AFRICA POPULATION INSTITUTE (API)

PUBLIC ADMINISTRATION & MANAGEMENT

PAM HANDBOOK

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Forward:

API is a registered institution with 3 years' experience of supporting voluntary organizations, agencies and individuals in developing quality systems. A major part of our work is providing external evaluations and trainings to organizations or specific projects and also building capacities of the members to have relevant skills applicable to their working environment.

How we work

We aim to understand the precise needs of your organization and to offer you good value, an integrated service, and work which is based on clear principles. Our style is inclusive, participatory and flexible.

We aim to help you:

- Develop your skills, reflect and gain focus
- Make your organization more confident, effective and efficient, and able to demonstrate this to others
- Help you plan more effectively and strategically for the future
- Demonstrate the benefits (or outcomes) for your service users.

Our approach

- Starts by listening carefully to what you need and tailoring our services accordingly
- Includes clear and practical advice, plans and reports
- Is based on extensive knowledge and experience of the voluntary sector
- Is supportive and friendly.

Some of the other areas offered in our training that are client tailored

Monitoring and Evaluation Training
Project Planning and Management
Public Health and HIV/AIDS management
Guidance and Counseling Techniques
Family Planning and RH issues
Research Methods and Data management
Specialized Statistical Packages for data analysis (SPSS, STATA, EVIEWs, ATLAS TI, SUDAN, EPINFO and Epi Data etc)
Training of Trainers Course
Management and Leadership Skills Development
Procurement and Contract Management
Peace and conflict Management/Resolution
Disaster Preparedness and Management Course
Communication Skills and Technique
Heath Care Administration (HCAD)
Interdisciplinary Environmental Health Studies (ENVHs)
Substance Abuse and Addictions Management (SAAM)
Advocacy and Lobbying Techniques
Strategic Planning and Management
Business Sales and Marketing Strategies
Health Marketing and Health Promotion

Logistics, Transport and Supply Chain Management

Course Overview

As organizations or projects continue to grow in complexity, scope and size, a broad understanding of the concepts of management is needed to ensure an organizations success in the marketplace. Management is a formal discipline, increasingly recognized by more and more organizations, and is one of the fastest growing professions in today's construction, service, product development, and manufacturing industries. Thus management is both an art and a science; an art because it requires skills, tact and finesse to manage people, and a science because it demands an in-depth knowledge of technical tools. Management is designed to develop the knowledge base of persons working as managers and personnel within the organizations, whether for the principal or for service providers i.e. consultants or contractors. The course focuses on basic principles across the breadth of the project management body of knowledge, and covers the key concepts in management. The course reviews management processes in an organized framework, with an emphasis on tools that enable the concepts to be applied directly into the participants working environment

This course also offers a comprehensive introduction not just to the theory and practice of management but it highlights the professional management as an unexplored public administration innovation and contribute to the advancement of your professional capacity

The course objectives, It aims to:

Enhance skills

Broaden knowledge

Discover new trends

Share experiences and best practices

Achieve national certification recognition

Maintain educational level and goals

The curriculum certification programme encompasses(course content)

- Management Concepts(management versus administration)
- Teams and Team leadership
- Human Resource/ personnel management
- Public relations (communication)
- Budgeting/ fiscal management information Systems
- Research and data management

- Procurement Management
- Time Management (Resource Analysis, PERT, Monitoring and Control) and Risk management

Instructional Methods

A combination of instructional methods is used. The course uses lecture and facilitated discussion techniques together with individual and group exercises. The latter are designed to illustrate the application of specific tools to achieve the objective of the project management process.

Public, adj, is of or pertaining to the people; relating to, or affecting, a nation, state, or community; opposed to private; as, the public treasury, a road or lake. Public, n, is also defined as the people of a nation not affiliated with the government of that nation.

Public to the general body of mankind or of a nation, state, or community; *the people*, indefinitely; as, *the public*; also, a particular body or aggretion of people; as, *an author's public*. "Public network" means a network that is regulated as a common carrier.

Aggens (1983) in the paper titled "Identifying different levels of public interest in participation" states: "*There is no single public, but different levels of public based on differing levels of interest and ability*".

Administration refers to;

In **business**:

- Administration (business), the performance or management of business operations.
- Management, the act of directing people towards accomplishing a goal
- Central Administration, the highest administrative department of an organization

In **computing**:

- System administrator, a person who maintains and operates a computer system or network
- an Internet forum administrator

In **law**:

- Administration of an estate on death, arising if the deceased is legally intestate
- Administration (law), a mechanism allowing insolvent companies to continue running their business. Also see administrative receivership.

In **medicine**:

- Route of administration, the path by which a substance is brought into contact with the body

In **politics**:

- Administration (government), a term used in the context of government
- Public administration, the study and implementation of policy
- Local government, administrative offices that are smaller than a state or province

In **academia**:

- Academic administration, a branch of an academic institution responsible for the maintenance and supervision of the institution

Management Concepts (Management Vs Administration)

Administration can be defined as the universal process of efficiently organizing people and resources so to direct activities toward common goals and objectives. Administration is both an art and a science (if an inexact one), and arguably a craft, as administrators are judged ultimately by their performance. Administration must incorporate both leadership and vision

Management is viewed as a subset of administration, specifically associated with the technical and mundane elements within an organization's operation. It stands distinct from executive or strategic work. Management is closer to the employees. Administration is over the management and more over the money of the organization and licensing of an organization.

The verb *manage* comes from the Italian *maneggiare* (to handle — especially a horse), which in turn derives from the Latin *manus* (hand). The French word *management* (later *ménagement*) influenced the development in meaning of the English word *management* in the 17th and 18th centuries.

Management in business and human organization activity, in simple terms means the act of getting people together to accomplish desired goals. Management comprises planning, organizing, resourcing, leading or directing, and controlling an organization (a group of one or more people or entities) or effort for the purpose of accomplishing a goal. Resourcing encompasses the deployment and manipulation of human resources, financial resources, technological resources, and natural resources. Thus a good manager should be effective and efficient because may use the same resources and achieve the same target. Management can also refer to the person or people who perform the act(s) of management. Management operates through various functions, often classified as planning, organizing, leading/motivating and controlling.

Planning: deciding what needs to happen in the future (today, next week, next month, next year, over the next 5 years, etc.) and generating plans for action. (What to do?)

Organizing: (Implementation) making optimum use of the resources required to enable the successful carrying out of plans.

Staffing: Job analyzing, recruitment, and hiring individual for appropriate job.

Leading/Motivating: exhibiting skills in these areas for getting others to play an effective part in achieving plans.(To make individual work willingly in the organization)

Controlling/monitoring: checking progress against plans, which may need modification based on feedback.

Factors for the differences between administration and management

Factors	*Administration*	*Management*
Nature of work	It is concerned about the determination of objectives and major policies of an organization.	It puts into action the policies and plans laid down by the administration.
Type of function	It is a determinative function.	It is an executive function.
Scope	It takes major decisions of an enterprise as a whole.	It takes decisions within the framework set by the administration.
Level of authority	It is a top-level activity.	It is a middle level activity.
Nature of status	It consists of owners who invest capital in and receive profits from an enterprise.	It is a group of managerial personnel who use their specialized knowledge to fulfill the objectives of an enterprise.
Nature of usage	It is popular with government, military, educational, and religious organizations.	It is used in business enterprises.
Decision making	Its decisions are influenced by public opinion, government policies, social, and religious factors.	Its decisions are influenced by the values, opinions, and beliefs of the managers.
Main functions	Planning and organizing functions are involved in it.	Motivating and controlling functions are involved in it.
Abilities	It needs administrative rather than technical abilities.	It requires technical activities

Managerial levels and hierarchy

Top-level management	• Require an extensive knowledge of management roles and skills. • They have to be very aware of external factors such as markets. • Their decisions are generally of a long-term nature • Their decisions are made using analytic, directive, conceptual and/or behavioral/participative processes • They are responsible for strategic decisions. • They have to chalk out the plan and see that plan may be effective in the future. • They are executive in nature.
Middle management	• Mid-level managers have a specialized understanding of certain managerial tasks. • They are responsible for carrying out the decisions made by top-level

	management.
Lower management	• This level of management ensures that the decisions and plans taken by the other two are carried out. • Lower-level managers' decisions are generally short-term ones
Foreman / lead hand	• They are people who have direct supervision over the working force in office factory, sales field or other workgroup or areas of activity.
Rank and File	• The responsibilities of the persons belonging to this group are even more restricted and more specific than those of the foreman

Leadership Styles

From Mahatma Gandhi to Jack Welch, and Martin Luther King to Rudolph Giuliani, there are as many leadership styles as there are leaders. Fortunately, business people and psychologists have developed useful, shorthand ways of describing the main leadership styles. This can help aspiring leaders to understand and adapt their own styles, so that they can improve their own leadership.

Whether you are managing a team at work, captaining your sports team or leading a major corporation, your leadership style is crucial to your success. Consciously, or subconsciously, you will no doubt use some of the leadership styles featured, at least some of the time. By understanding these leadership styles and their impact, you can become a more flexible, better leader.

Leadership style: is the manner and approach of providing direction, implementing plans, and motivating people. Kurt Lewin (1939) led a group of researchers to identify different styles of leadership.

The leadership styles we look at:

Autocratic Leadership

Autocratic leadership is an extreme form of transactional leadership, where a leader exerts high levels of power over his or her employees or team members. People within the team are given few opportunities for making suggestions, even if these would be in the team's or organization's interest. Most people tend to resent being treated like this. Because of this, autocratic leadership usually leads to high levels of absenteeism and staff turnover. Also, the team's output does not benefit from the creativity and experience of all team members, so many of the benefits of teamwork are lost. For some routine and unskilled jobs, however, this style can remain effective where the advantages of control outweigh the disadvantages.

