FRAMEWORK FOR STRATEGIC APPLICATION OF TSA AND GFMIS IN EGYPT

Leadership in Public Financial Management II (LPFM II)

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Leaderships in Public Financial Management II

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ACRONYMS

COR	Contracting Officer's Representative
IDIQ	Indefinite Delivery Indefinite Quantity Contract
LPFM II	Leadership in Public Financial Management II
PFM	Public financial management
USAID	United States Agency for International Development
USAID/E3	United States Agency for International Development Bureau for Economic Growth, Education and Environment
USG	United States Government

1. EXECUTIVE SUMMARY

By implementing the Treasury Single Account (**TSA**) and Government Financial Management Information System (**GFMIS**), the Government of Egypt is taking important steps to modernize and improve its public financial management (**PFM**). The two systems will allow for smoother and more efficient financial operations, and provide policymakers with tools and data they can use to inform decision making. In order to take full advantage of these capabilities, GOE officials will require training in their strategic use.

This document will function as a guide for developing, implementing, and institutionalizing the strategic application of TSA and GFMIS. After providing relevant background on these systems and their implementation in Egypt, the document will outline GOE's needs and desired outcomes for strategic training, to ensure that all staff are able to maximise use of the features of the new systems to support their work.

A strategy and approach for implementing this training is also provided, which includes plans for a pilot training, evaluations, and program for long-term sustainability, to support the MOF carrying out an ongoing program of evaluation and targeted training for staff. This strategy focuses around three key aims

1. determining the requirements of the Ministry of Finance for reporting, oversight etc;
2. determining the current skills of staff and the capabilities of the new systems to provide this; and
3. helping determine an initial and ongoing training program to support bridging a gap between these two.

Finally, the document includes detailed initial training programs identifying the courses appropriate for different categories of GOE officials (Managers/Senior Executives vs. Finance Group vs. others), as well as course contents.

On an ongoing basis this document will be adapted as training needs change or further needs are identified, including the addition of:

- a checklist of documents and reports which can be generated if certain features of the TSA/GFMIS are in place;
- some standard reporting formats which the government could adopt for regular management reports; and
- details on additional features or dashboards which could be utilised with the new systems to provide detailed reporting and oversight capability.

2. BACKGROUND

The Government of Egypt (**GOE**) has established a TSA for managing all Government revenue and overseeing all expenditure.

The TSA is a unified structure of government bank accounts enabling consolidation and optimum utilization of government cash resources that:

- ensures comprehensive control over the government cash balances;
- facilitates government cash management, and economic liquidity management;
- facilitates reconciliation between the banking and public accounting data, hence better controlling budget execution and allowing more reliable reporting more quickly; and
- introduces the same monitoring for all agencies.

STRUCTURE IN EGYPT

The MOF has established a centralised system, whereby, all receipts and expenditures go through the TSA in the central bank and the MOF provides payment services for spending agencies and has sole authority on the TSA. Further details on the structure including the degree of use of sub-accounts; the degree of use of the commercial banking systems (and reporting from the commercial banking system) and the degree to which revenue payments are integrated into the TSA need to be discussed with the Ministry of Finance (**MOF**).

Coupled with the TSA the MOF is implementing the Government Financial Management Information System (**GFMIS**) and it is expected all agencies will be utilising GFMIS for expenditure management by March 2018. GFMIS, which captures all transactions, sits above the TSA and is the conduit for providing information in relation to cash on hand, revenue collection and expenditure. Further details are needed on the modules included in the Government's GFMIS, their utilisation, who enters and controls data on the GFMIS and the degree of centralisation of payments.

The implementation of GFMIS includes the basic training for financial staff to utilise GFMIS for day to day budget execution processes which includes making payments through the TSA.

With the implementation of GFMIS extensive computerised financial information will become available, it will be more easily accessible and there will need to be a strategy for government decision makers to understand the availability of the information and how to utilise the information for improving decision making. The finance team has a key role to fully understand data contained in GFMIS, be able to add value to create information based on the data and present the information in a way that it can be used for informed decision making.

