

# BEST PRACTICE FINANCIAL MANAGEMENT AND REPORTING ON IPSAS AND IFRS® STANDARDS TOOLKIT

FINANCIAL MANAGEMENT PORTFOLIO



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# BEST PRACTICE FINANCIAL MANAGEMENT AND REPORTING ON IPSAS AND IFRS<sup>®</sup> STANDARDS TOOLKIT

## COURSE OUTLINE

This two-week programme combines:

**International Accounting Standards – Strategy, Principles and the Core Standards** 05 days

**International Accounting Standards – Major Application Area Implications, Systems & Processes** 05 days

International Accounting Standards are being or have been implemented widely across the world – IFRS primarily aimed at the private sector with IPSAS tailored to the public sector's specific circumstances. Both sets of standards are largely based on the same principles. The standards are designed to improve financial reporting, financial management, transparency and accountability, with a common accrual-based approach enhancing financial accountability and corporate governance. In this programme, delegates will learn how to achieve improvements in financial management and reporting while moving to full compliance with the Standards. The course explores the Standards' requirements and how they can be complied with. It assists delegates to analyse impacts on their organisations and plan the journey towards compliance.

Week one of the programme will examine the development of strategies for adopting and developing the application of the standards. We will then set out the principles underpinning the standards and explain the requirements set out in the "core" standards.

The second week will examine the major application areas including those specifically impacting delegates' organisations. We will also examine the impacts on systems, reporting and decision making. Finally, we will examine the practical implementation and development of the application of the standards.

**COURSE OBJECTIVES:** On completion, you will be able to:

- Understand the principles and application of the Standards in both the public and private sectors

- Explain financial reporting under the IFRS and IPSAS regimes including: the core statements; the style of annual reporting; the consequences for governments, organisations etc.
- Identify the changed approaches and ways of improving financial management under the Standards
- Use the financial management systems to improve financial monitoring and control in an accruals environment

## KEY TOPICS

- How core concepts such as accruals, capital and revenue spending depreciation and financial instruments should be reported on
- The requirements of specific sectors such as oil and gas, taxation and land [adapted to match delegates' business areas]
- How actions will affect reported financial performance

In order to ensure the highest learning standards for delegates, Crown Agents delivers training courses using excerpts from the official IFRS Standards under licence from the IFRS Foundation.

DURATION	FEE	DATE	VENUE
10 days	£4,450	29 July - 09 August 2024	London

## "ON DEMAND" COURSES



In addition to the scheduled dates shown, we are flexible to schedule additional dates to our calendar in a location of your choice. To ensure we can explore adding an additional date, do aim to contact us with your request with a minimum of 4 months' notice to allow the course to be advertised.

## WE REWARD LOYALTY

We offer all our clients a '4+1' loyalty scheme. For every four delegates enrolled from an organisation in any calendar year, we will provide you with one additional place, free of charge.

**"The training programme has enhanced my understanding of the IFRS and IPSAS standards."**

CHARLES DICKSON BROWN, Deputy Manager/ Finance & Admin, Ghana Stock Exchange. A delegate attending Best Practice Financial Management and Reporting on IPSAS and IFRS Standards.



## FEATURED TRAINER KEN MACNEILL

Ken has worked extensively in both the public and private sectors to improve performance, including within national and regional governments and the NHS.

He brings considerable practical experience of financial management, corporate governance, risk management and accounting to his training delivery. For over 10 years Ken has trained delegates from across the world, and has worked with the UK senior service on a UK government financial management improvement programme.

A Business Studies and Accounting graduate from the University of Edinburgh, Ken is a Chartered Institute of Public Finance and Accountancy member and former examiner.

# INTERNATIONAL ACCOUNTING STANDARDS - STRATEGY, PRINCIPLES AND THE CORE STANDARDS

FINANCIAL MANAGEMENT PORTFOLIO



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# INTERNATIONAL ACCOUNTING STANDARDS - STRATEGY, PRINCIPLES AND THE CORE STANDARDS

## COURSE OUTLINE

International Accounting Standards are being implemented widely across the world - IFRS primarily aimed at the private sector with IPSAS tailored to the public sector's specific circumstances. Understanding the common set of principles and the requirements of the Standards, and devising a strategy for application, are a critical first step to achieving a successful implementation.

The Standards are designed to improve financial reporting, financial management, transparency and accountability, introducing a common accrual-based approach to enhance financial accountability and corporate governance.

The course explores the principles on which the Standards are based. We will examine the core standards that will impact on all organisations and how they can be complied with. It assists delegates to analyse impacts on their organisations and to plan the journey towards compliance.

Delegates will learn the requirements relating to accruals, provisions and liabilities, accounting for revenue capital accounting for tangible and intangible assets including recognition, depreciation, amortisation and impairment. During the week we will also examine the development of strategies for adopting the application of the Standards.

**COURSE OBJECTIVES:** On completion, you will be able to:

- Understand the key principles and the application of the Standards in both the public and private sectors
- Implement the core accounting practices relating to the Standards
- Consider strategic approaches in applying the Standards
- Understand the core reporting requirements of the Standards

## KEY TOPICS

- History and development of the Standards and the principles on which they are based
- Core concepts - such as accruals, capital and revenue spending depreciation - and how they should be reported on
- Key options organisations have in adopting aspects of the Standards
- Actions affecting reported financial performance

In order to ensure the highest learning standards for delegates, Crown Agents delivers training courses using excerpts from the official IFRS Standards under licence from the IFRS Foundation.

This is week one of the **Best Practice Financial Management and Reporting on IPSAS AND IFRS® Standards Toolkit**.

