



Ministry of Finance & the Public Service

TERMS OF REFERENCE

**CONSULTANCY TO DEVELOP THE CURRICULUM FOR THE PUBLIC
INVESTMENT MANAGEMENT SYSTEM (PIMS) AND TO DESIGN THE TRAINING
STRATEGY FOR THE TRAINING PROGRAMME**

**STRATEGIC PUBLIC SECTOR TRANSFORMATION PROJECT
IBRD LOAN NO.: 8406-JM**



1. BACKGROUND

The Government of Jamaica has pursued strategic public investment programmes for over thirty years¹. Though there has been institutional ownership of the process, it is believed that the programmes were not streamlined and cohesive enough to allow for the anticipated outcomes. Reviews of the previous public investment frameworks, including their weaknesses, indicate that the quality of the projects, project execution in terms of physical outputs and adherence to the timelines for project execution were problematic. Notwithstanding the weaknesses, many lessons were learnt and these lessons have informed the current process of strengthening the Public Investment Management System (PIMS).

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.

A new section 48J was introduced into the FAA Act as well as a Fourth Schedule which specifies the elements of the Public Investment Management System including the main stakeholders and their roles and the intended outputs and outcomes of the PIMS. Key among these new statutes was definitions related to “public investment” and “public investment project”. Amendments were also made to the PBMA with respect to public investment given that much of the public investment in Jamaica is executed through public bodies.

Since these amendments, more legislative and regulatory work has been done to further refine the PIMS and, by extension, the Public Sector Investment Programme (PSIP). In February 2015, additional amendments to both the FAA and PBMA provided for exceptions to the definition of public investment. The exception limits public investment to those undertaken by entities within the “specified public sector”. The “specified public sector” is defined as the public sector minus those entities that will be certified as commercial by the Auditor General and, therefore outside of the fiscal rules, as at April 1, 2017. It is anticipated that only a few entities will qualify and the specified public sector will encompass much more than 90% of the public sector. The ambit of the PIMS and PSIP, therefore, is quite extensive in scope.

The Public Investment Management Committee (PIMC) and the Public Investment Secretariat have both been given central roles in the new Public Investment Management System (PIMS). The establishment of these bodies and clarity about their roles and responsibilities is critical to the success of the PIMS.

The role and the responsibilities of the PIMC (PIMC) and the PIMSEC are laid out in the Fourth Schedule of the Financial Administration and Audit (Amendment) Act 2014, hereinafter referred to as ‘the Act’.

It is intended that PIMC will be the principal authority on PIMS in Jamaica and as such will be a key adviser to the Cabinet in terms of their executive decision making regarding the Public Sector Investment Programme (PSIP), in terms of which projects are included and which ones are not.

¹ The process pre-dates to 1978 but the World Bank Structural Adjustment Loan in 1982 sought to formalize.

PIMSEC directly supports the work of PIMC and as such has a pivotal role in the whole system. It is PIMSEC that is the ‘Gatekeeper’ of the entire system. Its primary objective is to provide focus, co-ordination and direction to the PIM system and in doing so, improve the quality of the projects that are approved for funding whilst at the same time weeding out unsuitable or unaffordable projects early before they can waste the country’s limited resources. Like PIMC, it has no executive powers, only an advisory role; therefore, it can only be sustainable if it achieves credibility and respect. This will happen if its decisions, based objectively on policy and supporting data, are in the main accepted by PIMC and, subsequently, the Cabinet.

2. STRATEGIC PUBLIC SECTOR TRANSFORMATION PROJECT (SPSTP)

The Government of Jamaica is the beneficiary of an investment loan from the World Bank to implement The **Strategic Public Sector Transformation Project (IBRD Loan No.-8406-JM)**. The Project is being implemented by the Ministry of Finance and the Public Service and its Development Objective 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 five components. This consultancy falls under Component I: Strengthening the Public Investment Management System (PIMS). The components of the SPSTP are:

- **Component I:** Strengthening the Public Investment Management System
- **Component II:** Strengthening the Budget Preparation Process & Results-Based Budgeting
- **Component III:** Adaptive Public Sector Approaches to Promote Fiscal Sustainability
- **Component IV:** Modernizing the Accountant General’s Department
- **Component V:** Fostering Industrial Growth and Trade Facilitation
- **Component VI:** Project Management

COMPONENT I

The objective of this component is to improve public investment management through strengthening of the procedures, tools, institutions and governance mechanism of the system, and 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 implementation of a public investment management training programme for the public sector is a key output under Component I of this loan. This output must: address the various stages of the project cycle and the multi-faceted stakeholders; and be tailored to meet the capacity needs of the entire group, as well as the distinct competencies that specified groups will require.

This component will support the GOJ reform efforts through; *inter alia*, 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**; and
- (iii) reviewing legislation and carrying out dissemination activities to integrate the PIMS with the administrative systems (including procurement and human resources)

3. OBJECTIVES OF THIS CONSULTANCY

This consultancy aims to enhance the capacity of the main stakeholders within the PIMS. It is oriented to:

- (i) identify training needs of Jamaican public servants on PIMS topics,
- (ii) develop a set of courses on the PIMS including curriculum, educational material and suggested methodology; and
- (iii) Recommend training strategy for the PIMS based on training needs and identified set of courses.

4. SCOPE OF WORK

In order to achieve these objectives, the Consultant will be required to do the following:

To complete the Training Assessment

- i. Meet with key stakeholders in the Ministry of Finance and the Public Service including the Planning Institute of Jamaica, as well as identify the MDAs which are active/ well-represented in the PSIP to understand the challenges they envision/being encountered as far as the implementation of the PIMS and to gauge what support they require to be effective.
- ii. Review all the relevant literature, including legislation, regulations, institutional assessments, any revised structure including new job descriptions, PIMS Guidelines (*being revised as the PIMS Handbook Guidelines*), other technical work and the PSIP database that will directly inform: the training needs' assessment, competency profiles and curriculum development for the PIMS Training Programme.
- iii. Assess the offering of local tertiary institutions to identify if there is local capacity to deliver this training and make recommendations, where applicable, as to how this capacity can be enhanced where it does exist or developed where it does not exist.