3. GOVERNMENT NEEDS

The GOE has completed the ground work for the implementation of the TSA, which is now operational, and for the implementation of GFMIS, which includes basic training for financial units, and expected to be completed by March 2018. GOE requires GFMIS strategic training for all levels of Government from Ministers down to ensure optimal use of the new structures. This includes supporting stakeholders to:

- understand the purpose of the implementation of TSA and its interactions with GFMIS (how it supports and strengthens Public Financial Management (PFM) and eGovernment);
- understand the benefits for the Government entities, Egypt and its constituents (how TSA/IFMIS can enhance internal controls, improve cash and liquidity management, minimise financial risk and enhance transparency, and improve management of Government's interactions with the rest of the economy);
- be able to value add to the information and enable informed decision making based on the TSA/GFMIS data, which can now be gathered more quickly and accurately, because of the TSA and GFMIS; and
- enable Ministers to make informed decisions based on robust information and informed technical advice.

3.1 KEY COMPETENCIES REQUIRED FOR PUBLIC FINANCIAL MANAGEMENT

This framework commits to ensuring the Government has the highest levels of financial management and professional competency. These competencies are defined as:

3.1.1 Professional and Technical Expertise

Staff need to have appropriate technical expertise and understand, including, but not limited to: understanding of systems and the structure of systems, understanding of the reporting needs and the reporting abilities of the systems, capabilities in analysis and a knowledge of how to use the system for analysis, and understand of international standards and requirements for reporting.

3.1.2 Professionalism and Ethical Behaviour

Staff need to understand how to conduct work with appropriate concern for detail, and accuracy and well as conduct work ethically and efficiently; as well as understanding how the system can improve this.

3.1.3 Management, Organisation and Leadership

Senior executives must understand the information required for decision making, and how the systems provide additional capability in this regard. Senior executives must understand the capacity of staff and systems to provide information and assess the usefulness of this information.

3.1.4 Assessment, Education and Mentoring

Senior executives and staff must understand their limitations and where new educational opportunities are available and senior executives must understand how to evaluate staff competencies and ensure staff training programs. Senior executives must also understand the mechanisms of training which most support learning.

3.1.5 Collaboration and Sharing

Staff must be able to work across teams, understanding how to share information, understand the information available with other teams and how to present information requests. Senior managers must understand how to promote collaboration through systems, and how collaboration can improve their access to information for decision making.

At the finance section level, this competency requires a team approach to the workplace.[1]

[1] Sydney Local Health District, Education and Training Strategic Plan 2013-2018, 2013

4. STRATEGY FOR IMPLEMENTING TRAINING

To meet the needs of the Government and to support the development of key competencies the training must achieve the following:

4.1 STRATEGIC PRIORITIES, ACTIONS, OUTCOMES

Strategic Priorities	Actions	Outcomes
Determining and Improving Workforce Skills and Competencies	Develop understanding of Senior Executive and Public Financial Management personnel to determine a view of the skills base and training already undertaken	Identification of appropriate training and mentoring program for the target group
	Establish a multidisciplinary working group to determine and maintain curricula, and training approach	Education and training curriculum
	Adopt a balanced approach between educational programs, strategies and mentoring targeted at junior staff and those targeted at experienced and senior staff	Comprehensive annual education and training calendar Teaching and mentoring education programs
	Establish a regular forum for dialogue about educational needs with key stakeholders	Establishment of a community of practice that fosters collaboration and sharing of expertise and resources
	Integrate learning with day-to-day work	Transfer by an individual of their learning from a program to others in the workplace. People share their learning by disseminating material from seminars or coaching others in the workplace. Opportunities made available such as special projects, acting positions, secondments, direct reporting to manager for particular tasks
Matching public financial management requirements with the staff skills and competencies	Ensure that education initiatives support the transition from technical roles to supervisory and management roles	Managers demonstrate core management competencies
	Evaluate and build on the Management and Leadership program	Develop a critical mass of managers with skills and experience

