



**LAGOS STATE GOVERNMENT**

*Strengthening MDA Planning Units  
Preliminary Proposals*

December 2014

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## Abbreviations and Acronyms

<b>BPS</b>	Budget Policy Statement
<b>COFOG</b>	Classification of Functions of Government
<b>DFID</b>	Department for International Development, UK
<b>EFU</b>	Economic and Fiscal Up-dates
<b>EIU</b>	Economic Intelligence Unit
<b>FSP</b>	Fiscal Strategy paper
<b>KPI</b>	Key Performance Indicator
<b>LIRS</b>	Lagos Internal Revenue Services
<b>LSDP</b>	Lagos State Development Plan
<b>M&amp;E</b>	Monitoring and Evaluation
<b>MDA</b>	Ministry Department Agency
<b>MEPB</b>	Ministry of Economic Planning and Budget
<b>MTEF</b>	Medium Term Expenditure Framework
<b>MOF</b>	Ministry of Finance
<b>MTBF</b>	Medium Term Budget framework
<b>MTFF</b>	Medium Term Fiscal Framework
<b>MTSS</b>	Medium Term Sector Strategy
<b>PMR</b>	Performance Management Report
<b>PRS</b>	Planning, Research and Statistics
<b>PS</b>	Permanent Secretary
<b>SHoA</b>	State House of Assembly
<b>SPARC</b>	State Partnership for Accountability, Responsiveness and Capability

## Executive Summary

The purpose of this report is to present proposals aimed at improving the effectiveness of Planning Units in Ministries, Departments and Agencies. While the Ministry of Economic Planning and Budget is the state's ministry charged with supervising and coordinating planning, budgeting, monitoring and evaluation activities, the actual detailed work related to these activities is carried out in MDAs through Planning Units. The Planning Units are a means to implement state policies and programmes at MDA level.

The Planning Units were set up without defined mandates and clearly structured functions. Officers posted to MDAs are neither given job descriptions with aligned responsibilities to specialisation of the respective MDAs nor are their planning functions situated with due cognisance to respective MDA mandates. There is need to formalise these Planning Units with the Head of Service so that proper staffing and procedures suitable for the Units are established. Most of the planning staff in the units are still referred to as 'budget' officers because 'budget' is what is perceived to be the most important value addition these units are bringing to the MDAs.

Having recognised the need for proper definitions of functions and tasks these Units have to carry out, the report suggests that functions and tasks be promoted under six headings, namely, Research and Documentation, Statistical Services, Medium Term Planning, Budget, Monitoring and Evaluation and Sector Policy. Procedures and staffing requirements are then suggested.

# **Section One: Introduction and Background**

## **Objectives of Report**

The purpose of this report is to present proposals aimed at improving the effectiveness of Planning Units in Ministries, Departments and Agencies (MDAs). While the Ministry of Economic Planning and Budget (MEPB) is the State ministry charged with supervising and coordinating planning, budgeting, monitoring and evaluation activities, the actual detailed work related to these activities is carried out in MDAs through Planning Units. The Planning Units are a means to implement State policies and programmes at MDA level. These proposals derive from proceedings of a workshop with Heads of Planning Units of Key MDAs held in November 2014. The workshop report is attached as Annex 1.

## **Background**

In 2008, MEPB embarked on a budget reform agenda to enhance transparency, accountability and promote value for money in the planning and implementation of Lagos State Government programmes and activities. The reforms have been largely successful with the State and MDA budgets becoming more realistic and implementable. The budget process and content improvements have included development of a Fiscal Model leading to Economic and Fiscal Updates (EFU), Fiscal Strategy Paper (FSP) and Budget Policy Statement (BPS) that form the basis for budget preparation. Despite this progress, the state has concluded that these reforms are not enough. The reforms need to go further and include other areas like planning, Monitoring and Evaluation (M&E), data collection and analysis. For example, it has been observed that linkages between planning and budgeting remain weak leading to poor implementation efforts. Weaknesses exist in the current statistics and M&E systems to produce sufficient data for the desired evidence based decision making in Medium Term Sector Strategies (MTSS) and other sector programmes including Local Government initiatives. Project choices and prioritisation are not sufficiently informed by past events and experiences. There is thus need to develop and/or strengthen continuous and integrated links among planning, M&E and budgeting processes and outputs.

