



MINISTRY OF FINANCE AND THE PUBLIC SERVICE

TERMS OF REFERENCE

**Firm to Develop and Implement a Change Management Plan for
Component 1 - Strengthening the Public Investment Management
System (PIMS)**

STRATEGIC PUBLIC-SECTOR TRANSFORMATION PROJECT

IBRD LOAN NO.: 8406-JM



1.0.BACKGROUND:

Cabinet Decision No 38/13 of October 2013 gave approval for the institutionalization of the Public Investment Management System (PIMS) and, in doing so, standardize the treatment of public investment across the public sector with respect to the entire project cycle. The Government has committed to strengthen Jamaica's public investment management system, as part of a comprehensive public financial management (PFM reform) agenda. This reform has seen the incorporation of public investment management as part of an enhanced fiscal governance framework that seeks to increase fiscal surpluses over time and concurrently reduce the debt to gross domestic product (GDP) ratio so that public resources can be allocated to public investment and other activities that have the potential to contribute to growth in the economy.

The Strategic Public-Sector Transformation Project: The Government of Jamaica (GOJ) has received loan financing from the International Bank for Reconstruction and Development (IBRD) towards the cost of the Strategic Public-Sector Transformation Project (SPSTP). The Project Development Objective (PDO) is to strengthen public resource management and support selected public sector institutions in facilitating a more enabling environment for private sector growth. The project has 6 components divided into 2 thematic areas.

The first thematic area of the proposed intervention seeks to reinforce fiscal discipline and revenue enhancement through four main components: (a) Strengthening the Public Investment Management System (PIMS); (b) Strengthening the Budget Preparation Process and Results Based Budgeting (c) Adaptive Public-Sector Approaches to Promote Fiscal Sustainability and Project Management; (d) Modernizing of the Accountant General's Department.

The second thematic area seeks to support those institutions that sit at the interface between the public and private sectors: Bureau of Standards of Jamaica (BSJ) through component 5, Fostering Industrial Growth and Trade Facilitation, that will support strategic public-sector institutions essential to creating an enabling environment for the private sector. The management of the project makes up the sixth component.

Component 1 falls under the first thematic area of the SPSTP and is the focus of this consultancy. The objective of this component is for the PSIP to incorporate public investment projects with estimated five-year operating and maintenance costs fully linked to long term development goals and medium-term priority areas. The component will support the GOJ reform efforts through the following activities:

- (i) migration of the current web-based database to a robust platform to manage all information about public investment across the project cycle and linked to the budgeting and financial systems of the country (expected to be compiled into IFMIS);
- (ii) design and implementation of a public investment management training program for public sector;
- (iii) reviewing legislation and carrying out dissemination activities to integrate the PIMS with the administrative systems (including procurement and human resources);
- (iv) strengthening monitoring through Citizens Participation;
- (v) designing a fund for the funding of pre-investment financial and economic analysis and post-investment evaluations of the public investments; and
- (vi) provision of technical assistance for the implementation of the Public Financial Management Action Plan.

Rationale for change management: Organisations move through a number of identifiable stages as they grow and develop usually in response to changing environment and conditions. In some cases, these changes are planned, in others they are unplanned or unintended consequence of planned change. Sometimes the forces for change come from within the organisation and at other times they will be caused by external forces or influences; in this instance, change is planned and being executed under a structured programme with a defined set of activities or change initiatives. The need for MDAs and Public Bodies (PBs) to meet and to cope with changing conditions requires innovation, creativity and flexibility. The particular approach is best defined in a theory of change that will provide a framework for the change in practice and behaviour desired.

2.0.OBJECTIVES OF THE CONSULTANCY:

The purpose of this consultancy is to develop change management initiatives and processes so as to ensure that standardized methods and procedures are used by MDAs/PBs for efficient and prompt handling of all changes, in order to minimize the impact of change-related activities under Component 1 on service quality, and consequently improve the day-to-day operations of the PIMS.

3.0. SCOPE OF WORKS:

The specific tasks of the firm under this consultancy shall include:

- i.** Development of theory of change framework/plan identifying the desired long-term goals and all the conditions that must be in place for the goals to occur. The firm is expected to lead in the execution of resulting activities in consultation with relevant units within the MDAs and PBs.
- ii.** Undertaking a readiness assessment to determine
 - the scope of the change
 - the readiness of the MDAs & PB to embrace the change in the PIMS process, including: What is the value- system and background of the impacted groups? How much change is already going on? What type of resistance can be expected?
 - Identify a change management team in key divisions of the MDAs & Public Bodies that are critical to the PIMS. This should include Change Champions and key high-level Sponsors
- iii.** Developing and delivering culture change programmes inclusive of workshops to define the desired culture change; leadership training & training for the Change Champions to support the change process.
- iv.** Develop a communications plan and strategy to inform stakeholders – MDAs & PBs, the general public and other public bodies that will interact with the PIMS of the requirements the processes and the standards. The firm will:
 - develop appropriate messages for internal stakeholders, Change Champions and other groups identified.
 - providing support to the Communications Specialist and Change Champions to develop some simple communications materials for communicating back to staff the final ‘desired future culture’ and the strategy that they, along with the Ministry leadership, will implement to bring about the new culture and process change.