Bureaucratic Leadership

Bureaucratic leaders work “by the book”, ensuring that their staff follow procedures exactly. This is a very appropriate style for work involving serious safety risks (such as working with machinery, with toxic substances or at heights) or where large sums of money are involved (such as cash-handling). In other situations, the inflexibility and high levels of control exerted can demoralize staff, and can diminish the organizations ability to react to changing external circumstances.

Charismatic Leadership

A charismatic leadership style can appear similar to a transformational leadership style, in that the leader injects huge doses of enthusiasm into his or her team, and is very energetic in driving others forward. However, a charismatic leader can tend to believe more in him or herself than in their team. This can create a risk that a project, or even an entire organization, might collapse if the leader were to leave: In the eyes of their followers, success is tied up with the presence of the charismatic leader. As such, charismatic leadership carries great responsibility, and needs long-term commitment from the leader.

Democratic Leadership or Participative Leadership

Although a democratic leader will make the final decision, he or she invites other members of the team to contribute to the decision-making process. This not only increases job satisfaction by involving employees or team members in what’s going on, but it also helps to develop people’s skills. Employees and team members feel in control of their own destiny, and so are motivated to work hard by more than just a financial reward. As participation takes time, this style can lead to things happening more slowly than an autocratic approach, but often the end result is better. It can be most suitable where team working is essential, and quality is more important than speed to market or productivity.

Laissez-Faire Leadership

This French phrase means “leave it be” and is used to describe a leader who leaves his or her colleagues to get on with their work. It can be effective if the leader monitors what is being achieved and communicates this back to his or her team regularly. Most often, laissez-faire leadership works for teams in which the individuals are very experienced and skilled self-starters. Unfortunately, it can also refer to situations where managers are not exerting sufficient control.

People-Oriented Leadership or Relations-Oriented Leadership

This style of leadership is the opposite of task-oriented leadership: the leader is totally focused on organizing, supporting and developing the people in the leader’s team. A participative style, it tends to lead to good teamwork and creative collaboration. However, taken to extremes, it can lead to failure to achieve the team's goals. In practice, most leaders use both task-oriented and people-oriented styles of leadership.

Servant Leadership

This term, coined by Robert Greenleaf in the 1970s, describes a leader who is often not formally recognized as such. When someone, at any level within an organization, leads simply by virtue of meeting the needs of his or her team, he or she is described as a "servant leader". In many ways, servant leadership is a form of democratic leadership, as the whole team tends to be involved in decision-making. Supporters of the servant leadership model suggest it is an important way ahead in a world where values are increasingly important, in which servant leaders achieve power on the basis of their values and ideals. Others believe that in competitive leadership situations, people practicing servant leadership will often find themselves left behind by leaders using other leadership styles.

Task-Oriented Leadership

A highly task-oriented leader focuses only on getting the job done, and can be quite autocratic. He or she will actively define the work and the roles required, put structures in place, plan, organize and monitor. However, as task-oriented leaders spare little thought for the well-being of their teams, this approach can suffer many of the flaws of autocratic leadership, with difficulties in motivating and retaining staff. Task-oriented leaders can benefit from an understanding of the Blake-Mouton Managerial Grid, which can help them identify specific areas for development that will help them involve people more.

Transactional Leadership

This style of leadership starts with the premise that team members agree to obey their leader totally when they take a job on: the "transaction" is (usually) that the organization pays the team members, in return for their effort and compliance. As such, the leader has the right to "punish" team members if their work doesn't meet the pre-determined standard.

Team members can do little to improve their job satisfaction under transactional leadership. The leader could give team members some control of their income/reward by using incentives that encourage even higher standards or greater productivity. Alternatively a transactional leader could practice "management by exception", whereby, rather than rewarding better work, he or she would take corrective action if the required standards were not met.

Transactional leadership is really just a way of managing rather a true leadership style, as the focus is on short-term tasks. It has serious limitations for knowledge-based or creative work, but remains a common style in many organizations.

Transformational Leadership

A person with this leadership style is a true leader who inspires his or her team with a shared vision of the future. Transformational leaders are highly visible, and spend a lot of time communicating. They don't necessarily lead from the front, as they tend to delegate responsibility amongst their teams. While their enthusiasm is often infectious, they can need to be supported by "detail people".

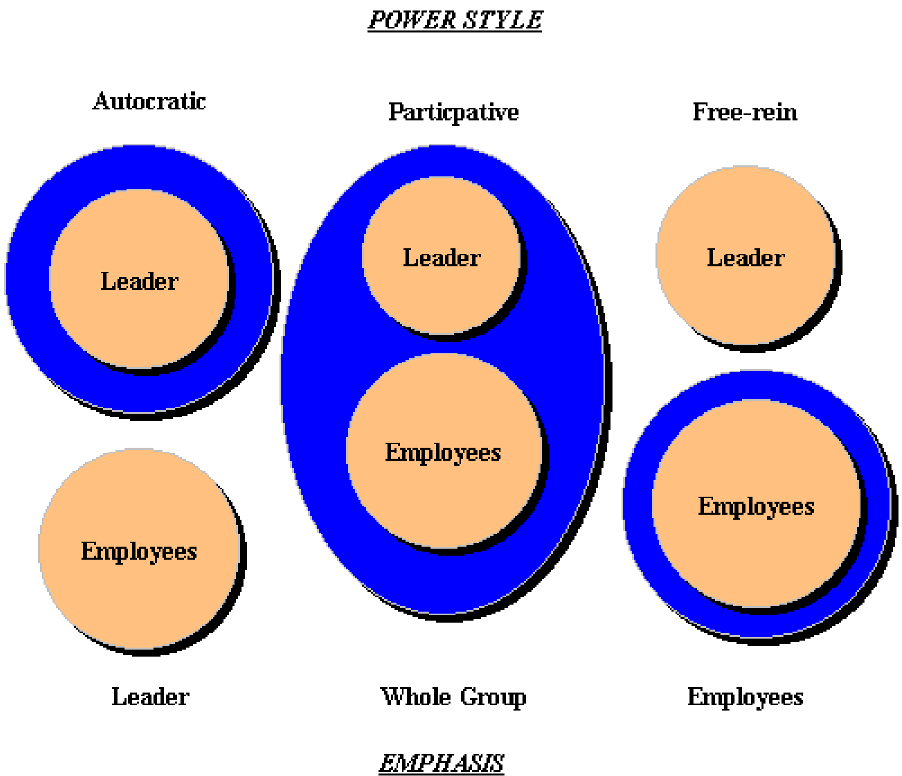
In many organizations, both transactional and transformational leadership are needed. The transactional leaders (or managers) ensure that routine work is done reliably, while the transformational leaders look after initiatives that add value. The transformational leadership style is the dominant leadership style taught in the "How to Lead: Discover the Leader Within You" leadership program, although we do recommend that other styles are brought as the situation demands.

Using the Right Style – Situational Leadership

While the Transformation Leadership approach is often highly effective, there is no one “right” way to lead or manage that suits all situations. To choose the most effective approach for you, you must consider:

- The skill levels and experience of the members of your team.
- The work involved (routine or new and creative).
- The organizational environment (stable or radically changing, conservative or adventurous).
- You own preferred or natural style.
- Internal conflicts and Stress levels.
- How much time is available

A good leader will find him or herself switching instinctively between styles according to the people and work they are dealing with. This is often referred to as “situational leadership”. For example, the manager of a small factory trains new machine operatives using a bureaucratic style to ensure operatives know the procedures that achieve the right standards of product quality and workplace safety. The same manager may adopt a more participative style of leadership when working on production line improvement with his or her team of supervisors. Although good leaders use all three styles, with one of them normally dominant, bad leaders tend to stick with one style.



Leadership Theories

many different leadership theories have emerged, most can be classified as one of eight major types:

1. “Great Man” Theories: Great Man theories assume that the capacity for leadership is inherent – that great leaders are born, not made. These theories often portray great leaders as heroic, mythic, and destined to rise to leadership when needed. The term “Great Man” was used because, at the time, leadership was thought of primarily as a male quality, especially in terms of military leadership.

2. Trait Theories: Similar in some ways to “Great Man” theories, trait theory assumes that people inherit certain qualities and traits that make them better suited to leadership. Trait theories often identify particular personality or behavioral characteristics shared by leaders. But if particular traits are key features of leadership, how do we explain people who possess those qualities but are not leaders? This question is one of the difficulties in using trait theories to explain leadership.

3. Contingency Theories: Contingency theories of leadership focus on particular variables related to the environment that might determine which particular style of leadership is best suited for the situation. According to this theory, no leadership style is best in all situations. Success depends upon a number of variables, including the leadership style, qualities of the followers, and aspects of the situation.

4. Situational Theories: Situational theories propose that leaders choose the best course of action based upon situational variable. Different styles of leadership may be more appropriate for certain types of decision-making.

5. Behavioral Theories: Behavioral theories of leadership are based upon the belief that great leaders are made, not born. Rooted in behaviorism, this leadership theory focuses on the actions of leaders, not

on mental qualities or internal states. According to this theory, people can *learn* to become leaders through teaching and observation.
6. Participative Theories: Participative leadership theories suggest that the ideal leadership style is one that takes the input of others into account. These leaders encourage participation and contributions from group members and help group members feel more relevant and committed to the decision-making process. In participative theories, however, the leader retains the right to allow the input of others.
7. Management Theories: Management theories (also known as "Transactional theories") focus on the role of supervision, organization, and group performance. These theories base leadership on a system of reward and punishment. Managerial theories are often used in business; when employees are successful, they are rewarded; when they fail, they are reprimanded or punished.
8. Relationship Theories: Relationship theories (also known as "Transformational theories") focus upon the connections formed between leaders and followers. These leaders motivate and inspire people by helping group members see the importance and higher good of the task. Transformational leaders are focused on the performance of group members, but also want each person to fulfill his or her potential.

How people work (Motivation theories)

McGregor sees Theory Y as the preferable model and management method, however he thought Theory Y was difficult to use in large-scale operations.

