SOUTH AFRICAN COUNCIL FOR EDUCATORS



PLANNING, MONITORING & EVALUATION AND REPORTING POLICY FRAMEWORK 2025-2027

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	as Amended

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LIST OF ABBREVIATIONS / ACRONYMS

ARC Audit and Risk Committee

APP Annual Performance Plan

ASS Annual School Survey

CEO Chief Executive Officer

DBE Department of Basic Education

DPME Department of Planning, Monitoring and Evaluation
DPSA Department of Public Service and Administration
eQPRS electronic Quarterly Performance Reporting System

FMPPI Framework for Managing Programme Performance Information

IA Internal Audit

MO Measurable Objective
MOV Means of Verification

MTDP Medium-Term Development Plan

MTEF Medium Term Expenditure Framework

MTSF Medium Term Strategic Framework

NDP National Development Plan

NPC National Planning Commission

NT National Treasury

PFMA Public Finance Management Act

PI Performance Information

PME Planning, Monitoring and Evaluation

PMER Planning, Monitoring, Evaluation and Reporting

PMERR Planning, Monitoring, Evaluation, Reporting and Research

QPR Quarterly Performance Report

SACE South African Council for Educators

SO Strategic Objective

SONA State of the Nation Address

Stats SA Statistics South Africa

1. INTRODUCTION

The democratic reforms introduced in South Africa's public sector have underscored the importance of managing performance information as part of sound public financial management. The Constitution of the Republic of South Africa, 1996, and the Public Finance Management Act (PFMA), 1999, place strong emphasis on accountability, transparency, and effective management of performance across government institutions.

In response to these legislative and policy imperatives, the South African Council for Educators (SACE) has developed the Planning, Monitoring, Evaluation and Reporting (PMER) Framework 2025–2027. This Framework is not merely a compliance tool; it is a practical guide designed to strengthen performance management processes, enhance service delivery, and promote accountability within the Organisation.

The PMER Framework provides a structured approach for implementing performance management practices and outlines the roles and responsibilities of key stakeholders involved in these processes. It also consolidates progress made in addressing audit findings related to performance information and ensures that monitoring and reporting practices adhere to national standards and best practices.

Furthermore, this Framework serves as a guide for the development and implementation of corporate plans, including the Strategic Plan (SP), Annual Performance Plan (APP), and Annual Operational Plan (AOP), to ensure alignment with performance monitoring and reporting requirements.

1.1. The importance of measuring performance in the public sector

After more than three decades of democracy, South Africa continues to face complex service delivery challenges. These realities reinforce the need for effective systems to monitor, evaluate, and report on performance across public institutions. Measuring performance is essential because it:

- Demonstrates how effectively an organisation is achieving its strategic objectives and identifies which interventions are yielding results.
- Promotes accountability by focusing the attention of oversight bodies and the public on

whether institutions deliver value for money.

- Informs resource allocation by highlighting underperforming areas and recognising successful programmes.
- Enables managers to strengthen service delivery through evidence-based and resultsoriented management practices.
- Enhances transparency by ensuring that performance outcomes and institutional progress are accessible and verifiable.

1.2. Objectives of the PMER Framework

The objectives of the PMER Framework 2025–2027 are to:

- Strengthen strategic planning processes within the organisation to improve alignment and coherence.
- Integrate and align monitoring and evaluation (M&E) functions by clarifying roles and responsibilities for managing performance information.
- Outline procedures for documenting, recording, and reporting performance information.
- Promote accountability and transparency by providing stakeholders including the
 Executive Authority, Provincial Legislature, Office of the Premier, and national planning
 and evaluation bodies with timely, accurate, and accessible information.
- Establish consistent processes for identifying, collecting, collating, and verifying performance information.
- Support effective resource allocation by ensuring that resources are directed efficiently toward achieving organisational goals.
- Facilitate the development and implementation of strategic plans that are aligned with the organisation's mandate and objectives.

2. POLICY IMPERATIVES 2024-2029

Following the establishment of the Government of National Unity, South Africa entered a new phase of governance that brought renewed focus to national priorities. Within this context, the basic education sector welcomed a new Minister who announced revised priorities for the sector. Accordingly, as SACE continued to implement its 2020–2025 Strategic Plan, alignment with the

priorities outlined in the Medium-Term Development Plan (MTDP) 2024/25 was ensured.

The Medium-Term Development Plan (MTDP) 2024–2029 serves as a five-year implementation plan of the South African Government, designed to fulfil its electoral mandate and advance the objectives of the National Development Plan (NDP) Vision 2030. The MTDP provides strategic direction for the Seventh Administration, guiding government's efforts towards achieving the commitments outlined in the Statement of Intent of the Government of National Unity (GNU) and the NDP.

Through this plan, government aims to transform the country's energy and logistics systems to enhance efficiency and competitiveness; drive inclusive economic growth through the green and digital economies and other labour-intensive, export-oriented sectors; strengthen public institutions; and improve basic service delivery in areas such as water, sanitation, healthcare, and education.

The MTDP 2024–2029 aligns closely with the overarching goals of the NDP and sets five national goals to be pursued over the next five years. To achieve these, the Plan identifies three Strategic Priorities to be implemented across government:

- Strategic Priority 1: Drive inclusive growth and job creation.
- Strategic Priority 2: Reduce poverty and tackle the high cost of living.
- Strategic Priority 3: Build a capable, ethical, and developmental state.

The entity contributes directly to the Medium-Term Strategic Framework (MTSF) Priority 2: Reduce poverty and tackle the high cost of living.

SACE is mandated to drive and ensure the implementation of Outcome 4: Improved education outcomes and skills within the national and provincial landscapes. This outcome seeks to enhance the quality of basic education, and the associated outputs include:

- Improved quality of teaching and learning through the development, supply, and effective utilisation of teachers
- Enhanced teaching and learning through the provision of infrastructure and learning materials.

- Strengthened Grade R provision and planning for the expansion of Early Childhood Development (ECD)
- A credible, outcomes-focused planning and accountability system to build state capacity for intervention and support of quality education.
- Partnerships that support a strong, sustainable education system

The Minister of Basic Education has identified five strategic priorities:

- 1. Intensify efforts and increase access to Early Childhood Development (ECD)
- 2. Improve literacy and numeracy skills across all phases of schooling.
- 3. Enhance access to and quality of inclusive education, particularly for learners with special educational needs.
- 4. Strengthen teacher training and professional development opportunities for school management teams.
- 5. Improve the safety and quality of learning environments for all learners.

SACE will priorities the centrality of ECD and Grade R in achieving foundational learning outcomes. This will involve:

- Professionalising ECD and Grade R educators/practitioners through enhanced registration processes
- Endorsing fit-for-purpose quality professional development programmes for ECD practitioners

These initiatives directly support Priority 1 by increasing access to Early Childhood Development and ensuring quality learning foundations.

3. LEGISLATIVE AND POLICY CONTEXT

The guideline must be read and implemented in conjunction with the following Legislative frameworks for performance planning, monitoring, and evaluation:

(a) Constitution of the Republic of South Africa 1996

A number of sections in the Constitution refer to monitoring and evaluation of performance in the

public sector. Most importantly creates a mechanism for holding the government accountable. Section 92 of the Constitution states that "members of the Cabinet are accountable collectively and individually to Parliament for the exercise of their powers and the performance of their functions, and that they must provide Parliament with full and regular reports concerning matters under their control".

