving access to services and eradicating backlogs. The Batho Pele Policy Framework was an initial attempt to translate the imperatives set out in the Constitution into tractable principles that would govern the interactions between government and citizens during the service delivery process. These principles are aligned with the Constitutional values of governing departments for service delivery which includes consultation, service standards, access to services, information, openness and transparency, redress and value for money.

3.6 State of the Nation Address 2018

On 16 February 2018, President Cyril Ramaphosa delivered the State of the Nation Address in Cape Town, outlining the key areas of focus for the Republic of South Africa in 2018. These are summarised below:

- i. Quality of basic education, and the acceleration of the ASIDI programme;
- ii. Youth development, and employment;
- iii. Reindustrialisation;
- iv. Mining;
- v. Support for small business,
- vi. Redistribution of land for agricultural growth;
- vii. Tourism support;
- viii. The Digital Industrial Revolution, as a key focus for growth and economic development;
- ix. Introduction of the national minimum wage;

- x. Support for drought-stricken provinces and communities;
- xi. Implementation of fully subsidised free higher education for poor households;
- xii. Improvements in the quality of health care, and introduction of the National Health Insurance;
- xiii. Distribution of resources at the police station level, to tackle crime and make communities safer;
- xiv. Reconfiguration of national government departments;
- xv. State-owned Entities; and
- xvi. Improvements in the Public Sector, instilling new discipline amongst public servants to do things correctly, completely and timeously.

4. OVERVIEW OF THE FRONTLINE MONITORING AND SUPPORT PROGRAMMES

4.1 Strategic Objective

To monitor the quality of the services provided to citizens at institutional and facility level.

4.2 Purpose

The purpose of the Programme is to facilitate service delivery improvements through frontline, citizen-based monitoring and effective complaint resolution systems.

4.3 Functions

The programme has the following functions:

- i. To develop and implement monitoring systems that are responsive to priority at policy and service delivery level;
- ii. To provide support to Political Principals on taking government to the people through the Presidential / Ministerial Siyahlola and Izimbizo Programmes;
- iii. To establish, coordinate and enhance citizen based monitoring systems; and
- iv. To manage the Presidential Hotline, coordinate and enhance complaints resolution systems in government.

4.4 DPME Frontline Monitoring Systems

As discussed earlier the FSDM is made up of different monitoring systems that are complementary. It is, therefore, important to discuss the unique features of each system to ensure flawless integration as a build up to refined approaches, guidelines and toolkits. Below is a diagram illustrating the four Frontline Monitoring systems:

