the dpsa
Department:
Public Service and Administration
REPUBLIC OF SOUTH AFRICA

IMPLEMENTATION GUIDE
GESF & JASF
ELECTRONIC TEMPLATES 2020

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1. INTRODUCTION

A major challenge for any Government is to become more effective. To this end, effective M&E processes can assist the public service in evaluating its performance and identifying the factors which contribute to its service delivery outcomes. The DPSA has (amongst others) monitored and provided feedback to Departments on the implementation of both the Gender Equality Strategic Framework for the Public Service (GESF) and the Job Access Strategic Framework for the Public Service (JASF) for many years. Up to this point a paper based template was used to monitor planning and progress reporting for the said strategic frameworks.

One of the major objectives of both monitoring and evaluation initiatives are to provide an evidence base for public resource allocation decisions and to help identify how challenges should be addressed and successes replicated. Government-wide monitoring and evaluation of any policy is, however, a very complex and time consuming process. The capacity constraints in most government departments, including the Chief Directorate: Transformation Policies and Programmes at DPSA has prompted the development of electronic templates to reduce the burden of analysis and feedback. The electronic reporting process will guide departments in terms of what actions are expected in terms of the implementation of the various strategic objectives. Furthermore it will enable Directors-General and Heads of Departments to assess information collected through the monitoring process with the aim of using it as a tool for taking managerial action and to improve future interventions through the planning process. Feedback reports will be published on DPSA's website annually and departments will be able to measure their performance against that of other departments.

2. COMPLETING THE ELECTRONIC TEMPLATES

Probably the most IMPORTANT matter to remember (when completing the electronic templates), is that the templates should not be changed in any manner – it must also not be retyped. The data gathered from these electronic templates is read programmatically and any alterations to the templates will skew the data and not give a true reflection of the current state of affairs.

2.1 Excel advice

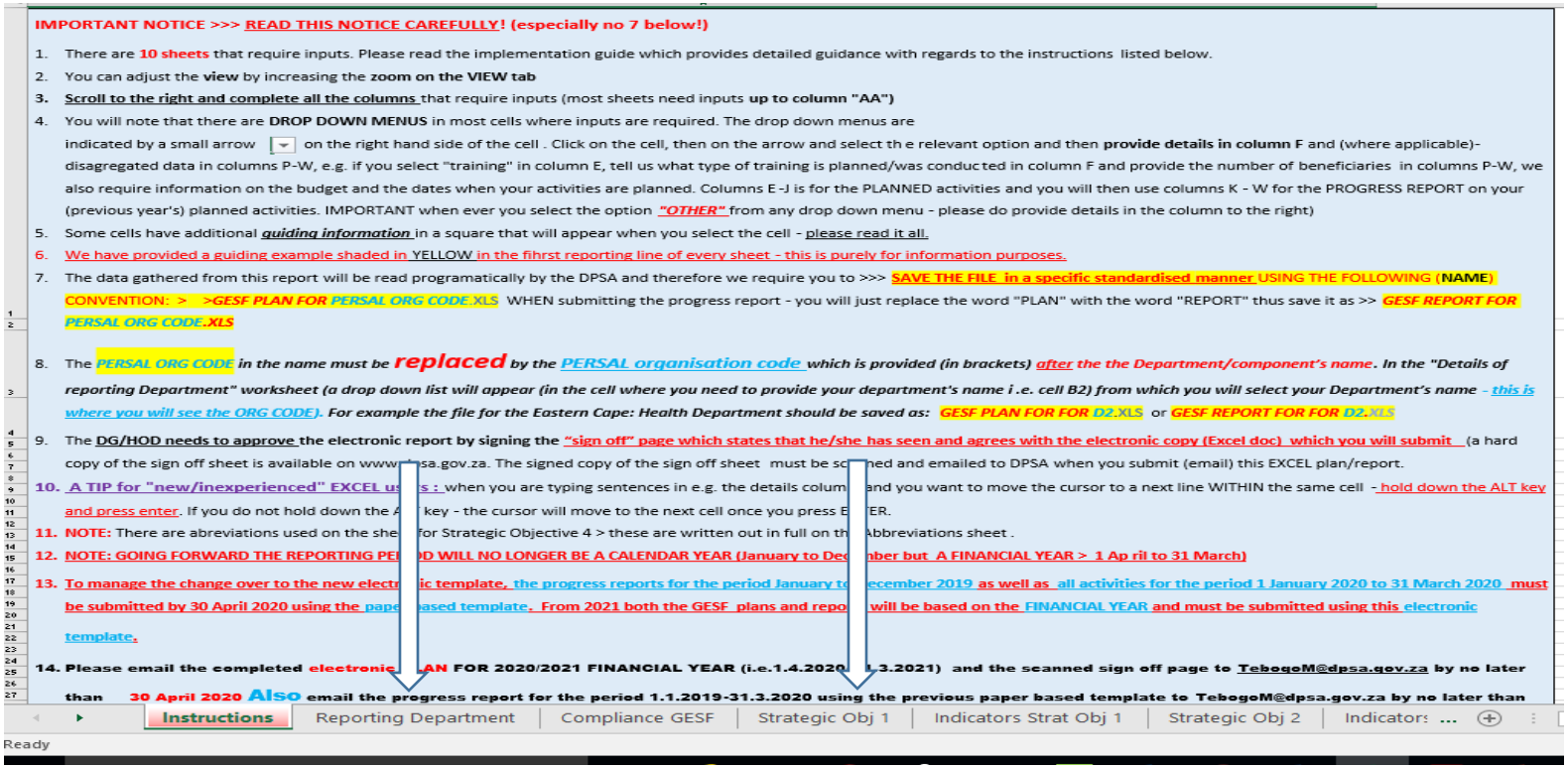
These guidelines are provided to ensure that the process of completing the template is not complicated.

