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SOUTH AFRICAN QUALIFICATIONS AUTHORITY

REGISTERED UNIT STANDARD:

Plan a municipal budgeting and reporting cycle

SAQA US ID	UNIT STANDARD TITLE		
116364	Plan a municipal budgeting and reporting cycle		
SGB NAME		REGISTERING PROVIDER	
SGB Public Administration and Management			
FIELD		SUBFIELD	
Field 03 - Business, Commerce and Management Studies		Public Administration	
ABET BAND	UNIT STANDARD TYPE	NQF LEVEL	CREDITS
Undefined	Regular	Level 6	8
REGISTRATION STATUS	REGISTRATION START DATE	REGISTRATION END DATE	SAQA DECISION NUMBER
Registered	2004-10-13	2007-10-13	SAQA 0256/04

PURPOSE OF THE UNIT STANDARD

This Unit Standard is intended for practitioners at local government that are involved in municipal policy decision-making and strategic planning. Practitioners who are required to advise on the legislative mandate of municipalities from a provincial and national government perspective will also benefit from this Unit Standard.

The qualifying Learner is able to:

- Advise on the application of the South African local government legislative framework to local government budgeting processes.
- Advise on the timing of budget related events and the integration of budget related processes with budget processes to ensure compliance with the legislative requirements.
- Ensure legal requirements that non-budget documentation is correctly references in budget documentation is applied with and vice versa.
- Advise on the roles and responsibilities of financial and non-financial management and political executives in the budget process, which should contribute to the overall process of social and economic development.

LEARNING ASSUMED TO BE IN PLACE AND RECOGNITION OF PRIOR LEARNING

It is assumed that Learners are competent in:

- Communication at Level 4.
- Mathematical Literacy at Level 4.

UNIT STANDARD RANGE

N/A

UNIT STANDARD OUTCOME HEADER

N/A

Specific Outcomes and Assessment Criteria:

SPECIFIC OUTCOME 1

Identify the roles and responsibilities of municipal political executives and senior management required by the local government legislative framework for budgeting.

ASSESSMENT CRITERIA

ASSESSMENT CRITERION 1

The roles and responsibilities of municipal political executives, accounting officers and senior managers in the budget preparation are identified using the regulatory framework.

ASSESSMENT CRITERION 2

Roles and responsibilities of municipal political executives, accounting officers and senior managers during the municipal budget cycle are identified using the regulatory framework.

ASSESSMENT CRITERION RANGE

The typical scope of this outcome would include roles and responsibilities of the mayor, municipal manager, council, chief finance officer and senior managers.

SPECIFIC OUTCOME 2

Plan a municipal budget calendar in accordance with the legislation.

ASSESSMENT CRITERIA

ASSESSMENT CRITERION 1

The tabling and adoption of a municipal budget is planned for as required by legislation.

ASSESSMENT CRITERION RANGE

The typical scope of this outcome will include community participation, Integrated Development Plans, mayoral activities and budget approval.

ASSESSMENT CRITERION 2

Supporting documents to be tabled with the municipal budget are provided in line with the regulatory framework.

ASSESSMENT CRITERION 3

The funds that can be transferred between multi-year appropriations are identified using the regulatory framework.

ASSESSMENT CRITERION 4

The conditions under which a municipal adjustment budget may be tabled are recognised in line with the regulatory framework.

SPECIFIC OUTCOME 3

Develop a legislatively compliant municipal budget and treasury office.

ASSESSMENT CRITERIA

ASSESSMENT CRITERION 1

The legislation is interpreted in terms of the governing of a municipal treasury and budget office.

ASSESSMENT CRITERION 2

A budget is compiled that complies with relevant legislation.

SPECIFIC OUTCOME 4

Comply with the conditions for municipal delegations.

ASSESSMENT CRITERIA

ASSESSMENT CRITERION 1

The legislative conditions of municipal delegations are explained and applied including restrictions and conditions for delegations and role players.

UNIT STANDARD ACCREDITATION AND MODERATION OPTIONS

- An individual wishing to be assessed (including through RPL) against this Unit Standard may apply to an assessment agency, assessor or provider institution accredited by the relevant ETQA, or an ETQA that has a Memorandum of Understanding with the relevant ETQA.
- Anyone assessing a Learner against this Unit Standard must be registered as an assessor with the relevant ETQA, or an ETQA that has a Memorandum of Understanding with the relevant ETQA.
- Any institution offering learning that will enable achievement of this Unit Standard or assessing this Unit Standard must be accredited as a provider with the relevant ETQA, or an ETQA that has a Memorandum of Understanding with the relevant ETQA.
- Moderation of assessment will be conducted by the relevant ETQA at its discretion.

UNIT STANDARD ESSENTIAL EMBEDDED KNOWLEDGE

- The sequence of events required by legislation during the budget process.
- The status of the municipal budget and treasury office.
- The reporting requirements of the local government legislative framework.

UNIT STANDARD DEVELOPMENTAL OUTCOME

N/A

UNIT STANDARD LINKAGES

N/A

Critical Cross-field Outcomes (CCFO):

UNIT STANDARD CCFO IDENTIFYING

Identify and solve problems using critical and creative thinking processes, e.g. by trying to find creative solutions to improve the efficiency and effectiveness of all role-players in the budgeting and reporting cycle.

UNIT STANDARD CCFO WORKING

Work effectively with others as a member of a team, group, organization or community, e.g. through communicating with by fostering team commitment amongst all role-players in the budgeting and reporting cycle.

UNIT STANDARD CCFO ORGANISING

Organise and manage oneself and one`s activities responsibly and effectively, e.g. through the demonstration of a high quality of output of one`s own responsibilities in terms of budgeting and reporting.

UNIT STANDARD CCFO COLLECTING

Collect, analyse, organise and critically evaluate information, e.g. through assuring that all relevant information is included in the relevant budget and reporting documents.

UNIT STANDARD CCFO COMMUNICATING

Communicate effectively using visual, mathematical and / or language skills in the modes of oral and/or written persuasion, e.g. through assuring that all information is communicated to the appropriate role-players and team members.

UNIT STANDARD CCFO SCIENCE

Use Science and technology effectively and critically, showing responsibility to the environment and health of others, e.g. use appropriate computer software for data capturing and document storage purposes.

UNIT STANDARD CCFO DEMONSTRATING

Demonstrate an understanding of the world as a set of interrelated systems by recognising that problem-solving contexts do not exist in isolation, e.g. in keeping in mind that an budget cycle effects the lives of individuals, the community and the country as a whole.

UNIT STANDARD CCFO CONTRIBUTING

Participating as responsible citizens in the life of local, national and global communities, for example acting as custodian of ethical behaviour and maintaining a high Level of commitment to assuring that all legislation is complied with in the budget and reporting cycle.

UNIT STANDARD ASSESSOR CRITERIA

N/A

UNIT STANDARD NOTES

N/A

QUALIFICATIONS UTILISING THIS UNIT STANDARD:

	ID	QUALIFICATION TITLE	LEVEL	STATUS	END DATE
Core	50205	National Certificate: Municipal Integrated Development Planning	Level 5	Registered	2009-02-09
Core	48965	Certificate: Municipal Financial	Level 6	Registered	2007-10-

		Management			13
Fundamental	58601	National Certificate: Land Transport Planning	Level 6	Registered	2010-06-14
Elective	58600	National Certificate: Land Transport Planning	Level 5	Registered	2010-06-14

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