As a starting point there is need to strengthen the planning system as strengthened effective planning system has the potential to lead to enhanced service delivery, provide better linkages between planning and budget, develop better links with M&E and achieve better coordination between MEPB and MDAs and MDAs themselves. A strengthened planning system rests on the principle that budgets, project choice and implementation of programmes/projects should be decided on the basis of an approved or adopted State Development Plan and linked Sector Strategies, unless there are other material considerations, such as emergencies, that may indicate otherwise. Improved plans contain integrated Key Performance Indicators (KPIs) and by monitoring these, it is possible to see how development in all its myriad features is progressing in the state. A strengthened planning system encourages learning from the planning and implementation of past programmes so that informed decisions are then possible.

The bulk of the planning and development activity, especially the day to day planning, takes place at the MDA level and is specifically driven from Planning Units which have been established in every MDA. Unfortunately, these Units do not have as yet clearly defined mandates, organisational structures and job descriptions. It is thus important that special attention is paid to these Planning Units and there is need to ensure that the units have clearly defined mandates, are fully functional and are able to deliver on their “mandates “as well as have the capacity to carry out assigned tasks.

## Section Two: Overview of MDA Planning Units

### Overview

MDAs are central to improving the effectiveness of the planning and development system. State policies and long term proposals are implemented through Sector strategies prepared by MDAs. MDAs are thus expected to demonstrate the effectiveness of their development role through timely production of good quality data, MTSSs, Budget submissions Performance Management Reports (PMRs), etc.

At a broader scale, MDA Planning Units are expected to:

- Assume leadership in advising the MDA Permanent Secretary, Directors and unit heads on the formulation of their long and medium term policy and programmes derived from the MDA mandate and the State Development Plan;
- Ensure that the MDA is aware of the latest State policies and standard State Government procedures relevant to the MDA;
- Encourage the use of planning by making the MDA membership aware of the benefits of planning or a plan led system;
- Ensure that all relevant stakeholders in the MDA are involved in the planning process;
- Lead in the preparation of the MDA MTSS;
- Ensure that MTSS proposals are linked to and within budget and economic forecasts e.g. Budget ceilings;
- Encourage dialogue between different groups bidding or competing for resources within the MDA;
- Ensure that proper procedures are followed in preparing and submitting budgets to MEPB;
- Collect and analyse data in order to present decision makers with the appropriate amount of information, well analysed and clearly showing the implications of certain decisions;
- M&E of programmes and implementation and ensure the MDA is learning from its past practices and experience;
- Act as the professional interface on resource matters between the MDA and MEPB.

### Challenges

There are some challenges that need to be overcome before these Planning Units can be fully functional and become effective instruments for policy development and implementation.

The key challenges were identified at the workshop as:

- The Planning Units were not properly set up. Officers were as it were just 'dumped' in MDAs and left to fend for themselves. There is need to formalise these Planning Units with Head of Service so that proper mandates are defined and staffing and procedures suitable for the units are established. Most of the planning staff in the units is referred to as 'budget' officers because 'budget' is what is perceived to be the most important value addition these units bringing to the MDAs;
- There is still lack of clarity regarding the functions and tasks these units have to carry out. An attempt needs to be made to prescribe the functional areas of the Planning Units. There is need for proper definition of these and completing the list of tasks for each of them;
- There are no standard and formalised procedures establishing the relationship between the host Permanent Secretary and the Heads of these Planning Units. It has very much depended on the charisma and initiative of that Head of the Planning

Unit to develop and cultivate a good and professional relationship with the Permanent Secretary. Some Heads of Planning Units have not been successful in doing this and this shows from the quality of outputs produced e.g. the MTSS is not produced on time and the full ownership of the MTSS in the Ministry is doubtful;

- There are a number of grey areas in the relationship between these units and MEPB that need to be addressed e.g. supervision and coaching lines to ensure that these units function properly;
- There are motivational issues in these units. The units have reached different levels of functionality depending on the perceptiveness and energy of the unit head. Some Heads of Planning Units do not show motivation at all or lack simple basic managerial skills. There is also a general expression that these units are not adequately staffed and where they are adequately staffed, the staff is inappropriate in terms of relevant qualifications and experience. There is also dissatisfaction with the frequent movement of officers. This has created a feeling of instability and such situations make the task of managing the unit challenging for the Heads of Units;
- There is need to improve the quality of outputs. The quality of the outputs should justify the existence of these units. For example, the quality of some MTSS is not satisfactory. Some Heads of the Planning Units have evaluated the quality of their MTSSs or linkages between Lagos State Development Plan (LSDP) and MTSS for example and have discovered some gaps that need to be filled.