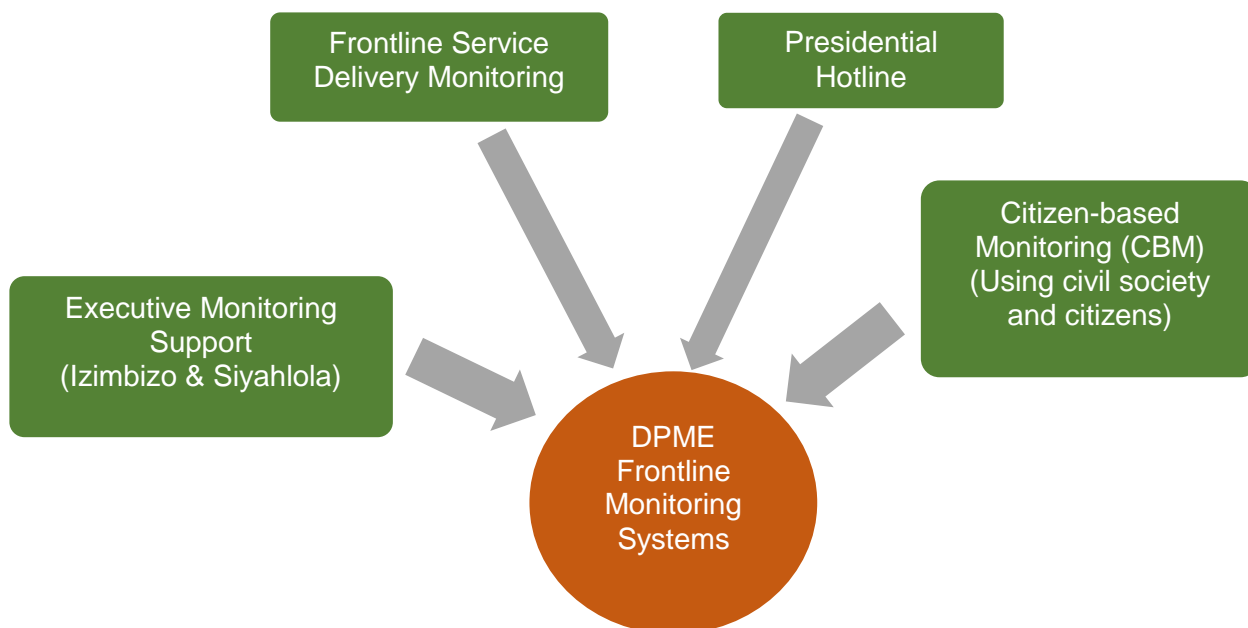


Figure 1: DPME Frontline Monitoring Systems

4.4.1 Executive Monitoring Support

Monitoring findings have revealed that poor service delivery is often as a result of political interference and lack of boundaries between the political and administrative interface. Therefore, political will and leadership to deliver effective services is paramount at all levels of government, from the President of South Africa to ward counsellors on the ground. Involvement of the political principals at the centre of government and the establishment of delivery offices is a recognised approach of using authority and influence in the accelerating service delivery. Political principals can be used most beneficially to unblock different types of service delivery challenges and it is critical that they are afforded the opportunity to service delivery improvements. The Executive Monitoring support consists of two approaches and below a brief is provided on each approach.

4.4.1.1 Presidential Siyahlola Monitoring Programme

The President of South Africa introduced the *Presidential Siyahlola Monitoring Programme* in 2009 as a mechanism for direct monitoring of sector focused frontline services by himself and Cabinet, through face-to-face engagement with communities on specific areas of service delivery. Since the inception of the *Siyahlola Presidential Monitoring Programme*, 29 projects have been initiated across the length and breadth of South Africa. Twelve (12) of these projects have been completed. The Department of Planning, Monitoring and Evaluation

provides technical support for monitoring and reporting to the President on progress made with these initiatives, thus allowing for accountability and responsiveness by ministers and senior staff responsible for the delivery of governments' key priorities. As the results intergovernmental task team have been established to address multifaceted service delivery challenges.

4.4.1.2 Izimbizo

The Izimbizo is a public participation programme, or 'Taking Government to the People', which is unique to South Africa. It is a participatory frontline monitoring process which fosters meaningful dialogue between elected public representatives and communities. It promotes both social and public accountability, therefore entrenching the principles of engagement and reconciliation of a developmental state.

The President / Minister and other Political Principals, with government officials, visit areas in all the nine provinces of South Africa to meet with ordinary members of a community in the locality of a village, township or town to exchange views on the status of service delivery and related challenges as experienced in their area and or environment. As part of the process robust engagements are held and commitments between Political principals and communities are agreed upon. This commitments are monitored on quarterly basis by DPME.

4.4.2 Frontline Service Delivery Monitoring

Frontline Service Delivery Monitoring (FSDM) programme monitors government facilities in collaboration with the Offices of the Premier in all nine provinces. The programme commenced its monitoring activities in 2011 and to date, over 1000 facilities have been monitored. The intention of the FSDM Programme is not to cover all facilities, but to demonstrate the value of on-site monitoring to selected facilities and catalyse service delivery improvement. The key message from the FSDM initiative is that sector departments need to strengthen planning and monitoring at facility-level by ensuring that norms and standards are in place, realistic and monitored continuously.

Unannounced monitoring visits are conducted to assess the quality of service delivery in frontline service facilities. Structured questionnaires are used to guide interviews with citizens and staff. This information is verified by the independent observations of a monitor on the same standards being assessed in the questionnaire administered to staff and citizens. After the assessment, an improvement plan is developed jointly with the facilities management and key decision makers from the relevant department. Facilities are viewed within the local

context of communities. Use of community structures, for example, school governing bodies and business councils, are key stakeholders in the development of improvement plans. The implementation of the improvement plan is then monitored. Thereafter, key trends are identified, analysed and reported at the sector level and other decision-making platforms to address policy barriers to effective service delivery.

4.4.3 Citizen Based Monitoring

Citizen-based Monitoring (CBM) is an approach used to monitor government performance with a focus on the experiences of ordinary citizens for purposes of strengthening public accountability and driving service delivery improvements. It places the citizen as an active participant in shaping what is monitored, how the monitoring is done and what interpretations and actions are derived from the data. CBM is about routine mechanisms to bring the voice of the citizen in service delivery processes, responding to the following problem statement:

“The participation of citizens in monitoring government service delivery is ad hoc and in many sectors not present. It is currently not valued as a way to enhance the efficiency and quality of service delivery”.

- Monitoring systems and practices of sector departments are largely dependent on government monitoring itself.
- Citizen-government monitoring mechanisms at the service delivery site level are generally weak or absent.
- Low levels of trust currently exist between organised civil society and government around service delivery monitoring.