(b) The Public Finance Management Act of 1999

Section 27(4) of the PFMA makes provision for the development of measurable objectives which must be included in the annual budgets of national and provincial institutions. While Section 40 (3) (a) and 55 (2) (a) makes provision for the reporting of performance against predetermined objectives in institutions' Annual Reports. The PFMA promotes reporting against predetermined measurable objectives which are outlined in short and medium terms plans.

Section 38 (d) of the PFMA states that the Accounting Officer has the responsibility to manage, safeguard and maintain assets and manage the liabilities of the Department or entity, and Section 38 (a) (iv) and (c) (iii) makes a provision for systems for properly evaluating all major capital projects before a final decision on the project and manage available working capital efficiently and economically.

(c) Treasury Regulations, 2005

The Treasury Regulations outline the requirements for the development and submission of Strategic Plans as well as, related quarterly performance reporting. In addition, National Treasury Instruction Note 33 of 2011 regulates the development of Strategic and Annual Performance Plans according to the Framework for Strategic Plans and Annual Performance Plans (2010). The Treasury regulations regulate the requirements for the development of strategic and annual performance plans and the reporting thereof.

(d) Policy Framework for the on Government-Wide Monitoring and Evaluation Systems

In 2007 government produced a Policy Framework for the Government-Wide Monitoring and Evaluation Systems. This framework was essentially the first policy on government-wide monitoring and evaluation in South Africa. It aimed to provide an integrated, encompassing framework for M&E principles, practices, and standards to be used throughout government, and function as an apex-level information system that draws from the component systems in the

framework to deliver useful M&E products for its users.

(e) Framework for Performance Information Management (2007)

National Treasury's 2007 Framework for Management of Programme Performance Information stresses the need for Organisations to put in place processes to ensure that performance information is used in planning, budgeting2, and management in the Organisation. This would include (a) the setting of ex-ante performance standards and targets; (b) reviewing progress and taking managerial action and (3) evaluation of programme performance. It also suggests processes to ensure that performance information management responsibilities are included in the performance agreements of line managers.

(f) The Green Paper: Improving Government Performance (2009)

The Green Paper on Improving Government Performance (2009) provides the framework for the activities of the Organisation of Performance Monitoring and Evaluation. The Green Paper on Improving Government Performance was developed to translate Government's electoral mandate into a clear set of outcomes and output measures. It is envisaged that these outcomes and output measures will assist Government in delivering on the 12 outcomes identified as priorities. The Paper complements the Green Paper on National Strategic Planning and together envisages reforms that will facilitate improvements towards achieving a development state.

(g) Budget Prioritisation Framework

Government plans are implemented at different levels across the three spheres of government (national, provincial, and local) and a large number of public entities and State-owned Companies. The Budget Prioritisation Framework aims to guide all spheres of Government and all Government entities to refine plans and develop budget proposals. The Budget Prioritisation Framework's objective is to establish the strategic framework for decision-making on budget priorities that are required to advance the goals of the NDP. It seeks to establish a systematic basis for making strategic choices among competing priorities and limited resources, to better optimise the budget as a key lever for driving the NDP.

(h) Statistics Act 6 of 1999

The Statistics Act advances the planning, production, analysis, documentation, storage,

dissemination, and use of official and other statistics. The purpose of official statistics is to assist organs of state, businesses, other organisations or the public in planning, decision making, and monitoring or assessment of policies.

The use of official statistics strengthens the quality of government and institutional short- and medium-term plans.

(i) Revised Framework for Strategic and Annual Performance Plans

The revised framework for strategic and annual performance plans 2019, replaces the framework that has been utilized by the national and provincial government and was published by the national treasury in 2010.

The disparate and diffused nature of planning has resulted in a complex plethora of plans, legislation, and structures. This fragmented planning landscape has led to sub-optimal outcomes and asymmetrical impacts of government policies and programmes and sub- optimal returns on the resources allocated to them. The imperative of institutionalising planning for development in government has been fully recognised and resultant planning reform to thus the Integrated Planning Framework Act". (Revised strategic and annual performance plans framework 2019)

The purpose of the Revised Framework for Strategic and Annual Performance Plans is to provide the principles for short- and medium-term planning for government institutions, outline the alignment of various institutional plans to the high-level government long and medium-term plans, as well as institutional processes for the different types of plans. This Framework applies to all National Departments, Provincial Departments, and government components as listed in Schedule 1, Schedule 2 and Schedule 3A of the Public Service Act (PSA) (1994) respectively, constitutional institutions as provided in the Constitution of the Republic of South Africa (1996) and public entities listed in Parts A and C of Schedule 3 of the Public Finance Management Act (PFMA) (1999).

(j) Guidelines on the preparation of quarterly reports for public entities and constitutional institutions

Public entities are required to report quarterly to their Executive Authority. Treasury Regulation 5.3.1 requires the accounting officer of a constitutional institution to establish procedures for quarterly reporting to the executive authority to facilitate effective performance monitoring, evaluation, and corrective action. Treasury Regulations 29.3.1 and 30.2.1 state that the accounting

authority of a public entity must establish procedures for quarterly reporting to the executive authority to facilitate effective performance monitoring, evaluation and corrective action. These guidelines are aimed at improving transparency and enhancing oversight over the financial and non-financial performance of constitutional institutions and public entities.

(k) Electronic Quarterly Performance Reporting System (eQPRS) Manual: National Public Entities

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 applies 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.

(I) National Evaluation Policy Framework

The importance of using evaluation processes to generate evidence that can shape policy and practice is critical to the support provided to the government to achieve its development priorities as set out in the National Development Plan (NDP). Since the adoption of the National Policy Framework (NEPF) in 2011 the Department of Planning, Monitoring and Evaluation (DPME), as the custodian of evaluations in the country, has continuously promoted evaluation as an effective decision-making tool that works across all levels and sectors of government, in different contexts and for all citizens.

The Policy framework provides the basis for a minimum system of evaluation across government to guide and promote relevance, efficiency, and quality in evaluation processes. It seeks to ensure that credible evidence (including comprehensive sex, age and disability disaggregated data) from evaluations is used in planning, budgeting, monitoring and Organisational reviews to improve performance and is supported by several guidelines which support the various steps for undertaking evaluation in line with the National Evaluation System.

(m) The 2007 Policy Framework for Government-wide Monitoring and Evaluation

This document is the overarching policy framework for monitoring and evaluation in the South African Government. It sketches the policy context for supporting frameworks, such as National Treasury's Framework for Managing Programme Performance Information and Statistics South Africa's South African Statistics Quality Assurance Framework. It is further supplemented by an outline of the legislative mandates of the various stakeholders charged with its implementation. It also provides a section on principles that will guide future implementation initiatives. This Policy Framework applies to all entities in the national, provincial, and local spheres of government.

Monitoring and Evaluation (M&E) is inherently complex, multidisciplinary, and highly skill intensive. Implementing M&E across government systems is even more challenging, as it demands in-depth knowledge both within and across sectors, as well as a clear understanding of the linkages between planning, budgeting, and implementation. The complexity is further heightened by the decentralised nature of government, where powers and functions are distributed across three spheres. This intricate intergovernmental structure, with its diffused responsibilities, underscores the need for robust M&E systems to enhance coordination and mitigate the risk of fragmentation.

