

# mSCOA Project Phase 4:

## Port Elizabeth

25 & 26 February 2015



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# mSCOA Project Phase 4:

## Training, Transition and Change Management



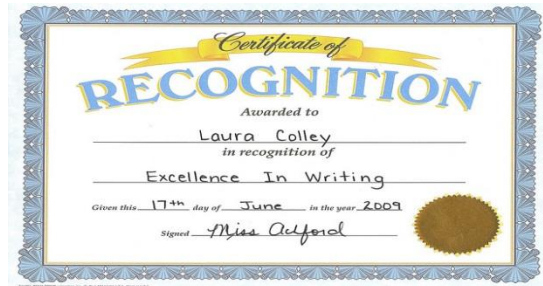
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mSCOA PROJECT PHASE 4 – PLAN		Start - Dec 2014	Jan - June 2015	July 15 – June 16	July 16 – June 17	1 July 2017.....
		0 – 6 months	6 – 12 months	12 – 24 months	24 – 36 months	36 months and beyond...
INTERNAL ENGAGEMENT	WORK STREAM 1: TECHNICAL	Mobilise Project SCOA V5 Scoping Position papers BRF & AFS Configuration and amendments to the LG Database – SCOA aspects	Testing of BRF, IYM & AFS formats Building capacity (NT & PT's)	Testing: SCOA, in-year reporting framework and functionality of LG Database – Piots AFS – SCOA Migration: All munis		GO LIVE
		EXTERNAL ENGAGEMENT	WORK STREAM 2: PILOT	Identify pilots		IMPLEMENTATION MONITORING & EVALUATION
Est. position on pilots	Piloting and progress management					
Define report formats for system output	Municipal risk register					
	Engage with broader municipal environment					
EXTERNAL ENGAGEMENT	WORK STREAM 3: TRAINING	Est. programme strategy	Train the trainer			GO LIVE
		Develop non-accredited training materials for pilot munis	Develop the unit Standards for SCOA for Local Government	Roll out of accredited training materials to all munis		
EXTERNAL ENGAGEMENT	WORK STREAM 4: TRANSITION	Communications and Change Mgt. Strategy development	Communications and Change Management Strategy roll-out			GO LIVE
		Engage on database adjustments	Establish capability gaps throughout process			
		Support business processes	Standardise practice for issuance of circulars			
			SCOA Technical Committee Integration	Scale-up interface with municipalities	Develop and roll-out capacitation plan based on gaps identified	

# TRAINING:

- Non-accredited training for pilot municipalities, provincial treasuries and other stakeholders



