



EXPRESSION OF INTEREST

Business Analyst/Financial Specialist to support implementation of a Fixed Asset and Inventory Management System of the Government

The Planning Institute of Jamaica (PIOJ), representing the Government of Jamaica is implementing the **European Union – Jamaica Cooperation Facility** project funded by the European Union. The project's purpose, is to provide support to the effective preparation/formulation, implementation and management of the EU-Jamaica cooperation, while enhancing the capacities of the Government and relevant stakeholders to efficiently implement national development objective.

The PIOJ is seeking to identify suitable firms to participate in the above stated tender to support the Ministry of Finance and the Public Service.

To assist potential bidders/tenderers in determining their eligibility for participation in the planned tender, please see attached for further details on:

- Terms of Reference
- Selection criteria
- Maximum available budget and implementation period

Interested parties are asked to submit a signed **letter** declaring your interest, in electronic format no later than Friday July 26, 2024 at 4:00pm to the address below:

Planning Institute of Jamaica
16 Oxford Road, Kingston 5
Attention: EU Unit Director
Email: projectsjobs@pioj.gov.jm

We thank you for your Expression of Interest, only shortlisted applicants will be contacted.

**THIS IS NOT A TENDER
NO DETAILED PROPOSAL IS REQUIRED AT THIS TIME**

Business Analyst/Financial Specialist to support implementation of a Fixed Asset and Inventory Management System of the Government

Contract Description

The general objective of this assignment is to develop a sustainable asset management process in the Government of Jamaica this includes the adoption of an Asset Management System that incorporates both Fixed Asset Management and Inventory Management. The resultant goal is to have all MDAs perform the work of Asset Management concisely and uniformly.

The expected goal for the Business Analyst is to aid in the implementation process of the Asset Management System. Therefore, the analyst will be required to work with the project team during the development phase of the system to ensure that the relevant documentation is maintained during the implementation phase and to facilitate training.

Specific Work

To facilitate the thrust of alignment and integration with policy, FAIMS will be developed and designed by the structure of the GOJ Chart of Accounts, with consideration of stakeholders' needs. The following categories of assets will be developed in this phase of the project:

- Tangible Fixed Assets, e.g.
 - Furniture
 - Buildings
 - Transportation
 - Infrastructure Assets
 - Road/Pipelines
 - Bridges
- Intangible Fixed Assets, e.g. GOJ-owned Software
- Valued Asset, these are assets that are not classified as consumables or Fixed Assets such as cell phones, tablets, microwaves etc.
- Consumables

All existing systems, whether manual or otherwise, will be replaced with this new FAIMS. This entails moving data and information relevant to asset management to the new system where relevant access to information will be considered. Once this is done, in terms of migration of information and addition of required information, the software will be used for managing assets and their vulnerability as well as providing any needed financial reporting.

To support the process outlined above, the consultant will be expected to produce the following:

- a) Asset management business processes documentation
- b) Updated system (operational and reporting) requirements
- c) Asset Management Procedural Manual
- d) Software Quality Assurance Testing (QAT)

- e) Software Change Requirements and Issues logs
- f) Training of asset practitioners on the content of the procedural manual and system usage
- g) System manuals (including user and training manuals)

The contractor must also comply with the latest Communication and Visibility Requirements for EU funded external action, laid down and published by the European Commission. See https://ec.europa.eu/international-partnerships/comm-visibility-requirements_en.

Legal basis, eligibility and rules of origin

The legal basis of this procedure is Regulation (EU) N° 2021/947 establishing the Neighbourhood, Development and International Cooperation Instrument – Global Europe (NDICI)¹ >/< OAD-Greenland Decision 2021/1764. See Annex A2 of the practical guide.

Participation is also open to international organisations.

SELECTION AND AWARD CRITERIA

Capacity-providing entities

An economic operator (i.e. candidate or tenderer) may, where appropriate and for a particular contract, rely on the capacities of other entities, regardless of the legal nature of the links it has with them. If the economic operator relies on other entities, it must in that case prove to the contracting authority that it will have at its disposal the resources necessary for the performance of the contract by producing a commitment by those entities to place those resources at its disposal. Such entities, for instance the parent company of the economic operator, must respect the same rules of eligibility and notably that of nationality as the economic operator relying on them and must comply with the selection criteria for which the economic operator relies on them. **Furthermore, the data for this third entity for the relevant selection criterion should be included in a separate document.** Proof of the capacity will also have to be provided when requested by the contracting authority.

With regard to technical and professional criteria, an economic operator may only rely on the capacities of other entities where the latter will perform the tasks for which these capacities are required.