(n) Annual Report Framework issued by the National Treasury

Annual reports are an integral part of public entities' reporting. The achievements, performance information, outlook, financial position, and human resources information of public entities for each reporting period are reported in the annual report. The information reported on in the annual report includes the actual achievements for the reporting period in relation to the planned targets and budgets as published in the strategic plan, annual performance plan and budget documents. Annual reports are tabled in Parliament/Legislatures, and it is available to the public. The publishing of financial and non-financial information of public entities is essential for accountability and, transparency and to improve trust and confidence in government service delivery. The reported information must be accurate and balanced, reporting both the successes and explaining the shortcomings.

(o) Protection of Personal Information Act

The purpose of the Act is to protect personal information, to strike a balance between the right to privacy and the need for the free flow of, and access to information, and to regulate how personal information is processed. The basis of the POPI Act is that organisations need to conduct themselves responsibly. Organisation should not only be responsible but should be seen to be responsible corporate citizens. Part of this responsibility is to protect the information inside the

Organisation, to be responsible when it comes to the process of storing and sharing personal information. Personal information is to be seen as precious goods and the act requires organisations to exercise control over these precious goods. Ignorance of the law is no excuse and companies need to update IT systems and start training and educating staff since early action is essential.

The Act applies to other than a natural person; it, therefore, includes companies or any other legally recognised Organisation. All organisations are seen as data subjects and are afforded the same right of protection. The Act applies to anyone who keeps any type of records relating to the personal information of anyone unless those records are subject to other legislation which protects such information more stringently. It, therefore, sets the minimum standards for the protection of personal information. It regulates the "processing" of personal information. "Processing" includes collecting, receiving, recording, organising, retrieving, or using such information; or disseminating, distributing, or making such personal information available.

4. SCOPE OF APPLICABILITY

This policy framework serves at the departmental planning, performance monitoring and evaluation guide and it applies all employees of SACE, the programmes and sub-programmes including their operations and processes. The framework is linked to the current strategic plan cycle 2025-2030.

5. DEFINITION OF CONCEPTS

CONCEPT	DEFINITION	
Planning Documents		
Strategic Plan (SP)	A Strategic Plan provide information about the SACE's programmes and projects, that are aimed at contributing towards the achievement of government priorities and the realization of the mandate of SACE. The Strategic Plan is a five-year plan that reflects the intended impact and outcomes that are set for SACE and that will be measured, evaluated and reported at Parliament and to the public in general.	

	An Annual Performance Plan (APP) contains the outputs, output	
Annual Performance Plan (APP)	indicators and targets that SACE seeks to achieve in the coming financial year in line with the Strategic Plan. The APP also include two-year projections in line with the Medium-Term Expenditure Framework (MTEF) period. These projects reflect on the applicable annual and quarterly performance. targets for the financial year.	
	An Annual Operational Plan (AOP) reflects on the activities that will be	
Annual Operational Plan	implemented for each output and output indicator as outlined in the APP. However, the AOP can also include operational outputs that are not included in the APP. Within SACE, AOP can be developed for Divisions and Provinces.	
Planning Concepts		
Performance Information	Planning information helps SACE to reflect on how it has performed in achieving the results. Plaining information includes planning, budgeting, implementation, monitoring, reporting and evaluation processes, which are key to effective management of SACE. Furthermore, performance information is important as it enhances transparency, accountability and oversight of the Organisation.	
Pathway of Change	Pathway of change is a map that shows the linkages between an intervention and the outcome. It reflects on the results chain through a map illustrating the pathways that lead to the achievement of the outcome. and the impact.	
Impact	The impact is the change that is desired. It reflects on the change in conditions after intervention and shows the results of achieving a specific outcome. For example, reducing poverty and creating jobs.	
Outcome(s)	Outcomes reflect the results that are aimed to be achieved in the medium term. It could be related to specific consequences to beneficiaries, institutional and behavioral changes are observed as a result of the interventions delivered by SACE. The achievement of these outcomes reflects on the performance of SACE.	
Outputs	Outputs are what has been produced and delivered. They are the building blocks towards the desired outcomes.	
Activities	Activities are the actions or processes that involve using the inputs to produce the desired output. It is what will be done to produce the ultimate outputs.	
Inputs	Refers to all the resources contributing to the production and delivery of outputs, including finances, personnel, and buildings, i.e. what we use to do the work	

Target	A target is a level an institution would like to achieve and must be time-bound and achievable. Furthermore, targets must be SMART.
SMART	Is an acronym that is used to define the set of criteria for selecting performance targets: S-specific; M-measurable; A-achievable; R-relevant. T-time-bound.
Baseline	The current level of performance that the institution aims to improve. It is the starting point from which progress will be measured.
Assumptions	Assumptions are factors that are accepted as true and certain to happen without proof.
Risks	Risks are the potentially unwanted outcomes that may adversely affect the achievement of the planned results or service delivery.
Indicator	An indicator is a predetermined signal that a specific point in a process has been reached or the result achieved. It should include a unit of measurement that specifies what is to be measured along a scale or dimension but does not indicate the direction or change. In addition,
	indicators can be qualitative or quantitative measures.

	The description of impact, outcome and output indicators and targets
Technical Indicator	to outline data collection processes, gathering of a portfolio of
Description (TID)	evidence, the acceptable level of performance at the beginning of the
	planning cycle.

6. THE PLANNING PROCESS

6.1. Strategic Planning

Strategic planning is an important process to guide the work of any organization and it helps to maintain a focused, long-term vision of the organization's mission and purpose while also serving as a tool to support decisions about the allocation of human and financial resources.

The Integrated Planning Framework Act (IPFA), provides for the functions of the Department responsible for Planning, Monitoring and Evaluation; to establish an institutional framework for a new predictable planning paradigm and discipline within and across all spheres of government; to support effective monitoring and evaluation of government programmes aimed at improved service delivery and positive impact on society, to provide for the continued existence of the National Planning Commission; and promote better coordination, collaboration and alignment of Planning, Monitoring and Evaluation between and across the national, provincial and local spheres of government, and including public entities. Planning tools enables the institutions to conceptualise the strategic focus, plan for results and identify enablers towards achieving the intended results. The following planning tools, among others, may be used in the different stages of the planning process:

- Planning tools for the Situational or Diagnostic Analysis
 - Scenario planning
 - SWOT and PESTEL
 - o Fishbone
 - Problem and Solution tree analysis
- Planning tool for the development of Strategic Plans, Annual Performance Plans and Annual Operational Plans
 - Theory of change
 - o Log-frame.
 - Balanced scorecard
 - Activity-based costing
 - Project management tools
- The diagram illustrates the planning frameworks and institutional planning processes:

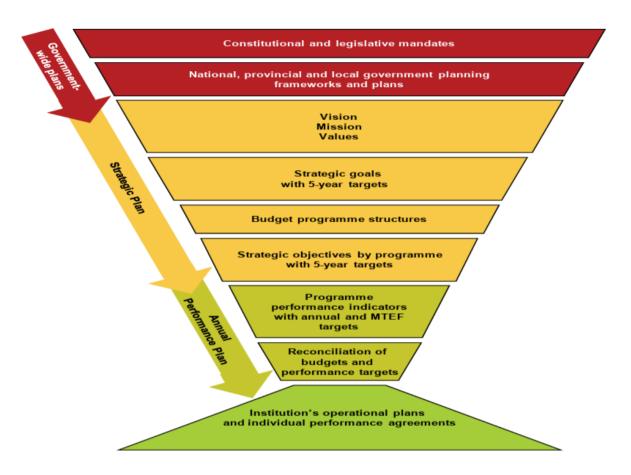


Figure 2: The hierarchy of the relationship between planning concepts Source: SP and APP Framework, National Treasury, 2010