DURATION	FEE	DATE	VENUE
05 days	£2,650	29 July - 02 August 2024	London

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**"The training programme has enhanced my understanding of the IFRS and IPSAS Standards. I found it very helpful learning from the experiences of participants as well as facilitators."**

CHARLES DICKSON BROWN, Deputy Manager/ Finance & Admin, Ghana Stock Exchange. A delegate attending **Best Practice Financial Management and Reporting on IPSAS and IFRS Standards**.



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# INTERNATIONAL ACCOUNTING STANDARDS - MAJOR APPLICATION AREAS, SYSTEMS AND PROCESSES

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# INTERNATIONAL ACCOUNTING STANDARDS - MAJOR APPLICATION AREAS, SYSTEMS AND PROCESSES

## COURSE OUTLINE

International Accounting Standards are being implemented widely across the world - IFRS primarily aimed at the private sector with IPSAS tailored to the public sector's specific circumstances. Understanding the major applications areas, and systems and processes are key to ensuring that your organisation adopts and applies the Standards effectively - to optimise the benefits and remain compliant. The Standards are designed to improve financial reporting, financial management, transparency and accountability, and introduces a common accrual-based approach enhancing financial accountability and corporate governance.

This course builds on core knowledge relating to the Standards. It looks at particular major areas of accounting and sets out the Standards' requirements and their implications for organisations. The areas examined will include Foreign Currency, Financial Instruments, Public Private Partnerships, Pensions, Agriculture and Oil and Gas. The course will also examine how to achieve compliance and the full benefits of improved financial management.

The course will address the actions that are required to make a success of adopting the Standards. This will include the use of systems and the development of the organisations' capability and capacity in dealing with the Standards. It will examine the reporting and decision-making implications and benefits of the application of the Standards and explore the assurance processes including with respect to External Audit.

**COURSE OBJECTIVES:** On completion, you will be able to:

- Understand financial reporting under the IFRS and IPSAS regimes and the consequences for governments, organisations etc.
- Explain the specific requirements of the Standards in key areas
- Apply new approaches and improve financial management
- Enhance systems to improve financial monitoring and control in an accruals environment

- Understand systems requirements and plan for successful implementation

## KEY TOPICS

- The Standards' requirements relating to major specific areas that affect many organisations
- Approaches to achieving compliance and improved financial and resource management including project management, training and changes to governance arrangements
- Role and application of systems in supporting compliance
- Enhancing reporting, decision making and assurance processes
- Adoption actions, lessons and implementation planning

In order to ensure the highest learning standards for delegates, Crown Agents delivers training courses using excerpts from the official IFRS Standards under licence from the IFRS Foundation.

This is week two of the **Best Practice Financial Management and Reporting on IPSAS AND IFRS® Standards Toolkit**.

DURATION	FEE	DATE	VENUE
05 days	£2,650	05 - 09 August 2024	London

## "ON DEMAND" COURSES



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# INTEGRATED FINANCIAL MANAGEMENT SYSTEMS: STRATEGY AND IMPLEMENTATION

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# INTEGRATED FINANCIAL MANAGEMENT SYSTEMS: STRATEGY AND IMPLEMENTATION

## COURSE OUTLINE

For several years, governments and public sector entities around the world have been implementing Integrated Financial Management Information Systems (IFMIS). The objective is to improve budget preparation and execution and achieve better value for money, efficiency, transparency and accountability in the delivery of government services.

This course explores the key business, people, process and technology issues that are critical to a successful IFMIS implementation. Delegates will receive guidance on practical IFMIS project implementation, key components of the system and how they fit in with the public financial management (PFM) cycle. The course will also explore other relevant issues such as the processes needed to secure the IFMIS against internet and information threats.

**COURSE OBJECTIVES:** On completion, you will be able to:

- Define IFMIS and its architecture and how it supports and strengthens PFM and electronic governance services
- Critically examine the factors involved in the effective planning and implementation of an IFMIS project, taking account of practical change management, system integration, legal, political and institutional issues
- Explain how an IFMIS solution can enhance internal controls, minimise risk, maximise value for money and enhance transparency
- Identify the additional operational risks arising from computerising financial management systems and the audit procedures required to address them
- Assess the scope for enhancing monitoring and evaluation
- Communicate results effectively to management and key stakeholders

## KEY TOPICS

- IFMIS implementation: the core business and technology components
- Public sector budgeting and the budget cycle
- Importance of the Chart of Accounts (COA)
- Effective public sector cash management within the scope of the IFMIS
- Results-based performance measurement, monitoring and evaluation
- International public sector accounting standards and reporting
- Auditing the IFMIS
- Internet and information security considerations of the IFMIS
- Systems acquisition, customisation and development
- Developing and implementing IFMIS and electronic governance strategies

DURATION	FEE	DATE	VENUE
10 days	£4,450	03 - 14 June 2024	London
		02 - 13 December 2024	London

## "ON DEMAND" COURSES



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**"Crown Agents offer the best course training contents by relating theory to the practical experience in building capacity by trainers in line with their organisational goals."**

ZAKARI ALHASSAN, Assistant Manager, State Interests and Governance Authority, Ghana.



## FEATURED TRAINER RICHARD ODOOM

Richard is a fellow of the Institute of Chartered Accountants in England and Wales and a Chartered member of the British Computer Society.

He has over 30 years' experience providing financial management and IT systems integration services to Ministries of Finance, Central Banks and other public-sector entities around the world, using his unique combination of IT, business management and accounting expertise.

With many years of capacity building experience, Richard has devised and delivered numerous Crown Agents training courses on financial management and accounting, audit and monitoring and evaluation in the UK and abroad.