- develop brochures for dissemination to external audiences
- as appropriate arrange for public information via radio television and face-to-face presentations to special audiences such as the PSOJ, Chambers of Commerce etc.
- v. Undertaking coaching and management training for supervisors to influence change in practice and business process related to the PIMS
- vi. Developing a plan to lessen resistance and inform the continuing role of Change Champions, Sponsors/Senior Management
- vii. Collecting and analysing data from PIMS stakeholders and users to determine any required modification/corrective action in the change initiatives and programme
- viii. Designing a recognition programme to celebrate and encourage continued change

4.0. DELIVERABLES:

| Key Deliverables | Proposed Timeline | Standard for delivery |
|---|-------------------|--|
| 1. Work Plan | 10 days | Workplan to include broad implementation strategy & methodology, related activities; projected beginning and end times for major activities and resources required |
| 2. Theory of Change | 25 days | As indicated in Section 3.0 (i) & (iv) in the Scope of Works |
| 3. Report on readiness assessment | 25 days | As indicated in Section 3.0 (ii) in the Scope of Works |
| 4. Report on culture change programmes & workshops and coaching | 35 days | As indicated in Section 3.0 (iii) & (v), in the Scope of Works |
| 5. Plan to lessen resistance | 15 days | As indicated in Section 3.0 (vi) & (vii) in the Scope of Works |
| 6. Design of recognition programme & Final report | 10 days | As indicated in Section 3.0 (viii) in the Scope of Works |

5.0.CHARACTERISTICS OF THE CONSULTANCY

- **Level of effort:** Full time level of effort (FTE)
- **Duration of contract:** The Consultancy is expected to be 120 days over 12 months
- **Location:** Jamaica
- **Type of Consultancy:** Firm

Schedule of Deliverables:

| | |
|----------------|--|
| Work Plan | Within 10 days of contract signing |
| Deliverables 2 | Within 10 weeks from start of contract |
| Deliverables 3 | Within 20 weeks from start of contract |
| Deliverables 4 | Within 30 weeks from start of contract |
| Deliverables 5 | Within 40 weeks from start of contract |
| Deliverables 6 | Within 45 weeks from start of contract |

Type of contract: Lump sum payments as follows:

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|---|-----|
| Upon submission and acceptance of Work Plan | 10% |
| Upon submission and acceptance of D2 | 15% |
| Upon submission and acceptance D3 | 15% |
| Upon submission and acceptance D4 | 20% |
| Upon submission and acceptance D5 | 20% |
| Upon submission and acceptance D6 | 20% |

6.0.QUALIFICATION & EXPERIENCE:

Consulting Firms shall possess the following:

1. At least ten (10) years of experience in developing and managing large projects in Change Management, supervising teams, and organizing and overseeing administrative and logistical support;
2. At least five (5) years' experience in providing services related to change management to the Public Sector

3. Team members with knowledge of the principles and methods for change management principles and tools;
 4. Robust communication skills (written and oral), strong teamwork skills;
 5. Human resource management skills, such as demonstrated capacity in organisation development and business process reengineering;
 6. Must understand the role and function of the MOF&PS in the context of GOJ.
7. Members of the firm must have qualifications at the post graduate levels in areas relevant to the assignment
8. In the case of a body corporate, it is legally incorporated or otherwise organised in an eligible country, has its principal place of business in an eligible country and is more than 50 per cent beneficially owned by citizen(s) and/or *bona fide* resident(s) of eligible country(ies) or by a body(ies) corporate meeting these requirements.

Team Leader should have:

- Post graduate qualification in organisation development, organisation psychology, business administration or Human Resource Development
- A solid understanding of how people go through a change and the change process
- At least 10 years' experience and knowledge of change management principles, methodologies and tools
- Organized with demonstrated competence in planning strategy and tactics
- Problem solving and root cause identification skills
- Exceptional communication skills, both written and verbal
- Change management Certification or designation
- Excellent active listening & interpersonal relationship skills
- Ability to clearly articulate messages to a variety of audiences

Team Members should have:

- Minimum of a First degree in the following areas:
 - Organisation Development/Psychology,
 - Human Resource Development,
 - Public Administration or Business Administration,
 - Mass Communication, Social Marketing or Public Relations or any other related discipline

Desired experience skills & competencies:

- Flexible and adaptable; able to work in ambiguous situations

- At least 5 years' experience and knowledge of change management principles, methodologies and tools
- Able to work effectively at all levels in an organization
- Must be a team player and able to work collaboratively with and through others
- Understanding of organizational issues and challenges
- At least 3-5 years familiarity with project management approaches, tools and phases of the project lifecycle
- At least 5 years' experience with large-scale organizational change efforts

7.0.REPORTING AND SIGN-OFF

The Firm shall report directly to the **Technical Coordinator**, *Strengthening the Public Investment Management System (Component 1, SPSTP)*; contract monitoring meetings will be convened with 5 days of delivery of each deliverable listed. Deliverables will be considered certified as satisfactory when they are accepted by the Technical Coordinator, Component 1 based on the defined and agreed performance standards for delivery.

8.0.CONDITIONS

The firm is expected to provide their own tools & resources to undertake this assignment; where necessary the client will provide venue for meetings and or workshops. Office space will be the responsibility of the firm during the conduct of the assignment. All materials and documents accessed during the conduct of the consultancy remains the property of the MOF&PS and is not authorized for use by the firm for any other purpose than for the effective conduct of the assignment, unless expressly authorized in writing by the client. Travel as required under this assignment is authorized.