The following Process must be followed for tabling Strategic Plans:

- New SPs developed at the beginning of a five-year planning cycle:
- The entity's plan approved by the Executive Authority must be tabled in Parliament.
- Tabling of approved plans must follow the process and dates for tabling given by Parliament.
- The accounting officer, in consultation with the executive may revise the strategic plan in when there are significant policy changes in the service delivery environment by either changing preparing annexure to the existing strategic plan or by publishing the new strategic plan that replaces the preceding plan.
- SPs revised and approved during the five-year planning cycle:
- SPs revised and approved by the Executive Authority during a financial year, after the original SP was tabled, must be re-tabled in Parliament.
- Proof of tabling of new SPs or re-tabling of revised SPs must be submitted to the DPME
 within a month after their tabling or re-tabling in Parliament.
- New SPs and revised SPs must be shared with the DBE, DPME and other relevant

stakeholders and must be published on the institutions' websites to allow wider public access on the document.

6.2. Annual performance plan

The Annual Performance Plan (APP) outlines the specific performance targets that the Department aims to achieve in the budget year and the subsequent two years of the Medium-Term Expenditure Framework (MTEF).

The APP articulates the institution's intended outputs that contribute to the achievement of strategic outcomes and impact statements. These outputs are reflected in the budget and must include audited performance for the previous three financial years, estimated performance for the current year, and projections for the medium term.

The following process must be followed in developing the Annual Performance Plan:

- The priorities of the entity must be aligned with those outlined by the relevant oversight bodies.
- Programme Managers must identify key performance indicators and set targets linked to key policy priorities determined by the Executive Authority. All indicators must comply with the SMART principle (Specific, Measurable, Achievable, Realistic, and Time-bound).
- To ensure clarity and consistency, a Technical Indicator Description (TID) must be developed for each performance indicator.
- Facilitate stakeholder participation through workshops or consultation meetings organised per programme, sub-programme, priority area, or cross-cutting functional area.
- Use approved planning tools and frameworks developed collaboratively during the Strategic Plan (SP) development process.
- Ensure that APP outputs are aligned with the outcomes and objectives of the Strategic Plan.
- The Strategic Planner must consolidate the plan using relevant planning tools for inclusion in the APP.
- Programme Managers must review and sign off the content through internal quality assurance mechanisms.
- The Accounting Officer, Chief Financial Officer (CFO), and relevant Heads of Department must sign off the APP prior to submission to the Executive Authority for approval.
- The Accounting Officer must ensure that the APP is submitted within the prescribed

- timeframes set by oversight bodies such as the Department of Planning, Monitoring and Evaluation (DPME) and National Treasury.
- Once approved, the APP must be shared with all relevant stakeholders, including DPME and National Treasury, and published on the institution's website.

The following process must be followed when tabling Annual Performance Plans:

- APPs must be developed and finalised before the beginning of the new planning year.
- The APP, once approved by the institution's Executive Authority, must be tabled in Parliament on a date determined by the Leader of Government Business.
- The tabling of approved APPs must comply with the processes and timelines prescribed by Parliament.
- APPs that are revised and approved by the Executive Authority during the financial year,
 after the original APP has been tabled, must be re-tabled in Parliament.
- Proof of tabling or re-tabling must be submitted to the oversight bodies within one month after the tabling or re-tabling.
- New and revised APPs must be shared with other relevant stakeholders and published on the institution's official website.

Ideally, an APP should not be revised during a financial year. It may, however, be revised during a financial year under the following conditions:

- Revisions to the SP, as described in Section 2.1, will require revision of the outcomes and related outputs of the APP.
- Targets changed as a result of the in-year budget adjustment process must be reflected in a re-tabled APP and Adjusted Estimates.

6.3. Annual Operational Planning

An Annual Operational Plan outlines the activities and budgets for each of the outputs and output indicators reflected in the Annual Performance Plan. Annual Operational Planning is crucial in the hierarchy of institutional planning as it is the mechanism within which institutions plan for the achievement of activities that contribute to the Annual Performance Plan outputs. In addition, Annual Operational Plans include operational outputs, which are not reflected in the Annual Performance Plan.

The contents of the Annual Operational Plan should be informed by the Strategic and Annual

Performance Planning processes using the relevant planning tools. Annual Operational Plans must be developed at an institutional level and should be used as a management tool to inform performance agreements. Within SACE, AOP can be developed for Divisions and Provinces. **The following process must be followed in developing the Annual Operational Plan:**

- The AOP must be aligned to the tabled Strategic Plan (SP) and Annual Performance Plan (APP)
- The AOP must be developed for all divisions in the entity and must reflect activities across all programmes.
- At the programme level, list all outputs, including those captured in the APP and any additional outputs, particularly those addressing women, youth, and persons with disabilities, where applicable.
- Develop a set of activities for each identified output.
- For each activity, specify the timeframe for completion.
- Cost each activity in collaboration with the relevant Branch and the finance division.
- Identify and document dependencies for each activity to ensure coordinated implementation.
- Assign clear responsibility for each activity to the relevant officials or units.
- The planning division must consolidate the AOP, which must be approved by the Accounting Officer by the end of March.

6.4. Evaluation

Evaluations seek to provide an objective view through rigorous research methods to inform conclusions about performance, reasons for performance and nonperformance, and to suggest recommendations for improvement.

The National Evaluation Policy Framework (2011) provides the basis for a minimum system of evaluation across government. Its main purpose is to promote quality evaluations which can be used for learning to improve the effectiveness and impact of government, by reflecting on what is working and what is not working and revising interventions accordingly. It seeks to ensure that credible and objective evidence from the evaluation is used in planning, budgeting, organisational improvement, policy review, as well as ongoing programme and project management, to improve performance. It provides a common language for evaluation in the public service.

Evaluation is the systematic assessment of the operation and/or outcomes of a program or policy,

compared to a set of explicit or implicit standards, as a means of contributing to the improvement of the program or policy. More practically, evaluation is a time- bound exercise carried out periodically that seeks to provide useful and credible information about the usefulness and success of an intervention. Types of evaluations that can be undertaken at the different stages of the planning and implementation cycle.

