



# **MINISTRY OF FINANCE AND THE PUBLIC SERVICE**

## **TERMS OF REFERENCE FIRM TO UNDERTAKE RELATED WORKS TO SUPPORT THE UPGRADING OF THE OPEN DATA PORTAL AND SYSTEM FOR JAMAICA**

### **LOT 2**

#### **STRATEGIC PUBLIC-SECTOR TRANSFORMATION PROJECT GOJ FUNDED PROJECT**

## **1.0. BACKGROUND:**

Open Data is data, in digital form, that are made available with the technical and legal characteristics necessary for the data to be freely used, reused and redistributed by anyone, anytime and anywhere<sup>1</sup>. At the heart of open government is the integration of transparency, accountability and inclusiveness in the relationship between government and citizens. Citizens are increasingly demanding and expecting more direct dialogue with the Government about their communities and future. Open Government Data provides an avenue to encourage public education and stakeholder engagement, by proactively providing freely accessible information on the progress and performance of national initiatives. It also provides the ability for historical and future data consolidation in a single accessible location, which encourages public use, analysis and feedback. Review of the positive impact made by Open Data across various countries has revealed that Open Data is driving greater transparency, accountability and participation, enhances social impact by making the policy process more inclusive, and has positive economic impacts.<sup>2</sup>

The Open Government Partnership (OGP) is a voluntary, international forum of countries working to be more open, accountable and responsive to citizens. Participation in the OGP requires countries to endorse a high-level Open Government Declaration, deliver a National Action Plan (NAP) developed with public consultation with civil society with commitments which advance the OGP values, and commit to independent reporting on its implementation, including through the Independent Reporting Mechanism (IRM).

In December 2016, the Government of Jamaica (GOJ) became a member of the Open Government Partnership (OGP), through submission of a Letter of Intent signed by Prime Minister, Most Honourable Andrew Holness, who has endorsed the high-level Open Government Declaration. GOJ's engagement with the OGP is led by the Ministry of Finance and the Public Service (MOFPS). The GOJ has joined the OGP and committed to the OGP process, as the objectives of the OGP coincided with the Government's anti-corruption policy and strategies towards achieving greater transparency, accountability, public sector efficiency and the overall strengthening of governance. The Government of Jamaica (GOJ) has taken deliberate steps to increase the availability and use of Open Data to advance social and economic development. In 2016, an Open Data Portal was established with the support of the World Bank, to enable the easy publication and consumption of country and regional datasets as part of the Caribbean Open Data Initiative. In 2021, the GOJ approved the Open Data Policy with the goals to establish an informed citizenry, by enabling

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<sup>1</sup> Open Data Charter (2015). International Open Data Charter. Retrieved from <https://opendatacharter.net/wpcontent/uploads/2015/10/>

<sup>2</sup> The Government of Jamaica Open Data Policy (2021), p. 12.

participation in the Government's decision making and service delivery processes; improve access and accelerate the use of government data to increase the efficiency of the Government's operations and processes; and increase the social and economic value of government data through business opportunities that produce products and services of value.

## 1.2. INTRODUCTION

The Government of Jamaica (GoJ) is on a new journey to make one of its most important assets, "data", more freely and openly available to its citizens, businesses and the international community. The Government is changing the way it treats data and its approach to governance, by providing citizens and businesses with opportunities to actively engage government and to play a more active role in influencing and improving government policies and procedures that may impact them and their quality of life. Jamaica has had a significant history that aligns with the principles and core values of the OGP viz:

- Access to Information
- Civic Participation
- Public Accountability
- Technology and Innovation for Transparency and Accountability

Jamaica's history of implementing initiatives towards enhancing open governance, including the following:

- Passage of the Access to Information Act in 2002 and establishment of the Access to Information Unit; Passage of the Public Bodies Management and Accountability Act (2001) and the Corruption Prevention Act (2002);
- Establishment of the GoJ's fiscal responsibility framework through amendments to the Financial Administration and Audit Act and the Public Bodies Management and Accountability Act (2010);
- Passage of the Integrity Commission Act (2017);
- Publication of the annual Citizens Guide to the central government's budget commencing with the FY 2019/2020.
- Launch of the InvestmentMap Jamaica (Nov. 2020) which tracks Jamaica's public investment projects and makes available to citizens in a user-friendly format;
- OGP and commitment to a National Action Plan (NAP) 2021-2023;
- Passage of BOJ (amendment) Act 2020 which modernises Jamaica's central bank through clarification of its mandate and enhancement of its governance structure, and which came into effect in April 2021;
- Passage of legislation in Parliament to establish a Fiscal Commission (February 2021); and
- GoJ's Open Data Policy in July 2021.

