INTEGRATED FINANCIAL AND PERFORMANCE MANAGEMENT FOR DEVELOPMENT PROJECT



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TRAINING CENTER

GENTEX Training Center LLC | Orlando - FL, USA
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Introduction

Integrated Financial and Performance Management for Development Project Training Course prepares finance, programme and donor-facing professionals to plan, fund and monitor development projects with discipline. Participants learn how to translate project objectives into budgets, funding schedules and performance measures that donors and boards accept. The programme covers results-based budgeting, cost allocation, fund disbursement, procurement-linked expenditure and financial reporting for donor-funded programmes. Furthermore, it addresses variance analysis, audit readiness and the controls that protect restricted funds. As a result, delegates can manage multiple projects and report credible results. Gentex Training Center delivers the programme through budgeting workshops and donor reporting case work.

Integrated Financial and Performance Management for Development Project Course Objectives

- Translate development project objectives into measurable performance indicators.
- Build activity-based and results-based budgets for donor-funded projects.
- Apply cost classification including direct, indirect, shared and eligible costs.
- Plan fund disbursement schedules and manage cash flow across projects.
- Align procurement and expenditure planning with donor rules.
- Monitor budget versus actual performance and analyse variances.
- Apply earned value concepts to track progress against cost and schedule.
- Prepare donor financial reports, interim statements and forecast revisions.
- Apply internal controls, segregation of duties and audit trail requirements.
- Manage restricted funds, budget revisions and donor compliance obligations.

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Course Methodology

The course combines practical briefings with budgeting workshops and donor reporting case work. Participants build a project budget, run variance and earned value analysis and prepare a donor report extract. In addition, structured peer review and group discussion reinforce each technique, and every day closes with an applied programme finance task.

Who Should Take This Course

- Finance managers and officers in development organisations.
- Programme and project managers in donor-funded projects.
- Grants, contracts and compliance officers.
- Monitoring and evaluation specialists working with budgets.
- Internal auditors and finance reviewers in development agencies.
- Government and municipality staff managing funded programmes.

Integrated Financial and Performance Management for Development Project Course Outlines

Day 1: Development Project Finance Framework

- Development project cycle: identification, appraisal, implementation and closure.
- Funding sources: donors, government, concessional loans and blended finance.
- Logical framework approach and its link to budgets and indicators.
- Results-based management and performance measurement principles.
- Roles of donors, implementing partners and oversight bodies.
- Financial management standards for donor-funded programmes.

- Workshop: linking a project logframe to budget lines and indicators.

Day 2: Budgeting and Cost Structure

- Activity-based budgeting and cost estimation techniques.
- Direct, indirect, shared, eligible and ineligible cost classification.
- Cost allocation methods for shared resources and overhead recovery.
- Budget structure: headings, cost centres and donor budget formats.
- Multi-year budgeting and annual work plan alignment.
- Budget narratives and supporting assumptions.
- Workshop: preparing a multi-year project budget with cost allocation.

Day 3: Disbursement, Cash Flow and Procurement Linkages

- Fund disbursement schedules and tranche conditions.
- Cash flow forecasting and working capital planning for projects.
- Managing advances, retirements and replenishment cycles.
- Procurement planning and its link to expenditure forecasting.
- Contract commitments, purchase orders and commitment tracking.
- Currency, inflation and exchange rate considerations.
- Workshop: building a disbursement and cash flow forecast.

Day 4: Performance Monitoring and Variance Analysis

- Monitoring budget versus actual expenditure by activity.
- Variance analysis, root cause review and corrective actions.
- Earned value concepts: planned value, earned value and cost variance.

- Burn rate, cost efficiency and value-for-money metrics.
- Forecast revisions and re-budgeting during implementation.
- Key performance indicators for programme and donor reporting.
- Workshop: analysing variances and applying earned value to a project.

Day 5: Donor Reporting, Controls and Audit Readiness

- Donor financial report formats and reporting deadlines.
- Preparing interim statements, forecasts and budget revisions.
- Internal controls, segregation of duties and expenditure authorisation.
- Restricted funds, eligibility rules and documentation requirements.
- Audit readiness, findings management and corrective action plans.
- Programme closure, final reporting and asset transfer.
- Workshop: preparing a donor financial report extract for review.

Conclusion

By successfully completing Integrated Financial and Performance Management for Development Project Training Course, participants will have acquired the knowledge to plan, fund and monitor development projects with confidence. They will understand results-based budgeting, cost allocation, disbursement planning, variance and earned value analysis, donor reporting and controls, and they will know how to manage restricted funds responsibly. As a result, delegates deliver projects that meet both development goals and donor expectations. Gentex Training Center builds the programme around current development finance practice.

LEARN BOLD. **LEAD BEYOND**
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FAQs for the Integrated Financial and Performance Management for Development Project course

Q1 What is the "Integrated Financial and Performance Management for Development Project" course about?

It covers how development projects are budgeted, funded, monitored and reported. You learn results-based budgeting, cost allocation, disbursement planning, variance and earned value analysis, donor reporting and controls, with practical budget and reporting workshops.

Q2 What are the key benefits of the "Integrated Financial and Performance Management for Development Project" course?

You gain better control over project budgets and donor funds, which reduces disallowed expenditure and audit findings. You also improve cash flow planning, spot performance problems earlier, and prepare donor reports that stand up to review and deadlines.

Q3 What skills will I gain from the "Integrated Financial and Performance Management for Development Project" course?

You will gain development project budgeting and cost allocation, disbursement and cash flow planning, performance monitoring and variance analysis, and donor financial reporting and audit readiness.

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Q4 What tools, methods, or standards are covered in the "Integrated Financial and Performance Management for Development Project" course?

The course covers the logical framework approach, results-based budgeting, activity-based costing and cost allocation methods, disbursement and cash flow forecasting, budget versus actual variance analysis, earned value concepts with planned value and cost variance, burn rate and value-for-money metrics, and donor reporting formats with expenditure eligibility and documentation rules.

Q5 How is the "Integrated Financial and Performance Management for Development Project" course applied in real-world practice?

Graduates apply it to prepare multi-year project budgets, plan disbursement tranches and replenishment cycles, monitor expenditure against work plans, analyse variances and revise forecasts, prepare interim and final donor reports, support audit reviews, and manage programme closure and asset transfer.