## Section Three: Proposals for strengthening planning units

### Functions and Tasks

From the workshop, there is agreement that the functions of MDA Planning Units should fall under six headings; namely, Research and Documentation, Statistical Services, Medium Term Planning, Budget, M&E and Sector Policy.

The tasks and outputs associated with the above functional areas are presented in Table 1 below. It is recognised that different planners will require varying amounts of detail to enable them to carry out their tasks. It is not possible to provide all this detail here and it is hoped that this will be done as part of ongoing work and refined of functions and tasks of the Planning Units. In Table 1 there is also an attempt to provide references where possible to assist the existing staff to be better able to carry out their tasks.

Table 1 Function and Tasks

Functional Area	Tasks	Expected Output	Reference Material to assist with Task
General	Provide policy, programme or project advice to the Commissioner, Permanent Secretary and technical staff of the MDA.	Policy Briefs and Advice Notes	Policy Making Guidelines LSDP
Research and Documentation	<ul style="list-style-type: none"> <li>• Data collection relevant to Agency</li> <li>• Proper storage of data collection</li> <li>• Gathering data/information/development of the policy thrust of the MDA</li> <li>• Provision of relevant data to MEPB</li> <li>• Data collection and analysis on the MDA activities</li> <li>• Gathering of inputs and data from all departments in our MDA</li> <li>• Acquiring necessary equipment for data processing</li> </ul>	Policy analysis reports	
Statistical Services	<ul style="list-style-type: none"> <li>• Collate data</li> <li>• Analyse data</li> <li>• Interpret data</li> </ul>	Good quality data	
Medium Term Planning	<ul style="list-style-type: none"> <li>• Advise host ministry in matters relating to state reforms and policy issues</li> </ul>	MTSSs	MTSS Operational Manual

Functional Area	Tasks	Expected Output	Reference Material to assist with Task
	<ul style="list-style-type: none"> <li>• Management of MTSS and Medium Term Expenditure Framework (MTEF)</li> <li>• Provision of support to the Economic Intelligence Unit (EIU) in MEPB</li> <li>• Ambassador to MEPB and also serve as an office to carry out duties and functions of all departments in MEPB</li> <li>• Member of the procurement committee</li> <li>• Help in planning the activities of the MDA according to available resources</li> <li>• Assist MDA in the process of making plans, advise where necessary, prepare budgets, monitoring budget during implementation</li> <li>• Ensure that the goals of the MDA are strictly followed in line with the MTSS document which can be related to state development plan in order to achieve the vision of the state Government as Africa's Megacity</li> <li>• Costing of MTSS</li> </ul>		Stakeholder Operational Manual
Budget	<ul style="list-style-type: none"> <li>• Preparation of annual budget as well as implementation, monitoring and control</li> <li>• Uploading budget proposals into Oracle system</li> <li>• Budget control and monitoring</li> <li>• Liaison with MEPB on</li> </ul>	Budget submissions  Rendition reports	Budget Manual

Functional Area	Tasks	Expected Output	Reference Material to assist with Task
	request for funds <ul style="list-style-type: none"> <li>• Preparation of annual budgets on the same format for all MDAs</li> <li>• Rendition of revenue, expenditure returns from ministry</li> <li>• Rendering of the monthly expenditure return to MEPB</li> <li>• Attendance of bilateral discussions</li> </ul>		
M&E	<ul style="list-style-type: none"> <li>• Preparation of MDAs' PMR</li> <li>• Implementation and monitoring and control of budget</li> <li>• Project monitoring and evaluation</li> </ul>	PMRs	
Sector Policy	<ul style="list-style-type: none"> <li>• Aligning with sector policy document</li> <li>• Ensure implementation of State Planning reform agenda at MDA level vis-à-vis preparation, articulation, coordination, collation of policy, strategic, planning, budgeting, implementation of programme and projects</li> </ul>	Sector Review reports	Lagos State Policy Making Guide  Stakeholder Consultation Guide

## **Procedures and Content**

The purpose of state government is to provide services to all Lagosians and in order to successfully do so each MDA will need to:

- Structure its operational processes such that its key stakeholders are involved in the planning and development process;
- Clearly define the outputs and timing of the planning and development process e.g. MTSS, PMR, Budget, and Operational Plan;
- Align human, systems and financial resources to enhance service delivery e.g. procurement, contracts, properly organised project management system, and monitoring and performance management system.