With regard to economic and financial criteria, the entities upon whose capacity the economic operator relies, become jointly and severally liable for the performance of the contract.

The following selection criteria will be applied to the tenderers. In the case of tenders submitted by a consortium, these selection criteria will be applied to the consortium as a whole if not specified otherwise. The selection criteria will not be applied to natural persons and single-member companies

¹ Regulation (EU) 2021/947 of the European Parliament and of the Council of 9 June 2021 establishing the Neighbourhood, Development and International Cooperation Instrument – Global Europe, amending and repealing Decision No 466/2014/EU and repealing Regulation (EU) 2017/1601 and Council Regulation (EC, Euratom) No 480/2009; OJ L 209, 14.6.2021, p. 1–78.

when they are sub-contractors.

The tenderer shall not use previous experience which caused breach of contract and termination by a contracting authority as a reference for selection criteria.

The selection criteria for each tenderer are as follows:

1) Economic and financial capacity of the tenderer (based on item 3 of the tender form). In case of tenderer being a public body, equivalent information should be provided. The reference period which will be taken into account will be the last three financial years for which accounts have been closed.

Criteria for legal persons:

- a) Current ratio (current assets/current liabilities) in the last year for which accounts have been closed must be at least 1. In case of a consortium, this criterion must be fulfilled by each member.
- b) Possess a valid Tax Compliance Certificate (TCC)²

Criteria for natural persons:

- a) the financial situation of the tenderer should not be in deficit, taken into account debts, at the beginning and end of year as evidenced via a report signed by a Certified Auditor, Chartered Certified Accountant, or Chartered Financial Analyst
- b) Possess a valid Tax Compliance Certificate (TCC)³

2) Professional capacity of the tenderer (based on items 4 of the tender form).

The reference period which will be taken into account will be the last three years preceding the submission deadline.

Criteria for legal persons:

- at least two staff currently working for the tenderer in fields related to this contract

Criteria for natural persons:

- is currently working/has worked during the past 3 years with two collaborators in fields related to this contract.

3) Technical capacity of tenderer (based on items 5 and 6 of the tender form). The reference period which will be taken into account will be the last seven years preceding the submission deadline.

Criteria for legal persons:

- the tenderer has provided services under at least one contract with a budget of at least 75% of this contract, that was implemented at any moment during the following period: **July 2017-July 2024**.

Criteria for natural persons:

- the tenderer has worked successfully on at least one project with a budget of at least 75% of this contract in fields related to this contract in the past seven (7) years (**July 2017-July 2024**)

² If residing in Jamaica

³ If residing in Jamaica

This means that the service contract the tenderer refers to could have been started at any time during the indicated period but it does not necessarily have to be completed during that period, nor implemented during the entire period. Tenderers are allowed to refer either to service contracts completed within the reference period (although started earlier) or to service contracts not yet completed. Only the portion satisfactorily completed during the reference period will be taken into consideration. This portion will have to be supported by documentary evidence (-statement or certificate from the entity which awarded the contract, proof of payment) also detailing its value. If a tenderer has implemented the service contract in a consortium, the percentage that the tenderer has successfully completed must be clear from the documentary evidence, together with a description of the nature of the services provided if the selection criteria relating to the pertinence of the experience have been used.

Previous experience which would have led to breach of contract and termination by a contracting authority shall not be used as reference. This is also applicable concerning the previous experience of experts required under a fee-based service contract.

MAXIMUM BUDGET and IMPLEMENTATION PERIOD

Maximum Budget: JMD 15, 000,000⁴

Implementation Period: 18 months

Contract is anticipated to commence on September 23, 2024⁵

Key experts

Key expert 1: Team leader

Qualifications and skills

Specialist in Business Analyst and/or System Development and have the following minimum Qualifications:

- First degree in Management Studies and/or a certification in Business Analyst
- Database and computer language programming certification would be a distinct advantage.
- A minimum of five years of experience in business analyst

General professional experience

- Ability to translate technical database language and terminology into plain language to guide asset practitioners.
- Strong communication and facilitation skills

⁴ Or the USD equivalent using JMD 1:USD 0.00659

⁵ Tentative Date

Specific professional experience

- At least five (5) years of experience working with institutions preferably government, in the area of business analysis.

Key expert 2- Financial Specialist

Specialist in Financial Management and have the following minimum Qualifications:

- First degree in Financial Management, or ACCA (level 2 or 3) qualification
- A minimum of five years of experience in financial management

General professional experience

- Ability to develop financial management manuals.

Specific professional experience

- At least five (5) years of experience working guiding institutions in the area of business analysis.
- Asset management experience would be an asset

All experts must be independent and free from conflicts of interest in the responsibilities they take on.