4.4.4 Presidential Hotline

Management of the Presidential Hotline as the apex complaints system of government falls within frontline monitoring. It is connected through an electronic platform to all nine OTP and all national departments. It is a platform established for citizens to escalate their challenges to the President when all other complaints management systems have failed. It has a designated toll free number (17737) and receives complaints from all over the country, working with national departments and Offices of the Premier to resolve the cases. The hotline monitors case resolution time and citizen satisfaction of the process and the outcome of the complaint. The capacity to analyse emerging trends to the types of complaints reported has been developed, which includes disaggregating information to provincial and local government,

ward and facility level. To strengthen the scope and depth of frontline service delivery monitoring systems, there are coordinators appointed for each of the nine provinces.

5. FRONTLINE MONITORING PROGRAMME CYCLE

The key change in 2018/19 will be the streamline Frontline Monitoring systems for a more focused approach to monitoring. The strategic intervention to strengthen the oversight monitoring at the centre of government will be prioritised in 2018/19, including the strengthening of the capacity of the OTPs to monitor provincial and local government frontline performance. In order to do this DPME is proposing an area based approach to its operational model which will allow for contextual realities of each province to be identified proactively, thus being more responsive to identify early warning signs and unintended consequences of policy implementation as depicted in the below rollout strategy.

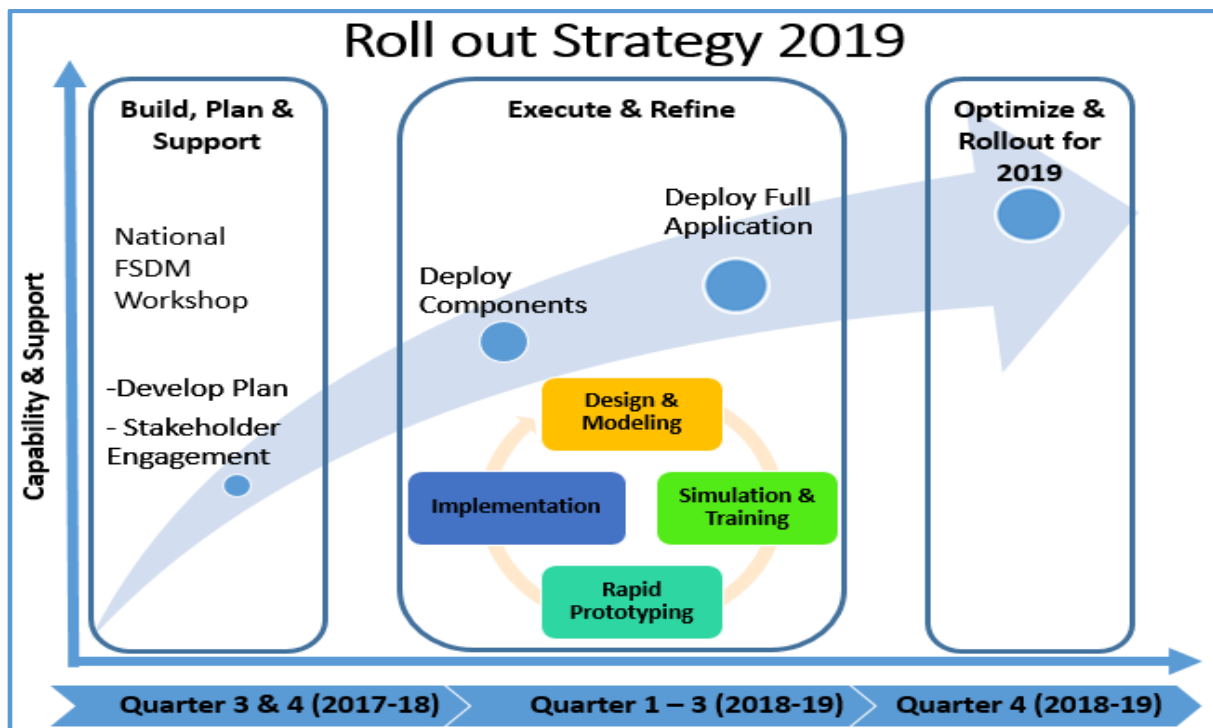


Figure 2: Roll-Out Strategy for FM

5.1 Frontline Monitoring Operational Model

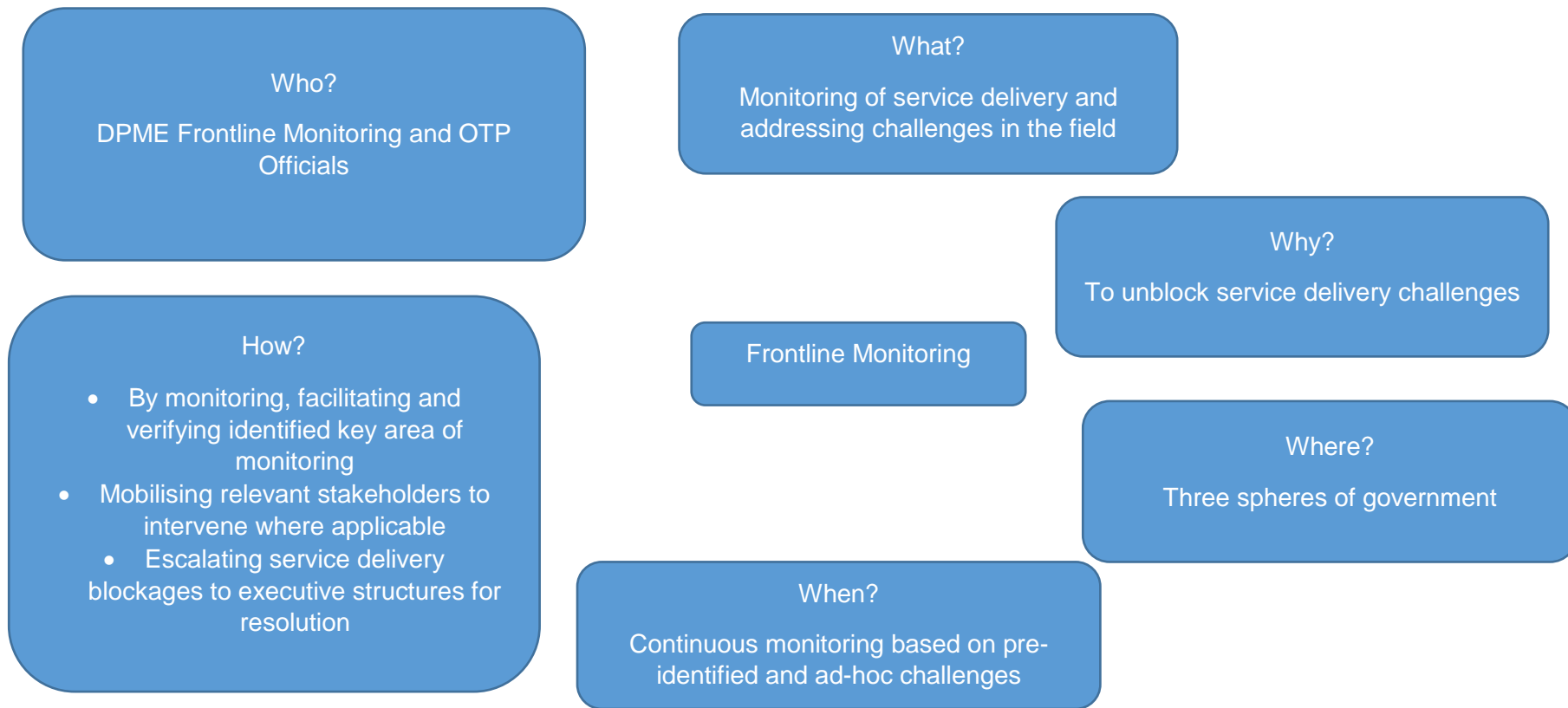


Figure 3: 5WH of Frontline Monitoring

5.2 Stakeholder Management and Mapping

All the work of the Frontline Monitoring and Support Programme will be communicated to the respective OTPs by the respective DPME Provincial Directorates as they take leadership in advocating for the work of the Frontline Monitoring and Support Programme in the provinces. This should not take away the responsibility of Executive Monitoring Programmes and Presidential Hotline to report separately and directly to the President's Office. Advocacy with other stakeholders will be managed internally within the Frontline Monitoring and Support Programme.

The following stakeholders have been identified as crucial in the various FMS processes, especially in terms of feedback.