Type of	Description	Stage in cycle	Use of Evaluation
Evaluation			Findings
Diagnostic evaluation	Defines the problem, the root causes of the problem, and options that can be considered	Diagnosis is undertaken before planning an intervention to inform the design of an intervention.	The diagnostic evaluation is used to assess the underlying problem, the root causes, and options/solutions.
Design evaluation	Reviews the strength of the design of an intervention.	Preferably a quick review after the design is completed but before implementation, to allow time to make improvements to the intervention.	To improve the design of intervention before implementation to strengthen the likelihood of the intervention achieving its intended. results.
Implementation evaluation	Assesses whether the theory of change underlying the intervention is being achieved, whether the outputs are being achieved, whether the outcomes are likely to be achieved and whether the assumptions underlying the design of the intervention hold.	During the implementation of an intervention.	Findings can be used to determine how the design and operation of an intervention should be improved to achieve the intended results.
Impact evaluation	Undertaken at the end of a phase of the implementation of a plan to assess whether the intended outcomes and impacts of the intervention are being achieved. Impact evaluation should be designed at the beginning of an intervention, including a baseline, and the planned results.	After a minimum of five years of implementation of an intervention.	This will provide a source of evidence for decisions related to the improvement, continuation, or discontinuation of the intervention, and/or other policy and budget allocation decisions.
Economic evaluation	Undertaken to assess costs- benefits or cost- effectiveness	At any stage during the implementation of an	Findings are used to determine whether an

	of the intervention will often be	intervention.	intervention requires
	combined with a diagnostic (to		improvement or
	compare options), or impact		discontinuation based
	(to compare cost-benefits of		on evidence on the
	different models in lamented		relationship between
	evaluations		an
			intervention's results
			and the costs
			associated with
			those results.
Synthesis	Different models in lamented	Any stage of an intervention,	The costs associated
evaluation	evaluations. Undertaken when	particularly diagnostic before	with those results.
	several evaluations have been	the redesign of the new	Findings often used
	concluded for a sector. These	policy, or legislation	from a range of
	evaluations review where the		programme
	results of several evaluations		evaluations as a review
	and research evidence can be		of
	used to generate a		a sector
	performance view of the		
	sector.		

6.5. Monitoring and Reporting

It refers to the continuous process of examining the delivery of programme outputs to intended beneficiaries, which is carried out during the execution of a programme to immediately correct any deviation from operational objectives. The activities pertaining to collecting performance data, producing the performance reports and performance reviews are the main examples of performance monitoring that is undertaken in the Organization must be planned and conducted continuously by collecting data on specified indicators, verifying, and storing the data, and analysing and reporting findings. These monitoring findings must be utilised to provide management, oversight institutions and the public with information on the extent of actual progress in implementation in relation to the plan.

Reporting is a vital component of the monitoring process and must be undertaken with the intent to use the findings to inform management and oversight decision making. Reporting entails tracking progress against a plan, and it improves accountability for delivering on the priorities of the government and provides focus on the use of allocated budgets by institutions. It also provides an opportunity for institutions to indicate measures that will be taken to ensure that the implementation of plans remains on track.

The institutions' Performance Information Management policy or Planning, Monitoring and

Evaluation framework should outline institutional processes for management and use of credible Monitoring and Evaluation (M&E) findings and recommendations.

In terms of the Revised Draft Framework for Strategic and Annual Performance Plans, monitoring and reporting must be done against the Strategic Plans, Annual Performance Plans and Annual Operational Plans. An integral part of monitoring is the practice of regular and ad hoc reviews. Regular reviews must be undertaken against the Strategic Plan such as Mid-term reviews (two and a half years) and End-term reviews (on the fifth year before the new administration). Ad-hoc reviews should be conducted against Implementation Programmes, policies, projects, systems, and other special interventions. The findings of these reviews must be used to inform the design or improvements of plans during the short- and medium-term planning processes.

7. ORGANISATIONAL PERFORMANCE MONITORING

7.1. Performance Monitoring Documents and Processes

Following the development of all plans, plans are to be implemented. Implementation of plans must be monitored to measure progress towards the achievement of planned targets so that monitoring findings can be used to improve performance, future planning, and budgeting. Monitoring must be planned and conducted continuously by collecting data on specified indicators, verifying, storing the data, analysing and reporting the findings.

The measurement and reporting of performance results in improved performance. The DPME Framework indicates that monitoring and reporting of performance information provide management, oversight institutions and the public with information about the extent to which implementation of the plan has progressed. To improve transparency concerning financial and non–financial performance, Treasury Regulation 5.3.1 and 29.3.1, 30.2.1 indicate 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. To this effect, the Policy Framework for the Government-wide Monitoring and Evaluation System requires that all government institutions establish a monitoring and evaluation system. This system is described as: "A set of institutional structures, management processes, standards, strategies, plans, indicators, information systems, reporting lines and accountability relationships which enable government institutions to discharge their monitoring and evaluation functions effectively."

The National Treasury Framework for Managing Programme Performance Information (2007) further requires Departments to publish administrative and performance information. Departments need to develop policies and procedures to publish performance information, which includes the tabled Annual Reports for each financial year.

National Departments, Provincial Departments and Schedule 3A (national) and 3C (provincial) public entities have in the past compiled and submitted Quarterly Performance Reports (QPR) manually using MS Excel-based reporting models. The manual reporting tools for national Departments, Provincial Departments and schedule 3A (national) and 3C (provincial) 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 Department of Planning, Monitoring and Evaluation (DPME) has developed an Electronic Quarterly Performance. Reporting System (eQPRS) for reporting by all national and provincial institutions of government.

QPR Guidelines will be provided to national Departments, Provincial Departments, and Schedule 3A (national) and 3C (provincial) public entities on an annual basis to guide performance reporting for the financial year. SACE PMER Framework 2025-2027 provides for performance monitoring against the Strategic Plan and the APP through the Scorecard system. SACE's monitoring and evaluation system is such an established system, which provides for the quarterly performance monitoring and reporting on the delivery of the Strategy. The performance reported on the Quarterly Performance Report is assessed based on the guidelines provided for in the approved Standard Operating Procedure, which is a supplementary document to this document. The following are the performance monitoring reports that will be produced:

PERFORMANCE MONITORING REPORTS	PURPOSE
Report	The DPME Framework states that quarterly reporting, also called in-year performance reporting, aims to monitor the progress towards achieving targets every quarter. The quarterly performance report should detail the actual achievements of targets as set in the APP, including the highlights on under/non-achievement of targets. If there is under/non-achievement reported, reasons for such must be indicated together with the corrective measures to ensure that such targets will be achieved before the end of the financial year. The Scorecard completion guide is a tool that will be used internally to score on targets that are

	reported.
eQPRS	The eQPRS is an online system that allows users to access, report, provide
	oversight and use reported information with ease. The eQPRS applies to national
	Departments, Provincial Departments, and Schedule 3A (national) and 3C
	(provincial) public entities. The PMERR will in each quarter circulate the quarterly
	performance report template to reporting Divisions, which after being populated,
	the information will be used by PMERR to complete the eQPRS. The eQPRS will be
	submitted online to DPME, Treasury, and DBE as stipulated in the DPME
	guidelines.
AOP	All Divisions and Provinces are to report on the performance of their respective
	DOPs and POPs to enable the produce the Scorecard for the AOP – Divisions and
	that of the AOP – Provinces. In the completion of the DOP and POP Scorecards,
	Divisions and Provinces must indicate actual achievements of targets as set in the
	Plan including the highlights on under/non-achievement of targets. If there is
	under/non-achievement reported, reasons for such must be indicated together
	with the corrective measures to ensure that such targets will be achieved before
	the end of the financial year.
Quarterly Missed Targets	This is a report that shall be produced at the end of each quarter after the
Report	finalisation of the APP and AOP Scorecard processes. This report will highlight any
	missed targets and interventions to improve performance. These reports will serve
	as quarterly service delivery improvement plans.
Annual Report	In terms of Section 55 (1) (d) of the PFMA, the Accounting Authority for a Public
	Entity must submit their audited Annual Report within five (5) months after the end
	of the financial year. Furthermore, Treasury Regulation 28.2.2 stipulates that the
	particulars of the public entity's strategic objectives and outcomes as identified
	and agreed on with the Executive Authority must be included in the Annual Report,
	including key performance measures and indicators for assessing the entity's
	actual performance against targets. Annual Reports are key reporting
	instruments for institutions to not only report performance, but also budget spent.
	As such, Annual Reports must contain non-financial service delivery information
	and financial statements, as well as the audit report.
	and initiational statements, as well as the addit report.