# STRATEGIC FINANCIAL MANAGEMENT AND EFFECTIVE BUDGET EXECUTIVE TOOLKIT

FINANCIAL MANAGEMENT PORTFOLIO

NEW COURSE FOR 2024



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# STRATEGIC FINANCIAL MANAGEMENT AND EFFECTIVE BUDGET EXECUTIVE TOOLKIT

NEW

## COURSE OUTLINE

This two-week programme combines:

**Strategic Financial Management: Frameworks, Principles and Practice** 05 days

**Effective Budget Execution: Critical Processes and Strategic Drivers** 05 days

This toolkit is designed to enhance delegates' understanding of all the key strategic financial management processes which fall within the budget cycle, including the use of performance measurement techniques. The course will focus on the issues and challenges which impede the seamless operation of management and financial accounting processes, and examine the techniques and tools needed to address them. It will highlight what constitutes strategic financial management and effective budget execution, aimed at achieving the organisation's strategic and operational objectives.

In the first week, delegates will explore processes within the formulation, preparation and approval stages of the budget cycle through looking at the prevailing medium-term budget contexts and legal framework.

In the second week, the course will examine procedures and activities during execution of the budget, covering budget control, accounting and reporting and oversight of financial management operations.

**COURSE OBJECTIVES:** On completion, you will be able to:

- Understand the principles and practices involved in applying the medium term budget frameworks
- Appreciate the public financial management reform context of strategic financial management
- Design relevant performance measures to monitor achievement of policy objectives
- Apply strategic financial management to add value to the budget execution process
- Describe the components of management accounting and its inter-connections with financial accounting
- Undertake cost analysis and allocation, and design and implement a Chart of Accounts [COA]

## KEY TOPICS

- Budget formulation, preparation, approval and execution processes
- The framework of management control and expenditure monitoring
- Medium-term budget frameworks
- Traditional financial reporting and results-based performance measurement
- Results-based monitoring and evaluation
- Role, design and implementation of the Chart of Accounts [COA]
- Procurement principles and importance for public financial management
- Costing principles and techniques
- Effective cash management and treasury and cash management integration
- Integrated financial management information systems
- Sources of finance including the use of Public-Private Partnerships [PPPs]

DURATION	FEE	DATE	VENUE
10 days	£4,450	15 - 26 April 2024	London
		18 - 29 November 2024	London

## "ON DEMAND" COURSES



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**"The course was well structured with attention to detail and was in a great location."**

ABENA SERWAA ANNOR, Finance Officer, Ghana Maritime Authority.



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# STRATEGIC FINANCIAL MANAGEMENT: FRAMEWORKS, PRINCIPLES AND PRACTICE

FINANCIAL MANAGEMENT PORTFOLIO

NEW COURSE FOR 2024



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# STRATEGIC FINANCIAL MANAGEMENT: FRAMEWORKS, PRINCIPLES AND PRACTICE

NEW

## COURSE OUTLINE

Strategic financial management provides the essential ingredients for achieving a sound budget preparation and execution system.

This one-week course will focus on operations within the strategic planning and fiscal framework, budget formulation, preparation and approval stages of the budget cycle. The course will also explore the prevailing medium-term budget contexts and the legal framework underpinning the budget processes and the role of Parliament in the budget process.

In addition, the course will also examine the performance measurement techniques involved in monitoring achievement of policy objectives throughout the budget cycle.

**COURSE OBJECTIVES:** On completion, you will be able to:

- Understand the principles and practices involved in applying the medium term budget frameworks
- Recognise the importance of the legal framework and the role of Parliament in the budget formulation and preparation process
- Appreciate the public financial management reform context of strategic financial management
- Understand the critical importance of procurement planning for effective budget execution
- Explain the principles of budgeting and its linkages to cash forecasting and cash management
- Understand the principles of cost analysis as a prerequisite for effective budget preparation
- Design relevant performance measures to monitor achievement of policy objectives

## KEY TOPICS

- Budget formulation and preparation process
- The role of parliament in the budget formulation process

- Medium-term budget frameworks
- The framework of management control and expenditure monitoring
- Results-based performance measurement, monitoring and evaluation
- Procurement planning
- Linking policy objectives to budget outcomes
- Role of the Chart of Accounts
- Planning and budgeting, and linkages to cash-flow forecasting
- Integrated financial management information systems
- Financing the fiscal gap
- Sources of finance including the use of Public-Private Partnerships (PPPs)

This is week one of the **Strategic Financial Management and Effective Budget Executive Toolkit**.

DURATION	FEE	DATE	VENUE
05 days	£2,650	15 - 18 April 2024	London
		18 - 22 November 2024	London

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# EFFECTIVE BUDGET EXECUTION: CRITICAL PROCESSES AND STRATEGIC DRIVERS

FINANCIAL MANAGEMENT PORTFOLIO

NEW COURSE FOR 2024



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# EFFECTIVE BUDGET EXECUTION: CRITICAL PROCESSES AND STRATEGIC DRIVERS

NEW

## COURSE OUTLINE

Effective budget execution, that also takes place within a strategic financial management context, is a key factor in an organisation achieving its strategic and operational objectives.

This course is designed to enhance delegates' understanding of the key components of the budget cycle, with an emphasis on the procedures and activities within the execution phase of the budget, covering: budget control; accounting and reporting; and oversight of financial management operations.

This one-week course will also address the role of results-based performance measurement techniques in monitoring the achievement of government policy objectives, supported by the Chart of Accounts [COA].