Theory Z - Ouchi

In 1981, William Ouchi came up with a variant that combined American and Japanese management practices together to form Theory Z, having the following characteristics: long-term employment - collective decision-making - individual responsibility - slow evaluation & promotion - implicit, informal control with explicit, formalized measures - moderately specialized career paths - and a holistic concern for the employee, including family.

Theory X and Y Description

Douglas McGregor, an American social psychologist, proposed his famous Theory X and Theory Y models in his book 'The Human Side Of Enterprise' (1960).

Theories	**Theory X**	**Theory Y**
Assumptions	Humans inherently dislike working and will try to avoid it if they can.	People view work as being as natural as play and rest. Humans expend the same amount of physical and mental effort in their work as in their private lives.
	Because people dislike work they have to be coerced or controlled by management and threatened	Provided people are motivated, they will be self-directing to the aims of the organization. Control and punishment

	so they work hard enough.	are not the only mechanisms to let people perform.
	Average employees want to be directed.	Job satisfaction is key to engaging employees and ensuring their commitment.
	People don't like responsibility.	People learn to accept responsibility and seek responsibility. Average humans, under the proper conditions, will not only accept, but even naturally seek responsibility.
	Average humans are clear and unambiguous and want to feel secure at work.	People are imaginative and creative. Their ingenuity should be used to solve problems at work.
Application	Shop Floor, Mass Manufacturing. Production workers.	Professional Services, Knowledge Workers. Managers and Professionals.
Conducive to	Large scale efficient operations.	Management of Professionals, Participative Complex Problem Solving.
Management Style	Authoritarian, Hard Management.	Participative, Soft Management.

NB: Think how the above theories can be or not applied in a given situation

Teams and Team Leadership

Leaders should not think of themselves as simply managers, supervisors, etc.; but rather as "team leaders." Thinking of yourself as a manager or supervisor places you in a position of traditional authority based solely on respect for the position, which places you in a position of power

What is a Team?

A team is a group of people coming together to collaborate. This collaboration is to reach a shared goal or task for which they hold themselves mutually accountable. A group of people is not necessarily a team. A team is a group of people with a high degree of interdependence geared towards the achievement of a common goal or completion of a task rather than just a group for administrative convenience. A group, by definition, is a number of individuals having some unifying relationship.

A team has three major benefits for the organization:

It maximizes the organization's human resources. Each member of the team is coached, helped, and led by all the other members of the team. A success or failure is felt by all members, not just the individual. Failures are not blamed on individual members, which give them the courage to take chances. Successes are felt by every team member, this helps them to set and achieve bigger and better successes. In addition, failure is perceived as a learning lesson.

Its output is superior, even when the odds are not in its favor. This is due to the synergistic effect of a team -- a team can normally outperform a group of individuals.

There is continuous improvement. No one knows the job, tasks, and goals better than the individual team members. To get real change, you need their knowledge, skills, and abilities. When they pull together as a team, they will not be afraid to show what they can do. Personal motives will be pushed to the side to allow the team motive to succeed

What makes a good team leader?

The way a team is led will have a major impact upon the success or otherwise of the team. When asked what they want from a team leader, team members will often identify several values they would want a leader to hold : commitment to people as well as task is the first key element Desire to support and serve the team as well as lead from the front. Enthusiasm, energy, inspiration and sufficient expertise. Willingness to shoulder responsibility rather than pass the buck ability to make the team come together to achieve more than a group of individuals.

Commitment to people: Most team members are primarily concerned about relationship and about being valued as a team member, before they are concerned about the task that the team is to undertake. Feeling secure in a group environment is an important pre-requisite before individual contribution. The good team leader is able to spend time building the team, not only when the team starts off, but when a newcomer joins an existing team

Desire to Support and Serve
Whilst team members want to see the ability to lead from the front, they are also strongly motivated by the ability to lead from the back! Servant leadership from the team leader is vital if team members are in turn, to want to serve each other. This is a particularly key topic for Christian leaders. There is a balance to be struck between a willingness to take on any chores that need to be done by the team, and taking an inappropriate balance of roles so that the leadership is diminished.

Enthusiasm, Energy, Inspiration and Expertise
Unsurprisingly team members want to be inspired and motivated by team leadership which has the energy and enthusiasm to fire them up. However, they also want to feel secure that the team leader has themselves, or has access to, the necessary expertise to lead the team in the right direction. The leader doesn't have to be the most knowledgeable of the subject at hand, but if they are not, they must

encourage the input of others.

Willingness to shoulder responsibility.
Team leaders are tested under pressure. When challenges arise, as they inevitably will, the leader will need to take responsibility to ensure that they are fixed as far as possible and that the team is strengthened as a result. This does not mean that the leader should admit that issues beyond their control are in any way their fault, (although they should be honest in admitting their mistakes), but rather adopt a proactive stance to ensure the team is not deflected from its course.

Ability to achieve more as a team.
Teams only become a team once there is some synergy within the group ie the team process adds value to that which a disparate group of individuals would achieve undirected. This is likely to require the team leader to explore leadership models that share the leadership role within the team, to have an understanding of different individuals team roles, strengths and gifts, establish a mutual accountability within the team, and to create a team environment which is open, fun and allows healthy and productive discussion.

Common Elements

A team goal - Although your team might have a number of goals, one of them must stand out. For example, "To produce 10% more widgets than last year without hiring additional personnel." A supporting goal might be, "To provide 40 hours of yearly training for each member." Everyone must know, agree upon, and be committed to accomplishing the team goal.

Productive participation of all members - This has four levels:

1. Contributing data and knowledge
2. Sharing in the decision making process and reaching consensus
3. Making the decision
4. Making an imposed decision work

Communication - Open, honest, and effective exchange of information between members.

Trust - Openness in critiquing and trusting others.

A sense of belonging - Cohesiveness by being committed to an understood mandate and team identity.

Diversity - This must be valued as an asset. It is a vital ingredient that provides the synergistic effect of a team.

Creativity and risk taking - If no one individual fails, then risk taking becomes a lot easier.

Evaluation - The ability to self correct.

Change compatibility - Being flexible and assimilating change.

Participatory leadership - Everyone must help lead to one degree or another.

Team leadership differs from traditional top-down leadership in the following ways (Bradford, 1976, as adapted by Yukl, 1989):

1. Responsibility for group effectiveness is not on the leader's shoulders but is shared by the group.
2. Control over the final decision is not held by the leader but is best left to the group.
3. The importance of one's position and power are de-emphasized in team leadership.
4. The leader perceives the group not as a set of individuals but as an "interacting and collective team."
5. The task-oriented functions of the team are not performed only by the leader but are shared by the entire group through its new roles.
6. Group maintenance functions are not performed systematically but are emphasized and shared by the group as a whole.
7. Socioemotional processes and interactions, while mostly ignored by leaders in top-down settings, are observed closely by team leaders.
8. Expressions of members' needs and feelings are not discouraged but are encouraged by team leaders and are dealt with openly in meetings.

Human Resource/ personnel management

Human resource management (HRM) is the strategic and coherent approach to the management of an organization's most valued assets – the people working there who individually and collectively contribute to the achievement of the objectives of the business. The terms "human resource management" and "human resources" (HR) have largely replaced the term "personnel management"

Personnel management is often used in a more restricted sense to describe activities that are necessary in the recruiting of a workforce, providing its members with payroll and benefits, and administrating their work-life needs. Thus humans are an organization's greatest assets; without them, everyday business functions such as managing cash flow, making business transactions, communicating through all forms of media, and dealing with customers could not be completed

Human resource management works to ensure that employees are able to meet the organization's goals.

"Human resource management is responsible for how people are treated in organizations. It is responsible for bringing people into the organization, helping them perform their work, compensating them for their labors, and solving problems that arise" (Cherrington, 1995,and ensures that employees are able to meet the organization's goal. Human resources management comprises several processes. These processes can be performed in an HR department, but some tasks can also be outsourced or performed by line-managers or other departments.

- Workforce planning
- Recruitment (sometimes separated into attraction and selection)
- Induction and Orientation
- Skills management
- Training and development
- Personnel administration
- Compensation in wage or salary
- Time management
- Travel management (sometimes assigned to accounting rather than HRM)
- Payroll (sometimes assigned to accounting rather than HRM)
- Employee benefits administration
- Personnel cost planning
- Performance appraisal

Generally, in small organizations—those with fewer than a hundred employees—there may not be an HR department, and so a *line manager* will be responsible for the functions of HRM. In large organizations—those with a hundred employees or more—a human resource manager will coordinate the HRM duties and report directly to the chief executive officer (CEO). HRM staff in larger organizations may include *human resource generalists* and *human resource specialists*. As the name implies, an HR generalist is routinely involved with all seven HRM functions, while the HR specialist focuses attention on only one of the seven responsibilities

It is necessary to understand the job analysis. An essential component of any HR unit, no matter the size, is the *job analysis*, which is completed to determine activities, skills, and knowledge required of an employee for a specific job. Job analyses are "performed on three occasions: (1) when the organization is first started, (2) when a new job is created, and (3) when a job is changed as a result of new methods, new procedures, or new technology" (Cherrington, 1995).

Jobs can be analyzed through the use of questionnaires, observations, interviews, employee recordings, or a combination of any of these methods. Two important tools used in defining the job are (1) a *job description*, which identifies the job, provides a listing of responsibilities and duties unique to the job, gives performance standards, and specifies necessary machines and equipment; and (2) the *job specification*, which states the minimum amount of education and experience needed for performing the job (Mondy and Noe, 1996).

