



STANDARD OPERATING PROCEDURE

CHIEF DIRECTORATE: STRATEGY & SYSTEMS

DIRECTORATE: MONITORING & EVALUATION SERVICES

SOP Title

HALF -YEAR (PERFORMANCE OVERSIGHT) REPORTING STANDARD OPERATING PROCEDURE

SOP Number:

SOP/ M&E 03/2025

PURPOSE:

The purpose of the SOP is to detail the regularly recurring/ repetitive work processes that are conducted or followed within the monitoring and evaluation processes and promotes consistent work performance and predictable results.

STANDARD OPERATING PROCEDURE: HALF- YEAR PERFORMANCE REPORTING

SCOPE:

This SOP is applicable to every official working in the M&E directorate. The directives of the SOP must be adhered to by all SMS members.

RESPONSIBILITY:

- M&E practitioners responsible for data collection, verification and consolidation.
- Deputy Director responsible for monitoring and reporting.
- Director M&E responsible for review of all reports and recommendation of deviation memoranda.
- SMS responsible for performance reporting, narrative reports and POE
- Chief Directors responsible for submission of quality checked performance reports, narrative reports and POE by the due dates

STANDARD OPERATING PROCEDURE: HALF- YEAR PERFORMANCE REPORTING

PROCEDURE:

No.	Task Name	Task Procedure	Responsibility	Time Frame	Supporting Documentation	Service Standard
1.	Half Year Performance Reporting	Develop the half year reporting template	Deputy Director M&E	Half Yearly	Annual Performance Plan, OP Plan and TIDs	
2.		Load the first two quarters as per the APP onto the template	Deputy Director M&E	Half Yearly	Annual Performance Plan, OP Plan and TIDs	
3.		Load the actual performance per indicator onto the template	Deputy Director M&E	Half Yearly	Narrative Reports; QPR	
4.		Load the reasons for deviations in the Report	Deputy Director M&E	Half Yearly	Deviation Memos; Narrative Reports; QPR	
5.		Review the performance report	Director M&E	Half Yearly	Narrative Reports; QPR	
6.		Prepare a narrative input in the half year report on achievements	Director M&E	Half Yearly	Narrative Reports; QPR	
7.		Quality check the performance information	Quality assurance Team	Half Yearly	Narrative Reports; QPR	
8.		Prepare the financial information	CFO	Half Yearly	Financial Statements	
9.		Include the financial information in the half year report	Director M&E	Half Yearly	Narrative Reports; QPR	
10.		Present the HOD with the Draft half-year report for signoff and approval to print.	Director M&E	Half Yearly	Narrative Reports; QPR	

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No.	Task Name	Task Procedure	Responsibility	Time Frame	Supporting Documentation	Service Standard
11.		Draft the submission letter for HOD sign off and submission to the Legislature	Deputy Director M&E	Half Yearly	Narrative Reports; QPR	
12.		Deliver the half year report to the Legislature before end of October	Director M&E; Communication Management	October Yearly	Submission Letters	

REVIEW AND REVISION:

The SOP will be reviewed as and when there are changes to the Government systems and related legislation

CONTINGENCIES

No.	Task Name	Task Procedure	Responsibility	Time Frame	Supporting Documentation
1.	Non submission of the Narrative Reports, HR Tables and Financial Information required in the Half Year Report	Develop a list of non-submissions	Director M&E	Quarterly	Draft Half Year Report; submission registers per Programme
2.		Develop a report to the DDGs; Chief Directors, the CFO and HOD for action	Director M&E	Quarterly	Validation reports; submission registers per Programme and DSC

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- REFERENCES:

TYPE OF REFERENCE	REFERENCE
Policy	<ul style="list-style-type: none"> • M&E Policy • Quality Assurance Policy
Frameworks	<ul style="list-style-type: none"> • Revised Framework on Development of SP and APPs • Guidelines on the Development of SP and APPs • Government Wide Monitoring and Evaluation Framework • National Planning Evaluation framework
Act / Legislation	<ul style="list-style-type: none"> • PFMA • Public Audit Act • Public Service regulations • Treasury Regulations

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DEFINITIONS

Acronyms:

AGSA – Auditor General of South Africa

DPME-Department of Planning, Monitoring and Evaluations

PT- Provincial Treasury

APP – Annual performance Plan

SP- Strategic Plan

CFO – Chief Financial Officer

DDG – Deputy Director General

GWME – Government Wide Monitoring and Evaluation Framework

OP Plan – Operational Plan

SOP – Standard Operating Procedure

M&E – Monitoring and Evaluation

MFMA – Public Finance Management Act

NR – Narrative Report

QPR – Quarterly Performance Report

POE – Portfolio of Evidence

TIDs – Technical Indicator Description

SMS – Senior management service

HOD – Head of Department

OMEC- Office of the Member of Executive Council

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DSC- District Support Centre

ATTACHMENTS:

- M&E Policy
- Quality Assurance policy
- National Evaluation Framework

HISTORY OF CHANGE: <State in sufficient detail what changes were made what parts of the SOP were effected & when the changes become effective>

CERTIFICATION OF DUE PROCESS:

Prepared by: Mrhali Z
Name


Signature

20/ 04/ 2026
Date

Certified by: MADOLO S.S
Name


Signature

20/04/2026
Date