Two words best describe the above task: Coordination and Integration.

The coordination role is to ensure that there is a healthy dialogue among all relevant stakeholders in the MDA and all are involved in the planning process.

The integration role is to ensure that there is logic and connection in the proposals contained in MDA strategies and plans. It is important that the units present decision makers with relevant and appropriate amount of information- well analysed and clearly showing the implications of certain decisions – to enable the MDA to be responsive and accountable in service delivery.

The best way to achieve coordination is to follow a planned course of actions through the preparation of workplans in each unit. Table 2 below presents a proposed framework which can be used as a basis for developing a comprehensive annual workplans calendar for the Planning Unit. Through this calendar it will be possible to coordinate all data, planning, budgeting and M&E work in the unit. It should be part of a broader initiative by MEPB to create an integrated framework for the same.

<b>Month</b>	<b>Data Analysis Activity</b>	<b>Planning</b>	<b>Budget</b>	<b>Monitoring and Evaluation</b>
January	Collect and analyse data from MDA Annual Report	Preparation of MDA Operational Plan	Budget notification by issuance of warrants to MDAs	Budgetary performance review
	Compile Quarterly Digest of Statistics		Release of Funds	Preparation of draft financial statements and budget out-turn report
				Submission of Monthly Receipts and Expenditure Returns to MEPB <sup>1</sup>
February	Collect and analyse data from MDA Annual Report	Examination of MDA Operational Plans for compliance with MTSS and Budget	Implementation of Budgeted Activities	
March	Compile Quarterly Digest of Statistics			
April	Compile Quarterly Digest of Statistics	Preliminary MTSS Performance reviews	Budgetary performance review	Performance Management Review
		Analysis of Performance Management Review Reports and Review of MTSS		
May		MTSS Roll over Strategy workshops		
June		Documentation and costing of MTSS (Use the standard documentation format and costing template)		

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<sup>1</sup> This is done monthly

<b>Month</b>	<b>Data Analysis Activity</b>	<b>Planning</b>	<b>Budget</b>	<b>Monitoring and Evaluation</b>
July	Compile Quarterly Digest of Statistics	MTSS validation	Budget Call Circular	Performance Management Review
			Mid-year budgetary review	
		MTSS signing off	Re-appropriation of Funds	
August		MTSS Submission	Preparation and Submission of Budget Proposals	
			Compilation of revenue estimates Scrutiny of recurrent and capital budget estimates	
			Submission of estimates to MEPB	
			Meeting with MoF & LIRS to discuss revenue	
September			Budget Discussions	
			Bilateral Discussions	
October	Compile Quarterly Digest of Statistics	Preparation Programme profiles	Collation of budget proposals	Budgetary performance review
		Presentation of Programme profiles	Presentation of draft budget to Governor	
			Discussion of the draft budget	
			Supplementary Budgets	
			State Executive Council	
			Presentation to State House of Assembly	
November			Discussion and approval	

<b>Month</b>	<b>Data Analysis Activity</b>	<b>Planning</b>	<b>Budget</b>	<b>Monitoring and Evaluation</b>
			of the State's annual budget	
		Presentation of Programme profiles to SHoA	Presentation to State House of Assembly	
			Appropriation Act to be passed	
December		Preparation of MDA Operational Plan	Governor's Assent	

## Staffing and Policy

Each unit should ideally be manned by staff that are:

- Professionally competent in interpreting policy, strategy and budgets;
- Aware of and competent in their roles;
- Familiar with the LSDP and the functions and purpose of their own MDA and how they are related;
- Aware of standard government procedures relevant to their work
- Aware of the institutional framework within MEPB, including roles of different departments and units;
- Able to communicate economic and financial advice to policy makers;
- Able to work closely with others involved in decision making, especially the top administrators in the MDA. Planning and budgeting are fundamentally political processes that involve securing consensus for the decisions that are taken. The wider the process of participation in planning and budgeting decisions, the more likely it is that consensus can be achieved and decisions sustained;
- Able to spend time talking, informally as well as in meetings, to others involved in planning and budgeting activities;
- Able to influence and shape the role of others –educating others and overcoming opposition.