In December 2021, Cabinet approved seven (7) OGP commitments for inclusion in Jamaica's first NAP completed in keeping with the values and processes embraced by the OGP. The 7 commitments included in the GoJ's NAP are summarized in the following table:

<b>Commitment</b>	<b>Lead Implementing Agency</b>
1. Complete National Anti-Corruption Strategy	Integrity Commission
2. Upgrade and Strengthen the Open Data System in Jamaica	Ministry of Science, Energy and Technology (MSET)
3. Amend the Access to Information (ATI) Act and Strengthen the ATI System in Jamaica	Office of the Prime Minister (OPM)
4. Increase Access to Information on and Public Awareness of the Justice System and Human Rights	Ministry of Justice (MOJ)
5. Complete Environmental Impact Assessment (EIA) Regulations	Ministry of Economic Growth and Job Creation (MEGJC)
6. Update and Implement the Climate Change Policy Framework	Ministry of Economic Growth and Job Creation (MEGJC)
7. Strengthen Youth Participation and access to services	Ministry of Education & Youth (MOEY)

In June of 2022 Cabinet approved revisions to the OGP which encapsulated:

- i. In response to stakeholder feedback received, a new milestone activity was added to each of the OGP commitments to Upgrade and Strengthen the Open Data System in Jamaica and to Update and Implement the Climate Change Policy Framework;
- ii. Based on feedback received from lead implementing agencies, revisions were made to the timelines for some of the milestone activities for the OGP commitments to: Upgrade and Strengthen the Open Data System in Jamaica; Amend the Access to Information (ATI) Act and Strengthen the ATI System in Jamaica; Increase Access to Information on and Public Awareness of the Justice System and Human Rights; and Strengthen Youth Participation and Access to Services;
- iii. Changes were made to reflect the Cabinet reshuffle and reassignment of portfolios and subjects announced by the Government on January 10, 2022;
- iv. Messages have been included from the Minister of Finance and the Public Service, from the Government Co-Chair of the MSF and from the Civil Society membership of the MSF;
- v. Sections were inserted for Acronyms and Abbreviations and Executive Summary;
- vi. Minor edits were made for grammar, presentation and reformatting

The Open Data Portal which was launched in 2016, has been deemed to be in need of upgrade. Of significance, the revision gave priority inter alia, to the **upgrade and strengthening of Jamaica's Open Data System (ODS)**. The MOF&PS and OGP partners have identified 4 priority areas for action in respect of upgrade of the ODS which include:

- i. Conduct comprehensive demand survey of Open Data users across the public sector, private sector and civil society;

- ii. Conduct mapping of relevant Open Government Data sets across the public sector;
- iii. Upgrade the Open Data Portal, including application of technology to automate aspects of the Open Data System; and
- iv. Undertake technology transfer and training on the upgrading of the Open Data Portal.

The MOF&PS, as the lead entity for the OGP, through the Strategic Public Sector Transformation Project (SPSTP) intends to respond to the second listed commitment under the NAP which is to “*Upgrade and Strengthen the Open Data System in Jamaica*”. The SPSTP means to procure services under **two Lots** to fulfill this commitment. Each **Lot** will satisfy a specific objective(s) with respect to the upgrade of the ODS/ODP. Both will be procured concurrently and it is expected that there will be necessary and meaningful collaboration in delivery of the activities listed for each Lot regardless of the Consultancy firm(s) awarded contracts. **This is a necessary condition of the award of contract to the party(ies).**

**The Strategic Public Sector Transformation Project (SPSTP):** The Government of Jamaica (GOJ) embarked on an Economic Reform Programme in 2013 that has as its major objectives the reduction of public debt to a sustainable trajectory and the achievement of sustained growth. Since then measures undertaken by the GOJ, such as reform of the Public Financial Management (PFM) System, effecting fiscal rules to entrench fiscal discipline and instituting requirements to make public institutions more accountable, Jamaica’s debt to GDP ratio has moved from approximately 136% to 94% at the onset of COVID-19 in March 2020. However, due to the pandemic it had increased to 110 percent by March 2021.

The Strategic Public Sector Transformation Project (SPSTP) was formulated and developed in 2014 in support of the Public Financial Management (PFM) action Plan in response to an unsatisfactory assessment of Jamaica’s Public Financial Management System by the International Development Partners including the IMF.