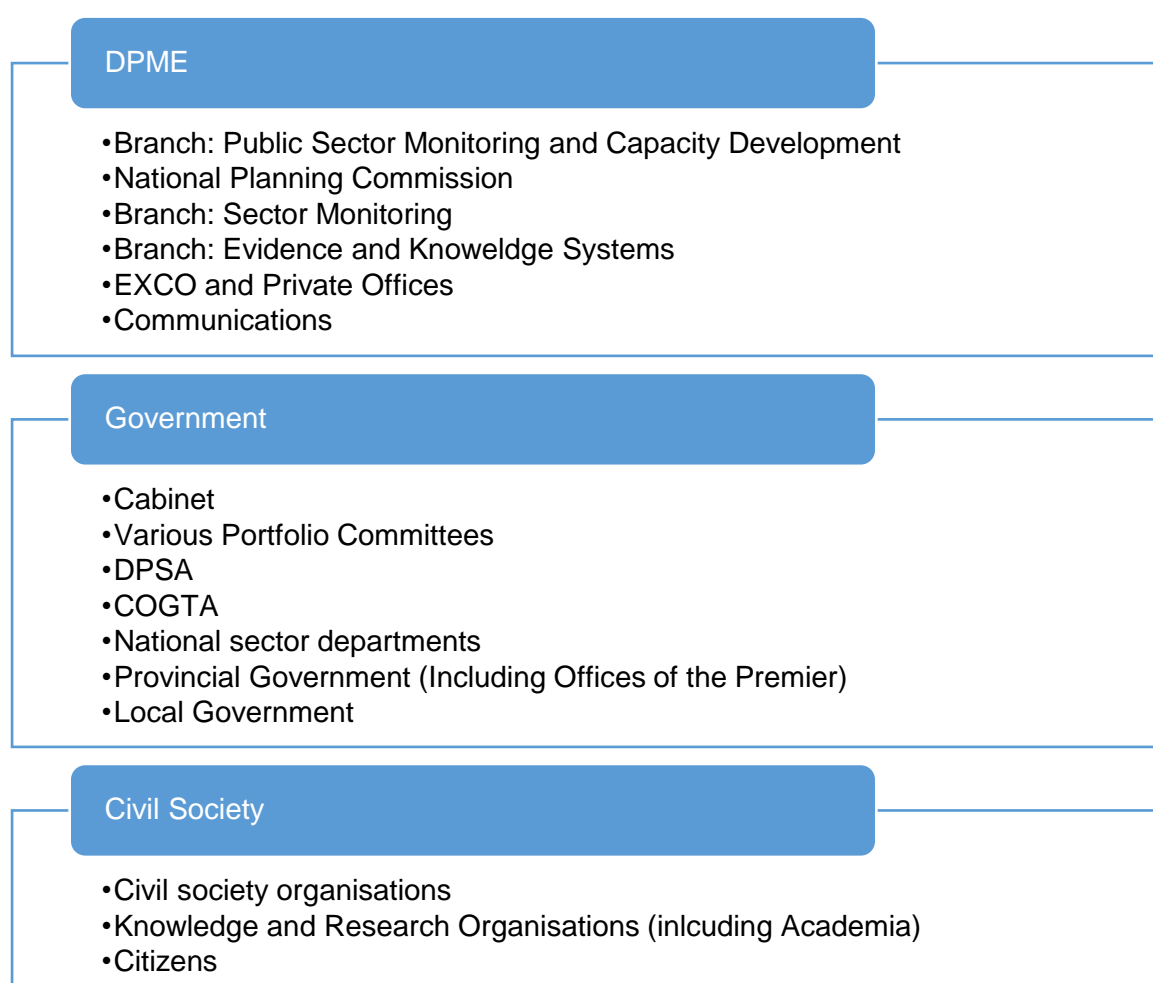


Figure 4: FMS Stakeholders

5.3 Planning and Review

The FMS framework requires specific planning and review timeframes, as the 2018/2019 financial year will be the first year of roll-out. It should be treated as an iterative learning process, that will necessitate several review and improvement cycles as the programmes are implemented.

Due to the nature of the development of new approaches to frontline monitoring, planning reviews and refinements should be done at least every quarter. This will allow the programme to adjust its planning and implementation approaches where necessary, as well as provide for adjustments in the development project plans as and when required.

