

SAI PMF: Annual Plan 2018

IDI as at 23.08.2017

No.	Program Output / Component, and Activity	Priority 2018	Responsibility	Target Date	Progress	Notes
1	Strategic Governance and Advice					
1a	INTOSAI Capacity Building Committee					
1a.1	Provide direction and decision making on strategic issues, e.g. SAI PMF Implementation Strategy, revision of SAI PMF, evaluation of SAI PMF Implementation Strategy	High	CBC	Ongoing		
1a.2	Approval of the SAI PMF Annual Plan	High	IDI and CBC	At the annual CBC SC meeting in September and IDI board in November		A high level annual plan for implementation of the SAI PMF strategy in 2018 will be put forward for discussion and approval at the CBC SC meeting in September and the IDI board as part of IDI operational plan in November 2017. A more detailed annual plan for 2018 , including details of individual training activities and roll out of regional facilitation programs, will be put forward for approval by the IDI Director General and the CBC Chair and Vice Chair in December 2017. Adjustments proposed to the plan, must be approved by the Director General of IDI.
1a.3	Establish and maintain a platform for communication on strategic SAI PMF matters with INTOSAI regions and other stakeholders	High	CBC	Ongoing		The SAI PMF Unit in IDI will provide support as needed.
1a.4	Act as advocate for SAI PMF in line with the SAI PMF Strategic Outcomes	Medium	CBC	Ongoing		The SAI PMF Unit in IDI will provide support as needed.
1a.5	Coordinate SAI PMF Independent Advisory Group	High	CBC	Ongoing		The SAI PMF Unit in IDI will provide support as needed.
1b	SAI PMF Independent Advisory Group (IAG)					
1b.1	Provide advisory reports on SAI PMF issues to the CBC as appropriate	High	IAG	When needed		Advice and recommendations regarding implementation of the SAI PMF strategy, if and when needed.
1b.2	Provide summary of its work and recommendations to annual CBC meeting	High	IAG	Annual CBC meeting		Annual report from IAG with advice and recommendations regarding implementation of SAI PMF strategy (and potentially revisions to it), potential revision SAI PMF document etc.
2	Conduct SAI PMF Assessments					
2.1	Professional development of new SAI PMF unit staff - being part of assessment teams	High	IDI	Q1 and Q2 2018		2 staff members will as part of their development into SAI PMF experts take part in assessment teams.
2.2	Continued support to SAIs, assessment teams and other stakeholders in connection to conduct of individual SAI PMF assessments	High				Activities related to support on SAI PMF is specified in component no. 3, 4 and 5 in this plan.
3	Support of Assessment Quality and Global Monitoring					
3.1	Monitor SAI PMF implementation					
3.1,1	Monitor/track SAI PMF assessments, incl. requests for support (incl. Survey)	High		Ongoing		Survey to track progress of SAI PMF assessments conducted in June 2018
3.1,2	Monitor development of SAI PMF Pool of Experts	Medium		Ongoing		
3.1,3	Monitor implementation of training courses, workshops and programs	Medium		Ongoing		
3.2	Act as knowledge centre on SAI PMF					
3.2,1	Respond to queries on SAI PMF and support SAI PMF assessors	High		Ongoing		
3.2,2	Individual orientation meetings for SAIs with an introduction to SAI PMF	Medium		Ongoing		Based on request
3.2,3	Maintain SAI PMF virtual community in English	Medium		Ongoing		
	Maintain SAI PMF virtual community in Spanish	Medium		Ongoing		
	Maintain SAI PMF virtual community in French	Medium		Ongoing		
	Develop and launch SAI PMF virtual community in Arabic	Low		Postponed due to staff shortages		Launching date seen together with start up of a potential program facilitating conduct of SAI PMF assessments in ARABOSAI
3.3	Manage SAI PMF pool of experts					
	Develop SAI PMF experts in core languages to support SAI PMF Implementation Strategy	High		Ongoing		
	Manage certification system	Medium		Ongoing		
3.4	Coordinate and deliver SAI PMF training courses and workshops in core languages					
3.4,1	Update SAI PMF training and workshop materials based on approved SAI PMF document (module based)		IDI			There will be a gradual roll-out of individual SAI PMF activities, piloting in english speaking regions awaiting translation of the guidance and training material into relevant languages.
	- training course to develop independent reviewers (module 5)	Medium		2018/04/30		
	- translation of training material to relevant languages (module 5)	Medium		2018/08/15		