**COURSE OBJECTIVES:** On completion, you will be able to:

- Apply strategic financial management to add value to the budget execution process
- Describe the components of management accounting and its inter-connections with financial accounting
- Appreciate how to undertake cost analysis and allocation and their importance for strategic management and improved decision-making
- Design robust and meaningful financial performance measures to help enhance financial control and delivery of policy objectives
- Design and implement a COA for effective classification of transactions and tracking of outcomes
- Comprehend the essential components of effective cash management and the need for cash-debt management integration

## KEY TOPICS

- Strategic financial management context
- Budget execution processes

- The framework of management control and expenditure monitoring
- Traditional financial reporting and results-based performance measurement
- Procurement principles and importance for public financial management
- Costing principles and techniques
- Principles of effective cash management
- Treasury and cash management integration
- Integrated financial management information systems
- Governance and external scrutiny

This is week two of the **Strategic Financial Management and Effective Budget Executive Toolkit**.

DURATION	FEE	DATE	VENUE
05 days	£2,650	22 - 26 April 2024	London
		25 - 29 November 2024	London

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**"Crown Agents has left an amazing lasting impression. I will recommend their courses to all my colleagues."**

EDNA NANDUDU, Senior Assistant Secretary, Ministry of Justice & Constitutional Affairs, Uganda.



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# PUBLIC FINANCIAL MANAGEMENT, ESG AND GREEN FINANCE TOOLKIT

FINANCIAL MANAGEMENT PORTFOLIO

NEW COURSE FOR 2024



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# PUBLIC FINANCIAL MANAGEMENT, ESG AND GREEN FINANCE TOOLKIT

NEW

## COURSE OUTLINE

This two-week programme combines:

Public Financial Management: Issues and Solutions	05 days
ESG, Green Public Financial Management and Climate Finance	05 days

Public financial management (PFM) systems are essential for the achievement of government policy and development objectives. The scope of PFM now extends to include sustainability and Environmental, Social, Governance (ESG) risks and opportunities, and climate related concerns.

In the first week, delegates will explore the fundamentals of government reforms and the key issues and solutions across the PFM landscape. The PFM landscape includes: budget preparation and execution; accounting; financial reporting and trends towards results-based performance measurement; monitoring and evaluation; internal controls; integrated financial management information systems (IFMIS) and auditing.

In the second week, delegates will discover the ongoing and critical transformations to the PFM landscape related to the latest developments in ESG and sustainability, Green PFM and Green/Climate Finance.

**COURSE OBJECTIVES:** On completion, you will be able to:

- Lead in developing solutions to contemporary PFM challenges
- Define the benefits of Medium Term Expenditure Framework (MTEF) reforms and budget processes
- Execute budgets and understand cash management, public procurement and internal controls
- Improve PFM compliance
- Adapt public finance strategy in response to key ESG risks
- Appreciate the range of financing options available for sustainable investment
- Understand how to meet ESG and climate-related reporting and accounting requirements

## KEY TOPICS

- Overview of PFM and origins of PFM reforms
- Public sector budgeting approaches and cash management
- Public Expenditure and Financial Accountability (PEFA)
- Service delivery and performance management in the public sector
- Capital budgeting, planning and sustainable procurement
- The local and global drivers for Green PFM and ESG
- ESG and sustainability in programme / project appraisal and impact assessments
- Climate and sustainable finance, strategies and opportunities
- ESG bonds, financial instruments and investor perspectives
- Transparency, greenwashing, ethics and corruption risks
- Integrated ESG reporting under international frameworks

DURATION	FEE	DATE	VENUE
10 days	£4,450	17 - 28 June 2024	London
		07 - 18 October 2024	London

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# PUBLIC FINANCIAL MANAGEMENT: ISSUES AND SOLUTIONS

FINANCIAL MANAGEMENT PORTFOLIO

NEW COURSE FOR 2024



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# PUBLIC FINANCIAL MANAGEMENT: ISSUES AND SOLUTIONS

NEW

## COURSE OUTLINE

Public financial management (PFM) systems are essential for the achievement of government policy and development objectives.

This one-week course explores the fundamentals of government reforms and the key issues and solutions across the PFM landscape. The course will include: budget preparation and execution; accounting; financial reporting and trends towards results-based performance measurement; integrated financial management information systems (IFMIS) and auditing.

Delegates will also explore the important management theories and strategic planning frameworks essential to understanding the current issues and trends in integrated PFM reforms.

**COURSE OBJECTIVES:** On completion, you will be able to:

- Lead in developing solutions to contemporary PFM challenges
- Define the benefits of Medium Term Expenditure Framework (MTEF) reforms and budget processes and assist in the realisation of these benefits
- Execute budgets and understand cash management, public procurement and internal controls
- Improve PFM compliance
- Define the PFM oversight function, the role of the Public Accounts Committee and external audit agencies
- Shape reforms to address deficiencies in transparency and accountability frameworks

## KEY TOPICS

- Overview of PFM and origins of PFM reforms
- Public sector budgeting, including programme and performance budgeting
- Overview of MTEF and linkages with policy objectives
- Public Expenditure and Financial Accountability (PEFA)

- Service delivery and performance management in the public sector
- Budget implementation, cash management and forecasting
- Monitoring and evaluation
- Financial accounting and reporting
- Integrated Financial Management Information Systems
- Governance and fraud prevention
- Overview of key issues in Green PFM and Climate Finance

This is week one of the **Public Financial Management, ESG and Green Finance Toolkit**.

DURATION	FEE	DATE	VENUE
05 days	£2,650	17 - 21 June 2024	London
		07 - 11 October 2024	London

## "ON DEMAND" COURSES



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## WE REWARD LOYALTY

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**"The training was well structured with strong attention to detail and was in a great location. I was very impressed."**

ABENA SERWAA ANNOR, Finance Officer, Ghana Maritime Authority.