Key achievements since the SPSTP commencement in 2014 include (1) the strengthening of the PIMS which was established via amendments to the FAA and PBMA Acts in 2014 and 2015. The PIMS has been operational since 2015 and stakeholders in the public sector now routinely submit project concepts and proposals that are reviewed and assessed. This is executed by the PIMS governance arrangements characterized by a committee structure which commences with the screening of the concepts and proposals through to development, review and selection, prioritization, approval and incorporation in the budget by way of the PSIP. (2) The strengthening of the Budget Preparation Process and Results Based Budgeting. One of the primary objectives of this component was to link GOJ policy priorities through a gradual transition from annual expenditure planning to a medium-term results-based expenditure framework. This was largely achieved with the publishing of the three-year budget estimates commencing in fiscal year 2018/2019. **Another major achievement under Component 2 of the project was the preparation and publishing of a National Action Plan for Open Government completed through**

**co-creation with civil society and in association with the Open Government Partnership (OGP).** (3) Interventions to transform the Ministry of Finance and the Public Service into a Centre of Excellence. (4) Senior Leadership Development Training of approximately 45 public sector workers from which the next cadre of public servants transitioning to leadership positions such as permanent secretaries and CEOs of Public Bodies can be drawn. (5) Audit of 33 financial statements from (Kingston & St. Andrew Municipal Corporation, Parochial Revenue Fund, Social Development Commission, Forestry Department, Jamaica 4-H Clubs; Passport Immigration and Citizenship Agency). (6) Rationalization of 44 Public Bodies. (7) The Bureau of Standards (BSJ) and other border agencies were supported to become service providers in accordance with international good practices. (7) The approval of the National Quality Policy (NQC) which supports the National Development Plan through the implementation of a National Quality System that ensures that goods and services produced in Jamaica are globally accepted. (8) Establishment of a new regulatory entity, the National Compliance and Regulatory Authority (NCRA) in order to remove regulatory functions from the Bureau of Standards Jamaica (BSJ).

The SPSTP was financed by loan funds of US\$35M from the World Bank along with GOJ counterpart funding. The Project Development Objective is to strengthen public resource management and support selected public sector institutions in facilitating a more enabling environment for private sector growth. As at the ending of December 2021, the loan disbursement support for the project from the World Bank ceased as was scheduled. However, GOJ has committed further resources towards the realization and completion of specific activities.

#### Project Components

- Component I: Strengthening the Public Investment Management System
- Component II: Strengthening the Budget Preparation Process and Results-Based Budgeting (RBB)
- Component III: Adaptive Public Sector Approaches to Promote Fiscal Sustainability
- Component V: Fostering Industrial Growth and Trade Facilitation
- Component VI: Project Management

This consultancy is in keeping with the continuing actions of the project to support, finalize and institutionalize the transformational undertakings spawned from the project's interventions; specifically, the work of this consultancy financed as part of Component 2 will aid in the implementation of the agreed National Action Plan for Open Government.

## **2.0. OBJECTIVES OF THIS CONSULTANCY:**

**The primary purpose of the proposed tender** is to upgrade the existing Open Data Portal, to be sustainable, current and relevant to users by way of making available the

pertinent data sets sourced from government, including through the application of technology to automate uploading of data. The work is expected to be carried out in two (2) Lots. The focus of **the Lots** is on the stated works resulting in the upgrading of the Open Data Portal.

**2.1. The specific objective of this Consultancy [Lot 2]** is to upgrade the existing Open Data Portal including upgrading the existing data platform, as well as to build capacity within MSET, eGov Jamaica Limited and other relevant government ministries, departments and agencies and public bodies with respect to technology transfer and training on the upgrading of the Open Data Portal. The specific actions from this objective shall include:

1. Undertake technical assessment of the current web content management system (WCMS) for the existing Open Data Portal to determine existing functionalities for:
  - applications gallery;
  - links to social media;
  - community functions;
  - news and announcements;
  - blogs;
  - embedded visualizations;
  - requests for data;
  - providing or maintaining hosting capacity for **at least 1,000** datasets for Jamaica;
  - Other recommended features.
2. Develop and deliver upgraded Open Data Portal that meets functional and non-functional requirements;
3. Build capacity within MSET and eGov Jamaica Limited through technology and knowledge transfer and training on the upgrading of the Open Data Portal [upgraded] for the continued use and sustainability of the portal.