FEASIBILITY STYDY

It is the study aimed at data and information to determining the viability/ possibility and it's determine very comprehensive

Components of Feasibility study

1. Technical Feasibility

   These include the following

   - Materials and inputs
   - Production technology/appropriate technology
   - Product mix-4ps: price, product(good,service), place (distribution channels) and promotion
   - Plant capacity(include; Feasibility, availability capacity)
   - Location site
   - Machinery/ equipment(electrical, mechanical, processing equipments)
   - Structures and civil works like parking yards, fence, flower gardens, stores and garages)

2. Financial Feasibility
   a) cost of project
   b) Sources of budgeting/means of financing: grants, shares, loans, donations, savings, trade credits, debentures, debt financing}.
   c) cost of capital- interest on borrowed money
   d) profitability
   e) tax burden-VAT,PAYE or G.tax, income, excise and custom
   f) financial projections/ flows- balance sheet, cash flow, income statement

   Debentures- grant got after guaranteed by an organization.
   Trade credits- goods taken on credits, then payments made later.
   Debt financing- borrow from one to pay the other

3. Economic Feasibility
   - Level of savings
   - Level of investment
   - Costs of benefits
   - Level of employment
   - Forex earnings(forex exchange)
   - Government revenue
   - Production capacity
   - Pricing policy

4. political feasibility
   a) government programs, policies

b) legal frame work-laws,-regulations etc

5. Market Feasibility

- market share eg MTN,celtel,mango/utl; coke, pepsi
- aggregate demand i.e who are you targeting
- supply and competition
- imports and exports
- consumer preferences and attitudes
- market policies

6. Social Feasibility
   - culture
   - religion
   - demographic factors(sex, age)
   - Community support like attitude.
   - Leadership structure- schools, roads,hospitals)
   - Quality of life

7. Environmental feasibility (EIA)
   - Natural (God made resources)
   -Social (environment within social: culture, language, colour (race)
   - Man made (fashion, luxury, car, house, planes)
   -shadow price (price that you can’t see)
   -recycling of wastes

8. Gender feasibility
   - Participation
   -Decision making
   -Roles and responsibility
   -access to resources by both sexes
   -Power (dominion)

BUDGETING AND ADMINISTATION OF THE BUDGET CONTENTS:
Introduction
o Characteristics of a budget
• Objectives of Budgeting/Purposes
• Advantages of Budgeting
• Limitations of Budgeting
• Preliminaries in the Installation of Budget System
• Budget Terms and Concepts
o Budgeting techniques for operations
• Types of Budgets
• Budgeting in Government and its cycle

• Budget

Introduction to budgeting:
Numerous definitions of a budget and budgeting have been put forward by different author in the field of budgeting process. In brief a budget is a type of plan. It's plan expressed in Monetary terms relating to a specific period of time. It effectively used for control purposes.
Accounting to Brown & Howard A budget is a predetermined statement: of management policy during a given period which provides a standard for comparison with the results actually achieved."
The Chartered Institute of Management accountant (CIMA) London has defined budget as plan quantified in monetary terms prepared and approved prior to a defined period of time usually showing planned income to be generated and or expenditure to be incurred during the period and the capital to be employed to attain a given objective.
Therefore the entire process of preparing the budgets is known as budgeting.
• Points to note:
• Objectives have to be set
• Plans have to be made how to achieve the objectives
• Activities to be performed to achieve those and workers) and non-=human money assets etc) have to be deployed to achieve those objectives.
-Money has to be received from sales. Borrowing or donations to carry out activities
• A quantitative estimates of expenditure and income for an income for and from carrying out activities respectively has to be made.
• This estimate is called a budget
o The process is called budgeting

Characteristics
1. A budget is primarily a planning and control devise
2. A budget is prepared in monetary terms and or quantitative terms
3. A budget is prepared for a definite future period

4. It shows planned income and expenditure and also the capital to he employed
5. Purpose of the budget is to implement the policies formulated by arrangement for attaining the given objectives

Objectives of Budgeting
Planning: a budget provides a detailed plan of action for business/organization over a definite period of time. By planning many problems are anticipated long before they arise and solutions can be sought through careful study.

Communication: A budget is a communication device. The approved budget copies are distributed to all management personnel, which provides not only adequate understanding and knowledge of programmes and policies to be followed but also gives knowledge about the restrictions to be adhered to. It is not the budget itself that facilitates communication, but the vital information is communicated

in the act preparing budgets and participation of all responsible individuals in this act.
Motivation: A budget is a useful devise for motivating managers to perform in line with company objectives. If individuals have actively participated in the preparations of budgets, it acts as a strong motivation force to achieve the target.

Control: Control as applied to budgeting is a systematised effort to keep management informed of whether planned performance is being achieved or not. For this purpose a comparison is made between plans and actual performance. The difference is reported to management for corrective action.

Performance evaluation: A budget provides a useful neans of informing mangers how well they are performing in meeting targets, they have previously helped to set. This helps in rewarding employees on the basis of achieving the budget target or promotion of managers may be linked their budget achievements.

Advantages of Budgeting

a) Budgeting compels managers to think a head to anticipate and prepared for changing conditions
b) Budgeting co-ordinates the activities or various departments and functions of he organisation
c) It increases production efficiency nominates waste and controls the costs
d) It pin points efficiency or lack of it.
e) Budgetary control aims at maximisation of profit through careful planning and control
f) It provides a yard stick against which actual results can be compared
g) It shows management where action is needed to remedy a situation.
h) It ensures that working capital is available for the efficient operation of the orgnisation or business.
i) It dircts capital expenditure in the most profitable direction
j) It instills into all levels of management a timely careful and adequate consideration of al factors before reaching important decisions
k) A budget motivates executives to attain the given goals

1) Budgetary control system assist in the delegation of authority and assignment of responsibility
m) Budgeting creates cost consciousness and introduces an attitude of mind in which waste and efficiency cannot strive.

Limitation of Budgeting

The list of advantages given above is impressive,but **a** budget is not **a** cure all for the organisation ills. Budgeting suffers from certain limitations and those using the system should be fully aware of them.
(i) The Budget plan is based on estimates. Budgets are based don forecasts and forecasting cannot be an exact science. Absolutes accuracy therefore, is not possible in forecasting and budgeting.
(ii) Danger of rigidity: A budget programmes must be dynamic and continuously usefulness if they acquire rigidity in the changing environment.
(iii) Budgeting is only a tool of management. Budgeting cannot take place of management but is only a tool of management. The budget should be regarded not as a master, but as a servant.” Sometimes its believed that introduction of an budget of a budget programmes is alone sufficient to ensure its success. Execution of a budget will not occur automatically. Its necessary that the entire organisation must participate enthusiastically in the programme for the realisation budgeted goals.

Essentials of Effective Budgeting

A budgetary control system can prove successful only when certain conditions and attitudes exists, absence of which will negate to a large extent the value of the budget.

The conditions are:

1. Support of top management if the budget system is to be successful it must be fully supported by every member of management and direction must come from the top management
2. Participation by responsible executives. Those entrusted with the performance of the budgets should participate in the process of setting the budget figures. This will ensure proper implementation of budget programmes.
3. Reasonable goals: The budget figures should be realist and represent reasonably attainable goals.
4. Clearly defined organization. **In** order to derive maximum. benefits from the budgetary system, well defined responsibility centers should be built up within the organization. The controllable costs for each responsibility centres should be separately shown.
5. Continuous budget education. The best way to ensure the active interest of the responsible supervisors is continuous budget education in respect of objectives. Potentials and techniques of budgeting this is through meetings, manuals etc.
6. Adequate accounting system. There is close relationship between budgeting and accounting. For the preparation of budgets one has to depend on accounting department for reliable historical data which forms a basis for many estimates.
7. Constant vigilance, Reports comparing budgets and actual results should be promptly prepared and special attention focused on significant exceptions-figures that are significantly different from those expected.

8. Maximum profits
9. Cost of the system. The budget system should not cost more than its worth. Since it's not practicable to calculate exactly what a caution against adding expensive refinements unless their valued clearly justifies them

Preliminaries in the Installation of Budget System

Pre-requisites for the successful implementation of **a** budgetary control system are as follows:

(a) Creation of budget centers

A budget centers is a section for the organization of **an** undertaking. **A** budget centre may be a department or apart thereafter. Budget centre must be clearly defined because **a** separate budget has to be set for each such **a** centre with the help of the head of department concerned.

(b) Information of adequate accounting records

The account system should be so designed as to be able to record and analyze the information required. The budget procedure must also emphasis the same classification of revenues and expenses as the accounting department. Comparisons can be made if the classifications do not coincide. A chart of accounts corresponding with the budget centers should be maintained.

(c) **Preparation of an organization chart**
Proper organization is essential for a successful budget system. An organization chart should be prepared which clearly shows the plan of the organization. Each member of management should know the exact scope of his authority and responsibility and his relationship to other members

(d) Establishment of budget committee
In large organisations, the direction and execution of the budget is delegated to budget committee which reports directly to the top management. The financial controller is usually appointed to serve as the budget director. The heads of department forms the finance committee

Functions of a Budget committee
• To provide historical data to all departments regarding requirements, dates of submission of estimates etc.
• To define the general policies of the management in relation to the budget system
• To receive budget estimates from various departments for consideration and review
• To discuss difficulties with departmental heads and suggest possible revisions
• To evaluate and revise the estimates before preparing the final budget. To make recommendations or budget matters where there is conflict between departments
• To prepare a master budget after functional budgets have been approved
• To inform departmental heads of any revisions made in their budgets by the committee.

• To co-ordinate all budget work
• To analyse variances and recommend corrective action where necessary
(e) Preparation of budget manual
(I) Budget period. This refers to the time interval for which budget estimates
are made and implementation.
(g) Determination of the key factor

Budget Terms and Concepts
(a) Budget Manual
A budget manual is a form of a source document which contains information that helps one to prepare **a budget. It** contains the following among other things.
• Procedures are forms for preparing **a budget**
• Who is responsible for preparing **a** budget?
• When **a** budget should be prepared
• The length of **a** budget period (normally **a** year)

(b) Budget Period, control period and Budget Centre
(i) Budget
A budget period refers to the time interval for which budget estimates are made. Normally budgets are

prepared for a year but this does not mean that shorter or longer time intervals are not used. For example, the National Development Plans normally have a planning period of 5 years and have budget estimates to that effect which are supported by shorter budgets estimates yearly budgets)

(ii) Control Period

A budget centre is any division of an enterprise/organisation for which a budget is required for example budgets are normally prepared for departments such as finance, production, marketing, personnel etc. these departments can be considered as budget centres.