a. Sheets that must be completed

There are **11 sheets** in total. Ten of the 11 sheets require your inputs. The names of the sheets are listed at the bottom of the screen (see figure 1). The first sheet is called "Instructions" and you must read the instructions carefully

Sheets that require your inputs are:

i. Reporting Department
ii. Compliance GESF/Compliance JASF
iii. Strategic Obj 1
iv. Indicators Strat Obj 1
v. Strategic Obj 2
vi. Indicators Strat Obj 2
vii. Strategic Obj 1
viii. Indicators Strat Obj 3
ix. Strategic Obj 1
x. Indicators Strat Obj 4



IMPORTANT NOTICE >>> READ THIS NOTICE CAREFULLY! (especially no 7 below!)

1. There are 10 sheets that require inputs. Please read the implementation guide which provides detailed guidance with regards to the instructions listed below.
2. You can adjust the view by increasing the zoom on the VIEW tab
3. Scroll to the right and complete all the columns that require inputs (most sheets need inputs up to column "AA")
4. You will note that there are DROP DOWN MENUS in most cells where inputs are required. The drop down menus are indicated by a small arrow on the right hand side of the cell . Click on the cell, then on the arrow and select th e relevant option and then provide details in column F and (where applicable)- disagregated data in columns P-W, e.g. if you select "training" in column E, tell us what type of training is planned/was conduc ted in column F and provide the number of beneficiaries in columns P-W, we also require information on the budget and the dates when your activities are planned. Columns E -J is for the PLANNED activities and you will then use columns K - W for the PROGRESS REPORT on your (previous year's) planned activities. IMPORTANT when ever you select the option "OTHER" from any drop down menu - please do provide details in the column to the right)
5. Some cells have additional guiding information in a square that will appear when you select the cell - please read it all.
6. We have provided a guiding example shaded in YELLOW in the fihrst reporting line of every sheet - this is purely for information purposes.
7. The data gathered from this report will be read programatically by the DPSA and therefore we require you to >>> SAVE THE FILE in a specific standardised manner USING THE FOLLOWING (NAME) CONVENTION: > >GESF PLAN FOR PERSAL ORG CODE.XLS WHEN submitting the progress report - you will just replace the word "PLAN" with the word "REPORT" thus save it as >> GESF REPORT FOR PERSAL ORG CODE.XLS
8. The PERSAL ORG CODE in the name must be replaced by the PERSAL organisation code which is provided (in brackets) after the the Department/component's name. In the "Details of reporting Department" worksheet (a drop down list will appear (in the cell where you need to provide your department's name i .e. cell B2) from which you will select your Department's name - this is where you will see the ORG CODE). For example the file for the Eastern Cape: Health Department should be saved as: GESF PLAN FOR FOR D2.XLS or GESF REPORT FOR FOR D2.XLS
9. The DG/HOD needs to approve the electronic report by signing the "sign off" page which states that he/she has seen and agrees with the electronic copy (Excel doc) which you will submit (a hard copy of the sign off sheet is available on www.dpsa.gov.za. The signed copy of the sign off sheet must be scanned and emailed to DPSA when you submit (email) this EXCEL plan/report.
10. A TIP for "new/inexperienced" EXCEL users : when you are typing sentences in e.g. the details column and you want to move the cursor to a next line WITHIN the same cell - hold down the ALT key and press enter. If you do not hold down the ALT key - the cursor will move to the next cell once you press ENTER.
11. NOTE: There are abreviations used on the sheet for Strategic Objective 4 > these are written out in full on the Abbreviations sheet .
12. NOTE: GOING FORWARD THE REPORTING PERIOD WILL NO LONGER BE A CALENDAR YEAR (January to December but A FINANCIAL YEAR > 1 April to 31 March)
13. To manage the change over to the new electronic template, the progress reports for the period January to December 2019 as well as all activities for the period 1 January 2020 to 31 March 2020 must be submitted by 30 April 2020 using the paper based template. From 2021 both the GESF plans and reports will be based on the FINANCIAL YEAR and must be submitted using this electronic template.
14. Please email the completed electronic PLAN FOR 2020/2021 FINANCIAL YEAR (i.e.1.4.2020 - 31.3.2021) and the scanned sign off page to TebogoM@dpsa.gov.za by no later than 30 April 2020 Also email the progress report for the period 1.1.2019-31.3.2020 using the previous paper based template to TebogoM@dpsa.gov.za by no later than

Instructions | Reporting Department | Compliance GESF | Strategic Obj 1 | Indicators Strat Obj 1 | Strategic Obj 2 | Indicators ...

Ready

b. How to make reading the document easier

You can adjust the **view** (size of the letters and words) by increasing the **zoom on the VIEW tab.** This will assist you to read the text with ease.