## FEATURED TRAINER RICHARD ODOOM

Richard is a fellow of the Institute of Chartered Accountants in England and Wales and a Chartered member of the British Computer Society.

He has over 30 years' experience providing financial management and IT systems integration services to Ministries of Finance, Central Banks and other public-sector entities around the world, using his unique combination of IT, business management and accounting expertise.

With many years of capacity building experience, Richard has devised and delivered numerous Crown Agents training courses on financial management and accounting, audit and monitoring and evaluation in the UK and abroad.

# ESG, GREEN PUBLIC FINANCIAL MANAGEMENT AND CLIMATE FINANCE

FINANCIAL MANAGEMENT PORTFOLIO

NEW COURSE FOR 2024



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# ESG, GREEN PUBLIC FINANCIAL MANAGEMENT AND CLIMATE FINANCE

NEW

## COURSE OUTLINE

Public financial managers are now facing an increasingly urgent issue – the need to devise strategic transition plans to meet their ESG and Sustainable Development Goals. This must include an appreciation of the broader transformation needed to help their organisation transition towards its own Net Zero, ESG and Nationally Defined Contributions (NDC) goals.

This course will help participants examine and adopt green public financial management (PFM) strategies and practices. In the context of current and emerging ESG risks and opportunities, delegates will critically assess their PFM policies, financing strategy and capital investment framework. They will also explore issues of ethics and integrity and how to mitigate against 'greenwashing' and corruption risks.

This highly practical training will equip public financial managers with the necessary understanding, skills and tools to confidently address these complex issues and help their organisation to deliver on its environmental and social impact goals.

**COURSE OBJECTIVES:** On completion, you will be able to:

- Identify key ESG and climate change risks and opportunities facing your organisation
- Adapt public finance policy and strategy in response to ESG risks, opportunities and obligations
- Assess, plan and budget for capital and investments in the context of your country's NDCs
- Appreciate the range of financing options available for sustainable investment
- Outline key ESG issues for finance staff, procurement staff, auditors and pensions investors
- Understand and meet ESG and climate-related disclosure, reporting and accounting requirements

## KEY TOPICS

- The local and global drivers for Green PFM and ESG
- Capital budgeting, planning and sustainable procurement
- ESG and sustainability in programme / project appraisal
- Environmental, climate and social impact assessments
- ESG investment strategies and opportunities
- Climate and sustainable finance, ESG bonds and financial instruments
- Pensions scheme investor perspectives and ESG screening / investing
- Transparency, greenwashing, ethics and corruption risks
- Sustainability and integrated ESG reporting under the international frameworks

This is week two of the **Public Financial Management, ESG and Green Finance Toolkit**.

DURATION	FEE	DATE	VENUE
05 days	£2,650	24 - 28 June 2024	London
		14 - 20 October 2024	London

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Having held senior positions in government and international development organisations, Dev has a wealth of knowledge and experience in implementing a diverse portfolio of projects in public financial management, macroeconomic management, debt and cash management, PPP, risk management and leveraging IT systems. He is regularly called upon to design and deliver hands-on training in different aspects of PFM in both Anglophone and Francophone countries and to talk at key workshops.



# FINANCIAL RISK MANAGEMENT

FINANCIAL MANAGEMENT PORTFOLIO



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# FINANCIAL RISK MANAGEMENT

## COURSE OUTLINE

Organisations across the world are entering into partnerships and commercial arrangements with other entities such as clients, strategic partners or suppliers. It is critically important that the financial strength of this partner is understood in order to accurately assess and manage the risk to your organisation.

Partner failure is often a major hazard identified in project risk analysis and can result in financial strain and even late payment for projects, as in the case of the widely reported collapse of Carillion, a large UK outsourcing company. Financial analysis is therefore a key skill in assessing and understanding how some key risks can be mitigated.

This course will equip you with the skills to undertake an analysis of other organisations to inform decisions as to whether to enter a partnership arrangement. It will also explore how to understand the developing financial health of the organisations you are already partnering by analysing the ratios derived from published accounts and examining trends and relationships between different sets of figures published in core statements and external sources of information.

Highly practical and interactive, this programme will focus on action planning and case study analysis as a method to put your learnings into action back in the workplace.

**COURSE OBJECTIVES:** On completion, you will be able to:

- Undertake analysis of an organisation's accounts
- Identify information that will inform on the financial strength of an organisation
- Understand the risks presented by projects or services and how to mitigate them
- Summarise a financial assessment and present it in context

## KEY TOPICS

- The objectives of financial analysis
- Sources of information for analysis
- Analysing accounts – calculating and understanding the key financial metrics
- Using and understanding the limitations of other sources information, including company statements, credit agencies and media
- Securing further information from the target organisation
- Risk mitigation actions and strategies

DURATION	FEE	DATE	VENUE
10 days	£4,450	02 - 13 December 2024	London

## “ON DEMAND” COURSES



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## FEATURED TRAINER KEN MACNEILL

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He brings considerable practical experience of financial management, corporate governance, risk management and accounting to his training delivery. For over 10 years Ken has trained delegates from across the world, and has worked with the UK senior service on a UK government financial management improvement programme.

A Business Studies and Accounting graduate from the University of Edinburgh, Ken is a Chartered Institute of Public Finance and Accountancy member and former examiner.

# THE TREASURY AND DEBT MANAGEMENT TOOLKIT

FINANCIAL MANAGEMENT PORTFOLIO

NEW COURSE FOR 2024



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# THE TREASURY AND DEBT MANAGEMENT TOOLKIT

NEW

## COURSE OUTLINE

This two-week course includes:

**Best Practice in Treasury Management**  
**Public Debt Management: Issues and Solutions**

05 days  
05 days

This new programme brings together two subjects closely linked to the overall financial health of an organisation: treasury and debt management. These two areas help organisations to see financial flows and available spending, in order to make more informed decisions on financial planning and the acquisition and use of funds.