### **3.0. SCOPE OF WORK:**

The specific tasks of the Consultancy firm under this consultancy [**Lot 2**] shall include:

- I. **Technical assessment of the current web content management system (WCMS) and related components to determine requirements for version update of the existing Drupal system; this will include the following:**
  - i. Carry out a technical review/assessment of the existing Open Data Portal to make recommendations for upgrade to the most current version of Drupal WCMS based on the outcome of that assessment. The focus of the assessment should ensure that the upgraded version should have at a minimum, functionality to:

- upload, manage and access data;
  - visualize data using charts and maps;
  - deliver data to other applications via Application Programming Interfaces (APIs) or other endpoints;
  - manage the exposure of the APIs for delivering data to applications; and
  - support bulk downloads and uploads.
- ii. Prepare a report for presentation to the Coordinator of the consultancy which describes the technical assessment and recommendations for upgrade of the WCMS, and how the Overall Requirements of the upgraded WCMS will be met, bearing in mind the need for long-term technical support cost effectiveness of the recommended action. Automated updating of the upgraded Open Data Portal must be a priority, including the deployment of APIs and other technologies as appropriate and based on the capabilities of MDAs. The report should specify if there are any particular limits on extent of scalability. It should include estimates (with justification(s)) of necessary ongoing running costs so future sustainability of the proposed solution could be evaluated. The report should also be informed by the preliminary findings of the demand survey and data mapping exercise from **Lot 1**.

**II. Delivery of upgraded Open Data Portal with upgraded web content management system (WCMS) based on the most recent version of Drupal, and the required functionalities:**

- iii. Develop proof of concepts approaches for updating data on the portal in manual (single data set), manual (bulk upload), and automated (via an API) use cases.
- iv. Provide upgraded and tested Open Data Portal based on upgrade to the most current version of Drupal, and approved requirements for the platform inclusive of the following features:
- applications gallery;
  - links to social media;
  - community functions;
  - news and announcements;
  - blogs;
  - embedded visualizations;
  - requests for data;
  - providing or maintaining hosting capacity for **at least 1,000** datasets for Jamaica.



- v. Conduct a requirements elicitation and analysis process to verify the requirements for the solution.
- vi. Develop a Data Dictionary [attribute, structure etc.] to guide both the supply & demand sides resulting from the research actions.
- vii. Ensure that upgraded WCMS and Open Data Portal meet the following overall requirements:
  - The data should be available from the upgraded portal in at least 3-star open format (Berners-Lee open data deployment scheme), available as bulk downloads and through APIs;
  - The upgraded portal and their hosting should be easy to maintain by the technical staff of the Jamaican government and with the skills that they have or could easily acquire locally;
  - Support all major web browsers, including support of full functionality on mobile devices;
  - The upgraded portal should be sustainable in developing countries with limited financial resources and inability to attribute large budgets to an Open Data Initiative. It is therefore especially important that ongoing mandatory running costs of the upgraded platform is minimized. Annual and monthly subscription fees or licensing fees are to be avoided. It is preferable to propose a solution that includes training local officials in maintaining the upgraded portal directly;
  - Automated updating of the upgraded Open Data Portal must be a priority, including the deployment of APIs and other technologies as appropriate;
  - The updated portal should include a management tool to monitor the receipt of data into the portal.
- viii. Ensure that upgraded WCMS and Open Data Portal meet the following detailed minimum requirements:
  - a. Types of data to be supported by the upgraded Open Data Portal should include or continue to include:
    - Geospatial data in a range of formats. Ability to interoperate with GeoNode, QGIS, or similar GIS/spatial Open Data portals/software is required;
    - Tabular (numerical and text) data in Excel and CSV and other open data formats.
  - b. The WCMS for the upgraded Open Data Portal should:

- support different user roles. Definition of roles for uploaders from various ministries, departments, and agencies owning and uploading data would be required;
  - allow ‘power users’<sup>3</sup> to upload and manage data with ability to stage data before publishing;
  - allow accessing and downloading data in multiple formats, including bulk downloads;
  - allow users to visualize data using charts and maps;
  - have built-in APIs that provide access and a query language for every dataset;
  - have built-in APIs that provide ‘power users’ with the ability to publish data;
  - implement DCAT Open Data metadata profiles;
  - provide an ability to search across data and metadata, including an advance search to further filter and customize search options;
  - enable data analytics around website, content, embeds, users, and API;
  - provide an ability to upload documents to provide additional context (e.g., data dictionaries, methodology notes, etc.);
  - Solutions based on widely used and sustainably supported packages are preferred rather than customized programming. Presentation to the Project Advisory Committee should specify any additional functionality relevant to improving use of open data.
- c. The upgraded Open Data Portal should provide or maintain functionality similar to best practice among existing national open data portals, including:
- Custom branding and style;
  - Applications gallery and community functions;
  - Links to social media;
  - News and announcements;
  - Blogs;
  - Requests for data;
  - Visualizations of data;
  - Management and user administration functionality;
  - Management information on usage including visits and downloads;
  - Backup, migration, upgrading, and disaster recovery procedures;

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<sup>3</sup> E.g., database administrators, software and business application developers, scientists, researchers and academics.