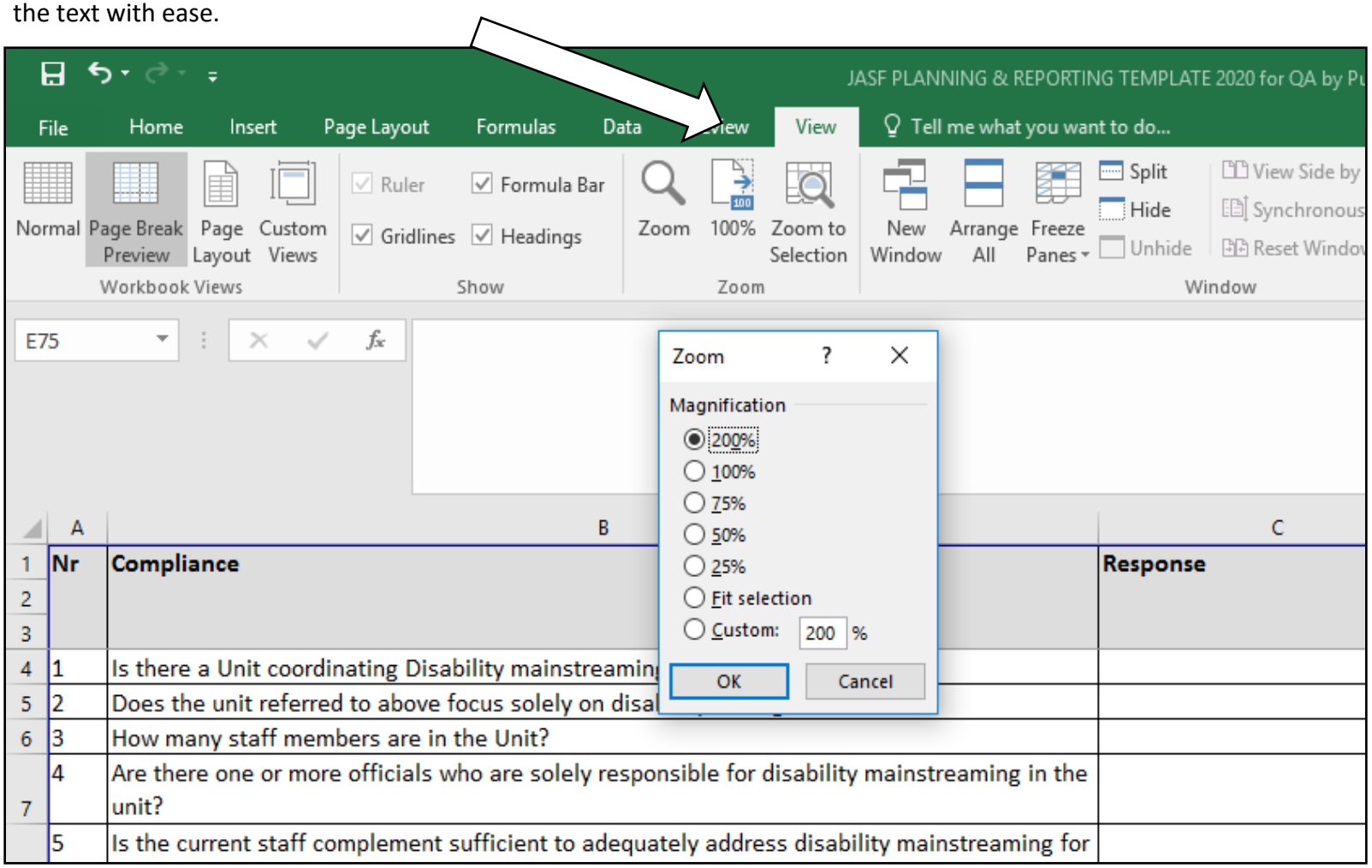


Figure 2 How to make reading the document easier

c. How to make sure you complete ALL the information by scrolling

When you open the document you will not be able to read all the information on the sheets without scrolling to the right/left or up/down. Please click on the arrows to scroll up or down left or right and make sure you complete all the cells that require inputs. The plans require inputs up to column J and the progress reports require inputs up to column AA.