In week one, delegates will explore how effective monitoring of treasury resources can ensure that the organisation has the cash resources it needs while managing risk, minimising the cost of debt and optimising the returns on investment.

In the second week, you will study the fundamental principles of public debt management and develop an understanding of the latest tools and techniques to manage your debt portfolios effectively. Recent events, such as the COVID-19 pandemic and global supply chain disruption, will be taken into account.

This programme is essential learning for anyone with responsibilities for cash management or managing debt and investments at an organisational or national level.

Case studies will illustrate the practical application of the techniques covered and trainers will work with delegates on the real-life issues they face in their own organisation.

**COURSE OBJECTIVES:** On completion, you will be able to:

- Develop a Treasury Management strategy
- Manage risk and performance, cash flow management and modelling
- Understand borrowing and investing instruments
- Assess the treasury implications of International Accounting Standards
- Understand the scope of public debt management and its linkages with fiscal and monetary policy
- Apply concepts of cost and risk to your public debt portfolio

- Create a sound debt management strategy based on a portfolio review and a good understanding of the objectives for debt management
- Appreciate the impact on public debt management of emerging lenders and lending arrangements

## KEY TOPICS

- Treasury Management strategy, reporting and performance measures
- Developing capital markets and liquidity
- Proactive management of the debt portfolio and refinancing
- Counter-fraud measures
- Sovereign debt and sustainability
- Debt strategy formulation
- Guarantees and contingent liabilities
- Internal and external audit
- Analysing and reporting on the debt portfolio
- Debt and cash management
- New challenges in bond issuance
- Public-Private Partnerships
- Emerging lenders

DURATION	FEE	DATE	VENUE
10 days	£4,450	17 - 28 June 2024	Dubai

## "ON DEMAND" COURSES



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EDNA NANDUDU, Senior Assistant Secretary, Ministry of Justice & Constitutional Affairs, Uganda.



## FEATURED TRAINER KEN MACNEILL

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A Business Studies and Accounting graduate from the University of Edinburgh, Ken is a Chartered Institute of Public Finance and Accountancy member and former examiner.

# BEST PRACTICE IN TREASURY MANAGEMENT

FINANCIAL MANAGEMENT PORTFOLIO

NEW COURSE FOR 2024



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# BEST PRACTICE IN TREASURY MANAGEMENT

NEW

## COURSE OUTLINE

Treasury Management lies at the heart of the financial strategy of all organisations. It brings together the strategic management of cash, investments and debt to enable an organisation to manage and plan its liquidity.

Cash has to be closely managed on a daily basis, but also with regard to longer-term needs in terms of financing capital investment and investing surplus funds. Effective treasury management is vital in ensuring that the organisation has the cash resources it needs when it needs them, while managing risk, minimising the cost of debt and optimising the returns on investment.

Expertise in this area is required by every public and private sector organisation. It is vital that investments are managed within a Treasury Management strategy that is integrated with overall national economic policy.

**COURSE OBJECTIVES:** On completion, you will be able to:

- Develop an outline Treasury Management strategy and key associated policies
- Manage risk and performance, cash flow management and modelling
- Understand key borrowing and investing instruments and their risks and benefits
- Appreciate the key Treasury implications of International Accounting Standards
- Monitor and report on Treasury Management

## KEY TOPICS

- Treasury Management strategy, reporting and performance measures
- Financial risk management tools and techniques
- Cash flow management and modelling
- Investments and borrowing – short, medium and long term
- Proactive management of the debt portfolio and refinancing
- Counter-fraud measures
- Capital markets development, liquidity, sovereign debt and sustainability

This is week one of **The Treasury and Debt Management Toolkit**.

DURATION	FEE	DATE	VENUE
05 days	£2,650	17 - 21 June 2024	Dubai

## "ON DEMAND" COURSES



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# PUBLIC DEBT MANAGEMENT: ISSUES AND SOLUTIONS

FINANCIAL MANAGEMENT PORTFOLIO

NEW COURSE FOR 2024



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# PUBLIC DEBT MANAGEMENT: ISSUES AND SOLUTIONS

NEW

## COURSE OUTLINE

As the global economy comes to terms with the impact of the global financial crash, the threat of a new debt crisis has taken centre stage. This is compounded by the fact that borrowing has rapidly increased as countries seek to boost investment in infrastructure to support their objectives under the Sustainable Development Goals.

New borrowing sources include Eurobonds and emerging creditors such as China. Analysts have warned that global debt has reached an "all time high" as more countries than ever are in danger of slipping into a major debt crisis. Governments need to address these challenges in order to manage costs and risks within a sound macro and fiscal framework.

This course will take participants through the fundamental principles of public debt management, taking current developments into account, and will explore the latest tools to manage their debt portfolios effectively.

**COURSE OBJECTIVES:** On completion, you will be able to:

- Understand the scope of public debt management and its linkages with fiscal and monetary policy
- Understand debt concepts and the role of domestic financial markets
- Analyse the strengths and weaknesses of debt management operations in your country
- Apply concepts of cost and risk to your public debt portfolio to manage both in line with your country's debt management objectives
- Create an outline of a debt management strategy based on a portfolio review and a good understanding of the objectives for debt management
- Appreciate the impact on public debt management of emerging lenders and lending arrangements

## KEY TOPICS

- Fundamental debt concepts and techniques
- Global financial flows and different financing options
- Debt management, monetary and fiscal policy linkages
- Legal and institutional arrangements
- Debt strategy formulation
- Guarantees and contingent liabilities
- Analysing and reporting on the debt portfolio
- Debt and cash management
- Public-Private Partnerships
- Emerging lenders

This is week one of **The Public Debt and Loan Negotiation and Evaluation Toolkit** and week two of the **The Treasury and Debt Management Toolkit**.

