PEFA Open Forum at the ICGFM 2012 Spring Conference:
“PFM in the 21st Century: The PFM Architecture, Institutions, and Tools to Meet the Challenges of the Modern World”

Sunday, April 29 – Friday, May 4, 2012
Miami, Florida – USA

PEFA events at the ICGFM 2012 Spring Conference

Monday 30 April: 6PM (tbc)- Opening reception hosted by the PEFA Secretariat with an opening speech by Head of Secretariat about the 10 year anniversary celebration of the PEFA program and its achievements.

Thursday 3 May: PEFA First Open Forum: “Meeting the Needs of All PEFA Stakeholders”

- **9.00 –10.00**: “10 years of PEFA achievements and the way forward”
  - **Format**: presentations by 3 to 4 panelists and open discussion, Q&A.
  - **Speakers**: the Chair of the PEFA Steering Committee (*Linda Van Gelder, World Bank Director for Governance and Public Sector in the Poverty Reduction and Economic Management Network, PREM*), representatives of aid agencies (*Katharina Falkner Olmedo, IDB Head of Fiduciary services and Thomas Briggs, USAID Senior Policy Adviser, Office of Chief Operating Officer*) and partner country representatives (*for Peru: Vice-Minister of Finance Carlos Augusto Oliva Neyra, and for Nepal: M. Mahesh Dahal, Coordinator of Nepal’s PEFA Secretariat*).
  - **Facilitator**: Frans E. Ronsholt, Head of PEFA Secretariat

- **10.00 – 10.15**: coffee break

- **10.15 – 12.15**: Presentation of latest PEFA developments:
  - **Format**: presentations and discussion with 2 or 3 panelists including the Secretariat and partners, Q&A.
  - **10.15 – 11.00**: Use of PEFA data to identify trends in PFM system performance:
    - **Demo of new PEFA assessment portal** by Brandon Lundberg, PEFA Secretariat
    - **Panel discussion**: Clay Wescott, Director, Asia Pacific Governance Institute with Frans Ronsholt, Head of PEFA Secretariat.
  - **11.00 – 11.45**: New trends in assessment of Sub national governance and ongoing revision of guidance from PEFA for SN assessments: Steering Committee representative Jean-Francois Almanza (Project Manager, Department of Strategic Steering and Forecasting – AFD, on video), presentation on case of San Martin regional government (with governor Jose Luis Vela Guerra and Budget Division Officer Cesar Ulises Silva Guerra and SECO representative Christian Robin, Chief of the Swiss Cooperation for Economic Development in Peru), Giovanni Caprio, PEFA consultant with Charles Seibert, PEFA Secretariat.
11.45 – 12.15: PEFA secretariat’s services and support to its users: presentation of the new field guide for assessors: Dr Pratap Jena, Associate professor, National Institute of Public Finance and Policy, India and Bruno Giussani, PEFA consultant with Phil Sinnett, PEFA Secretariat.

12.15 – 13.30: Lunch and coffee

13.30 – 15.00: New Features of Phase 4 of the Program- 2012-2017:
   - Format: presentations by speakers from partners’ institutions and Q&A with audience
   - 13.30– 14.15: Quality Assurance and PEFA CHECK: the new process endorsement mechanism: chaired by PEFA Steering Committee (Mario Pessoa, IMF, Fiscal Affairs Department, Deputy Division Chief, Non-Anglophone Africa, Asia and The Pacific, Western Hemisphere), with European Commission (Claudio Salinas, Coordinator – Budget Support Operations in Latin America – Geographic coordination with Latin America and Caribbean Unit – DEVCO) and USAID (Thomas Briggs, Senior Policy Adviser, Office of Chief Operating Officer) and Helena Ramos, PEFA Secretariat
   - 14.15 – 14.45: Review of PEFA Framework content: adjustments to new realities and needs in PFM - technical review and process. PEFA Steering Committee Sanjay Vani (Lead Financial Management Specialist, OPCFM – World Bank and Chairman of PEFA Public Expenditure Working Group), Tony Bennett, PEFA consultant and Phil Sinnett, PEFA Secretariat
   - 14.45 – 15.00: Launching of thematic group discussions on “PEFA meeting the needs of all its stakeholders”: Introduction by Sylvie Zaitra, PEFA Secretariat.

15.00 – 15.30: Coffee break

15.30 – 16.45: “PEFA meeting the needs of all its stakeholders”: group discussion
   - 1 hour group discussion organized by language and facilitated by the PEFA Secretariat team and consultants, on 5 topics proposed with written “guiding” questions (format to be defined according to languages and interests from registered participants)
   1. Format of the PEFA annual open forum,
   2. Stakeholder network,
   3. Community of PEFA Practitioners
   4. PEFA training strategy
   - wrap-up by topics/groups and use of the electronic voting device

16.45-17.00: Conclusions of the day (Chair of PEFA Steering Committee /Head of PEFA Secretariat)
Friday 4 May: PEFA training session

- **9.00 - 9.30**: "PEFA Assessment portal - Navigating and Q&A" by Brandon Lundberg, PEFA Secretariat

- **9.30 - 12.15**: Hands-on training session organized in Group work on PEFA scoring methodology and related issues: facilitated by PEFA Secretariat training team (led by Charles Seibert and Helena Ramos) with the support of Marco Formentini, EC (Budget Support Operations in Latin America and the Caribbean, Geographic coordination with Latin America and Caribbean Unit – DEVCO).
  - **9.30-9.50**: 20min-presentation of PEFA scoring methodology (scale, M1/M2, aggregation of dimensions, evidence needed, including recently revised Performance Indicators and Repeat assessments etc.) and related application issues.
  - **9.50-10.45**: Set of case-studies on scoring issues to be read individually and analyzed by groups (language based) focusing on 2 specific cases/group.

- **10.45-11.15**: Coffee break
  - **11.15- 12.15**: Reporting of each group to the audience on one of the 2 cases (the other one being used to feed comments of another group’s rating). For each case, score and findings will be commented through an open Q&A session.

A set of hardcopies of the exercises in the 3 main languages (English, French and Spanish) will be distributed, as well as the PEFA Framework booklet and Guidance notes.

Followed by official closing ceremony of the Conference