Promoting excellence in the training	Implement an evaluation strategy that provides a robust and consistent approach to evaluating the impact of education and training delivered	Standardised evaluation framework developed
	Ensure programs are annually reviewed to determine their organizational impact	All courses are reviewed and modified to better meet requirements
Promoting organisational and partnership support for training	Strategically develop additional partnerships with local and international education providers	Collaboration on training opportunities
	Ensure training and development is accessible to districts	Access to training extended beyond Cairo

Source: Adapted from Sydney Local Health District, Education and Training Strategic Plan 2013-2018, 2013

4.1.1 Approach

Information Gathering

Skills assessment will be conducted through a multi-stage process:

1. Initial courses will be developed, refer section 4, to begin a pilot process whilst at the same time an information gathering exercise will be undertaken to determining a holistic view of the skills base and training already undertaken of the PFM community. This will be done through a sampling process including:
   a. Focus Group Discussion
   b. Surveys
   c. Interviews
2. Establish an inventory of the PFM workforce and review job descriptions to understand the skills requirement and competencies for each role to further inform the course requirements
3. Through the sampling process determine staff who have abilities in the areas of coaching and mentoring or staff who are willing to take on the role of a coach or mentor and willingness to undertake the necessary training.
4. Document how the TSA is structured and operates, the modules implemented in GFMIS, budget execution processes utilized through GFMIS and available GFMIS reports and the gaps based on GOE reporting requirements

Based on the findings the strategy and course offerings will be further modified.

Pilot Exercise: Identifying training, and undertaking relevant courses

The pilot will be undertaken in the MOF and the initial focus will be on providing awareness training for TSA and GFMIS (see Courses, Section 4) for Senior Executive and non-financial managers. This exercise will be intended to set out a mechanism for how trainings can be targeted and undertaken within MOF; to ensure different staff have relevant skills to utilise new systems.

- The first stage of the information gathering exercise will aim to capture the MOF financial unit staff and non-financial managers' skills, training already undertaken and understanding of PFM processes. This will be utilised to determine a useful course structure and set of trainings for the pilot phase.
- Secondly, we will work to develop, design and implement programmes of practical training in key areas based on the training needs analysis.
- Thirdly, we will identify the extent to which various learning interventions, could contribute to the implementation of the framework and the resources that will be required to put them in place.
- And lastly, recommend a course of action for future training and ongoing evaluation and training by the Ministry of Finance.

Pilot Evaluation

For each course immediately at the end of each course trainees will be requested to complete a questionnaire to determine:

- *Relevance*
  - the extent the training met the trainee's expectations
  - the relevance of the training to their day to day work
- *Appropriateness*
  - areas the trainees felt were covered well, areas that need modification and areas trainees felt were not covered
- *Reaction*
  - immediate reaction to aspects of the intervention such as topic, speakers, format, schedule

One to two weeks after each course selected trainees will be interviewed to determine:

- their current use of the concepts taught during the training
- whether they use the concepts for decision making
- the key strengths of the training and its limitations, particularly regarding any perceived weak points in the training that do not help or directly relate to a trainee's day to day work or decision making
- future developments that would be helpful in addressing their future needs
- determine willingness to become coaches/mentors

Training program

Training and Group Exercises – Classroom training including case studies and GOE scenarios. These presentations will be augmented by small group exercises and discussions to contextualize the issues being examined.

After Training Reviews – establishing reviews of training undertaking through one on one interviews, establishing focus groups 3 to 4 weeks after training to gain insights into how staff have applied the training and what areas of knowledge they feel the training did not cover.