To develop the Curriculum/ Content (topics and coursework)

- iv. Review all the relevant training material, including PIMS Guidelines (*PIMS Handbook Guidelines being revised*), to: develop a set of modules and related educational material that provides at least a general/systemic overview of the Public Investment Management System (graphic illustration) and dissects each component by function or purpose, output and main stakeholder; present an overview of the Jamaican project cycle, with its different specifications according to each main stakeholder (PIOJ, MOF, DBJ, MDA, others).

Recommend Training Strategy for Curriculum

- v. Prepare detailed Training Strategy that: identifies the mechanisms through which training will be developed, accredited and delivered and the time frame for each. Consideration should be given to a mix delivery where some of the training could be executed by internal stakeholders given GOJ’s internal systems and rules. The mix could encompass classroom, onsite or online. Emphasis should be on the building of specific competencies within the project cycle management and public investment portfolio management.
- vi. Design a TOR to support the hiring of a training institution with capacity and experience to execute the designed training strategy.

DELIVERABLES

In accordance with the objectives and scope of work, the consultant should present the following deliverables:

Key Deliverables	Proposed Timeline	Standard for Delivery
1. Work Plan and associated Gantt Chart outlining the assignment to be undertaken	2 weeks after signing of contract	A time-bound Work Plan in Microsoft Word identifying activities, methodology and required resources, this should be linked to a Gantt outlining tasks, duration and start and end dates. The format of the document should be agreed prior to submission
2. Draft Report on the Training Assessment	To be determined by the work plan	The report should include findings and recommendations emanating from items (i-iii) identified in Section 4 of the Scope of Work.
3. Draft Curriculum		The set of modules and related materials developed in accordance with Section 4 (iv) in the scope of works.
4. Draft Consultants report	To be determined by the work plan	The Report should include: (a) the standard for delivery associated with deliverables 1, 2,3 and the detailed training strategy as described in Section 4 (v) in the Scope of Work, (b) TOR to support the hiring of a training/consultancy firm as detailed in Section 4 (vi)
5. Final Report	Three weeks before end of contract	Should encompass final accepted key deliverables (1 – 4), strategy and methodologies and TOR to include all agreed changes and submitted within the timeframe agreed.

5. CHARACTERISTICS OF THE CONSULTANCY

- Level of effort: Full time level of effort of Six (6) consulting months will be required.
- Duration of contract: The Consultancy will begin August 2018 and will conclude in February 2019
- Location: Jamaica
- Type of Consultancy: Consultancy Firm or team of Consultants
- Type of contract: Lump sum.

6. RESOURCES

The following is a list of some of the key resources that are important to development of the Curriculum and Dissemination Strategy for the PIMS Training Programme.

- The Financial Administration and Audit (FAA) Act, 2014 & 2015
- The Public Bodies Management and Accountability Act, 2014 & 2015
- The FAA (Fiscal Responsibility Framework) Regulations 2015
- The Public Sector Investment Programme Policy Paper, FY 2016/2017
- The Public Investment Management System Guidelines 2015 (*Revised PIMS Handbook Guidelines*)
- Institutional Capacity Assessment of Government of Jamaica's Readiness to Implement the PIMS
- Jamaica: Policy and Institutional Framework for the Implementation of a Public-Private-Partnership Program
- The Public Sector Investment Programme (PSIP) in Jamaica, 1982 – 2000: Lessons Learnt

7. KEY EXPERTS' QUALIFICATION, EXPERIENCE AND COMPETENCE FOR THE ASSIGNMENT

- a) Curriculum Development and Assessment Specialist
- b) Organizational/Training Development Specialist
- c) Project Management Specialist

Curriculum Development and Assessment Specialist

- At least a Masters' degree in one of these areas: Curriculum Development; Education, Public Policy.
- Five years' experience in curriculum development including training manuals, preferably for the public sector.
- Five years' experience in curriculum assessment that has been successfully certified and accredited.

Organizational/Training Development Specialist

- At least a Masters' degree in one of these areas – Human Resource Management, Business Administration, Strategic Management or Organizational Development
- At least 5 years' experience in institutional analysis and diagnosis
- Should have worked in a public sector organization for at least 5 years
- At least 5 years' experience in the development of training strategies

Project Management Specialist

- Specialist must possess a Project Management certification **and** at least a Bachelor's degree in Project Management, Management Studies or related social science discipline
- Training in all aspects of project cycle management
- Experience in the building of specific competencies within project cycle management and public investment portfolio management.

Experience of the Firm.

- Seven years experience in curriculum development and assessment
- Five years' experience in providing strategic advice and the development of public policies

8. REPORTING AND SIGN-OFF

The Consultant shall report directly to the **Technical Coordinator**, *Strengthening the Public Investment Management System (Component 1, SPSTP)* and 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. However, the final deliverable is expected to have benefited from suggestions/comments and recommendations from the Technical Working Group that has been established to oversee the Change Process within the PIMS.

The consultants should include a communication strategy in the Work Plan to ensure that the Technical Coordinator is kept abreast during all stages of the execution of the consultancy.

No variations are to be made to the agreed time or cost without prior approval by the Technical Coordinator. The communication strategy ensures that once there is any indication of a variation in the scope of work which may result in changes to the timeline or additional costs, the Project Implementation Unit is made aware and can update the Procurement Plan accordingly. '/// ' /

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