

PEFA PRODUCTS

A POCKET GUIDE

The Public Expenditure and Financial Accountability (PEFA) program provides a wide range of products building on a flagship framework, used for assessing and reporting the strengths and weaknesses of public financial management (PFM), using quantitative indicators to measure performance. PEFA is designed to present a snapshot of PFM performance at specific points in time applying a methodology that can be replicated in successive assessments, providing a summary of changes over time.

PEFA products include methodological frameworks, templates and guidance materials to facilitate the work of all stakeholders applying the PEFA methodology, conducting PEFA assessments, using PEFA reports in dialogue for PFM improvements, and conducting analytical work on PFM related topics. Among the other products a PEFA e-learning course is available online.

Ready to use the PEFA Flagship Framework?

The PEFA Framework for Assessing Public Financial Management (PEFA Framework) is the main document containing the PEFA Methodology. It is used for assessing PFM performance at both national and sub-national levels.



Ready to start a PEFA Assessment? Check out the [PEFA Framework](#), which introduces you to the PEFA Methodology, including the significant upgrades since its inception in 2001. It reflects the changing landscape of PFM reforms and good practices.



AVAILABLE in the three official languages **English, French, Spanish** and 7 additional languages.



Applying PEFA at the subnational level? Read the [Guidance for Subnational Government PEFA Assessments](#) that supplements the PEFA Framework and provides additional guidance.



AVAILABLE in **English and French** and coming soon in Spanish and Portuguese.

Need to assess readiness of PFM Systems to mainstream gender or climate?

Learn about the PEFA Supplementary Frameworks:



PEFA Gender: The Supplementary Framework for Assessing Gender Responsive Public Financial Management (GRPFM) provides detailed measurement guidance and definitions to assess a country's performance in applying gender considerations to its PFM systems, processes, and institutions.



AVAILABLE in the three official languages **English, French, Spanish** and additionally in Portuguese



PEFA Climate: The Supplementary Framework for Assessing Climate Responsive Public Financial Management (CRPFM) provides detailed guidance on how to score a set of key indicators and dimensions to assess the extent of which PFM systems, processes, and institutions are climate responsive. It introduces an inception questionnaire used to establish the country climate profile, highlighting the main aspects of the climate policies, actions, and fiscal policy instruments relevant to that country.



AVAILABLE in the three official languages **English, French, Spanish** and additionally in Portuguese.

How to apply PEFA? Check the PEFA Handbook!

The PEFA handbook is a four-volume publication which provides all users, including government officials, assessors, development partners and other interested stakeholders, with comprehensive guidance on planning, implementing, reporting, and using the PEFA 2016 Framework.



Looking for guidance to start a PEFA assessment? Go to [The PEFA Assessment Process: Planning, Managing and Using PEFA \(Volume I\)](#) where you will find the key phases and steps in the PEFA assessment process.



AVAILABLE in the three official languages **English, French, Spanish**.



New to the PEFA report? Check the [Preparing the PEFA Report \(Volume III\)](#), currently revised, where you will find a template, instructions for each section, and automated charts.



AVAILABLE in the three official languages **English, French, Spanish**.



How to score 31 performance indicators and 94 dimensions of the PEFA framework? Check the [PEFA Assessment Fieldguide \(Volume II\)](#) that includes data requirements and sources, calculation, definitions, and a glossary of terms.



AVAILABLE in the three official languages **English, French, Spanish** and additionally in Arabic and Chinese.



How to use PEFA results? Read [Using PEFA to Support Public Financial Management Improvement \(Volume IV\)](#) which provides guidance on how to utilize PEFA assessments as an input in the stakeholder dialogue to support PFM reform initiatives.



AVAILABLE in the three official languages **English, French, Spanish** and additionally in Portuguese.

Looking for other guidance?



PEFA Check Guidance describes the quality endorsement mechanism of PEFA Assessments, provides the PEFA Check requirements, and the instructions for the preparation and use of a PEFA assessment quality statement.



AVAILABLE in the three official languages **English, French, Spanish**.



Agile PEFA Guidance is an alternative guidance for conducting a PEFA assessment under certain circumstances, including adjustments to the timeframe and the report format.



AVAILABLE in the official language **English** and expected in Spanish and French.



PEFA Fiduciary Guidance aims to enhance the use of PEFA reports for fiduciary considerations on country systems. As it follows the standard PEFA methodology, its focus is on central government with deeper emphasis on the Budgetary Central Government.



AVAILABLE in **English**.

Need assistance to find PEFA templates?



PEFA templates are used in the process of developing the PEFA Assessment: (1) the Concept Note or Terms of Reference for PEFA, PEFA Gender, PEFA Climate and SNG PEFA assessments; (2) PEFA Report Template; (3) Templates of Automated Excel Scores Worksheets for PEFA Assessments; (4) Calculation Sheets for PEFA Performance Indicators PI-1, PI-2 and PI-2.3; (5) Calculation sheet for revenue composition outturn PI-3.2; (6) PEFA Report Review Template for External Reviewers and others.

Discover PEFA online publications from the global PFM knowledge hub



Stocktaking of PFM Diagnostic Tools: Global Trends and Insights report presents the updated spectrum of PFM diagnostic tools and their use. It is intended to contribute to increased knowledge of all stakeholders on the available PFM diagnostic tools, as well as good practices related to tools development and use.



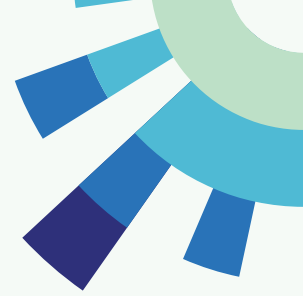
VOLUME 1 AVAILABLE in the three official languages **English, French, Spanish**.



The Global Report on PFM presents trends in public financial management (PFM) using Public Expenditure and Financial Accountability (PEFA) data. The online report contains data visualizations accompanied by short analyses and country examples that highlight key trends in PFM across seven key areas of the budget cycle.



AVAILABLE in the three official languages **English, French, Spanish**.



Expand your knowledge: Online PEFA training



The [PEFA e-learning course](#) provides an introduction to the PEFA Framework, presents examples, highlights relevant guidance documents and background material. It is available on the [OLC](#) and [edX](#) platforms. The time for completing the course is approximately 4 hours.

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The Public Expenditure and Financial Accountability (PEFA) program is a partnership of 9 international development partners: the European Commission, International Monetary Fund, World Bank, and the governments of France, Luxembourg, Norway, Slovakia, Switzerland, and the United Kingdom.