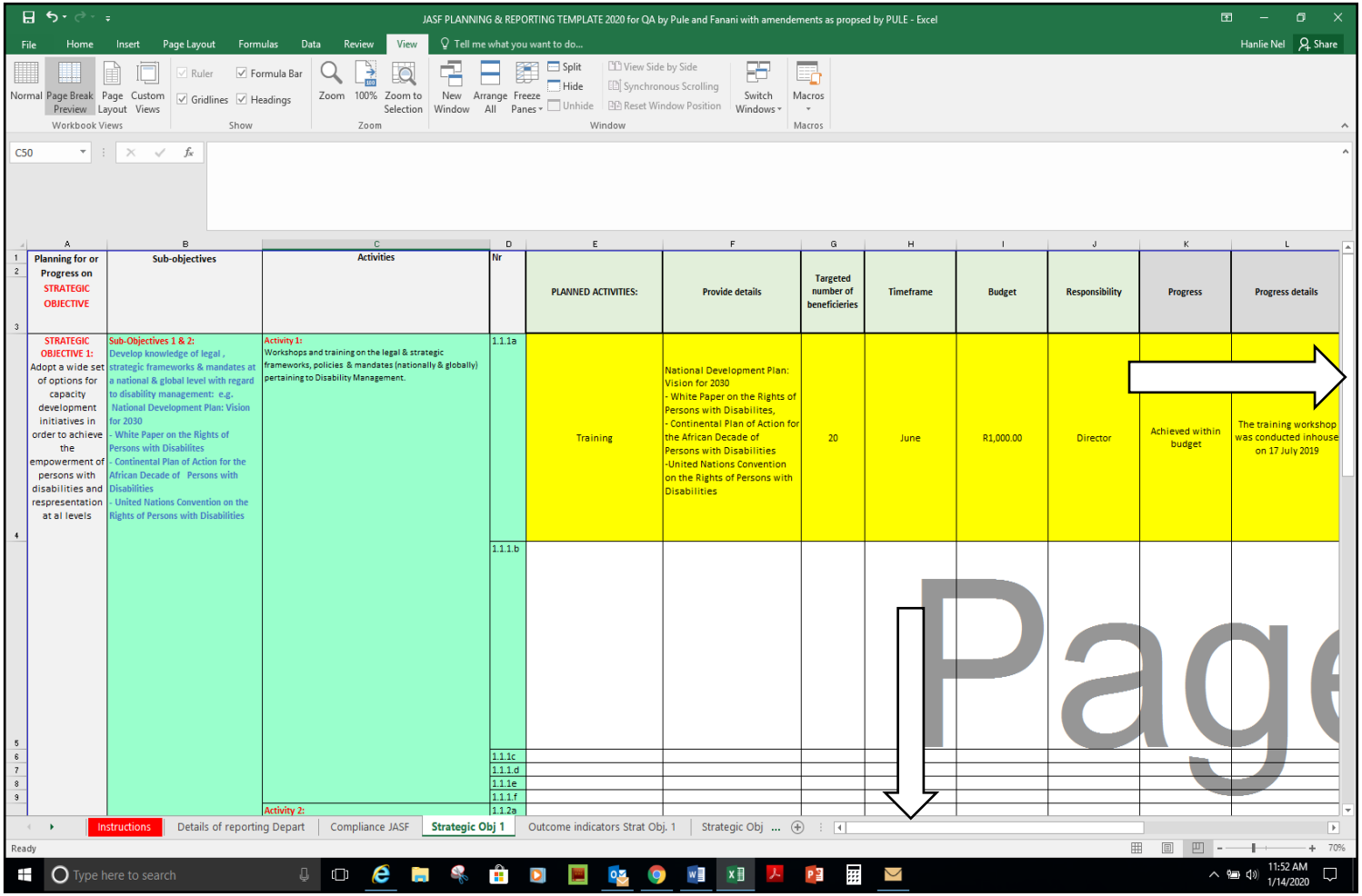


Figure 3 How to scroll left or right, up or down

d. How to move to the next line IN a single cell

When you are in a cell and you want to move the cursor to a next line WITHIN the same cell – hold down the **ALT key and press enter**. If you do not hold down the ALT key - the cursor will move to the next cell once you press ENTER.

	A	B	
1	Planning for or Progress on STRATEGIC OBJECTIVE	Sub-objectives	
2			
3	STRATEGIC OBJECTIVE 1: Adopt a wide set of options for capacity development initiatives in order to achieve the empowerment of persons with disabilities and respresentation at al levels	Sub-Objectives 1 & 2: Develop knowledge of legal , strategic frameworks & mandates at a national & global level with regard to disability management: e.g. National Development Plan: Vision for 2030 - White Paper on the Rights of Persons with Disabilites - Continental Plan of Action for the African Decade of Persons with Disabilities - United Nations Convention on the Rights of Persons with Disabilities	Ac Wo fra pe
4			

Note e.g. the frameworks are listed underneath one another in this cell – to do this hold down ALT & Press enter to go to the next line within the same cell.

Figure 4 Moving to the next line in the same cell

2.2 How to complete the planning report and progress report

A number of issues that must be noted or done correctly to ensure the document is completed correctly.

2.2a Guiding example in the various sheets

Firstly, you will note that a **guiding example** **shaded in YELLOW** in the first row of every sheet is provided- this is purely for information purposes and does not form part of your department's data.

