



PB INSTITUTE OF RESEARCH AND TECHNOLOGY

P.O Box 21457-00100

Nairobi - Kenya

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Global Budgeting Excellence: Benchmarking Financial Performance & Best Practices

Duration: 5 days

On-Site

01 Who Should Attend

- Strategic Planning Managers
- Public Expenditure Management Specialists
- Performance Management Professionals
- Monitoring and Evaluation Specialists
- Policy and Planning Officers
- Internal Auditors
- Development Finance Professionals
- Public Administration Professionals
- County and Local Government Finance Officers
- NGO and Development Organization Finance Managers
- Professionals responsible for budget performance, financial benchmarking, fiscal policy, resource allocation, and public financial management



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02 About the Course

Fiscal Foresight: Global Benchmarking for Budgetary Excellence is a specialized training course designed to help finance, budgeting, and public-sector professionals compare their budgeting practices against **international standards, peer institutions, and leading financial management practices** to identify performance gaps and opportunities for improvement. The course explores how benchmarking can be used to assess **budget credibility, expenditure efficiency, revenue performance, forecasting accuracy, fiscal discipline, transparency, accountability, and financial performance**. Participants will learn how to select appropriate benchmarks, collect and normalize comparative data, interpret performance gaps, identify leading practices, and translate benchmarking insights into practical budget reforms. The course also examines international approaches to public budgeting, including **performance-based budgeting, medium-term expenditure frameworks, fiscal transparency, digital budgeting, results-oriented resource allocation, and expenditure management**, enabling participants to develop evidence-based strategies for achieving budgetary excellence.

03 Workshop Objectives

- Master the core principles and methodologies of budget benchmarking.
- Identify and measure key performance indicators for fiscal health.
- Analyze international best practices in budget formulation and execution.
- Conduct a comprehensive benchmarking study for your organization.
- Translate benchmarking data into actionable policy and process improvements.

04 Module Topics

Module 1: Foundations of Budget Performance Benchmarking



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- The strategic importance of budget performance.
- Key concepts and terminology in global benchmarking.
- The benefits and challenges of benchmarking exercises.
- Different types of benchmarking: internal, competitive, and functional.
- The role of data and evidence in fiscal decision-making.

Module 2: Methodologies for Global Benchmarking

- A step-by-step guide to conducting a benchmarking study.
- Defining the scope and objectives of your analysis.
- Identifying and selecting appropriate peer organizations.
- Ethical considerations and data-sharing protocols.
- Developing a robust methodology for data collection and comparison.

Module 3: Social and economic KPIs: impact on employment, education, and health. Key Performance Indicators (KPIs) in Budgeting

- Financial KPIs: revenue growth, expenditure efficiency, and debt metrics.
- Operational KPIs: budget execution rates, approval times, and process efficiency.
- Social and economic KPIs: impact on employment, education, and health.
- The importance of non-financial indicators and qualitative data.
- Customizing KPIs to align with organizational goals.

Module 4: Data Collection and Analysis

- Sourcing reliable data from public documents and databases.
- Techniques for normalizing data to ensure comparability.
- Using statistical tools to analyze and interpret results.
- Identifying performance gaps and areas of excellence.
- Avoiding common pitfalls in data analysis and interpretation.

Module 5: Best Practices in Global Budgeting



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- Best practices in revenue mobilization and tax administration.
- Innovations in public expenditure management and control.
- Modern approaches to public investment and project evaluation.
- The role of digital tools and automation in the budget process.
- Case studies of high-performing national and sub-national budgets.

Module 6: Driving Performance Improvement

- Developing a strategic action plan based on benchmarking findings.
- Implementing process reforms and best practices.
- Change management strategies for a successful rollout.
- Monitoring progress and measuring the impact of improvements.
- Fostering a culture of performance and continuous learning.

Module 7: The Role of Technology in Benchmarking

- Using data analytics platforms for fiscal intelligence.
- Automation of data collection and reporting.
- The role of artificial intelligence and machine learning in forecasting.
- Building a performance dashboard for real-time monitoring.
- Case studies on digital transformation in budget offices.

Module 8: Communicating Benchmarking Results

- Crafting compelling reports for different audiences.
- Presenting findings to executive leadership and stakeholders.
- The art of data visualization for clear communication.
- Engaging with the public and media on fiscal performance.
- Using benchmarking results to build a case for reform.