All staff in the unit should have clear job description that captures the job and personal expectations and a personal development plan.

In building the staffing situation in the Planning Units, the following are suggested:

- A proper and common functioning structure consisting of at least five people is proposed for each Ministry Planning Unit with the following disciplines represented - economic planning/ policy analysis, finance, statistics and M&E;
- The unit is to be headed by persons qualified in any of the disciplines - economic planning, finance, statistics, M&E or policy analysis;
- There is no need of creating Planning Units at every Department or Agency. A Ministry Planning Unit with well qualified staff and procedures is sufficient to cater for the needs of Departments and Agencies;
- There is an advantage of using a common cadre system across all MDAs. It enables future deployment of officers between Ministries possible in order to make maximum use of scarce resources. Career development and training opportunities for the staff will be easier to programme;
- The cadre, especially the Head of the Unit, should be senior and qualified enough for the MEPB departments and host ministry to have confidence in the person.

It is important that the Head of the Planning Unit be empowered and given clear responsibility that will enable the building of effective teams. Some of the duties of the Head of the Planning Unit should include:

- Coordinate the preparation and periodic updating of all elements of the planning, budgeting M&E systems in the sector;
- Develop measures to strengthen the effectiveness of the system;
- Participate in the preparation, review and analysis of sector policy measures;
- Advise the host Permanent Secretary on resource allocation issues affecting the annual capital, recurrent and manpower budgeting process;

- Coordinate the preparation, monitoring and evaluation of each MTSS;
- Initiate and review measures to improve the data base for planning;
- Initiate and implement measures to improve the effectiveness of socio-economic planning;
- Guide and supervise the professional staff of the unit.

The staffing policy should be accompanied by other organisational and managerial support policies and mechanisms that will ensure:

- Planning Units are provided with operating budgets
- Procedures for technical guidance from parent MDA are prepared to ensure that sector standards and procedures are followed and maintained.

MEPB is responsible for oversight/quality assurance of the operations of the Planning Units. As such MEPB will be responsible for staff progression, promotion and transfer. Transfers should be, however, done in consultation with the host Permanent Secretary. MEPB should also be responsible for staff development including training in collaboration with the Ministry of Establishment, Training and Pensions.

# Annex One: Report of Workshop of Heads of Planning Units in MDAs

## Purpose

The purpose of the workshop was to gather data that would be used to design a strategy and programme to improve the effectiveness of Planning Units in MDAs.

## Background

The Ministry of Economic Planning and Development wants to improve its effectiveness in the oversight role it is playing in State Development.

In order to achieve this it has sought to improve its operational effectiveness in:

1. Statistics and Data Management
2. Planning
3. Budgeting
4. Monitoring and Evaluation

The focus of this workshop is on planning

The Ministry is promoting a plan led system. A plan-led system rests on the principle that budgets, project choice and implementation of programmes/projects should be decided on the basis of an approved or adopted State Development Plan and linked Sector Strategies, unless there are other material considerations, such as emergencies, that may indicate otherwise.

All development is predicated upon some high level goals. In general these goals seek to improve the quality of life of the people, expressed **in terms of a long term Vision.**

Without a plan-led system monitoring progress is also fragmentary and lacks any charting of how the elements are contributing to a wider vision. An integrated plan contains integrated KPIs and by monitoring these it is possible to see how development in all its myriad features is progressing.

No one MDA can undertake development on its own without synchronising its efforts **with MDAs that have a linked role.**

Sustainable development requires support from all stakeholders. Furthermore, in a city economy, developers and communities need to be clear about what is proposed or is likely to be acceptable.

A plan-led approach also places greater emphasis on strengthening linkages and collaboration between MDAs within the same Development Pillars and Classification of Functions of Government (COFOG) groupings so as to achieve cross-cutting objectives and improve specific **project and service delivery.**

MDAs will be required to:

- Adjust their planning and budget and associated procedures to comply with the plan-led approach as guided by the MEPB;
- Work more closely and effectively with other MDAs in their LSDP Development Pillar and their COFOG groupings;
- Develop a Stakeholder Participation Plan that incorporates existing consultative processes with their respective development partners in line with the guidance to be issued by MEPB.