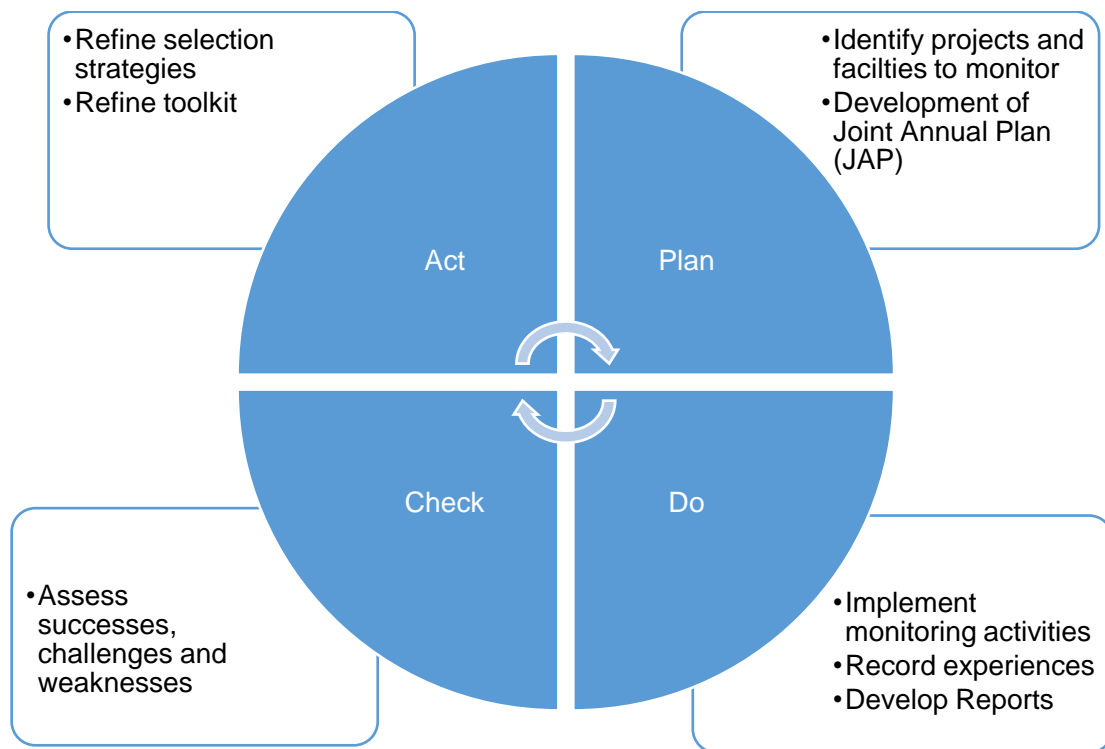


Figure 5: Cycle of FMS Implementation

5.3.1 Targeting Strategy

The FMS programme will follow an area-based approach. This implies that the selection of area will be determined by the needs on the ground, i.e., where there are serious challenges in terms of service delivery. Area-based monitoring can refer to:

- i. National and Provincial Development Plans;

- ii. Medium Term Strategic Framework (MTSF) and Government Outcomes;
- iii. Provincial and National Priorities (SONA/SOPA) such as education or health, that requires intervention to address specific service delivery issues;
- iv. An area can be a geographic area – e.g. a specific municipality; or
- v. An area can be a focus area (issue) – e.g. Transition of grant payments, or complaints about the ticketing queue system at Home Affairs Offices.

5.3.2 Inputs into the selection of areas for monitoring

The selection of area for monitoring will have to be carefully considered. Information from various sources will have to be consulted in order to make an informed decision. It will also be crucial not to duplication monitoring efforts. The information sources to be considered:

- i. National priorities: these will be in line with the NDP, or as expressed in SONA;
- ii. Provincial concerns: these will include issues raised by the respective Offices of the Premier that require multi-stakeholder intervention;
- iii. COGTA: poor-performing municipalities can be identified by liaising with COGTA, and determining the kind of challenges faced by these municipalities;
- iv. Presidential Hotline: as an apex complaints management system, the PH can direct monitoring efforts by identifying and clustering complaints regarding a specific issue within a specific locale or sector;
- v. DPME Priorities, including information provided by other branches (such as Outcomes) and other units (LGMIM, MPAT), as well SOEs that have a direct impact on service delivery;
- vi. Media-monitoring of service delivery related issues;
- vii. Existing areas of concern identified by previous FSDM activities (improvement facilities that require urgent intervention); and
- viii. Areas where several service delivery protests have been reported;

5.4 Programme Review

It is essential that the FMS programmes of the DPME be constantly reviewed in order to identify gaps in implementation, address inefficiencies as they are experienced, and to improve the methodologies utilised to implement the programmes. At least two review sessions should be held with each Office of the Premier (this should be over and above any planning sessions for the 2019/2020 financial years going forward).

It is also recommended that a task team be established to review the current approaches for frontline monitoring every quarter. This will allow the programme to identify and immediately address any shortcomings.

5.5 Frontline Monitoring Toolkit

The various methodologies available are targeted at specific areas of focus. All these methodologies should be considered as complementary and mutually supportive. However, the most suitable methodology, tools and approaches should be identified to address a specific issue. For the comprehensive management of the FMS activities, the toolkit will consist of three sets of interacting, and interdependent tools:

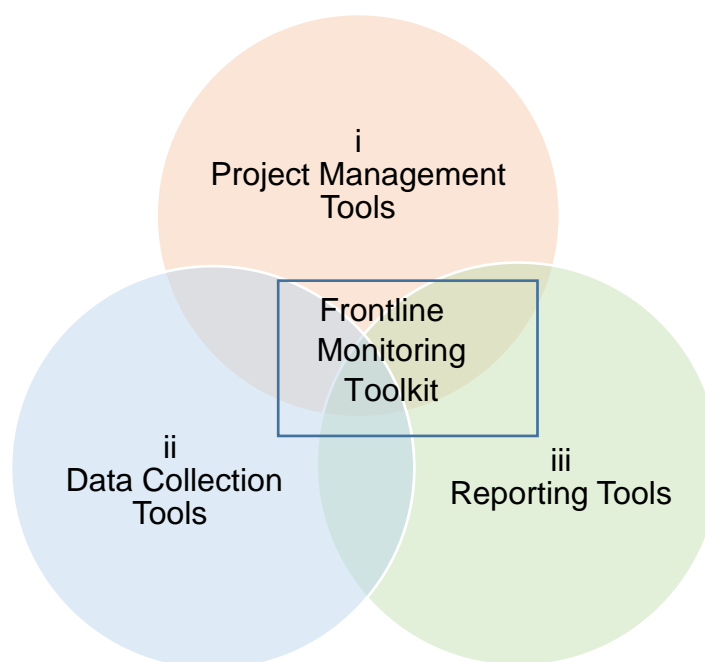


Figure 6: Frontline Monitoring Toolkit

5.5.1 Project Management Tools

Due to the frontline monitoring programmes taking on an area-based approach, there are certain templates that are core to the management of these programmes

- i. The Project Management Template: This template summarises the nature of the project to be implemented. It provides for the scoping, exploration and management of the various activities associated with the project.

5.5.2 Data Collection Tools

Dependent on the needs identified in the project plan (as mentioned above), the following tools are available to facilitate the gathering of information that informs the proposed methodology for addressing the identified issues:

- i. FSDM monitoring tools (user and staff interviews, monitor observation sheets): This methodology can be utilised to understand the specific issues affecting a service delivery facility;
- ii. CBM monitoring tools (community surveys, root cause analysis);
- iii. Izimbizo (community engagements);
- iv. Mystery client monitoring tools; and
- v. Context specific tools and methodologies.

Due to the iterative nature of the implementation of the Frontline Monitoring and support Programme in 2018/2019, these tools will continuously be updated and refined to adapt to the learning process. Project specific tools will be based on the existing generic tools of the various sub-programmes.

5.5.3 Reporting Tools

- i. Project Report: This template must be used to report on the implementation / progress of the project. The report should also have the recommendations included, alongside the timeframes for the monitoring of the implementation of the recommendations. Several of these might have to be submitted.
- ii. FSDM Report Template: This template is to be used when a facility was assessed using the standard FSDM methodology. It might be necessary to monitor facilities in a specific area using this methodology to (i) assess their compliance to service delivery standards, (ii) understand the systemic issues affecting the specific facility, and (iii) gauge the satisfaction and perceptions of the service users.

6. MONITORING VISITS

The core of the FMS programmes of the DPME is to explore the contributing factors that impede effective and efficient service delivery. This is done to assist the responsible stakeholders in the development of targeted recommendations to address the identified gaps, and in doing so, improve the quality of service delivery, and ultimately, the quality of life for the citizens of the country.

6.1 Pre-identified monitoring visits

This type of monitoring will be based on pre-identified areas of concerns at a national, provincial, or municipal level. This type of monitoring is aimed at unblocking service delivery challenges effectively and efficiently. These types of site monitoring will take the following format:

- i. DPME and OTP will identify the specific area of concern to be addressed;
- ii. DPME and OTP will identify the relevant stakeholders;
- iii. A project plan will be developed to address the identified issues
- iv. Conducting of the monitoring visit(s) to gather information and understand the systemic factors contributing to the issue. This includes implementing the appropriate data gathering methodology most suited to the context and nature of the area for monitoring;
- v. A project report to be developed, detailing the findings of the visit, and the development of appropriate recommendations;
- vi. An improvement plan will be developed based on the recommendations, and this improvement plan will be monitored for implementation;
- vii. A close out report after the conclusion of the project is to be developed, and submitted to all relevant stakeholders. These reports will also be used for lesson-learning and sharing.

6.2 Rapid-response Monitoring Visits

This type of monitoring will occur when an emerging issue is identified and prioritised for Frontline Monitoring.

These visits will take the following approach:

- i. The need for intervention is identified;
- ii. The applicable provincial director convenes an intervention team;
- iii. A pre-intervention meeting is held, discussing an action plan for the site visit that has to take place;
- iv. Conducting a site visit, to understand the context, and implement any urgent interventions to prevent catastrophic events;
- v. A findings report is produced, and communicated to affected stakeholders;
- vi. In collaboration with affected stakeholders, an action plan is developed to address the identified issues;
- vii. The implementation of the action plan is monitored;
- viii. A close-out report is to be produced;

6.3 Executive Monitoring

This type of monitoring can take either of the DPME Frontline Monitoring Systems or a customised approach will developed. Once a request is received on Executive Monitoring the Rapid response approach will be followed which will include intergovernmental teams. The lead provincial directorate will take responsibility for the planning and preparatory arrangements, prepare briefing notes and environmental scan or profiles for the political principals, anchor the Presidential or Ministerial delegation during the monitoring visits, prepare a detailed report for the monitoring visit and monitor the implementation of all commitments made.