(c) A **Master Budget**

A master budget is a budget which summaries other related budgets. A master budget does not give all the details of the source budgets. For example it could just only the cash balances of the control periods for say marketing, finance and personnel departments and not all the expenses and vote allocations.

(d) **Operational Budget**

An operation budget is one which shows periodic (daily or monthly or quarterly) operations estimates in terms of input (material) cost of input and quantity of output. As such it has three sub-budgets
(i) Production units budgets (showing the estimates of sales in units)
(ii) Materials usage budget
(iii) Material purchases budget (showing the cost of input)

(e) Cash Budget

A cash budget is an estimate of cash flows (cash receipts) and cash out flows (cash expenses) for a given period. It is only concerned with cash movements due to activities undertaken. For each control period you get cash deficit or surplus which is a closing balance for one period and an opening balance for the following period. The cash shortage or surplus so that he/she can determine where to find money to make up for the shortage and where invest the surplus

details **deficits**				**Surplus**		
What to do	ST	LT		ST	LT	
Reduce creditors, increase stock				X		
and make short term investment						

Increase creditors. Reduce stock	X					
and collect short term investments						
Sell some assets, sell shares or		X				
take LT loan						
Replace old asset, reduce debt or					X	
make long term investments						

(f) Interrelated Budgets and linking Budgets
Interrelated budgets are those budgets which have cause effect relationship. For example —sale budget and a production budget have cause effect relationship. An increase in one budget leads to an increase in the other budget.

Budgeting Techniques for operations:
(a) Zero-based Budgeting (ZBB)
This looks at the Organisation's activities and priorities a fresh. The previous year's resource allocation are not automatically considered the basis of this year's resource allocations, instead, each manager tries to justify his/her entire budget requests. Zero base budgeting involves allocating an organisation's funds on the basis of a cost benefit analysis of each organisation's major activities.

(b) **Incremental Budgeting**
This is the type of budgeting where the additions and subtractions on the previous budget is done. Therefore the current budget is usually based on the previous budget.

(c) **Programme Planning and Budgeting Systems (PPBS)**
Non-profit seeking organisations such as local and central government hospitals, charities often prepare detailed conventional budgets showing the different categories of expenditure classification by classification. As consequence the budgeting process frequently just compares current expenditure to budgeted expenditure with little or no attempt to compare expenditure against performance achieved.

(d) Economic measure approach technique
(e) Output oriented budgeting (OOB) and result oriented management (ROM)

TYPES OF BUDGETS
There are only two types of budget that is Recurrent Re\ ernie an3 pen: and capital *budgets.*
(a) Recurrent revenue and Expenditure budget
This type of budget in the one that handled the day today activities in any organisation and by life span they take a short time usually one financial ear or less than one financial year examples include, cash budgets, raw material budget production budget, sales and marketing budget, revenue and expenditure budget to mention but a few.

(b) **Capital Budgets**
These are long term budgets. They usually take more than one financial year. These are usually for investment purposes and acquisition of capital asseis of the organisation.
Government Budgeting and its **Cycle:**
Budget is an important element of financial planning control and evaluation process of public sector entitles. It is a means of allocating resources to achieve the objectives of a public sector entity. It is management tool for planning and for controlling funds to make sure than the stated objectives are met.
Parliament is responsible for approving the public sector budget and for authorising the executive to incur expenditures within the olverall level of expenditure.

TYPES OF BUDGET
Over the years, Government of Uganda has moved away from incremental budgeting. The following are of the most important current reforms in Budgeting.
1) Medium term Expenditure Framework (MTEF)
This budget framework tries to address problem of macro-economic stability. A three year budgets is prepared with each financial year rolling over. The objectives of MTEF are:
• Aggregate fiscal discipline
• The available resources are allocated according to strategic priorities. Key priorities areas addressing issues of poverty eradication are identified and more resources are allocated to those areas. These areas are protected from cuts in case of any resources shortfalls. This key priority areas are:
Education — especially UPE
Health-mainly Primary Health Care
• Water and Sanitation
• Agricultural Extension
• Rural Feeder Roads
• Justice, Law and Order
• Monitoring and Accountability
Most resources or savings under HIPC debt relief are channeled to those areas.
2) Sector Wide Investment Plans

Sector wide investment plans articulate the allocation of recurrent and development resources within the identified priorities for a specific period. The programs spelt out the goals and objectives that have a direct impact on poverty eradication and identify
effective strategies and intervention by the respecti e stakeholders. Critical requirements and cost that can be accommodated over the medium tern are also identified e.g. Education Sector Investment plan

(ESIP), the Health. sector strategic plan, the Ten Year roads Sector development Programme. the Plan for the Modernization of Agriculture
(PMA).
Using Sector Wide Investment Plans, Donors are moving av% ay from project support to general budget support. This allows much greater flexibility in programming of resources toward shared objectives within sectors, as well as allowing more scope for ensuring complementarily between different sectors programs. Budget support achieves the same result as projects but it saves appraisal and preparation costs and release them for assessment and improvement of the country's overall public expenditure program.

3. **The Poverty Eradication Action Plan (PRAP)**
This was set in order to channel the additional resources received under the Highly indebted Poor Countries (IIIPC) initiative directly to poverty reducing areas DEAP has over time been expanding as donors provide additional funds for this through budget support: Under PEAD four pillars for poverty eradication have been identified namely:
Economic growth and structural transformation
• Security and good governance
a Actions to improve the incomes of the poor and
• Actions to improve the quality of life of the poor

4 **Output Oriented Budgeting (OOB) Results —Oriented Management (ROM)**
This has been introduced by government to improve efficiency and effectiveness of government expenditure. Both OOB and ROM aim to re-focus budgeting and management away from the provision of inputs, towards the required outputs and 'outcomes and the monitorable targets and performance indicators. Such a focus improves monitoring and evaluation of such programme.

5. **Fiscal Decentralization**
Transfers to Local Government take the form of Conditional unconditional and Equalization Grants. However, there are a number of problems that are undermining the Government's overall fiscal Decentralization objects. Such problems include:
The growth on the number of diversity of the transfer mechanism from central government and donors.
The lack of real power over the allocation of resources on the part of Local Governments Problems with management an financial accountability arising from the prolification different transfer systems and back accounts and
Problems faced by line ministries in dealing with quarterly reporting requirements of the conditional grants.
To address these issues, a Fiscal Decentralisation study was conducted to streamline and harmonize the present systems and process of transferring resource to local governments. It also addressed the various policy options for improving transparency and accountability of local government expenditure.

Budgeting and budgetary control in local government

1. The local government Act 1997 is **a** mended in 2000 puts emphasis on the following:
(i) Budget estimates must be laid before the current year not later than the fifteenth e day of June
(ii) Budget of a local government must be balanced
(iii) Budget must be approved by council for to be operational
(iv) The Act requires a local government budget to reflect all the revenue that local governments is supposed to receive in a year
(v) The Act also requires a budget for a financial year to be based on a three year rolling plan.
(vi) A district local government budget in particular or urban authority, budget should put/take into considerations the national priorities as will be given from time to time.
(vii) The accountability arising out of the implementation of the budget is supposed to be strictly based on the financial and accounting regulations (instructions).
2. Urban local councils are, by law autonomous as regards budgeting planning and financial management and control; their plans are required by law to be incorporated into the district plans.

DEMOCRATIC FUNCTIONS OF A BUDGET

(i) A budget contains political aspirations of councillors. The contents of the budgetshould be related to the grass root need of the people the councillors represent (demand driven). The process therefore should be a combination of technical inputs , as far as costing (in the private sectors it is pricing policy) is concerned, and other areas where technical input is necessary and the councillors views and what they consider to be priorities(the needs of the people).
(ii) The process should be politically transparent so that all areas or constituencies are treated fairly. This will in turn encourage sustainability and social trust.
(iii) The budget should be based on a three year plan approved by the district council, or urban council, which is the planning authority of a district in accordance with section 36 of the Act.
(iv) All councillors should be given an opportunity to present or to propose what is considered to be priorities in their own constituencies.
(v) Priorities should come out of the three year plan, as mentioned above, in order to be consistent.
(vi) The priorities should be debated, ranked and finally a list is agreed upon for inclusion in the budget. The list should be costed to fit into the budget frame drawn according to available resources (resource envelope).
(vii) The resources to be included in the budget should be based on the law the constitution and the Act particularly the fifth schedule of the act and the seventh schedule of the constitution give sources of revenue for local governments.
(viii) The law requires each local government to approve its budget. Approval should be done by l51 of June each financial year. Once the budget has been approved then it is binding document to all participants in its implementation. No expenditure should be incurred outride the budget.

Budget control by the councillors

Once the budget has been approved, then the implementation process starts. The implementation should take into consideration the principles of decentralisations, i.e. powers to implement the budget should be concentrated in a few people or the executive alone. It is proposed and recommended as follows:
1. The budget should be divided into sectors or a group of services
2. There should be a vote controller appointed by the accounting officer to take charge of a vote of a

particular sector or a group of departments/services (e.g. the district engineer for technical services such as roads, buildings etc).
3. Standing committees should have a role to play in the supervision of the budget together with the executive committee.
4. Work plans based on the approved budget activities should be worked out by each department/or vote controller/or co-ordinator.
5. Budget of each department based on the activities should be in line with the main budget and should be approved by the executive committee.
6. Vote controllers should manage their votes and ensure that approved work plans are followed.
7. The executive committee should ensure that all allocations to the various sectors/departments are fairly done either on monthly or quarterly basis. The allocation should be proportional to the budget.