DURATION	FEE	DATE	VENUE
05 days	£2,650	24 - 28 June 2024	London
		18 - 22 November 2024	London

## "ON DEMAND" COURSES



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**"Crown Agents offer the best course training contents by relating theory to the practical experience in building capacity by trainers in line with their organisational goals."**

ZAKARI ALHASSAN, Assistant Manager, State Interests and Governance Authority, Ghana.



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# BEST PRACTICE FINANCIAL MANAGEMENT AND REPORTING ON IPSAS AND IFRS STANDARDS – ACCA CERTIFICATE

FINANCIAL MANAGEMENT PORTFOLIO



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# BEST PRACTICE FINANCIAL MANAGEMENT AND REPORTING ON IPSAS AND IFRS STANDARDS – ACCA CERTIFICATE

## COURSE OUTLINE

This course content is aligned to the ACCA Cert IFR syllabus and ACCA Cert IPSAS syllabus. It includes integrated preparation for either the ACCA Cert IFR certificate or Cert IPSAS certificate exam, which may be taken at the end of week two.

IPSAS and IFRS standards are designed to assist organisations to improve their financial reporting, financial management, transparency and accountability, introducing a common accrual-based approach that should enhance financial accountability and corporate governance.

Delegates will learn how to achieve improvements in financial management and reporting while moving to full compliance with the Standards. It assists delegates to analyse the impacts on their organisations and to plan the journey towards compliance, using case studies to illustrate the practical application of the Standards.

**COURSE OBJECTIVES:** On completion, you will be able to:

- Understand the key principles and the application of the Standards in both the public and private sectors
- Financial reporting under the IFRS and IPSAS regimes including: the core statements; the style of annual reporting; the consequences for governments, organisations etc.
- Changed approaches and improving financial management under the Standards
- Using the systems to improve financial monitoring and control in an accruals environment
- Systems requirements for successful implementation

## KEY TOPICS

- How core concepts such as accruals, capital and revenue spending depreciation and financial instruments should be reported on
- The requirements of specific sectors (adapted to match delegates' business areas)

- How actions will affect reported financial performance and how financial management should be amended to deal with these



## ABOUT THE ACCA CERTIFICATE:

This is blended course and includes either ACCA Certificate in International Public Sector Accounting Standards (Cert IPSAS) or ACCA Certificate in International Financial Reporting (Cert IFR). Delegates will elect to take either the Cert IPSAS or Cert IFR course. This programme includes access to the official ACCA online course and assessment exam, which is available for 6 months from course registration. Certification is subject to passing the ACCA assessment which is a one-hour multiple-choice exam.

In order to ensure the highest learning standards for delegates, Crown Agents delivers training courses using excerpts from the official IFRS Standards under licence from the IFRS Foundation.

DURATION	FEE	DATE	VENUE
10 days	£4,650	21 October - 01 November 2024	London

## "ON DEMAND" COURSES



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**"The training programme has enhanced my understanding of the IFRS and IPSAS standards."**

CHARLES DICKSON BROWN, Deputy Manager/ Finance & Admin, Ghana Stock Exchange. A delegate attending Best Practice Financial Management and Reporting on IPSAS and IFRS Standards.



## FEATURED TRAINER KEN MACNEILL

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# PUBLIC DEBT AND LOAN NEGOTIATION AND EVALUATION TOOLKIT

FINANCIAL MANAGEMENT PORTFOLIO

NEW COURSE FOR 2024



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# PUBLIC DEBT AND LOAN NEGOTIATION AND EVALUATION TOOLKIT

NEW

## COURSE OUTLINE

This two-week programme combines:

**Public Debt Management: Issues & Solutions**  
**Loan Negotiation & Evaluation**

**05 days**  
**05 days**

As the global economy strives to come to terms with various crises – financial, environmental, disease and war – the threat of a new debt crisis has taken centre stage. This threat is compounded by rapid borrowing by countries seeking to boost investment in infrastructure to support their objectives under the Sustainable Development Goals. In response to this demand, new borrowing sources have emerged, including Eurobonds and emerging creditors such as China. Analysts have warned that global debt has reached an 'all time high' as more countries than ever are in danger of slipping into a major debt crisis.

In the first week, the course will take delegates through the fundamental principles of public debt management, taking recent and current global developments into account, and explore the latest tools to analyse and manage their debt portfolios more effectively.

In the second week, the course will build the capacity of delegates in loan negotiation and the practical considerations needed for a successful outcome. The course will cover a number of restructuring scenarios and negotiation arrangements, related to various sources of finance and creditor forums, including the Paris Club.