Existing commitments of the Executive Monitoring will be tracked through the Joint Annual Plan by the DPME and respective OTPs.

6.4 Programme Meta-Monitoring

Constant refinement of the various programme monitoring activities and methodologies, will be an integral part of the 2018/19 implementation. This will enable for accurate reporting on the implementation successes, challenges and revisions of the frontline monitoring and support programme as well as inform the refinement of the approach for full roll-out in 2019/2020.

7. ANALYSIS AND REPORTING

7.1 Data Analysis

Data will be collected, collated, cleaned and analysed following best-practice standards that are aligned to the SASQAF standards of StatsSA. This will apply to all types of data collected. It is encouraged that data or information management cycles are followed in the management of information and data. An example of the information management cycle is provided below for reference. Narrative information will also be collected and stored. A variety of techniques will be used to analyse this information, ranging from thematic analysis, to in-depth case study development.

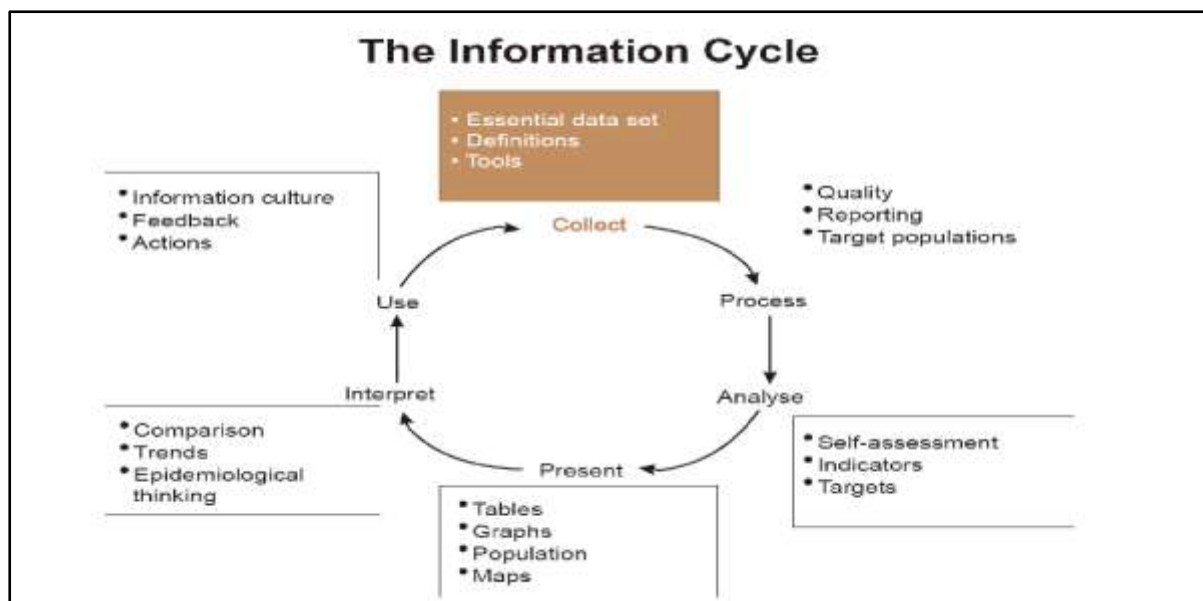


Figure 7: The Information Cycle

7.2 Reporting

Reporting of the FSM Programme work will be reported to the key strategic executive structures within the three spheres in order to maximise impact and responsiveness. Reports will be qualified as a means of verification for every monitoring activity and should be submitted into a centralised repository for quality assurance and dissemination. An adaptable reporting template will be made available.

These reports will be aimed at the specific stakeholders who are either directly, or indirectly, affected by the monitoring and may include any entity within the three spheres of government that has a vested interest in the applicable monitoring.

8. KNOWLEDGE MANAGEMENT

Related knowledge products for the FMS Programme will be developed and publish on the DPME website. These products will be developed in line with the communication and knowledge management plan for the FMS Programme to facilitate documentation and learnings. This may include (but is not limited to) policy briefs; case studies; profiles; papers, posters. All related knowledge and communication tools are available. Supplementing the knowledge products will be communication to various forums to build awareness about the FMS Programme. This will be done at all three spheres of government, academic institutions, and public participation platforms.

9. CONCLUSION

The programme needs to ensure that good practices are mainstreamed into the management practices of departments for accountability and to ensure that monitoring leads to positive improvements experienced by citizens. In the development of the joint annual plans, emphasis should be on guiding principles contained in this document and where there are deviations or changes, they must be communicated and discussed to ensure that the implementation of the programme is coherent yet customised across provinces. These guidelines will inform the methodology for implementation of the FMS programme from 2018/19 onward.