MDAs are to carry out these tasks through the Planning, Research and Statistics Units located in each MDA.

MDAs are to demonstrate the effectiveness of their planning through timely production of good quality data, MTSSs and Budget submissions, **preparation of PMRs, etc**

Before the workshop was run, a questionnaire had been circulated to all Heads of Planning Units to indicate principally their understanding of the functions of Planning Units, the tasks the units were expected to perform, the organisational arrangements for performing those tasks, the relationships the units had with their host ministries, stakeholders of those ministries and their parent ministry which is MEPB. They were further asked to demonstrate the quality of their work by indicating the progress they had made on MTSSs.

Fifteen responses on the questionnaire out of a possible 25 responses were received at the beginning of the visit. These were analysed and found that the content and quality of responses varied, with some Heads of Planning Units taking time to understand the questions and give measured responses. Even on the basic question to establish the functions of the Units the answers range from tasks to a description of how one carries out the task. There was also an element of understating 'positions' as was later revealed at the subsequent workshop where some head of units started speaking out and the real challenges facing these units on the ground emerged.

## **Workshop Proceedings**

MEPB has responsibility to coordinate planned development in the state. In order to achieve this task, MEPB works through Planning Units in MDAs. Among other things, the units are expected to:

- Assume leadership in advising the MDA Permanent Secretary, Directors and unit heads on the formulation of their long and medium term policy and programmes derived from the MDA mandate and the State Development Plan;
- Ensure that the MDA is aware of the latest State policies and standard State Government procedures relevant to the MDA;
- Encourage the use of planning by making the MDA membership aware of the benefits of planning or a plan led system ensure that all relevant stakeholders in the MDA are involved in the planning process;
- Lead in the preparation of the MDA MTSS;
- Ensure that MTSS proposals are linked to and within budget and economic forecasts e.g. Budget ceiling;
- Encourage dialogue between different groups bidding or competing for resources within the MDA;
- Ensure that proper procedures are followed in preparing and submitting budgets to MEPB;

- Collect and analyse data in order to present decision makers with the appropriate amount of information, well analysed and clearly showing the implications of certain decisions;
- M&E of programmes and implementation and ensure the MDA is learning from its past practices and experience;
- Act as the professional interface on resource matters between the MDA and MEPB.

Each unit should ideally be manned by staff who are:

- Professionally competent in interpreting policy, strategy and budgets;
- Aware of and competent in their roles;
- Familiar with the LSDP and the functions and purpose of their own MDA and how they are related;
- Aware of standard government procedures relevant to their work;
- Aware of the institutional framework within which economic planning takes place, including roles of different organisations;
- Able to communicate economic advice to policy makers;
- Able to work closely with others involved in decision making, especially the top administrators in the MDA. Planning is fundamentally a political process that involves securing consensus for the decisions that are taken. The wider the process of participation in planning decisions, the more likely it is that consensus can be achieved;
- Able to spend time talking, informally as well as in meetings, to others involved in planning activities;
- Able to influence and shape the role –educating others and overcoming opposition.

All staff in the unit should have clear job description that captures the job and personal expectations and a personal development plan.

For each of the two days, participants were expected to work in groups and respond to the following:

- Describe the function of a Planning, Research and Statistics Unit.
- Break down the functions into specific tasks and define the expected outputs such that each person working in the unit will understand their responsibilities.
- Describe the skill types found or should be in these Units
- What challenges face the unit and what impact do these challenges have on the effectiveness of the unit? Suggest how these challenges can be overcome?