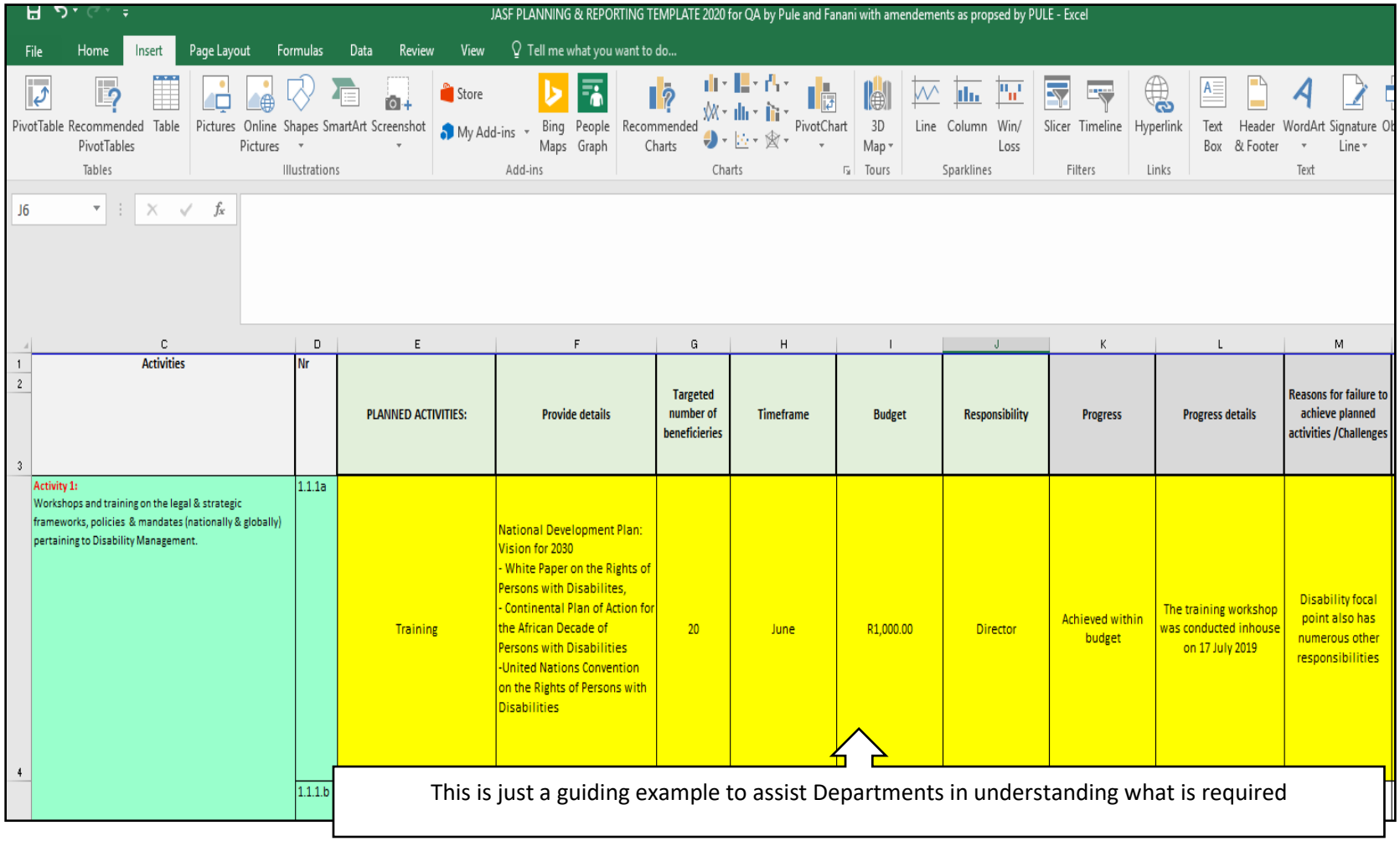


Figure 5 Guiding example shaded in yellow

2.2b Drop down lists

You will note that there are **DROP DOWN LISTS** in most cells where inputs are required (indicated by a small arrow in the right hand side corner of the cell. Click on the cell, then on the arrow and select the correct option.