7.2. Submission Dates

SUBMISSION	DEADLINE		
Quarterly Performance	Every financial year, a total of five (5) Performance Reports are to be prepared in		
Report	compliance with prescripts, as follows:		
	First-quarter report - 30 July for the period of 1 April to 30 June each year.		
	Second-quarter report - 30 October for the period 1 July to 30		
	September.		
	Third-quarter report - 30 January for the period 1 October to 31		
	December.		
	 Fourth-quarter report - 30 April for the period 1 January to 31 March; 		
	and		
	 Annual report – 30 May for the period of 1 April to 31 March. 		
	The second secon		
eQPRS	APP Configuration		
	Opening: First day of June		
	Closing: End day of June		
	• (Budget programme Structure, Performance		
	indicators and Performance Targets)		
	Q1: Quarter ending 30 June.		
	Opening: 01 July		
	Closing: 31 July		
	(Q1-Actual performance) Audited		
	Annual Output		
	Opening: 01 September		
	Closing: 30 September		
	(2024/25 Audited Annual Performance Report) Q2:		
	Quarter ending 30 September.		
	Opening: 01 October		
	Closing: 31 October (Q2-		
	Actual Performance)		
	Q3: Quarter ending 31 December.		
	Opening: 01 January		
	Closing: 31 January (Q3-		
	Actual Performance)		
	Q4: Quarter ending 31 March.		
	Opening: 01 April		
	Closing: 30 April		
	(Q4 -Actual Performance) Pre-		
	Audited Annual Reporting		
	Opening: 01 May		
	Closing: 31 May		
	(Actual Pre-Audited Annual reporting)		
AOP Scorecard	Every financial year, a total of five (5) AOPs (DOPs and POPs Scorecard		
	Reports) are to be prepared, as follows:		
	First-quarter Scorecard - 16 August for the period of 1 April to 30 June each		

	year, • Second-quarter Scorecard - 15 November for the period 1 July to 30
	September.
	 Third-quarter Scorecard - 15 February for the period 1 October to 31 December.
	 Fourth-quarter Scorecard - 15 May for the period 1 January to 31 March; and
	Annual Scorecard – 15 June for the period 1 April to 30 March.
Annual Report	Per legislative prescripts, the following submissions are to be made:
	The Annual Performance Report will be submitted on the 30 May of each year; The draft Annual Report to be submitted to the Auditor – General for auditing on 15 July of each year.
	The final audited Annual Report to be submitted to the Department of Basic Education, National Treasury, Parliament and any other stakeholder.

7.3. Performance monitoring flows

The following is the Quarterly Performance Report process flow:

Proces	ss	Timeframe
1.	Initiation of the Reporting Cycle	April / July / October /
•	Signal the commencement of a new quarter to all Divisions and	January
	Provinces.	
•	Develop and circulate the quarterly scorecard and performance	
	report templates, including completion guidelines.	
•	Communicate submission deadlines and required supporting	
	evidence following the end of the previous quarter.	
2.	Submission of Reports	July / October / January /
•	Divisions and Provinces submit completed scorecards and	April
	quarterly performance reports with all supporting evidence as per	
	PMER instructions.	
•	Ensure scorecards comply with the completion guide and	
	submission deadlines.	
3.	Assessment and Consolidation	July / October / January /
•	Assess the submitted scorecards and quarterly performance	April
	reports against supporting evidence.	
•	Finalise the preliminary scorecard report.	
•	Communicate preliminary assessment results to Divisions and	
	Provinces for consultation.	
4.	eQPRS Submission and Approval	July / October / January /
•	Capture approved quarterly performance report information into	April
	the eQPRS system.	
•	The Entity Coordinator submits the eQPRS to the PMER Manager	
	(delegated by the Chairperson) for approval.	
•	The PMER Manager approves the eQPRS and submits it to National	
	Treasury (NT) and the Department of Planning, Monitoring and	
	Evaluation (DPME), with the signed-off certificate and quarterly	
	performance report.	
•	The signed-off performance information and approval	
	certificate/letter are submitted to the Department of Basic	
	Education (DBE).	

5.	Internal Review and Committee Submission	July / October / January /
•	Finalise scorecards and quarterly performance reports following	April
	engagements with Divisions and Provinces.	
•	Submit finalised scorecards to Internal Audit for vetting and	
	opinion.	
•	Incorporate Internal Audit and stakeholder feedback, then table	
	the finalised scorecard and quarterly performance report to all	
	relevant Committees.	
6.	Organisational Feedback and Analysis	May / August / November /
•	Communicate final quarterly performance outcomes across the	February
	organisation.	
•	Produce a corrective action report for the CEO, highlighting	
	underperforming targets.	
•	Develop an M&E report on the reliability and credibility of SACE	
	performance information, based on verification and feedback	
	analyses.	
7.	Annual and Strategic Monitoring	January / February / March
•	Circulate templates, consolidate submissions, and finalise the	
	annual monitoring report on the implementation of the Approved	
	2025/2026 Annual Performance Plan and the 2025–2030 Strategic	
	Plan.	
8.	Mid-Term and End-Term Evaluation	Mid-Term: May / August
•	Conduct and produce the Monitoring and Evaluation Assessment	2028 End-Term: April / July
	Report for the Mid-Term and End-Term	2030
•	Review of the 2025–2030 Strategic Plan.	

The following is the AOP Scorecard process flow:

Proces	s	Timeframe
1.	Initiation of the Reporting Cycle	Five (5) working days before
•	Signal the commencement of the new quarter to all Divisions and	end of the quarter
	Provinces.	
•	Develop and circulate the quarterly DOPS and POPS scorecard temp	
	for completion by Divisions and Provinces.	
•	Communicate the submission deadlines for completed scorecards	
	supporting evidence.	

2.	Submission of Scorecards and Evidence	Two (2) weeks after the end (
•	Divisions and Provinces submit completed scorecards and supporti	quarter
	evidence as directed by PMER.	
•	Ensure scorecards are fully completed in line with the prescribed	
	guidelines and submitted within the stipulated deadlines.	
3.	Assessment and Consultation	Two (2) weeks after submiss
•	Assess submitted scorecards against the supporting evidence and	Divisions and Provinces
	finalise preliminary scorecard reports.	
•	Communicate preliminary assessment results to Divisions and Prov	
	as part of the consultation process.	
•	Finalise scorecards following engagements and resolution of issues	
	Divisions and Provinces.	
4.	Finalisation and Communication of Results	Within two (2) weeks after
•	Facilitate approval of the finalised scorecards.	completion of the assessme
•	Communicate the approved scorecard results to all Divisions and	and resolution process
	Provinces.	