Knowledge sharing and transfer:

- Peer improvement networks: Transfer by an individual of their learning from a program to others in the workplace. People share their learning by disseminating material from seminars or coaching others in the workplace
- Communities of practice: allow people to exchange information and experience, and contribute to a collective knowledge base.
- Opportunities made available such as special projects, acting positions, secondments, direct reporting to manager for particular tasks

Long-term Sustainability
In order to ensure this training program becomes part of the MOF regular functions we will need to:

- Establish skills requirement and competencies for each role and categorize all course according to the competencies which will inform the training requirements for staff to move to different roles
- Map out the appropriate sequencing of change interventions to ensure the long-term sustainability of activities
- Draft recommendations based on lessons learned from the pilot, to continue the process of institutionalizing the various learning and training initiatives by integrating it with the HR and other policies and practices across government that are known to mediate the effectiveness of the people-performance link.
- Produce a readiness assessment report setting out the resources that will be required, and any elements of the system which still need to be in place.
- Develop a coaching and mentoring program (an initial training for how to undertake this will be conducted – see section 5.3).
- Develop a standardised evaluation framework for the outcomes of the framework to determine:
    - outcomes achieved at individual, group and organisational levels.
        - value for money
        - tangible and intangible results leading to better decision making outcomes
        - How to improve
    - the level of contribution of the program to the achievement of outcomes as perceived by:
        - senior management
        - line managers
        - staff

5. COURSES

These courses[2] are broken down by target groups as different functional teams within the Ministry will need to get different things out of the new structure. This curriculum was compiled from training materials produced by the public-sector training program in Australia and is adapted for Egypt.

5.1 BUSINESS MANAGERS AND SENIOR EXECUTIVES

The courses set out below are intended to support senior staff, directors, etc. in understanding the additional information the TSA and GFMIS now allows, and how this information can be utilised for decision making (both within and outside of the Ministry of Finance).

5.1.1 Understanding the Treasury Single Account

This unit develops an understanding of the TSA including:

- Concepts and features of the treasury single account (**TSA**).
- The main objectives and benefits of TSA, in terms of both information and process improvements.
- Role of the Central Bank in the operation of TSA.
- TSA accounts process flow and structure.

Element	Study Areas
1. Concepts and features of treasury single account (TSA).	1.1 Describe the TSA model utilised by GOE 1.2 Describe the structure of the TSA as implemented by GOE
2. The main objectives and benefits of TSA.	2.1 Describe the benefits of the TSA to the GOE and its constituents
3. Role of the Central Bank in the operation of TSA.	3.1 Describe the role of the Central Bank in relation to managing the TSA
4. TSA accounts process flow and structure.	4.1 Explain the process to make payments through the TSA.

[2] Adapted from Commonwealth of Australia, PSP Public Sector Training Package Release 1.0, 2016

	4.2 Understand how TSA provides information on cash on hand, revenue received and expenditure management 4.3Describe the structure of the TSA as implemented by GOE
5. Cash flow forecasting	5.1 Make accurate projections of short-term cash inflows and outflows based on flows through the TSA 5.2 Ability to monitor actual changes in the aggregate balance of the TSA account 5.3 Forecast daily cash flows across the TSA for at least three months ahead on a rolling basis

5.1.2 Understanding GFMIS

This unit develops an understanding of GFMIS including:

- Concepts and features of GFMIS
- The main objectives and benefits of GFMIS
- GFMIS budget preparation and execution process flow and structure.

Element	Study Areas
1. Concepts and features of GFMIS	1.1 Understand and describe the features of GFMIS, including the modules and their use in the GOE GFMIS 1.2 Set out the evolution from the current system to the adoption of GFMIS and why it was undertaken
2. The main objectives and benefits of GFMIS	2.1 Describe the benefits of GFMIS to the GOE and its constituents
3. GFMIS budget preparation and execution process flow and structure	3.1 Explain the process to receive revenue and make payments through GFMIS, and how this links to the GOE payments process 3.2 Understand how GFMIS provides information on appropriations, manages commitments, revenue received and expenditure

5.1.3 Use Financial and Economic Information for Strategic Decision Making

This unit describes the skills and knowledge required to analyse financial and economic information to achieve the objectives of an organisation. It covers the use and interpretation of financial information to support decision making.