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3,4,2	Deliver individual SAI PMF basic training courses based on demand	High		On demand		
3,4,3	Deliver individual SAI PMF advanced training courses and workshops on demand	High		On demand		
3,4,4	Deliver workshops to train future experts to conduct independent review of assessments' quality, based on need for independent reviewers (in different regions, language groups, SAI model background):	Medium		As needed		
3,5	Produce data on SAI performance at an aggregate level	High	IDI	See notes column		Collect, analyze and make available data based on SAI PMF assessment results. respecting confidentiality of individual assessments as appropriate
4	Facilitate SAI PMF Assessments and Use of Assessment Results					
4,1	Cooperation with INTOSAI-regions, development of regional implementation plans, and delivery of facilitation programmes	High	IDI and INTOSAI regions in cooperation			Due to limited resources during the establishment phase of the SAI PMF unit, there will be a gradual roll-out of planning and implementation of regional programs and individual SAI PMF activities, piloting in english speaking regions awaiting translation of the guidance and training material into relevant languages. The development of regional plans will also be an issue during the IDI workshop with regions in September 2017.
4,1,1	AFROSAI-E - implementation of the regional plan 2018		IDI, AFROSAI-E			
4,1,2	ASOSAI - implementation of the regional plan 2018		IDI, ASOSAI			
4,1,3	ARABOSAI - implementation of the regional plan 2018		IDI, ARABOSAI			
4,1,4	CAROSAI - establish dialogue to identify needs and demands - develop regional implementation plan or annual plan (based on what is requested) - coordinate and implement regional facilitation programs, if requested		IDI, CAROSAI	2018/01/15 2018/04/01		Depends on needs communicated and program requested
4,1,5	CREFAI - establish dialogue to identify needs and demands - develop regional implementation plan or annual plan (based on what is requested) - coordinate and implement regional facilitation programs, if requested		IDI, CREFAI	2018/01/30 2018/04/30		Depends on needs communicated and program requested
4,1,6	EUROSAI - establish dialogue to identify needs and demands - develop regional implementation plan or annual plan (based on what is requested) - coordinate and implement regional facilitation programs, if requested		IDI, EUROSAI	2018/01/10 2018/04/01		Depends on needs communicated and program requested
4,1,7	OLACEFS - implementation of the regional plan 2018		IDI, OLACEFS, CEDEIR			
4,1,8	PASAI - dialogue to identify needs and demands post facilitation program - develop regional implementation plan or annual plan (based on what is requested) - coordinate and implement regional facilitation programs, if requested		IDI, PASAI	2018/04/15		If requested, develop plan for 2018-19 activities. Continue delivery of established 'Support to SAI Performance Measurement in PASAI' program (limited work - program set to end in 2017). Ring fenced funding from DFAT Australia.
5	Independent Reviews of SAI PMF Assessments					
5.1	Administer the function of Independent Reviews of SAI PMF Assessments		IDI			
5,1,1	Arrange conduct of Independent Reviews	High		Ongoing		Coordination work to arrange independent reviews of quality. The IDI offers to arrange review for all SAI PMF assessments.
5,1,2	Translation of revised guidance document for Independent Reviews to relevant languages	Medium		Ongoing		
5,1,3	Conduct Independent Reviews, with support from external reviewers	High		Ongoing		The SAI PMF Unit will conduct some reviews themselves, while others will be done by IDI appointed and certified reviewers.

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6	Program Management					
6.1	Custodian SAI PMF (support to CBC as strategic lead)		IDI			
6,1,1	Commission and manage external evaluations of SAI PMF Strategy, as required by CBC	NA				Not relevant in 2018
6,1,2	Support revisions of the SAI PMF Strategy for approval by CBC	High				
6.2	Establishment and funding of SAI PMF in IDI		IDI			
6,2,1	Ensure sufficient financial and in-kind resources for staff costs and implementation of SAI	High		Ongoing		
6,2,2	Work to position the SAI PMF within the new strategic plan of IDI	High		31.06.2018		
6.3	Develop SAI PMF Annual Plan for Approval by CBC and IDI		IDI			
6,3,1	High level SAI PMF Annual Plan 2019	High		2018/08/20		To be approved by CBC SC meeting in September and IDI board in November 2018. Ref. to explanation of process
6,3,2	Detailed SAI PMF Annual Plan 2019	High		2018/12/10		To be approved by the Director General of the IDI and CBC chair and vice-chair
6.4	Communication management		IDI			
6,4,1	Administer SAI PMF Outlook Inbox	High		Ongoing		
6,4,2	Improvement and maintenance of SAI PMF page on the IDI website	Medium		Ongoing		
6,4,3	Develop articles on SAI PMF implementation for INTOSAI and INTOSAI-Donor Cooperation Newsletters and Journals	Medium		Ongoing		
6,4,4	Prepare articles on SAI PMF for relevant PFM newsletters/blogs	Medium		Ongoing		E.g. IMF PFM Blog. Two possible angles: (1) How SAIs can lead by example among PFM stakeholders in performance measurement; and (2) How SAI PMF can be linked to PEFA to give thorough overview of a PFM system's strengths and weaknesses.
6,4,5	Develop introductory presentation material for others to use at relevant fora	Medium		2018/01/30		
6,4,6	Develop testimonies from SAIs and other stakeholders about their experience with SAI PMF	High		2018/06/30		To be put on website and shared with interested parties, e.g. regional INTOSAI secretariats
6,4,7	Participate at relevant PFM fora to spread knowledge about SAI PMF and on the importance of measuring SAI performance for further SAI capacity development	Low		Ongoing		
6.5	Monitoring results and reporting		IDI			
6,5,1	Provide annual report against SAI PMF Strategy to CBC and IDI board	High				To be reported to the CBC SC meeting in September 2018 and IDI board November 2018
6,5,2	Provide high level quarterly updates on SAI PMF implementation to CBC leadership	High				
6,5,3	Report on use of funds under SAI PMF specific grant agreements	High				