The following is the Annual Report Scorecard process flow:

Proces	3	Timeframe
1.	Initiation of the Annual Reporting Process	March – April
	 Signal the commencement of the Annual Report production process to all Divisions and Provinces. 	
	 Develop and circulate Annual Report templates for completion by Divisions and Provinces. 	
2.	Submission of Annual Report Inputs	April
	 Ensure that Annual Report templates are completed in full, submitted within the stipulated deadlines, and that data integrity and quality are maintained. 	
3.	Compilation of the Unaudited Annual Report	April – June
	 Finalise the unaudited annual scorecard report and prepare the first draft unaudited Annual Report. 	
	 Submit the unaudited annual scorecard report and draft Annual Report to Internal Audit (IA) for vetting and assurance. 	
	 Table the unaudited annual scorecard report and draft Annual Report to all relevant Committees and the Governing Body for approval. 	
	 Submit the approved unaudited annual scorecard report to the Department of Basic Education (DBE), National 	

		Treasury, and the external auditors.	
4.	Finalis	ation and Approval of the Annual Report	July – August
	•	Finalise the draft Annual Report and table it to all Committees and EXCO for approval.	
	•	Submit the approved final Annual Report to the DBE, Auditor-General, Parliament, and National Treasury.	
5.	Tabling	g and Publication	As determined by
	•	Facilitate the tabling of the approved final Annual Report in Parliament.	Parliament / Following tabling in Parliament
	•	Publish the tabled Annual Report across the organisation's communication platforms.	

7.4. Performance Criteria

Below are the criteria to be used to determine performance for 2025/26 financial year:

• Target Achieved 00%):

Means reported progress is in line with what was planned and evidence to support. performance is accurate and consistent with the target.

Target Partially Achieved 0% - 99%):

Means the target has been partially achieved in the planned timeframe.

• Target Not Achieved % - 79%):

Means the target has not been achieved in the planned timeframe.

NB: The number will be rounded off to the nearest whole number.

For qualitative targets in the Annual Performance Plan, progress on the implementation of planned key activities will also be considered applying the following principles:

8. ASSESSMENT OF THE STRATEGIC PLAN

The DPME Framework states that a study is required to conduct systematic assessments of programmes or policies, their design, implementation, and results, to determine their relevance, efficiency, effectiveness, impact, and sustainability relating to government spending priorities and use of public resources. Since the act of embarking on evaluations is new within government, the

DMPE plays a leading role in defining the standards, processes and techniques of planning and conducting evaluations. The DPME's National Evaluation Policy Framework support government institutions in embarking on evaluation activities.

Evaluation is essential to ensure that corrective measures are identified, and interventions put in place to improve the impact of implemented programmes and processes. The interventions obtained via evaluation are critical to evaluate past actions, build on areas of value and use the information to realign strategic, tactical, and operational outcomes. The Policy Framework for the Government-wide Monitoring and Evaluation System describes evaluation as a time-bound and periodic exercise that seeks to provide credible and useful information to answer specific questions to guide decision-making by staff, managers, and decision-makers. The evaluation may assess the relevance, efficiency, effectiveness, impact, and sustainability.

One of the goals of the Government-wide Monitoring and Evaluation System is to promote sectorial and thematic evaluations aimed at measuring the impact of government activities towards improving the lives of all citizens. Towards this goal, institutions are encouraged to evaluate their programmes regularly, provide guidance on the general approach to be adopted when conducting evaluations and provide for the publication of the results of evaluations against the goals where the impact is measured.

According to the DPME Framework, two (2) assessments must be conducted for an Organisation: a mid-term assessment and an end-term assessment. A mid-term These assessments will be done against the current strategic plan. The results from a mid-term help to assess the relevance of the intervention, progress made towards meeting the set targets, its relevance and useful and provides an opportunity to make necessary changes to ensure that the intended set results. The end-term assesses whether the strategic plan outcomes were achieved, how they were achieved or not achieved.

9. ROLES AND RESPONSIBILITIES

Official	Responsibility			
Member of the Executive Council	il Is accountable to parliament which has to be provided with full and			
	regular reports regarding matters under the organisation's control. The			
	Executive Authority needs to ensure that the Organisation has the			
	appropriate performance information systems in place to fulfil its			
	accountability reporting responsibility. They should also oversee such			
	systems to ensure that they are functioning optimally and comply with			
	the Framework on Managing Programme Performance Information and			
	other related standards and guidelines. The Executive Authority's role is			
	prescribed by section 133 Of the Constitution and section 5.1 of the			
	National Treasury Framework for Managing Programme Performance			
	Information.			
Accounting Officer/CEO	Is responsible for establishing and maintaining the systems to manage			
	performance information. The accounting officer must ensure that			
	performance information systems are integrated within existing			
	management processes and systems (i.e. that there is a link between			
	planning, budgeting and performance monitoring and evaluation			
	processes for example). In the integration of performance information			
	systems with management processes and systems			
Programme Manager/ Senior	Responsible for overseeing performance in their respective			
Managers	programmes/sub-programmes. This will include overseeing that the			
	systems and processes are established and maintained in the collection			
	of performance information and evidence of performance, as well as			
	signing off on progress reports that are sent to PMERR, to confirm			
	accuracy (i.e., verification). They are required to analyse and use			
	performance information for improving programme and project			
	management design as well as to act promptly upon monitoring and			
	evaluation findings where corrective action is required.			
Line Managers and other	Responsible for establishing and maintaining the performance			
Officials	information systems and processes within their areas of authority. Other			
	officials are responsible for capturing, collating, and checking			
	performance data related to their activities. The integrity of the			
	institution's overall performance information depends on how			
conscientiously these officials fulfil these responsibilities.				
	Internal Audit			

Planning	The IA will provide assurance regarding compliance with the processes		
	of developing a Strategic Plan, APP and AOP as per prescript. IA will also		
	provide consultative expertise assisting management with alignment and		
	ensuring implementation of the SMART principle when developing		
	planning documents.		
Reporting on quarterly	The IA will provide assurance regarding the accuracy, validity,		
performance of the APP	completeness, and reliability of the reported quarterly performance		
	information. The internal audit will provide reasonable assurance		
	through the sampling of quarterly reported information. The Internal		
	Audit Division will subsequently issue an audit report.		
Production of the Annual Report	The IA will provide assurance regarding the accuracy, validity,		
	completeness, and reliability of the reported annual performance report		
	in preparation for the external audit.		

10. INSTITUTIONAL ARRANGEMENT FOR PMER

Although the Organisation has been carrying out performance monitoring activities in the past and all managers are responsible for PMER in the immediate working environment, it has largely been uncoordinated and not integrated. In 2019 the Organisation decided to establish a division responsible for Planning, Monitoring and Evaluation Reporting and Research (PMERR). PMERR is the primary structure that is responsible for overall function and institutionalising M&E in the Organisation. In the outer years, it will develop a plan for institutionalising M&E in the Organisation. The PMER division has been functionally operating efficiently and effectively for six (6) years within the Organisation since its establishment. The PMER framework and oversight authorities (DPME, DBE, National treasury) legislation remained the main drivers for implementing SACE performance mandate.

