

Description of tools characteristics



Objective and features

1. Objective

Presents the stated objective(s) of the tool and the assessment.

2. Institutional coverage

Indicates the intended institutional coverage of the tool (national, subnational, entity- level, sector-specific).

3. Technical coverage

Describes the PFM areas and functions assessed by the tool.

4. Application method

Indicates the possible modalities for carrying out the assessment (self-assessment, external by any assessor, external by the custodian).

Methodology



5. Methodology

Describes the approach used to assess the performance of PFM functions covered.

6. Benchmarking system

Indicates whether assessment results are presented as scores/ratings, narrative evaluation, or both.

- a. a. Benchmarking against good practices, professional standards, or thematic principles (and risk levels in the case of group C):
 - i. i. with scoring systems (typically including a narrative assessment)
 - ii. ii. with narrative assessment only
- b. b. Database tool for comparison across governments.

7. Linkage to PEFA framework

Describes areas of technical coverage which correspond to the technical coverage of the PEFA Framework 2016.

8. Complementarity with PEFA framework

Describes areas of technical coverage which extend beyond the technical coverage of the PEFA Framework 2016.

Development and use



9. Development and coordination

Describes the tool development process, including coordination with key stakeholders for development, during and after the assessment.

10. Assessment management

Describes the assessment management process (data collection, involvement of key stakeholders, and dissemination of assessment findings).

11. Uses by the government and members of the PFM community

Presents the reported information on different uses of the assessment results by key stakeholders.

12. Sequencing with other tools

Describes (custodian-suggested) sequence for using the tool with other diagnostic assessments with a view to ensure complementary information and to optimize the transaction costs involved in conducting an assessment (time, cost, and level of effort from the government and development partners).

13. PFM capacity building

Describes the arrangements foreseen for training and support provided to the assessed governments or institutions, ahead of or during the assessment. Describes the arrangements foreseen for post- assessment capacity development in the form of follow-up technical assistance.

14. Tracking of changes and frequency of assessments

Indicates whether the tool is designed to allow tracking of performance changes over time. Indicates the suggested interval between successive (repeated) assessments using the tool.

15. Resource requirements

Provides an indicative range of costs involved in conducting an assessment, including indicative number of assessors and competencies required. Indicates duration of the assessment (planning through reporting).

Transparency



16. Access to methodology

Indicates whether there is public access to tool user guidance (with other resources).

17. Access to assessment results

Indicates whether there is public access to reports and whether there is a central internal or external repository of reports.