It applies to senior management, including operational heads of department, and those with policy oversight, consolidate knowledge, generate ideas and provide solutions to complex problems.

Element	Study Areas
1. Use financial information to support decision making	1.1 Monitor actual expenditure including commitments against appropriations and be able to determine if additional funding will be required to complete activities, if a virement request will be required or if particular activities will not be undertaken 1.2 Monitor actual expenditure including commitments against appropriations to determine annual outturn 1.3 Use GFMIS and TSA data to ensure sound financial performance (timely spending, not lapsing resources, not spending above allotments) 1.4 Review Variance Reports (revenue and expenditure) and determine corrective action decisions if required

5.1.4 Lead and Influence Change Using Financial Reports

This unit describes the skills and knowledge required to apply more information to decision making process, and utilise that information to determine priorities.

The unit includes influencing organisational culture, anticipating change and providing strategic leadership in change management.

Element	Study Areas
1. Influence organisational culture	1.2 Embed the acceptance of GFMIS financial reports in managerial practice and decision making
2. Provide strategic leadership	2.1 Use GFMIS to determine actual costs of programs and activities 2.2 Utilise GFMIS information when developing/reviewing agency priorities 2.3 Determine the costs of programs utilizing GFMIS expenditure reports and undertake analysis against outputs KPIs to determine departmental performance with respect to value for money 2.4 Use performance and program costs information to provide information to move resources from areas of lower to higher priorities, to eliminate poor performing programs and to have the evidence to seek additional resources for higher priority programs that would perform better with more resources

5.1.5 Search GFMIS

This unit describes the skills and knowledge required to search and analyse information from GFMIS and evaluate these against specific criteria. It supports decision makers by building technical skills in accessing specific information as needed from the database; information made more timely and accurate, and accessible, by the introduction of the TSA and GFMIS.

Element	Study Areas
1. Identify and access GFMIS	1.1 Select appropriate GFMIS information to meet specific needs and understand information limitations in GFMIS and what modules provide what information. 1.2 Use required procedures to access GFMIS (understanding basic database structure, and front-ends to GFMIS)
2. Construct searches	2.1 How information is structure in the GFMIS (overview of what are voucher numbers, how the COAs structure works for recording etc) 2.2 Conduct GFMIS searches to meet information needs (how to construct searches, and what information to restrict by) 2.3 Use and manipulate features of GFMIS to construct effective searches and access required information
3. Present information	3.1 Evaluate search results to identify information that meets needs 3.2 Conduct further searches and evaluations and download as required 3.3 Present or organise information in formats appropriate to needs

5.2 FINANCE GROUP

This section outlines skills useful to those in financial sections, in payments processing, budgeting, accounting etc, to fully make use of the TSA/GFMIS.

5.2.1 Manage Public Sector Financial Reporting

This unit describes the skills required to provide input into public sector budgeting, financial forecasting and reporting requirements, in line with local requirements, laws and reporting expectations. It includes contributing to financial bids and estimates, the allocation of funds, managing and monitoring budgets and the reporting on financial activity.

Element	Study Areas
1. Manage budgets	1.1 Obtain and provide financial reports from the systems. 1.2 Monitor expenses through analysis of financial information and provide analysis to managers.
2. Report on financial activities	2.1 Identify requirements for financial management and reporting in accordance with the public sector financial management framework

	(laws and standards) and Government, Department and Senior Executive needs 2.2 Undertake financial management and reporting, including reporting formats, and reporting methods.

5.2.2 Gather and Analyse Information

This unit describes the skills required to collect and analyse information to achieve work unit objectives and meet client needs. It includes identifying and collecting information, analysing and interpreting information, developing and applying workable solutions, presenting information and maintaining information.