THE MONITORING FUNCTION BY THE COUNCILLORS

The councilors should be involved in the monitoring of the budget implementation. Most activities take place in the field e.g. feeder roads etc. Every councilor should be familiar with the work plans. The following should be of interest to the councilors.
(i) Decision of the council and the period planned to complete the implementation
(ii) Funds made available for the implementation
(iii) Tools made available for the implementation
(iv) Value for money monitoring
(v) The level of participation by councilors and other members of the community
(vi) Check the official reports against what has been done on the ground
(vii) Raise issues in the council. Where work plans are not followed or where value for money is not visible. Raise issues regarding lack of transparency accountability sustainability and participation.
Budgeting and budget implementation should be taken quite seriously councilors, vote controllers and the accounting officer. They form the basis for the existence of the council and the councilors. Without a budget, councilors would have very little to do as well as the technocrats.

KEY FACTORS THAT MAKE PUBLIC BUDGETING PROCESS EFFECTIVE

1. **Transparency:** The budget documents should provide clear link between objectives and expenditures. All the participants in the budget process should be clear about their roles and responsibilities.
The budget process should be simple and well documented
The department or entity targets and resources should be allocated clearly indicated an explained.
2. Management: The management and monitoring of the budget are important and emphasis should be in results to be achieved.
3 Decentralizations: Decision making should be decentralized to line Ministries,-departments and Local
Governments.
4. **Co-ordination and Co-operation:** This links between recurrent and development budgets and the process in the financial management system should all be clearly spelt out.
***5.* Flexibility:** The process should allow responses to charge circumstances. The responses should be built into the system so that implications of any changes are sufficiently analyzed and to fit within the overall objectives and priorities.

6. Discipline
(i) There should be effective control over expenditures
(ii) Any changes to the budget should be carefully analysed and justified
(iii) Use of supplementary estimates should be limited
(iv) Penalties of breach of rules and regulations should be spelt out
7. **Accountability and Credibility**
(i) Role parliament and the Executive in Budget process should be clear
(ii) Top and senior managers should be involved in the process
(iii) Budget ceiling should be determined and communicated to all stakeholders
(iv) Budgets should be reliably close to actual outcome
8. **Comprehensive:** The budget process and documents need to include all revenue and expenditures including aid and donor funds.

Performance measurement
Budget for both recurrent and development should be based on input-output relationship.
Budget cycle with specific reference to Uganda
in Uganda, the budget cycle is as follows
a) Top Management Retreat
This budget retreat for top management of Ministry of Finance, Planning and Economic Development (MFPED) to discuss the budget outlook for the next financial year. The retreat discusses the macroeconomic outlook, expenditure issues, new policies and budget process for the coming year.
b) Updating the medium Term expenditure framework (MTEF)
After the top Management retreat, the medium term expenditure framework is updated to provide a starting point for the new budget process. The process includes extending the framework to include a new financial year and updating the first two years of the framework in light of unfolding economic conditions.
c) First **budget consultative budget framework** workshop
The workshop provides an opportunity for all stake holders to discuss the budgetary outlook for the next three years. The participants come from all line Ministries local Government Officials, members of Parliament, donors NGO's Private Sector and Civil society. The workshop also initiates the formulation of sector working groups which examiners they key objectives and priorities within a sector.
d) Sector working **group discussions**
The sector working groups need regularly to discuss the key issues within the sector.
The groups look into overall strategy and objectives of the sector, past performance key policy issue for cabinet approval and the medium term budget. The groups also formulate output and outcome targets for the medium term and to relate them to their budget allocations
e) Consultations with members of parliament
This meeting aims to inform MPs of progress in the budget process, to seek their involvement in setting of priorities and to gather more information on public perceptions of the budget process.
1) **Second consultative budget framework workshop**
This is a second workshop which provides an opportunity for the sector working groups to present their draft reports for discussion by all stakeholders. This meeting focuses specifically on Local Government issues. Key officials of the Local governments are invited for the workshop.
g) Local Government Budget framework process

The Local Government Budget framework paper involves two sets for regional workshops, which aim at providing training to Local Government officials in the areas of planning and budgeting. They also provide an opportunity for local governments to provide feedback to central government on key issues and constraints that they face, including implementation of the guidelines for conditional grants.

h) **Inter-Ministerial discussion on the sector budget framework paper**

A number of consultations take place between Ministry of Finance, Planning and Economic Development and the various sectors before finalizing the budget framework paper. These consultants, who have been held at higher and lower technical levels as well as ministerial level, have aimed to present and discuss the draft budget framework papers. And sector budget framework to build a consensus on areas to be found for the next financial year an on which activities must be postponed for future years, and to build strategies for improving efficiency and effectiveness of government expenditure.

i) Consultations and finalization of the budget framework paper

The aim of the budget framework paper is to provide cabinet with **a** clear view of the current budgetary outlook including budgetary options for the next financial year **for** their consideration. Budget framework paper includes the final version of the sector working groups' reports as well as discussion on the macro-economic outlook and cross-cutting issues.

j) **Preparation of the budget call circular**

The budget call circular presents the medium term ceiling an guidelines to line ministries to enable them to make a detail breakdown within the ceiling.

k) Discussion **of the budget framework paper with donors**

After the budget framework paper had been discussed and endorsed by cabinet, it is presented to and discussed with donors including NGOs. The aims for the donor funds, to discuss sector priorities in particular those funded by donors and to affirm the financial commitments from donors for both budget support and project funding.

1) **Submission of indicative budget allocations to parliament**

Under the budget Act, Ministry of Finance, Planning and Economic Development is to submit a Parliament estimates of Revenue and Expenditure for the next year by the l April. This should include fiscal and monetary programs and plans for economic and social development over the medium term period. Comments by Parliament are then collected and submitted officially to the president by 1st May.

m) **Review of parliamentary consideration and operation of cabinet memo on** the **Budget**

Under the Budget Act MFPEM is required to review the recommendations put forward by the Parliamentary Budget Committee ad to prepare a cabinet Memo on the Budget not late than the 7th June.

n) **Presentation of the Budget**

Once all the consultations are complete, MPPED proceeds to prepare the appropriate documents for presentation to parliament. These documents include the background to the budget and the budget speech. The background to the budget highlights the major achievement on the previous year. Setbacks register and their causes. The budget speech gives details of the budget and the set targets over the medium term period. At the same time, MFPED also presents the status of loans and grants to Uganda.

o) **Submission of Policy Statement** by **Line Ministries**

B end of June, the line ministries are required to submit their ministerial policy statements for discussion by parliament.

p) MFPED is required to reports on supplementary expenditure within four months of the period of expenditure. Similarly, MFPED is also required to provide a report to Parliament of all expenditures from Budget contingency provision, within 14 days from the date of authorisation of the advances from the provision.

BUDGET PREPARATION

What is a budget? There are many definitions of budgets hence for our purpose budget can be defined as the maximum amount available to an organization to meet its objectives as far as [possible in monetary terms (resources envelope)

In central Government and Local Government agencies, the budget is the authority to collect revenue to spend. It sets the limit on funds available to the organisation to meet their set objectives which must not be exceeded without authority and very good reasons. Central government departments can only exceed budgeted amounts with authority from parliament. Local Governments agencies must get authority from the minister responsible for local government, and their Local Councils.

THE ANNUAL REVENUE **BUDGET**

The way budgets are prepared depends on whether the emphasis is on the nature of income and expenditure, i.e. income from grants. fees. rents and rates or expenditure on salaries, child health care, refuse disposal, etc., or on the purpose of the expenditure e.g. crime prevention, mental health care, water and sanitation, refuse disposal, etc.

a) **Line-Item Budgeting (LIB)**

The approach to budgeting which lays emphasis on the nature of income and expenditure is known as line-item budgeting. At its most extreme; line item budgeting consists of a statement showing items of planned income and expenditure as shown below:

THE DIFFERENT **METHODS OF PREPARING THE BUDGET**

Incremental Budgeting can be defined as the method of budgeting in which the previous years actual expenditures or the current years revised budget is increased by a certain percentage in order to arrive at the next year’s budget.

ADVANTAGES OF INCREMENTAL BUDGETING

1. It is easy to prepare and simple, does not cost much in terms of manpower, time. stationery and money
2. Most of the activities carried out in the previous years are either mandatory or so fundamental to meeting the fundamental objectives of the organsation that an viremental approach is justified as it limits discussion to the relatively small changes that are proposed, hence time is redeemed.
3. It narrows the areas open to disputes thereby reducing on conflicts.
4. It is consistent with the principles of conservation

DISADVANTAGES OF INCREMENTAL BUDGETING

1. Because incremental budgeting is based on the previous year’s actual expenditure of the current year’s revised estimates, it does not cater for changes in policy
2. It assumes that the previous year’s allocation of resources is appropriate for the following years. This is not necessarily the case.

3. There is no need for managers, to identify and quantify their objectives and to evaluate the cost effectiveness of alternatives ways of achieving them.
4. Exceptional events that take place during the year may not be readily adjusted for because the basic information for modifying goals may not be readily available.

ZERO-BASED BUDGETING (ZBB)
Incremental budgeting has been one of the most used methods even though it has a number of weakens. Because of these weakens, it is argued that a far more desirable method is the zero based budgeting which starts from a nil balance and builds up the budget by inquiring or research what is necessary to carry out the organisations objectives.

IMSAD **VANTAGES OF ZERO BASED BUDGETING**
1. It does not assume that he previous year's or current allocation of resources are necessarily appropriate for the following year and therefore requires that all the functions of the organizations are re-valued from zero base, thus all changes policy are catered for in the new budget
2. Because an organization functions are re-valued from zero base, thus all changes in policy are catered for in the new budget.
3. If forces managers to identify and quantify their objectives and to evaluate the cost of alternative ways of achieving them.
4. Exceptional events that occurs or takes place during the year can be easily adjusted for because the basic information for modifying goals available.