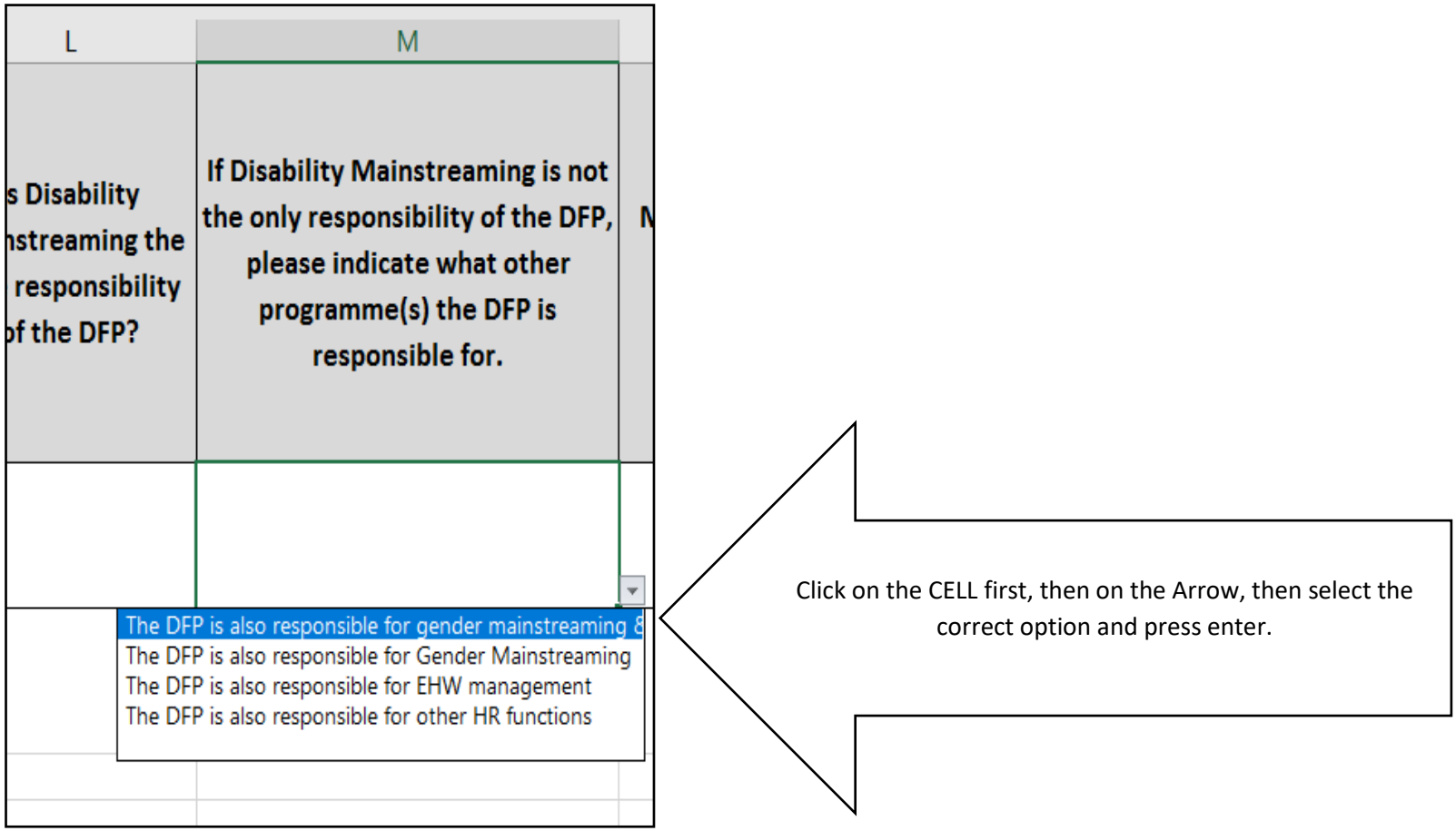


Figure 6 How to select the correct option from a drop down list

2.2c. Details of the reporting Department

The first sheet that require inputs is the sheet called **"Details of reporting Department".** This sheet must be completed when you submit the plan and again when you submit the report. Choose your Department from the drop down list in **Column B**. The code next to the name of your department is what you need to use when you save the EXCEL file (electronic template) for submission to DPSA.

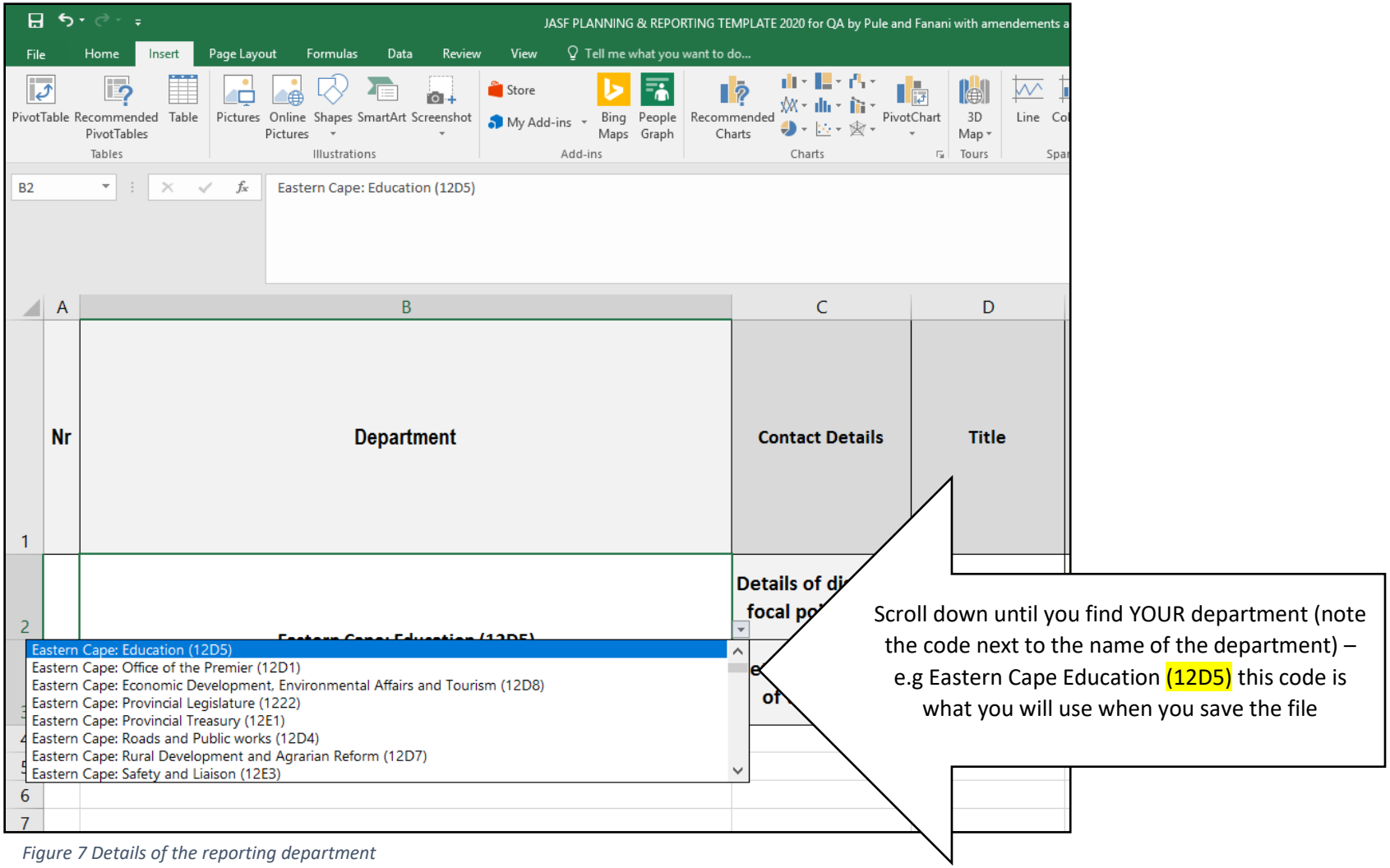


Figure 7 Details of the reporting department

2.2d. How to save the document correctly

The data gathered from this report will be **read programmatically** by the DPSA and therefore you are required to **SAVE THE FILE in a specific manner.**