10.1. Functions of PMER

The key functions of the PMER Division are to:

- Coordinate and support the strategic planning processes of the Organisation; Monitor and evaluate the performance of the Organisation against policy and mandated directives, report on findings and provide recommendations; Develop and institutionalize Planning, M&E and Reporting framework for the Organisation.
- Develop tools and methodologies to support the Monitoring and Evaluation of policies,

- programmes, and projects; and
- Conduct impact assessment of Organisational policy initiatives and implemented programmes.
- In the 2025-2027 financial years the Division will carry out the following activities to ensure that the Organisation plan, monitor, evaluate and report performance.
- Review the Planning, M&E and Reporting Framework for the financial years which will form
 the basis upon which PMER is to be conducted within the Organisation.
- Mid-Term assessment of the 2025-2030 strategic plan, according to the DPME Framework
- Develop an Annual Performance plan in line with the current strategic plan to ensure alignment and in-year reporting.
- Create standardised input templates for reporting purposes to ensure that similar data format is captured throughout the Organisation. This will improve the monitoring process in that similar data will improve the comparison and analysis processes.
- Analyses data for quarterly and annual preparation of the annual performance reports.
- Verify all performance reports and collate a portfolio of evidence for all Organisational outputs.
- Support quality performance reporting by conducting workshops on programme planning and report to all programmes.
- Monitor selected programmes in the Organisation.
- Compile PMER policies, process guides and other information guides to build capacity for monitoring and evaluation within the Organisation as and when required.
- Make recommendations to all, Committees as required to improve PMER functions and operations within the Organisation.
- Migrate from the manual submission of the quarterly reports to electronic.

10.2. Other Organisational PMER Institutions

The Organisation also has institutional structures that have an inherent role for monitoring and evaluating programme performance. In particular, the Organisational Executive Committee (EXCO), Senior Management Committee (Senior MANCO), Extended Management Committee (Extended MANCO) play an important institutional role in the planning and performance management of the Organisation.

• Executive Committee: It comprises with the Chairpersons of the seven committees, the CEO, CFO, two heads of divisions and the Chairperson of the council. The committee is responsible for adopting recommendations made by the other committees. The other role

is to hold the other committees and employees accountable especially on issues of performance. The committee looks at the reported outputs of the quarter and plans to ensure that the Organisation is on track with the planned activities.

- Organisational Senior Management Committee: It comprises of all Senior Managers in the
 Organisational and convenes once a month. The mandate of this committee is to
 determine the strategic direction of the Organisation, approve policy and related
 Organisational wide issues, and review organisational performance. The Senior MANCO
 meetings will monitor the Organisational performance through analysis of quarterly
 reports by the PMERR Division; make decisions based on the performance analysis and
 recommendations on corrective actions.
- Management Committee: It comprises of all managers in the Organisation and convenes
 monthly. The role of this forum is primarily to review organisational performance, thrush
 out administrative decisions and plan for the next financial year. PMERR will make a
 presentation to MANCO on the analysis of performance; recommend measures to be
 implemented and support its planning activities.
- Managing of performance information is the responsibility of each programme within the Organisation, as they must provide feedback and early indications of progress or lack thereof in the achievement of intended results and the attainment of goals and objectives. Inherent in this task is the responsibility of the programmes to compile progress reports in line with Organisational Annual Performance Plans and the Annual Operational Plans. The monitoring of programme performance will be conducted quarterly during the MANCO Meetings.
- Council Meeting: The CEO will keep the Member of the Council informed on progress regarding Organisational performance every quarter. High-level strategic outputs will be considered, challenges and trends in the monitoring process indicated and recommendations on corrective steps will be made to the Council. The Council will guide further interventions necessary to improve Organisational performance.

11. DISSEMINATION OF PERFORMANCE INFORMATION

Apart from the internal use of performance information and its reviews, it is also generated to enable oversight bodies and the public to know how well the Organisation is doing and hold it accountable. Accordingly, once the internal processes are completed and performance reports are finalised such information will be made available through the website of the Organisation and other means to be determined by the Division of Communication.

12. PROCESS OF REVIEW

The framework will be reviewed when there is a policy shift in the Organisation or within the government sector including DBE and DPME. However, the framework lifespan will be three (3) years.

13. ENFORCEMENT OF THE FRAMEWORK

The CEO has the ultimate responsibility of ensuring that this Framework is enforced and serve as a guide for managing performance information for SACE.

14. CONCLUSION

The Planning Monitoring & Evaluation and Reporting Framework 2025-2027 of the SACE, represents the document that outlines how the Organisation will carry out PMER. In the future, the framework will be improved to cover other essential areas such as the information management systems, capacity building issues, and how to institutionalise M&E in the Organisation.

15. ANNEXURE A

16. LEGISLATED ACTIVITIES

ACTIVITY	DEADLINE	SECTION/REGULATION	
Submit first draft Strategic Plan	31-Oct	Revised Framework on Strategic Plans and Annual	
		Performance Plans/ Treasury Regulation 30.1.1	
Final draft Strategic Plan	March	Revised Framework on Strategic Plans and Annual	
		Performance Plans/ Treasury Regulation 30.1.1	
Table final draft Strategic Plan to	March	Revised Framework on Strategic Plans and Annual	
Parliament		Performance Plans/ Treasury Regulation 26.1	
Submit First draft Annual Performance	31-Oct	Revised Framework on Strategic Plans and Annual	
Plan	01.000	Performance Plans/ Treasury Regulation 26.1	
Submit final Annual Performance Plan	31 January	Revised Framework on Strategic Plans and Annual	
		Performance Plans/ Treasury Regulation 26.1	
Tabling final draft Annual	March	Revised Framework on Strategic Plans and Annual	
Performance		Performance	
Plan to Parliament		Plans	
Submit Quarter 1 eQPRS	31-Jul	Department of Planning, Monitoring and Evaluation	
		Electronic Quarterly Performance Reporting System (eQPRS)	
		Manual: National Public Entities PFMA, Section 55 (1)(d)	
Submit Quarter 2 eQPRS	31-Oct	Revised Framework on Strategic Plans and Annual	
		Performance Plans/ Treasury Regulation 26.1Department of	
		Planning, Monitoring and Evaluation Electronic Quarterly Performance	
		Reporting System (eQPRS) Manual: National Public Entities	
Submit Quarter 3 eQPRS	31-Jan	Department of Planning, Monitoring and Evaluation	
Ele		Electronic Quarterly Performance Reporting System	
		(eQPRS) Manual:	
		National Public Entities PFMA, Section 55 (1)(d)	
		Department of Planning, Monitoring and Evaluation	
		Electronic Quarterly Performance Reporting System	
		(eQPRS) Manual:	
Submit unaudited draft Annual	31-May	National Public Entities Treasury Regulation 26.1 Revised Framework on Strategic Plans and Annual	
Performance Report	31-May	Performance Plans/ Treasury Regulation 26.1, Public	
T offermation report		Entities AR Guidelines	
		published by NT.	
Submit performance information to	31-May	PFMA, Sec 54(1) Framework for Managing Programme	
External Auditors		Performance Information (2007) Para 6.2	
Submit Audited Annual Report to	31-Aug	PFMA, Sec 40(1)(d)/ Sec 55(1)(d) Revised Framework	
Minister, National Treasury and	2	on Strategic Plans and Annual Performance Plans	
Parliament		2.20.20.20.20.20.20.20.20.20.20.20.20.20	
The tabling of Audited Annual Report to	31-Aug	PFMA, Sec 65(1)(a)/ Sec 55(3) Revised Framework on	
Parliament		Strategic	
		Plans and Annual Performance Plans (within 1 month after	
		the Accounting Officer received the audit report)	
Submit copies of published Annual	31-Aug	PFMA, Sec 55(1)(d) Revised Framework on Strategic Plans	
Report to National Treasury / Ministry/		and Annual Performance Plans	

Parliament	

DOCUMENT APPROVAL PAGE

RANK	NAME	SIGNATURE	DATE
Chief Executive Officer	Ms ME Mokgalane	9	25 November 2025
Manager. PMERR	Ms TV Sophethe	Todetle.	25 November 2025

Next Review Date

25 November 2028