DISADVANTES OF ZERO BUDGETING
1. It is complicated and expensive in terms of manpower. time, stationery and money
2. Most of the activities carried out by an organization are either mandatory or so fundamental to the achievement of the organization goals that scraping them altogether and re-evaluating them from a zero based is not justifiable particularly when considering marginal changes in the amount allocated are adequate.
3. It widens the areas of dispute thereby increasing conflicts.
4. It is not consistent with the principles of conservation.

THE NEED **FOR FLEXIBILITY** IN **BUDGETS**
Central and Local governments are empowered by budgets to collect and spend reer1ue and sets limit as to how much the central and local government authorities can spend on implementing government policies and achieve their objectives. This authority is derived direct from parliament or the local councils. Hence when there is need for any change in fine budget it should be the same authority to do so (approve the changes). This requirement makes the budget rigid instrument. The rigidity is an important requirement of budgetary control which involves ensuring that only those items and amounts of expenditure authorized in the budget is incurred. However, the need for some degree of flexibility in order to deal with changes circumstances or unexpected events have long been recognized. Budget discipline is very important for achieving the objectives.
• If amount not spend in one-year budget cannot be transferred to the subsequent year, then people will

ensure that their budgets are spend at the end of or towards the end of thy year. This particularly dangerous if used in conjunction with incremental budgeting as under spending a budget leads not only losses to the organization money in the base year but also in all future years based on the base year out tern

• In a changing environment there are exceptional events, such as increase in demand for a particular serve leading to increased costs, the rate of inflation being higher than predicted, essential equipment failing, income from fees and charges being lower than anticipated etc., and if there is no mechanism which allow for changes in the budget, then the authorities will not be able to meet their set objectives. One way of solving this problem is to meet the overspending in one are by transferring an amount of budgetary provision which is likely to be under spend from elsewhere in the budget. This is known as virement. Alternatively the budget might be varied by producing a supplementary allocation of resources, known as supplementary estimates.

I Virement

Virement is the process by which over spending in apace one area is met by under spending in another area. However, the unrestricted use of virement could lead to a breakdown in budgeting control: hence re-allocation should only be done by authorised persons or centre.

(a) An over spending in one area, for whatever reason, may be met by an under spending in another area.

(b) Individual managers or departments may be encouraged to build hidden reserves in the form of items which may be under spent in the budget.

The there is **an imposed checks on virement.**

a) In central government, virement is not permitted between one vote and another because the total expenditure on my vote may not exceed the amount authorised by Parliament. Virement is thus only allowed between subheads within the Treasur).

The Treasury might decide to refuse virement if it feels that the expenditure will:

(i) Be on a new service which Parliament should be aware

(ii) Be novel and contentious

(iii) Arise from a major change in policy

(iv) Be large in relation to be the original provision in the sub head

(v) Although relatively small be likely to involve heavy liabilities in later years.

(vi) Involve expenditure on running costs in excess of departments running costs.

b) In Local Government, virement has to be formally approved either by Council or Finance Committee or by the chief Finance Officer. The traditional attitude has been to permit virement where under spending is the to increase efficiency or cost saving measures of a department but refuse virement if the reasons for under spending are fortuitous as the benefit should then accrue to the organisation as a whole rather than to the department in which the item was included.

Involvement of the Chief finance Officer in virement has been criticised and many authority on this issue have urged that clear rules about virement as unnecessary but there are situations where clear rules about approval are needed e.g

(i) Where projects are financed by grants or contributions are financed from outside especially join finance

(ii) Where projects have a high political priority

(iii) Where a significant new projects are involved so that there are no incentives for managers to delay new plans and use the savings to finance overspending on existing projects.

(iv) Where virement leads to long-term commitments (e.g. the employment of staff) without these being matched by long-term savings
Where changes have occurred in the operating environment which necessitates large changes in the budget than that can be accommodated by virement or there has been a change in policy leading to creation of new expenditure heads or sub-heads then the authorities have to seek authorisation from Parliament in the case of Central Government and the Local Councils for Local Government.

Construction Project Management Plan

As projects continue to grow in complexity, scope and size, a broad understanding of the concepts of p management is needed to ensure an organizations success in the marketplace. Project management is a discipline, increasingly recognized by more and more organizations, and is one of the fastest growing p todays construction, service, product development, and manufacturing industries. Project management and a science; an art because it requires skills, tact and finesse to manage people, and a science becaus an in-depth knowledge of technical tools.

Construction Project Management is designed to develop the knowledge base of persons working as pr managers and project personnel within the construction industry, whether for the principal or for servic i.e. consultants or contractors. The course focuses on basic principles across the breadth of the project r body of knowledge, and covers the key concepts in managing a project from its initiation to final close course reviews project management processes in an organized framework, with an emphasis on tools t concepts to be applied directly into the participants working environment

The course is consistent with the knowledge areas of the Project Management Institutes Guide to the P Management Body of Knowledge, 2000 Edition (known as the PMBOK Guide). The course consists o which provide a comprehensive presentation of project management principles.

The nine units and their subtopics are as follows:

Unit 1. Key Concepts

- Definitions
- Descriptions
- Project Management Processes
- Project Lifecycles
- Project Success

Unit 2. Project Initiation and Planning

- Initiation Process
- Initiation Outputs
- Project Planning Processes
- The Project Plan
- Planning Process
- Work Breakdown Structures

Unit 3. Time Management

- Project Schedule Analysis
- Resource Analysis
- PERT
- Monitoring and Control

Unit 4. Cost Management

- Cost Plans
- Cost Estimating
- Budgets
- Financial Controls
- Change Controls
- Monitoring and Reporting
- Value Management

Unit 5. Earned Value Anlaysis

- Benefits
- Definitions
- Application

Unit 6. Quality Management

- Definitions
- Quality Concepts
- Quality Management Concepts
- Costs of Quality
- Quality Processes
- Quality Systems
- ISO 9000
- Project Quality Management
- Inspection and Test Plans

Unit 7. Risk Management

- Definitions of Risk
- Risk Management Models
- Risk Management Planning
- Assessment Criteria
- Risk Identification
- Risk Analysis
- Risk Evaluation
- Risk Response Strategies
- Monitoring and Control

- Communications

Unit 8. Project Team Management

- Management versus Leadership
- Organisation Structures
- Individual Styles: thinking, learning and conflict resolution
- Teams and Team Leadership
- Effective Project Teams
- Motivation, Empowerment and Culture
- Project Manager Attributes and Functions

Unit 9. Project Procurement

- The commonwealth legal system
- Elements of contracts
- Vitiating factors [things which destroy contracts]
- Tendering
- Termination of contracts
- Time for completion and extensions of time
- Remedies for breach of contract
- Procurement strategies
- Tendering processes
- Structure of tender & contract documents
- Responsibilities of principal, contractor, supervisor
- Typical administrative functions
- Contract disputes - causes, avoidance, resolution

Unit 10. Close-Out

- Objectives of Project Close-Out
- Elements of Project Close-Out
- Close-out Guidelines

Learning Outcomes:

Upon successful completion of this course, students will be able to:

- Define the impact of programme management issues on project outcomes
- Define the framework of the project management discipline
- Discuss the importance of defining Project Success Criteria and Critical Success Factors before developing the project plan
- Prepare a project charter
- Develop project Work Breakdown Structures
- Develop project plans
- Prepare a project network diagram

- Analyse the network using the precedence method
- Identify the critical path
- Recognise the importance of resource analysis
- Apply a simple PERT analysis to assist definition of schedule contingency
- Adopt appropriate schedule formats to assist progress monitoring
- Recognise the different applications of top down and bottom up cost planning
- Understand the different estimating methods and when to use them
- Communicate the uncertainty associated with any specific estimate
- Manage projects using the concept of Forecast Final Cost
- Apply Earned Value to measure and predict project outcomes
- Implement appropriate Value Management strategies
- Implement an effective Change Control process
- Understand the application of ISO 9000 [and similar standards]
- Implement Inspection and Test Plans as a project QA tool
- Be able to define a risk management plan
- Identify, evaluate, and treat project risks
- Identify advantages and disadvantages of organizational structures
- Define personal and team characteristics that impact on project performance
- Implement a strategy to develop team culture and enhance team performance
- Effectively demonstrate project leadership
- Analyse contractual issues relating to construction contracts
- Select appropriate procurement strategies
- Adopt effective forms of tender and contract documentation
- Define responsibilities of the parties to a construction contract
- Understand the issues that commonly give rise to construction contract disputes
- Close a project and capture lessons learned

PMBOK® Areas:

- Project Integration Management
- Project Cost Management
- Project Communications Management
- Project Scope Management
- Project Quality Management
- Project Risk Management
- Project Time Management
- Project Human Resources Management
- Project Procurement Management

Instructional Methods

A combination of instructional methods is used. The course uses lecture and facilitated discussion techniques together with individual and group exercises. The latter are designed to illustrate the application of specific tool achieve the objective of the project management process.

Critical Path Analysis
and PERT Charts

Planning and Scheduling Complex Projects
Related variants: AOA or Activity-on-Arc or Activity-on-Arrow Diagrams

Critical Path Analysis and PERT are powerful tools that help you to schedule and manage complex projects. They were developed in the 1950s to control large defense projects, and have been used routinely since then.

As with Gantt Charts, Critical Path Analysis (CPA) or the Critical Path Method (CPM) helps you to plan all tasks that must be completed as part of a project. They act as the basis both for preparation of a schedule, and of resource planning. During management of a project, they allow you to monitor achievement of project goals. They help you to see where remedial action needs to be taken to get a project back on course.

