



Accredited Africa Training Institute for Capacity Development

Unit FO409, Hatfield Plaza · 1122 Burnett St, Hatfield 0028 · Pretoria, Gauteng · South Africa

Tel: +27 12 004 8389 · Mobile: +27 65 077 6310

Email: apply@aaticd.co.za · Website: www.aaticd.co.za

COURSE BROCHURE

Municipal Budget Planning And Reporting Cycle Management Training

Business, Commerce and Management Studies / Public Administration

Unit Standard 116364 · NQF Level 6 · 8 Credits · 5 Days

COURSE OVERVIEW

This course equips municipal finance officials and budget planners with the skills to manage the full budget planning and reporting cycle in compliance with the Municipal Finance Management Act (MFMA). Participants will learn to prepare credible budgets, monitor expenditure, and compile accurate financial reports that support transparent governance and service delivery.

Category	Business, Commerce and Management Studies
Subfield	Public Administration
Unit Standard	116364
Accreditation	SAQA Accredited · NQF Level 6 · 8 Credits
Duration	5 days
Training Method	Online, On-Campus, In-House
Certificate	Issued via AATICD LMS – verifiable online

LEARNING OUTCOMES

- Apply the principles of the MFMA and relevant regulations to municipal budget planning and reporting processes.
- Analyze revenue and expenditure trends to prepare a credible budget aligned with the Integrated Development Plan (IDP).
- Implement budget monitoring and control mechanisms to track actual performance against budgeted figures.
- Evaluate budget variances and recommend corrective actions to ensure fiscal discipline.
- Design quarterly and annual financial reports that comply with prescribed formats and timelines.
- Demonstrate the ability to manage the budget cycle from planning through reporting and audit.

WHO SHOULD ATTEND

- Municipal finance managers, budget officers, accountants, and internal auditors responsible for budget planning, execution, and reporting within South African municipalities.

COURSE OUTLINE

Day 1: Foundations of Municipal Budget Planning

- Overview of the MFMA, Municipal Systems Act, and other relevant legislation.
- Roles and responsibilities of municipal officials, councillors, and community.
- Integrated Development Plan (IDP) as the foundation for budgeting.
- The budget cycle: planning, preparation, approval, implementation, and reporting.
- Key budget concepts: operating vs. capital budgets, revenue and expenditure.
- Stakeholder engagement requirements in the budget process.
- Financial governance and accountability principles.
- Case study: Reviewing a municipal IDP and budget timeline.

Day 2: Budget Preparation and Revenue Forecasting

- Revenue sources: property rates, user charges, fines, grants, and loans.
- Revenue forecasting methods: trend analysis, regression, and scenario planning.
- Expenditure classification: standard chart of accounts and cost centres.
- Capital budgeting: project prioritisation, funding sources, and depreciation.
- Budget preparation templates and software tools.
- Aligning the budget with the IDP and sector plans.
- Workshop: Preparing a draft operating budget for a sample municipality.
- Common pitfalls in budget preparation and how to avoid them.

Day 3: Budget Approval, Implementation, and Monitoring

- Budget approval: council processes, public participation, and provincial treasury oversight.
- Budget implementation: virement policies, procurement planning, and spending controls.
- Monthly budget reports: content, format, and submission deadlines.
- Quarterly performance reporting against Service Delivery and Budget Implementation Plan (SDBIP).
- Variance analysis: calculating and interpreting budget versus actual differences.
- Corrective actions: adjustments budget, spending freezes, and reallocations.
- Cash flow management: forecasting, monitoring, and liquidity.
- Case study: Analysing a quarterly budget report and recommending adjustments.

Day 4: Annual Reporting and Audit Preparation

- Annual financial statements: components and GRAP compliance.
- The audit process: planning, fieldwork, reporting, and follow-up.
- Audit Committee role and responsibilities.
- Responding to audit findings: action plans and implementation.
- Annual report: structure, content, and timeline.
- Performance reporting: linking service delivery outputs to budget.
- Internal controls: segregation of duties, authorisation, and reconciliation.
- Workshop: Drafting a section of the annual report and audit response.

Day 5: Integrated Cycle Management and Continuous Improvement

- Recap of the full budget cycle: interconnections and handovers.
- Continuous improvement: lessons learnt reports and process reviews.
- Change management: overcoming resistance to budget reforms.
- Technology solutions: financial management systems and data analytics.
- Ethics and anti-corruption measures in budget management.

- Peer sharing: participants present challenges and solutions from their municipalities.
- Developing a personal action plan for back-at-work implementation.
- Course evaluation and certification.

ASSESSMENT & CERTIFICATION

Delegates are assessed through exercises and a final test. A mark of **50% or above** earns an **AATICD Certificate of Completion**, issued digitally with a unique verification code. This course carries **8 NQF credits** at **NQF Level 6**.

PRICING (PER DELEGATE, EX-VAT)

Delegates	Training Method	Price per Delegate	Total
1	Online	R 25,300.00	R 25,300.00
1	In-House	R 32,900.00	R 32,900.00
1	On-Campus (Pretoria)	R 38,000.00	R 38,000.00

UPCOMING SESSIONS

Start	End	Method	Venue
10 Aug 2026	14 Aug 2026	On-Campus	Durban, South Africa
10 Aug 2026	14 Aug 2026	On-Campus	Abu Dhabi, UAE
10 Aug 2026	14 Aug 2026	On-Campus	Pretoria, South Africa
10 Aug 2026	14 Aug 2026	On-Campus	Dubai, UAE
10 Aug 2026	14 Aug 2026	On-Campus	Cape Town, South Africa
10 Aug 2026	14 Aug 2026	On-Campus	Mauritius
17 Aug 2026	21 Aug 2026	On-Campus	Dubai, UAE
17 Aug 2026	21 Aug 2026	On-Campus	Pretoria, South Africa

Contact us if no suitable date is listed – on-demand sessions can be arranged for groups.

HOW TO GET A QUOTE OR APPLY

1. **Get an instant quotation online:** visit www.aaticd.co.za, open the page for this course (Unit Standard 116364) and click **Get A Quote / Apply**. Select your training method and number of delegates – your quotation is generated immediately and emailed to you with the course brochure attached.
2. **Apply by email:** send the course title, your preferred training method (Online, In-House or On-Campus Pretoria), the number of delegates and your preferred dates to apply@aaticd.co.za – our team will reply with a formal quotation.
3. **Apply by phone or WhatsApp:** call +27 12 004 8389 or WhatsApp +27 65 077 6310 and we will prepare your quotation and reserve your seats.
4. **Confirm your booking:** accept the quotation and settle the invoice. As soon as payment is confirmed your delegates are enrolled and receive their AATICD LMS login details by email, along with joining instructions for their chosen training method.

Group discounts apply automatically – the more delegates you enrol, the lower the price per delegate. No payment is required to request a quotation.

Accredited Africa Training Institute for Capacity Development

Unit FO409, Hatfield Plaza, 1122 Burnett St, Hatfield 0028, Pretoria, Gauteng, South Africa
Tel: +27 12 004 8389 · WhatsApp: +27 65 077 6310 · apply@aaticd.co.za · www.aaticd.co.za