**COURSE OBJECTIVES:** On completion, you will be able to:

- Understand the scope of public debt management and its linkages with fiscal and monetary policy
- Apply concepts of cost and risk to your public debt portfolio
- Create an outline for a debt management strategy based on a portfolio review and a good understanding of the objectives for debt management
- Understand the building blocks of loan evaluation, including the loan cycle and the relevance of legislation

- Interpret loan and bond agreements, including evaluation of the financial terms
- Understand the practical processes involved in loan negotiations
- Evaluate different sources of finance and determine their appropriateness for funding various types of projects

## KEY TOPICS

- Fundamental debt concepts, techniques and instruments
- Debt sustainability framework
- Controlling debt management operational risk
- Analysing and reporting on the debt portfolio
- Debt portfolio management, rescheduling and refinancing
- Sources of finance, emerging lenders and Public-Private Partnerships
- Overview of a typical loan cycle
- Interpretation and evaluation of a financial agreement
- Negotiation theory and practice
- Refinancing and voluntary restructuring

DURATION	FEE	DATE	VENUE
10 days	£4,450	18 - 29 November 2024	London

## "ON DEMAND" COURSES



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# LOAN NEGOTIATION AND EVALUATION

FINANCIAL MANAGEMENT PORTFOLIO

NEW COURSE FOR 2024



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# LOAN NEGOTIATION AND EVALUATION

NEW

## COURSE OUTLINE

The impact of various financial crises and the tightening of credit markets has reduced the borrowing options available to governments. In addition, the cost of available credit has increased substantially, leading to a heightened need for governments to conduct a critical evaluation of different borrowing options and to negotiate the most favourable terms.

This course will build participants' analytical skills and provide them with the necessary tools to evaluate different financing options, as well as empowering them to select and negotiate the most appropriate terms. It will guide delegates to acquire a complete understanding of financial markets and different creditors, and the need to achieve the appropriate balance between borrowing cost and associated risk.

**COURSE OBJECTIVES:** On completion, you will be able to:

- Understand the relevance of debt management in the wider macroeconomic and public financial management context, including coordination with fiscal and monetary policy
- Understand the building blocks of loan evaluation
- Interpret loan and bond agreements, including evaluation of the financial terms of different loan and bond options and make recommendations on the most suitable option
- Understand the practical processes involved in loan negotiations
- Evaluate different sources of finance and determine their appropriateness for funding various types of project
- Apply financial evaluation techniques to appraise various sources of finance and assess the financial impact of debt restructuring
- Understand the process of reviewing the debt portfolio and assessing the impact on the portfolio of contracting new borrowing
- Appreciate the process of issuing government securities

## KEY TOPICS

- The borrowing cycle
- What and when to negotiate
- Legal and institutional frameworks for government borrowing
- Available financing options
- Structure and interpretation of loan agreements
- Techniques for financial evaluation
- Assessing the impact of new borrowing
- The impact of portfolio indicators
- Principles and processes of negotiation
- Negotiation skills, techniques and strategies
- Practical simulation of a loan negotiation

This is week two of the **Public Debt and Loan Negotiation and Evaluation Toolkit**.

DURATION	FEE	DATE	VENUE
05 days	£2,650	25 - 29 November 2024	London

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**"Let us never negotiate out of fear. But let us never fear to negotiate."**

JOHN F. KENNEDY



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# FINANCIAL MANAGEMENT OF DEVELOPMENT PROJECTS

FINANCIAL MANAGEMENT PORTFOLIO



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# FINANCIAL MANAGEMENT OF DEVELOPMENT PROJECTS

## COURSE OUTLINE

Sound financial management is critical to the success of all development projects. This course defines the components of effective financial management within the context of the development project life cycle. It examines the financial tools and techniques available for the efficient implementation of projects and for assessing the effectiveness of project financial management systems. It covers: budgeting; accounting standards; procurement and contract management; performance measurement; financial management staffing; audit and internal controls.

During the ten days, delegates will explore the processes needed to implement appropriate project risk mitigation strategies and set up monitoring of performance indicators and reporting for effective decision making. They will assess their own financial management systems and develop action plans for the improvement of these systems.

**COURSE OBJECTIVES:** On completion, you will be able to:

- Adopt appropriate financial tools and techniques for managing projects
- Understand the dynamics and principles involved in the use of donor systems
- Assess existing project financial management systems and effect needed improvements
- Appraise and choose between various prospective project investment opportunities
- Formulate project plans and budgets
- Align project procurement and contracting processes with international best practice
- Use integrated financial management information systems to enhance project efficiency and effectiveness
- Evaluate project implementation risks and minimise them

## KEY TOPICS

- Project life-cycle, project documentation and project management
- Project implementation structures, financial management and controls
- Tools to assess project financial management systems
- International public sector accounting standards
- Budgeting, and accounting policies and procedures
- Reporting, monitoring and evaluation
- Governance and fraud prevention
- Procurement for development projects
- Information systems
- Country and donor financial systems
- Project appraisal techniques and internal and external audit

DURATION	FEE	DATE	VENUE
10 days	£4,450	13 - 24 May 2024	London
		09 - 20 September 2024	London

## "ON DEMAND" COURSES



In addition to the scheduled dates shown, we are flexible to schedule additional dates to our calendar in a location of your choice. To ensure we can explore adding an additional date, do aim to contact us with your request with a minimum of 4 months' notice to allow the course to be advertised.

## WE REWARD LOYALTY

We offer all our clients a '4+1' loyalty scheme. For every four delegates enrolled from an organisation in any calendar year, we will provide you with one additional place, free of charge.

**"The delivery of the subjects was very well thought through. The facilitators and trainers have a good understanding of their subjects. We also appreciated how the principles taught in class can be put into practice with results to show for them."**

GREGORY SALIA IDDI, Project Accountant, Department of Urban Roads, Ghana.



## FEATURED TRAINER RICHARD ODOOM

Richard is a fellow of the Institute of Chartered Accountants in England and Wales and a Chartered member of the British Computer Society.

He has over 30 years' experience providing financial management and IT systems integration services to Ministries of Finance, Central Banks and other public-sector entities around the world, using his unique combination of IT, business management and accounting expertise.

With many years of capacity building experience, Richard has devised and delivered numerous Crown Agents training courses on financial management and accounting, audit and monitoring and evaluation in the UK and abroad.