Within a project it is likely that you will display your final project plan as a Gantt Chart (using Microsoft Project or other software for projects of medium complexity or an excel spreadsheet for projects of low complexity).The benefit of using CPA within the planning process is to help you develop and test your plan to ensure that it is robust. Critical Path Analysis formally identifies tasks which must be completed on time for the whole project to be completed on time. It also identifies which tasks can be delayed if resource needs to be reallocated to catch up on missed or overrunning tasks. The disadvantage of CPA, if you use it as the technique by which your project plans are communicated and managed against, is that the relation of tasks to time is not as immediately obvious as with Gantt Charts. This can make them more difficult to understand.

A further benefit of Critical Path Analysis is that it helps you to identify the minimum length of time needed to complete a project. Where you need to run an accelerated project, it helps you to identify which project steps you should accelerate to complete the project within the available time.

How to Use the Tool:

As with Gantt Charts, the essential concept behind Critical Path Analysis is that you cannot start some activities until others are finished. These activities need to be completed in a sequence, with each stage being more-or-less completed before the next stage can begin. These are 'sequential' activities.

Other activities are not dependent on completion of any other tasks. You can do these at any time before or after a particular stage is reached. These are non-dependent or 'parallel' tasks.

Drawing a Critical Path Analysis Chart

Use the following steps to draw a CPA Chart:

Step 1. List all activities in the plan
For each activity, show the earliest start date, estimated length of time it will take, and whether it is parallel or sequential. If tasks are sequential, show which stage they depend on.

For the project example used here, you will end up with the same task list as explained in the article on Gantt Charts (we will use the same example as with Gantt Charts to compare the two techniques). The chart is repeated in Figure 1 below:

Figure 1. Task List: Planning a custom-written computer project

Task	Earliest start	Length	Type	Dependent on...
A. High level analysis	Week 0	1 week	Sequential	
B. Selection of hardware platform	Week 1	1 day	Sequential	A
C. Installation and commissioning of hardware	Week 1.2	2 weeks	Parallel	B
D. Detailed analysis of core modules	Week 1	2 weeks	Sequential	A
E. Detailed analysis of supporting modules	Week 3	2 weeks	Sequential	D
F. Programming of core modules	Week 3	2 weeks	Sequential	D
G. Programming of supporting modules	Week 5	3 weeks	Sequential	E
H. Quality assurance of core modules	Week 5	1 week	Sequential	F
I. Quality assurance of supporting modules	Week 8	1 week	Sequential	G
J.Core module training	Week 6	1 day	Parallel	C,H
K. Development and QA of accounting reporting	Week 5	1 week	Parallel	E
L. Development and QA of management reporting	Week 5	1 week	Parallel	E
M. Development of Management Information System	Week 6	1 week	Sequential	L
N. Detailed training	Week 9	1 week	Sequential	I, J, K, M

Step 2. Plot the activities as a circle and arrow diagram
Critical Path Analyses are presented using circle and arrow diagrams.

In these, circles show events within the project, such as the start and finish of tasks. The number shown in the left hand half of the circle allows you to identify each one easily. Circles are sometimes known as nodes.

An arrow running between two event circles shows the activity needed to complete that task. A description of the task is written underneath the arrow. The length of the task is shown above it. By convention, all arrows run left to right. Arrows are also sometimes called arcs.

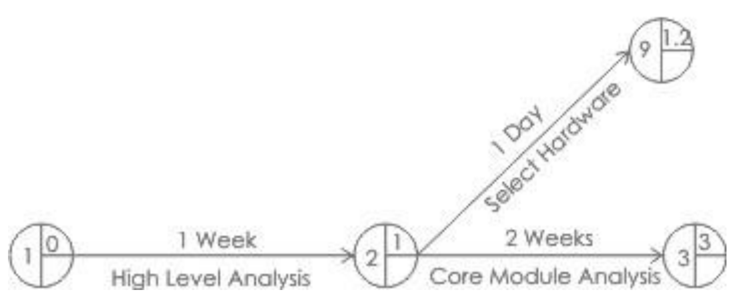
An example of a very simple diagram is shown below:

Figure 2: Simple Circle and Arrow Diagram

This shows the start event (circle 1), and the completion of the 'High Level Analysis' task (circle 2). The arrow between them shows the activity of carrying out the High Level Analysis. This activity should take 1 week.

Where one activity cannot start until another has been completed, we start the arrow for the dependent activity at the completion event circle of the previous activity. An example of this is shown below:

Figure 3: Circle and Arrow Diagram showing two activities that cannot be started until the first activity has been completed.



Here the activities of 'Select Hardware' and 'Core Module Analysis' cannot be started until 'High Level Analysis' has been completed. This diagram also brings out a number of other important points:

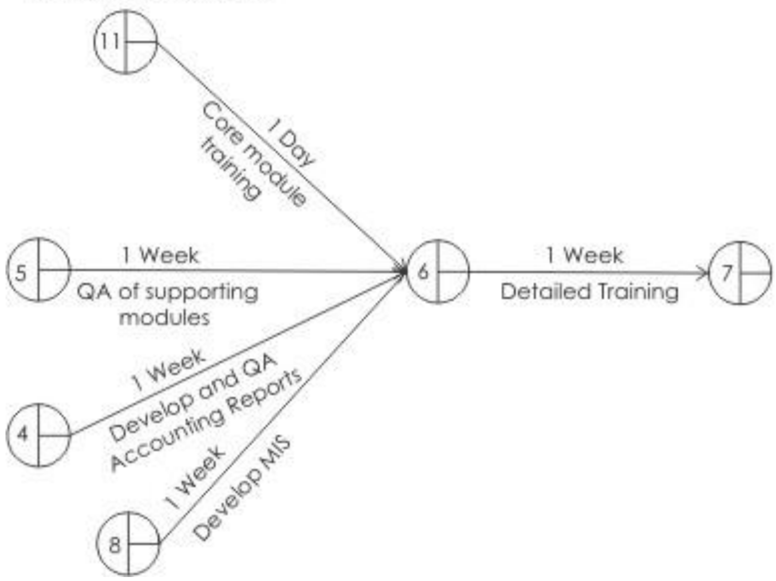
- Within Critical Path Analysis, we refer to activities by the numbers in the circles at each end. For example, the task 'Core Module Analysis' would be called activity 2 to 3. 'Select Hardware' would be activity 2 to 9.
- Activities are not drawn to scale. In the diagram above, activities are 1 week long, 2

weeks long, and 1 day long. Arrows in this case are all the same length.

- In the example above, you can see a second number in the top, right hand quadrant of each circle. This shows the **earliest start time** for the following activity. It is conventional to start at 0. Here units are whole weeks.

A different case is shown below:

Figure 4: Circle and Arrow Diagram showing an activity (6 to 7) that cannot start until other activities (11 to 6, 5 to 6, 4 to 6, and 8 to 6) have been completed.



Here activity 6 to 7 cannot start until the other four activities (11 to 6, 5 to 6, 4 to 6, and 8 to 6) have been completed.

Click the link below for the full circle and arrow diagram for the computer project we are using as an example.

Full Critical Path Diagram

This shows all the activities that will take place as part of the project. Notice that each event circle also has a figure in the bottom, right hand quadrant. This shows the latest finish time that's permissible for the preceeding activity if the project is to be completed in the minimum time possible. You can calculate this by starting at the last event and working backwards.The latest finish time of the preceeding event and the earliest start time of the following even will be the same for ciircles on the critical path.

You can see that event M can start any time between weeks 6 and 8. The timing of this event is not critical. Events 1 to 2, 2 to 3, 3 to 4, 4 to 5, 5 to 6 and 6 to 7 must be started and completed on time if the project is to be completed in 10 weeks. This is the 'critical path' – these activities must be very closely managed to ensure that activities are completed on time. If jobs on the critical path slip, immediate action should be taken to get the project back on schedule. Otherwise completion of the whole project will slip.

'Crash Action'

You may find that you need to complete a project earlier than your Critical Path Analysis says is possible. In this case you need to re-plan your project.

You have a number of options and would need to assess the impact of each on the project's cost, quality and time required to complete it. For example, you could increase resource available for each project activity to bring down time spent on each but the impact of some of this would be insignificant and a more efficient way of doing this would be to look only at activities on the critical path.

As an example, it may be necessary to complete the computer project in Figure 5 in 8 weeks rather than 10 weeks. In this case you could look at using two analysts in activities 2 to 3 and 3 to 4. This would shorten the project by two weeks, but may raise the project cost – doubling resources at any stage may only improve productivity by, say, 50% as additional time may need to be spent getting the team members up to speed on what is required, coordinating tasks split between them, integrating their contributions etc.

In some situations, shortening the original critical path of a project can lead to a different series of activities becoming the critical path. For example, if activity 4 to 5 were reduced to 1 week, activities 4 to 8 and 8 to 6 would come onto the critical path.

As with Gantt Charts, in practice project managers use software tools like Microsoft Project to create CPA Charts. Not only do these ease make them easier to draw, they also make modification of plans easier and provide facilities for monitoring progress against plans.

PERT (Program Evaluation and Review Technique)

PERT is a variation on Critical Path Analysis that takes a slightly more skeptical view of time estimates made for each project stage. To use it, estimate the shortest possible time each activity will take, the most likely length of time, and the longest time that might be taken if the activity takes longer than expected.

Use the formula below to calculate the time to use for each project stage:

$$\frac{\text{shortest time} + 4 \times \text{likely time} + \text{longest time}}{6}$$

This helps to bias time estimates away from the unrealistically short time-scales normally assumed.

Key points:

Critical Path Analysis is an effective and powerful method of assessing:

- What tasks must be carried out.
- Where parallel activity can be performed.
- The shortest time in which you can complete a project.
- Resources needed to execute a project.
- The sequence of activities, scheduling and timings involved.
- Task priorities.
- The most efficient way of shortening time on urgent projects.

An effective Critical Path Analysis can make the difference between success and failure on complex projects. It can be very useful for assessing the importance of problems faced during the implementation of the plan.

PERT is a variant of Critical Path Analysis that takes a more skeptical view of the time needed to complete each project stage.

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