## Workshop Results

### DAY ONE GROUP 1

FUNCTIONS	TASKS	OUTPUT/CHALLENGES
A. Preparation of Annual Budget	<ul style="list-style-type: none"> <li>• Understanding the condition for sound budget preparation</li> <li>• Holding a Stakeholder meeting</li> <li>• Review of Budget Call Circular</li> <li>• Disaggregation of the budget envelop</li> <li>• Coming up with the estimate</li> </ul>	Production of proposed Budget <u>Challenges</u> <ul style="list-style-type: none"> <li>• Limited understanding of government policy</li> <li>• Frequent movement of officers</li> <li>• Lack of cooperation from the Dept./MDA</li> <li>• Limited computer knowledge</li> </ul>
B. Rendition of Monthly Revenue & Expenditure Returns	<ul style="list-style-type: none"> <li>• Returns from Accounts Department</li> <li>• Preparation of the Report</li> </ul>	Production of the final copy of monthly returns
C. Preparation of MTSS, LSDP, PMR document	<ul style="list-style-type: none"> <li>• Composition of the drafting Committees</li> <li>• Review of high policy documents</li> </ul>	Revised MTSS document <u>Challenges</u> <u>Lack of data/Information</u>  <u>Way –Out</u> Development of data base
D. Monitoring & Evaluation of projects and programmes	<ul style="list-style-type: none"> <li>• Periodic review of programmes and projects</li> </ul>	Determination of the performance level <u>Skills</u> Sounds knowledge of projects and programmes <u>Challenges</u> Non-cooperation from professionals
E. Provision of supports to EIU in MEPB		
F. Acts as an Ambassador to MEPB		
G. Coordination of development partnership and projects.		

## GROUP 2

PLANNING UNITS FUNCTIONS	TASKS	RESPONSIBILITIES
<p>A. Institutionalizing state planning reforms agenda, developing strategies towards attainment of state goals and objectives through policy implementation and programmes</p>	<ul style="list-style-type: none"> <li>• Preparation of annual budget</li> <li>• Preparation of PMR and other reporting templates</li> <li>• Project M&amp;E to ensure value for money</li> <li>• Data collection, dissemination and analysis</li> <li>• Ensure LSDP feed into MTSS, programme based budet, budget profiling, costing estimate and PMR</li> </ul>	<p>To ensure that the unlimited resources are well allocated</p> <p>To inform decision making</p> <p>To ensure that projects/programmes meet with desired specification</p> <p>To ascertain the past, present and planned for the future</p> <p>That the state policy informs planning and budgeting.</p>

Challenges	Suggestions/solutions
Inadequate staffing	Deployment of more staff
Incompetence of Staff	Training and Re- training
Clash of interests	Adequate information on state policies
Posting of the same grade level	MEPB should take note
Loss of focus of role on the part of PRS staff	Staff should be reminded of their roles and duties.

## GROUP 3

FUNCTIONS	ACTIVITIES
<p><b>Planning</b> Ensure implementation of state planning reform agenda at MDAs level vis-a-vis Long term goal, Medium plan and short term</p>	<ul style="list-style-type: none"> <li>• Preparations of Lagos State Development Plan</li> <li>• Preparation of MTEF, MTBF, MTFE and MTSS</li> </ul>

## Workshop Conclusions and Recommendations

The workshops revealed three areas that will need MEPB attention:

1. The Planning Units have not been properly set up. Officers posted to MDAs do not have job descriptions with aligned responsibilities to specialisation of the respective MDAs. There is need to formalise these units with Head of Service so that proper staffing and procedures are established.
2. There are a number of grey areas in the relationship between these Units and MEPB that need to be addressed e.g. Supervision and coaching lines to ensure that these Units function properly.
3. There are motivational issues in these Units. The Units have reached different levels of functionality depending on the perceptiveness and zeal of the unit head. Some Heads of Planning Units do not show motivation at all or lack simple basic managerial skills.

Despite the above concerns some positives came out of the workshop and these include:

- A good attempt was made to outline and discuss possible functional areas of the Planning Units. What remains is the proper definition of these and completing the list of tasks for each of them. The Agreed functional areas are Research and Documentation, Statistical services, Medium Term Planning, Budget, M&E and Sector Policy.
- The complexities of the duality in roles of these Planning Units i.e. reporting to host ministry and MEPB at the same time were appreciated. Heads of Planning Units began to proffer suggestions of how to manage this complexity and the suggestions built on the need to stick to proper civil service procedures and leaving footprints in terms of reports, memoranda in the tasks.
- The need to be strategic if 'planning' as a discipline is going to be understood and respected in the Units. Most of these officers are referred to as 'budget' officers because 'budget' is what is perceived to be the most important value addition these Units are bringing to the MDAS.
- The need to improve the quality of outputs. The heads inspected and evaluated their MTSS in terms of quality including linkages with the LSDP and found them lacking. There were so many gaps identified and these gaps are going to be used to update the MTSS reports. The criteria introduced is also going to be used as a basis for future self-assessments before the reports are let out and by MEPB for evaluating MTSSs received by them.



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