- Accredited training for municipalities, treasuries and other stakeholders



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<b>TRAINING SESSION 1</b>	<b>Venue: Durban / PMB</b>	<b>Total Delegates: 20 + 5</b>	<b>Date: 14 and 15 April 2015</b>
<b>Kwa-Zulu Natal</b>	uMgungundlovu DM (3), Richmond LM (3), uMhlathuze LM (5), KZN Provincial Treasury (3), Sage Evolution (2), Fujitsu (2), VIP Payroll (2)		
<b>TRAINING SESSION 2</b>	<b>Venue: Middelburg</b>	<b>Total Delegates: 25</b>	<b>Date: 14 and 15 April 2015</b>
<b>Limpopo and Mpumalanga</b>	Giyani LM (3), Elias Motsoaledi LM (4), Nkangala DM (3), Victor Khanye (3), Mpumalanga Provincial Treasury (3), Limpopo Provincial Treasury (3), Sage Evolution (2), Munsoft (2), Sebata (2)		
<b>TRAINING SESSION 3</b>	<b>Venue: Bloemfontein</b>	<b>Total Delegates: 25</b>	<b>Date: 14 and 15 April 2015</b>
<b>Free State</b>	Setsoto LM (3), Mangaung Metro (5), Sol Plaatje LM (4), Free State Provincial Treasury (4), Northern Cape Provincial Treasury (6) BCX (3)		
<b>TRAINING SESSION 4</b>	<b>Venue: Port Elizabeth / East London</b>	<b>Total Delegates: 22+3</b>	<b>Date: 21 and 22 April 2015</b>
<b>Eastern Cape</b>	Camdeboo LM (3), Senqu LM (3), Buffalo City (5), Eastern Cape Provincial Treasury (4), RData (2), Payday (2), Sebata (2)		
<b>TRAINING SESSION 5</b>	<b>Venue: Cape Town</b>	<b>Total Delegates: 22+3</b>	<b>Date: 21 and 22 April 2015</b>
<b>Western Cape (1)</b>	Overstrand LM (4), Drakenstein LM (4), Bergrivier LM (4), Western Cape Provincial Treasury (4), BCX (2), Fujitsu (2), Bytes Technologies (2)		
<b>TRAINING SESSION 6</b>	<b>Venue: Hermanus/Knysna/Hessequa</b>	<b>Total Delegates: 14+11</b>	<b>Date: 21 and 22 April 2015</b>
<b>Western Cape 2</b>	Knysna LM (4), Hessequa LM (4), Western Cape Provincial Treasury (4), RData (2)		
<b>TRAINING SESSION 7</b>	<b>Venue: Johannesburg</b>	<b>Total Delegates: 24</b>	<b>Date: 5 and 6 May 2015</b>
<b>Gauteng and North West (1)</b>	Merafong LM (4), Tlokwe LM, (4), Gauteng Provincial Treasury (6), North West Provincial Treasury (5) BIQ (2), Vesta (2)		
<b>TRAINING SESSION 8</b>	<b>Venue: TBA</b>	<b>Total Delegates: 26</b>	<b>Date: 5 and 6 May 2015</b>
<b>Metro 1</b>	Tshwane Metro (7), Johannesburg Metro (7), City of Cape Town Metro (7), Nelson Mandela Bay Metro (5)		
<b>TRAINING SESSION 9</b>	<b>Venue: TBA</b>	<b>Total Delegates: 21</b>	<b>Date: 5 and 6 May 2015</b>
<b>Metro 2</b>	eThekweni Metro (7), Ekurhuleni Metro (7), IMFO(2),		
<b>TRAINING SESSION 10</b>	<b>Venue: Pretoria</b>	<b>Total Delegates: 30</b>	<b>Date: TBA</b>
<b>National Treasury (1) - 1 Day</b>	OAG, IGR and Budget Office		
<b>TRAINING SESSION 11</b>	<b>Venue: Pretoria</b>	<b>Total Delegates: 30</b>	<b>Date: TBA</b>
<b>National Treasury (2) - 1 Day</b>	AGSA, ASB, SALGA etc.		



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# TRANSITION:

- From pilot phase to all municipalities
- From non-compliant to fully mSCOA compliant
- Alignment of business processes and functions
- Driving the business case and extracting value
- From project mode, back to business as usual



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# CHANGE MANAGEMENT:

Embedding change in your head, heart and hand



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# CHANGE MANAGEMENT:

- **HEAD:** Cognitive assimilation of the required change, working knowledge
- Forums (ICF and Provincial)
- Standardised circulars (socialisation)
- Training (non-accredited and accredited)



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# CHANGE MANAGEMENT:

- **HEART:** Emotional roadmap, aligned commitment
- Accompany affected parties along a roadmap

## The Stages of Grief



denial



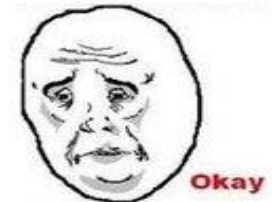
anger



bargaining



depression



acceptance



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# CHANGE MANAGEMENT:

- **HAND:** Back to business as usual, “do” mSCOA
- Alignment of business processes and functions
- Achieving the value expected from the business case
- Back to business as usual,  
**ONLY BETTER THAN BEFORE!**



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# CHANGE MANAGEMENT:

- ICF in PE, engage with Provincial Treasuries and review project readiness presentations (25 & 26 February 2015)
- Provincial Treasury individual engagements and project readiness discussion (see schedule)
- Engagement(s) with Provincial Treasuries and non-pilot municipalities (on site, TBA)
- ICF in Gauteng, engage with Provincial Treasuries and review project progress presentations, risk register (14 & 15 May 2015)
- Use of circulars and other communication collateral, training, business case, value drivers and FAQ database