To save the file you need to **use the organizational CODE that is next to the name of your department as shown in figure 7 above.**

CORRECT WAY TO SAVE PLANS	CORRECT WAY TO SAVE PROGRESS REPORTS
Please save the plan as follows:	***Please save the progress reports as follows:***
***GESF PLAN FOR PERSAL ORG CODE*.XLS**	***GESF PROGRESS REPORT FOR PERSAL ORG CODE*.XLS**
Replace this code with the correct code for your department	Replace this code with the correct code for your department
For example the file for the GESF PLAN for the Eastern Cape: Education Department should be saved as:	***For example the file for the GESF PROGRESS REPORT for the Eastern Cape: Education Department should be saved as:***
GESF PLAN FOR FOR 12D5.XLS	**GESF PROGRESS REPORT FOR FOR 12D5.XLS**
OR	***OR***
The file for the JASF PLAN for the Eastern Cape: Education Department should be saved as:	***The file for the JASF PLAN for the Eastern Cape: Education Department should be saved as:***
***JASF PLAN FOR FOR 12D5*.XLS**	***JASF PROGRESS REPORT FOR FOR 12D5*.XLS**

Table 1 Correct way to save the electronic template

2.3 How to prepare the report for planned activities

NOTE: Going forward the **reporting period** will be for the **FINANCIAL year** and no longer the calendar year! The plan that you will submit will thus cover the period **1 April 2020 to 31 March 2021**.

In the past, two separate but similar templates were submitted – the one was the PLANNED activities for the new reporting period and the second was the PROGRESS on the activities that were planned for the reporting period. This has not changed, Departments are still required to use one template for both the planned activities as well as the progress report. The only change now is that it is in an electronic format and disaggregated data is required for the progress report.

Every Strategic objective has its own sheet where the sub-objectives are listed. The planned activities must be completed in columns E to J.
There is also a sheet for each strategic objective where you are required to rate the success indicators. The sheet is called e.g. **Indicators Strat Obj. 1** (there are four such sheets one for each strategic objective - please complete all four). This must be completed when you do the plans for the upcoming financial year please.

Step one is to choose the planned activity from the drop down list in Column E.

Step two is to provide details in column F.

Step three is to provide the information regarding the targeted number of beneficiaries, the timeframe, budget and to list who is responsible for this work in columns G to J.

You will note that the activities often have numerous numbers. In figure 8 above Activity 1 has rows numbered 1.1.1a (this is just the example provided for your information) to 1.1.1f.You need to start completing from 1.1.1b if you indeed also plan to do training you will select "training" from the drop down list and provide the relevant information in column F. If you have planned more activities you will choose the relevant activity from the drop down list at number 1.1.1c – say you awarded bursaries for gender/disability studies, you will select "bursaries" from the drop down list in column E and provide the detailed information in Column F. Similarly you will use 1.1.1d-1.1.1f for all your various activities. If your activity is not listed on the drop down menu please choose "other" and describe the activity in column F.

Many of the cells have a **message that will pop up** to guide you what to look out for / what to do (please **read** it all carefully) see cell F5 in figure 8 above for an example for these type of messages.

NOTE: DPSA will secure (lock) the plans submitted and send back to departments so that you will no longer be able to access the plans and will only be able to submit the progress based on what was planned.

JASF PLANNING & REPORTING TEMPLATE 2020 for QA by Pule and Fanani with amendements as propsed by PULE - Excel

This part is the plan

Planning for or Progress on STRATEGIC OBJECTIVE	Sub-objectives	Activities	Nr	PLANNED ACTIVITIES:	Provide details	Targeted number of beneficieries	Timeframe	Budget	Responsibility	Progress	Progress details
STRATEGIC OBJECTIVE 1: Adopt a wide set of options for capacity development initiatives in order to achieve the empowerment of persons with disabilities and respresentation at al levels	Sub-Objectives 1 & 2: Develop knowledge of legal , strategic frameworks & mandates at a national & global level with regard to disability management: e.g. National Development Plan: Vision for 2030 - White Paper on the Rights of Persons with Disabilites - Continental Plan of Action for the African Decade of Persons with Disabilities - United Nations Convention on the Rights of Persons with Disabilities	Activity 1: Workshops and training on the legal & strategic frameworks, policies & mandates (nationally & globally) pertaining to Disability Management.	1.1.1a	Training	National Development Plan: Vision for 2030 - White Paper on the Rights of Persons with Disabilites, - Continental Plan of Action for the African Decade of Persons with Disabilities -United Nations Convention on the Rights of Persons with Disabilities	20	June	R1,000.00	Director	Achieved within budget	The training workshop was conducted inhouse on 17 July 2019
			1.1.1.b		Please provide brief details of the planned activity in the column to the right. For progress reports please provide disagregated data in the columns provided to the right.						
			1.1.1c								
			1.1.1.d								
			1.1.1e								
			1.1.1.f								
		Activity 2:	1.1.2a								

Instructions | Details of reporting Depart | Compliance JASF | Strategic Obj 1 | Outcome indicators Strat Obj. 1 | Strategic Obj ...

Figure 8 Plan for the new reporting period

2.4 How to prepare the progress report

NOTE: Going forward the **reporting period** will be for the **FINANCIAL year** and no longer the calendar year!