Element	Study Areas
1. Identify and collect information	1.1 Identify nature, extent and purpose of required information. 1.2 Identify and access internal and external sources to produce required information. 1.3 Collect, organise, record and report information. 1.4 Organise information collected in a way that enables easy access and retrieval by other staff.
2. Analyse and interpret information	2.1 Evaluate information and its sources for relevance and validity to business requirements. 2.2 Analyse information as required to identify key issues. 2.3 Carry out detailed analysis of information as required using relevant techniques including mathematical calculations.
3. Develop and apply workable solutions	3.1 Develop workable solutions to business requirements. 3.2 Communicate or implement proposed solutions as required. 3.3 Report and present information in required medium using relevant technology.
4. Maintain information	4.1 Maintain information and records to ensure data and system integrity using a range of standard and complex information systems and operations. 4.2 Reconcile routine data and records as required. 4.3 Identify and correct inadequacies in system/s relating to information retrieval or reported to relevant staff as required.

5.2.3 Scope Financial Data Collection

This unit describes the skills required to identify the scope of financial data collection and the expected outputs to meet user requirements.

Those undertaking this unit would work independently, performing complex tasks in a range of familiar contexts.

Element	Study Areas
1. Define purpose and/or outputs	1.1 Confirm required information with relevant personnel and/or stakeholders. 1.2 Specify and confirm requirements.
2. Research sources of data	2.1 Identify data stored in GFMIS. 2.2 Source data to test hypotheses.
3. Develop project documentation	3.1 Collate and examine information to determine the detail required 3.2 Identify the final reporting medium. 3.3 Determine anticipated communication strategies.
4. Determine resource requirements	4.1 Identify GFMIS requirements.

5.2.4 Interrogate and Analyse Financial Data

This unit describes the skills required to apply techniques to analyse financial data. It includes planning the analysis, determining strengths and weaknesses of the analysis and value adding to the information.

Those undertaking this unit would work independently seeking advice as required, performing complex tasks in a range of familiar contexts.

Element	Study Areas
1. Plan analysis	1.1 Determine priority of data to be interrogated in consultation with suitably qualified people, and organise work. 1.2 Reflect an understanding of the nature of the program or activity from which the data is obtained in the analysis of material. 1.3 Reflect an understanding of the way in which the data is structured in the system in the analysis.
2. Apply statistical concepts and processes	2.1 Use GFMIS to retrieve data and present it in the required format. (eg tables, charts etc)

	2.2 Perform quantitative or qualitative analyses to obtain required outcomes. 2.3 Use analysis and techniques appropriately given the nature of the information and the required outcomes. 2.4 Express preliminary results in accordance with the required detail, format and timeframe. 2.5 Perform analysis.
3. Determine strengths and weaknesses of analysis	3.1 Identify sources of error and describe as required. 3.2 Identify and describe limitations in the methodology as appropriate.
4. Produce further statistics	4.1 Calculate summary information from the given dataset as required.

5.2.5 Interpret Financial Data

This unit describes the skills required to interpret financial data. It includes interpreting data and its summarised highlights, presenting financial information and guiding others in the interpretation of financial data.

Those undertaking this unit would work independently seeking advice as required, performing complex tasks in a range of familiar contexts.

Element	Study Areas
1. Interpret a graph or table	1.1 Write reports based on data that identify relevant relationships within data.
2. Interpret data and its summarised highlights	2.1 Interpret financial data according to accepted standards. 2.2 Interpret financial data and summarise its highlights.
3. Interpret a range of official statistics in a policy environment	3.1 Identify and explain financial data summaries and trends. 3.2 Interpret the data in such a way as to inform decision making.
4. Present statistical results	4.1 Present data in tables, charts and maps so that the reader does not misconstrue it. 4.2 Include glossaries, technical notes and referencing where required. 4.3 Prepare and present reports that include financial concepts, tables, charts and maps. 4.4 Present findings in a way that is most appropriate for the audience. 4.5 Use charts in presentations that are appropriate to the variables and adhere to accepted standards.