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Province	Date	Location
KZN	30 March 2015	Durban
Eastern Cape	1 April 2015	East London
Gauteng	7 April 2015	Johannesburg
Mpumalanga	8 April 2015	Nelspruit
Limpopo	9 April 2015	Mafikeng
North West	10 April 2015	Klerksdorp
Northern Cape	16 April 2015	Bloemfontein
Free State	16 April 2015	Bloemfontein
Western Cape	20 April 2015	Cape Town



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# ROLE OF PROVINCIAL TREASURIES:

Coordinate the provincial efforts and report to NT

Attend National ICF and establish Provincial ICF

Liaise with the pilot municipalities (knowledge management & organisational learning)

Advise non-pilot municipalities and assist as required



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# ROLE OF PROVINCIAL TREASURIES:

Develop and monitor the risk register, update and mitigate risks (together with municipalities)

Support the non-pilot municipalities in roll out

Prepare for on site visits from mSCOA team

Drive change management and capacity building in the province



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# AGENDA FOR SITE VISITS:

Project team and sponsor and manager

Project charter and business case

Engagement plan

Communication plan

Roll out support

List of non-pilot municipalities and vendors/ systems

Liaise with the pilot municipalities (knowledge management & organisational learning)

Drive roll out across province



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# QUESTIONS?



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# PROJECT MAP:

Programme name:

Programme start date:

Programme end date:

Programme sponsor:

Programme manager:

Individual project monitors: (Provincial)

Individual project managers: (Municipal)

Other project stakeholders: (Vendors)

Project steering committee:



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# PROJECT DESCRIPTION:

Project description:

Project objectives:

Business objectives: (Describe the value drivers and what the municipality would like to achieve out of this project)

Project deliverables:

Acceptance criteria:

Project dependencies:

Project constraints:

Project assumptions:



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# PROJECT PLAN:

Project delivery strategy:

Project deliverables and milestones: (Link to due dates, assign to specific person or work stream and attach acceptance criteria)

Project plan:

Phase	Activity	Task	Milestone	Due date	Person	Acceptance criteria	Risk



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# PROJECT RISK MANAGEMENT:

CATEGORY	DESCRIPTION
Requirements	Requirements clearly specified
Benefits	Business benefits identified and quantified
Schedule	Schedule lists all activities and tasks with enough time to complete, provides accurate dependencies
Budget	Sufficient and accountability therefore assigned
Deliverables	Clearly defines with quality criteria
Scope	Clearly outlined scope
Issues	Issue log with all issues captured and addressed
Suppliers	Expectations and reporting lines for suppliers clearly defined
Acceptance	Criteria and process for acceptance of deliverables clearly defined and agreed
Communication	Controlled communication to project team, affected parties and other stakeholders
Resources	Skilled staff allocated and assigned in writing



# RISK ASSESSMENT EXAMPLE:

Rating	Impact
5	Catastrophic – collapse of business or project
4	Major – critical event
3	Moderate
2	Minor – normal operating conditions
1	Insignificant

Rating	Probability
1.0	Almost certain – event is expected
0.8	Likely – probability
0.5	Moderate – could occur some time
0.3	Unlikely
0.1	Rare/ remote

Risk Rating		PROBABILITY				
		1.0	0.8	0.5	0.3	0.1
IMPACT	5	5.0	4.0	2.5	1.5	0.5
	4	4.0	3.2	2.0	1.2	0.4
	3	3.0	2.4	1.5	0.9	0.3
	2	2.0	1.6	1.0	0.6	0.2
	1	1.0	0.8	0.5	0.3	0.1



# RISK REGISTER EXAMPLE:

**Risk** – Short description of what the risk is

**Impact** – Figure based on table in slide 21

**Probability** – Figure based on table in slide 21

**Rating** – Multiply Impact and Probability, evaluate the rating based on table in slide 21

**Mitigation** – Describe what measures have been taken to mitigate the risk and allocate a number value, based on the effectiveness of the mitigation (0 to 5; 0 being no effect and 5 being completely eliminated the risk)

**Residual risk** – Rating value less mitigation value

**Name** – Name and contact details of the person responsible to manage this risk

**Due date** – Due dates for implementing mitigation measures AND reporting back on the risk and mitigation thereof

**Cost** – Any costs incurred to mitigate the risk, also mention if it was on the approved budget or an additional expense (provide report number and date)

**Comments** – Any additional information