



Ministry of Finance & Public Service

TERMS OF REFERENCE

CONSULTANT – CITIZENS' BUDGET AND OGP NATIONAL ACTION PLAN

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

1. BACKGROUND

The Government of Jamaica has expressed its intention to join the Open Government Partnership (OGP), a multilateral initiative that aims to secure concrete commitments from governments to promote transparency, empower citizens, fight corruption, and harness new technologies to strengthen governance.

The Open Government Partnership formally launched on September 20, 2011, when the 8 founding governments (Brazil, Indonesia, Mexico, Norway, the Philippines, South Africa, the United Kingdom and the United States) endorsed the Open Government Declaration, and announced their country action plans. Since 2011, OGP has welcomed the commitment of 67 additional governments to join the Partnership.

Jamaica is the latest entrant to this global community, in keeping with the Government of Jamaica's commitment to "re-orient the composition of the budget toward growth-enhancing spending, shift our tax system from direct to indirect taxes, better protect society's most vulnerable and make our government more efficient and effective."¹

This signals a strong commitment to carry forward a more inclusive governance framework in terms of budgetary allocations, sectoral priorities and monitoring and oversight of public expenditure. This also calls for greater participation, openness and transparency in the budget process by the citizens. With Jamaica announcing its intention to join the OGP in December 2016, the current government has shown strong leadership to deepen citizen engagement in public financial management processes and monitoring of budget implementation. Over the course of the next year, it has to follow through with its commitment to publish a Citizens Budget and draw up an OGP National Action Plan.

2. STRATEGIC PUBLIC SECTOR TRANSFORMATION PROJECT (SPSTP)

The Government of Jamaica is the beneficiary of an investment loan from the World Bank. The Strategic Public Sector Transformation Project (IBRD Loan No.- 8406-JM) will, *inter alia*, assist in strengthening transparency, accountability and efficiency of public investments in order to achieve sustained and inclusive economic growth with fiscal stability.

The project has six components. This consultancy falls under Component 2: Strengthening the Budget Preparation Process and Results Based Budgeting. This includes the establishment of a participatory budgeting process through the

¹ <http://www.imf.org/external/pubs/ft/scr/2016/cr16350.pdf> (Appendix 1)

carrying out of thematic meetings including citizens, NGOs, universities and business representatives. As a first step, citizens need to gain knowledge and develop the capacity to analyze and discuss GoJ policies and programs. This is also one of the core commitments of the OGP national action plan mentioned above. The publication of the Citizens' Budget will provide such a document by detailing the budget process, explaining the government's expenditure priorities, and widely disseminating this information through traditional and digital media.

3. OBJECTIVES OF THIS CONSULTANCY

This consultancy is to provide support to the Ministry of Finance and Public Service to facilitate the publication of a Citizens Budget for the year 2017-18.

Additionally, the consultancy seeks to develop a roadmap for the OGP National Action Plan that will provide GoJ with concrete action points and timeline for submission of the NAP by June 30, 2018.

4. SCOPE OF WORK

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

1. Citizens Budget

- Undertake a global review of Citizens Budget initiatives
- Conduct a survey of existing literature on Citizens Budget in Jamaica
- Liaise with MoFPS to agree on the structure of the Citizens Budget in the context of review of national and global experience
- Examine previous budget documents and analyse revenue and expenditure indicators, listing those most relevant for Citizens Budget
- Hold consultations with MoFPS and other MDAs to finalize the content of the Citizens Budget
- Liaise with professional layout designer to prepare a draft Citizens Budget
- Finalize and publish Citizens Budget following the tabling of the 2017-18 budget in Parliament in March 2018

2. OGP National Action Plan

- Review existing NAPs available from the Open Government Partnership website (www.opengovpartnership.org)
- Prepare discussion paper on objectives, commitments and indicators relevant to Jamaica
- Hold consultations with MoFPS and other MDAs to determine list of objectives, commitments and indicators to include in NAP
- Conduct workshop with government, academia and civil society organizations to provide input into the NAP as required by OGP

- Submit detailed note on the outcome of consultations and propose a workplan and timeline, keeping to the OGP deadline of June 30, 2018

5. KEY DELIVERABLES (Output/Results to be achieved)

The following are expected deliverables for this consultancy:

1. Citizens Budget

- Survey of domestic and international experiences in Citizens Budget
- Draft list of indicators and analysis to be included in Citizens Budget
- Report on consultations with MoFPS, MDAs and other key stakeholders
- Finalization and publication of Citizens Budget for 2017-18

2. OGP National Action Plan

- Discussion paper on proposed NAP objectives, commitments and targets
- High-level workshop with MDAs, CSOs and other key stakeholders
- Policy Note on workplan, milestones and OGP compliant NAP process

6. CHARACTERISTICS OF THE CONSULTANCY

- **Level of effort:** Part-time level (20 man hours per week)
- **Duration of contract:** Six months (October 2017-March 2018)
- **Location:** Jamaica
- **Type of Consultancy:** Individual Consultant
- **Type of contract:** Lump sum (upon submission of outlined deliverables)

- **Schedule of Deliverables**

Citizens Budget

- Survey of Citizens Budget – End October
- Report of Citizens Budget consultations – End November
- Draft Citizens Budget – Mid December
- Final Citizens Budget – At the time of budget submission (March 2018)

OGP National Action Plan

- NAP discussion paper – Mid November
- High Level Workshop – Mid January
- Policy Note and Workplan – End January

7. QUALIFICATIONS, EXPERIENCE & COMPETENCIES

- Post-graduate degree in economics, public administration or public policy; or

- undergraduate degree in a relevant field with at least 10 years relevant experience, especially public financial management
- Demonstrated competence and experience in budgeting and public financial management in Jamaica
 - Understanding of the Public Sector and its various Ministries, Departments and Agencies (MDAs)
 - Experience with participatory budgeting and budget transparency is an advantage
 - Familiarity with international budget transparency and accountability organizations, especially International Budget Partnership and Open Government Partnership
 - Ability to communicate and work effectively with internal and external stakeholders
 - Competent in the use of Microsoft applications including Word, Excel, Publisher, PowerPoint and other relevant software

8. REPORTING

The Consultant shall report directly to the Component two lead who has responsibility for the delivery of this consultancy and day to day oversight of the process.

The consultants should include a Project Schedule (with milestones) in the Work Plan to ensure that all relevant parties including the Component two lead are kept abreast during all stages of the execution of the consultancy.