5. Guide others in the interpretation of data	5.1 Define data summaries and trends clearly and communicate to staff. 5.2 Communicate the assumptions upon which the interpretation is based, in accordance with audience needs.

5.3 PUBLIC FINANCIAL MANAGEMENT REFORM GROUP/GENERAL

This section contains course outlines for those groups working on training others in the use of new systems, and includes concepts on how to administer training, and how to best share knowledge in a workplace.

5.3.1 Provide Workplace Mentoring

This unit describes the skills required to establish and develop a professional mentoring relationship. It includes establishing the need for mentoring, developing a mentoring plan, facilitating the mentoring relationship, terminating the mentoring arrangement, and evaluating the effectiveness of mentoring.

Element	Study Areas
1. Establish the need for mentoring	1.1 Identify purpose of the mentoring relationship. 1.2 Clarify expectations and goals of the mentoring relationship with the other party. 1.3 Identify and confirm skill sets that may be shared within the objectives of the mentoring relationship. 1.4 Negotiate and agree upon a mentoring agreement in accordance with the identified need, personal expectations and cultural or other considerations.
2. Develop a mentoring plan	2.1 Identify the scope and boundaries of the mentoring relationship. 2.2 Establish ground rules and negotiate realistic expectations. 2.3 Establish and maintain confidentiality of the relationship. 2.4 Manage the perceptions of others outside the mentoring relationship.
3. Facilitate mentoring relationship	3.1 Share personal experiences and knowledge with the person being mentored, in accordance with agreed objectives. 3.2 Support the person being mentored to develop skills in problem solving and decision making. 3.3 Use personal and professional networks to assist the person being mentored.

	3.4 Assist the person being mentored to identify and access opportunities for development. 3.5 Use techniques for resolving differences without damaging the relationship, or seek assistance.
4. Monitor mentoring relationship	4.1 Provide planning assistance and guidance as requested. 4.2 Provide feedback on progress towards achieving the expectations and goals of the mentoring process. 4.3 Recognise and discuss changes in the mentoring relationship. 4.4 Negotiate and manage closure of the mentoring arrangement.
5. Evaluate effectiveness of mentoring	5.1 Establish and discuss benefits gained from the mentoring process. 5.2 Identify and report the benefits and outcomes of the mentoring arrangement for the organisation.

5.3.2 Provide Workplace Coaching

This unit describes the skills required to provide on the job coaching to colleagues. It includes preparation for coaching, and provision of and follow-up of coaching.

Element	Study Areas
1. Prepare for coaching	1.1 Confirm the need for coaching. 1.2 Identify specific coaching needs through discussion with the colleague to be coached. 1.3 Undertake self-assessment of own competencies and coaching style and confirm compatibility with colleague's needs and learning style. 1.4 Obtain approval for coaching arrangement. 1.5 Negotiate coaching agreement with the colleague.
2. Provide coaching	2.1 Explain and agree upon the principles and application of coaching. 2.2 Explain and demonstrate specific competencies to be coached. 2.3 Communicate any required underpinning knowledge and skills in a manner suited to the person's specific needs. 2.4 Check the understanding of the person being coached. 2.5 Provide the opportunity to practise and ask questions. 2.6 Provide feedback and review goals with the person being coached and adjust as necessary.

3. Follow up coaching	3.1 Monitor progress with new competencies in the workplace and provide supportive assistance as required. 3.2 Report progress. 3.3 Identify and rectify performance problems or difficulties with the coaching or refer for follow up. 3.4 Maintain confidentiality regarding coaching arrangements. 3.5 Manage the perceptions of those outside the coaching arrangement.

ANNEX A: BIBLIOGRAPHY

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