The progress report for the period 1 April 2020 to 31 March 2021 will be submitted BY 30 April 2021. This report will be a continuation of filling out the electronic template you used for the plan submitted the previous year (i.e this year on 30 April 2020) – using the locked plan that was sent back to you.

You will be required to indicate (using the drop down list in column K) if the planned target was achieved. Use Column L to provide the narrative details of your progress report. If you failed to meet the target, please choose a reason from the drop down list in column M and give the details in column N.

An important change here is that you are required to please **provide the disaggregated details of the beneficiaries** of your activities where applicable (e.g. when you conducted training indicate who the beneficiaries were, but if you developed a policy no need to list beneficiaries). The template will automatically total the number of beneficiaries in column AC and test to see if the total number of beneficiaries you indicated in column O corresponds with the total of the disaggregated data provided in columns P to AA.

A screenshot of the PROGRESS REPORT part of the template is depicted in figure 9 below. Note the space allocated for departments to provide disaggregated data of the beneficiaries.

JASF PLANNING & REPORTING TEMPLATE 2020 for QA by Pule and Fanani with amendements as propsed by PULE - Excel

This part is the progress report

Budget	Responsibility	Progress	Progress details	Reasons for failure to achieve planned activities /Challenges	Details on reasons for failure to achieve planned activities /Challenges	Total number of beneficieries	Female Beneficiaries				Male Beneficieries				Gender Non Conforming				Total	
							≤ 35 yr		> 35 yr		≤ 35 yr		> 35 yr		≤ 35 yr		> 35 yr			
							Disability	No disability	Disability	No disability	Disability	No disability	Disability	No disability	Disa bility	No disa bility	Disa bility	No disa bility		
R1,000.00	Deputy Director	Achieved within budget and timeframe	A training course on gender responsibe planning budgeting monitoring and evaluation was presented by the DPME on 2 May 2018	Not Applicable		20	0	0	1	11	0	2	1	5					20	TRUE
																			0	TRUE
																			0	TRUE
																			0	TRUE
																			0	TRUE
																			0	TRUE
																			0	TRUE

Page 1

Figure 9 Progress report for the new reporting period

3. Approval and submission of the reports

3.1 DG/HOD approval

3.1a Sign off sheet

One of the compliance areas for both the GESF and JASF is that the DG/HOD needs to approve the plans and reports by SINGING it. Due to the fact that this is an electronic submission, DGs/HODs are now required to approve the electronic report by **signing the "sign off" page** (see appendix A and note that a copy is available on www.dpsa.gov.za). You need to thus submit the electronic template to the DG/HOD in electronic format together with the said "sign off" page. You could password protect the electronic copy when sending it to the DG/HOD. Once signed, the **"sign off" page** must be scanned and emailed to DPSA when you submit (email) the electronic template (EXCEL doc) plan/report.

3.1.b Printing of the Excel document

The electronic template (Excel doc) was not developed in a manner that makes it easy to print it. This is due to the fact that the data needs to be read programmatically and every activity needs to be in the same row.

3.2 Reporting period transitional measures

Some transitional measures need to be implemented due to the fact that the reporting period will (with effect from 01.01.2020) change from a calendar year (1 January to 31 December) to a financial year (1 April to 31 March).

3.2a GESF and JASF Plans

Please submit your GESF and JASF plans **for the period 1 April 2020 to 31 March 2021 by 30 April 2021 using the new (Excel) electronic template** (which is available on the DPSA website). The plans will be quality assured and "locked" by DPSA and returned to you. This document will then be used for the preparation of the progress report for 1 April 2020 to 31 March 2021.

3.2b GESF and JASF Reports

Please submit your GESF and JASF reports for the period 1 January 2019 to 31 March 2020 using the old paper based template (see appendix B) by 30 April 2020.

Next year (2021) you will submit your GESF and JASF reports for the period 1 April 2020 to 31 March 2021 by 30 April 2021.

3.3 Submission of the GESF and JASF plans and reports

Please submit the GESF and JASF plans and reports as discussed in 3.2a and 3.2b to TebogoM@dpsa.gov.za by no later than **30 April 2020.**

Please consider all items on the check list below before submission:

3.3a Submission checklist for GESF and JASF PLANS & REPORTS

Items to comply with	Yes/ No
GESF and JASF PLANS:	
Reporting period covered is: 1 April 2020 to 31 March 2021	
Template: used electronic template	
Electronic template was saved correctly using the naming convention as discussed in item 2.2d	
DG/ HOD signed the sign off sheet	
Sign off sheet has been scanned and will be emailed	
GESF and JASF REPORTS	
Reporting period covered is: 1 January 2020 to 31 March 2021	
Template: used old paper based template NOTE: from next year the electronic template will be used for the reports and the reporting period will be 1 April to 31 March)	
DG/ HOD signed GESF and JASF REPORTS	
NOTE – from 2021 make sure Electronic template was saved correctly using the naming convention as discussed in item 2.2d	
DG/ HOD signed the sign off sheet	
Sign off sheet has been scanned and will be emailed with the GESF and JASF REPORTS	

4. Conclusion

In conclusion, using the words of two great minds: “There is nothing wrong with change...if it is in the right direction.” —Winston Churchill and “Our ability to adapt is amazing. Our ability to change isn't quite as spectacular. “ —Lisa Lutz. We are moving with the times and we know you will come to appreciate the benefits of the wealth of data we will all have at hand through this process of change. .