- Ability to manage the above functionality and create content by local teams.
- d. **Hosting requirements:** The Open Data Portal will be hosted by eGov Jamaica Limited. The hosting capacity for the upgraded WCMS should be capable of maintaining at least 1,000 data sets for the upgraded country portal; the following should be considered:
- The capacity in terms of number of simultaneous users, bandwidth, and data downloads should also be scalable, both up and down, in the light of experience, and the costs (and savings) from doing so should be detailed in the proposal;
  - The portal should be available with at least 99.5% uptime, and the architecture should allow upgrading to a fully resilient configuration, with the costs of doing so detailed in the proposal;
  - The hosting should include backup and disaster recovery procedures and capacity and specifications for the hosting environment including operating system, database, web server, and CGI scripting;
  - The hosting architecture and site(s) should have sufficiently good internet connectivity paths to users in Jamaica, as well as to the United States, using dual hosting or content distribution networks as needed, to allow the portal to be easily used and to allow data to be downloaded in a reasonable time limited by the speed of the individual's own connection to the local internet;
  - Final hosting arrangements will be agreed on between the client/Project Advisory Committee and the selected consultant;
- e. **Security considerations:** The Open Data Portal must comply with the Government of Jamaica Data Protection Act. While the government data on the portal will be *a priori* open government data and therefore there is no confidentiality requirement, the portal may also store information about its users that needs to be protected for privacy reasons; it should therefore:
- ensure the integrity of open government data, for instance against attacks aimed at substituting a modified dataset for the original;
  - allow only personnel authorized by an institution to be permitted to upload data purporting to come from that institution. The institutional authorization should be fine-grained - even within a single government a user from one Ministry should only be permitted to upload information pertaining to her Ministry and not to other Ministries;

- provide for users should have individual credentials (and not share credentials with others). It should be possible for system administrators to revoke individual user's credentials quickly and easily. It should be possible to delegate the authority to create users to lead users in individual institutions;
  - provide for role-based access control should also be applied for rights to create other content on the portal;
  - be certified to relevant government standards, but also should implement best commercial practice cybersecurity measures.
- ix. **Responsibilities following upgrade for an initial 3-month period** [to be included in the financial proposal], shall include:
- Options for technical assistance and support to be provided including a contact point for telephone calls and emails during the working day;
  - rectification of faults in the portal or associated support materials following handover and launch;
  - backup and disaster recovery post-launch;
  - monitoring of correct portal and hosting function and security, and taking any necessary corrective action post launch.
- x. Working with the list of public sector entities, government ministries, departments and agencies (MDAs) and public bodies (PBs) identified and prioritised under **Lot 1**, the consultancy firm should undertake data preparation and upload of data to be supplied by the selected public sector entities. The uploading of data sets shall be informed by the findings of the demand survey and data mapping exercises conducted under **Lot 1**. The consultant/firm should make provision for on-call (via phone and email) available pool of resources to provide up to **30 person-days** for data preparation and upload; where possible, the data owner will supply the data in its original format, although for some datasets the resource should be prepared to help and advise the data owner on the best query to extract the data from the database. The resource should then transform the data as necessary (including rationalizing complex formats into more usable formats, converting to open formats, converting data fields into a consistent set of values, etc.), and upload the datasets and associated metadata into the portal; any transformations should be documented and any custom scripts preserved so that local technical staff can transform updated datasets similarly in the future<sup>4</sup>.

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<sup>4</sup> The possibility exists for preparation and upload of further datasets subject to negotiation against a set rate which could be stated in the consultant's proposal for future consideration under a supplementary contract.

- xi. The consultant/firm shall conduct user acceptance testing (UAT) to ensure that the upgraded Open Data Portal meets the overall and detailed requirements specified in the Scope of Work. The selection of users for inclusion in the UAT shall be informed by the findings of the demand survey and data mapping exercises conducted under **Lot 1**. Any final revisions to the upgraded Open Data Portal shall be made based on the results of the UAT.

**III. Build capacity within MSET, eGov Jamaica Limited and the public sector through technology transfer and training on the upgrading of the Open Data Portal:**

- xii. Develop and deliver training sessions on the management and tools for the WCMS for the upgraded Open Data portal related to - licensing, curation, versioning and quality control for data, content management and other relevant matters. The selection and numbers of trainees will be informed by the results of the demand survey and data set mapping exercises [conducted under **Lot 1**], and will include focal points from relevant MDAs, civil society organizations and selected local developers.
- xiii. Develop training manual suitable for the local context to include:
  - Technical training:** This will be targeted at technical personnel. The training will cover:
    - System administration;
    - Maintenance and system administration of the upgraded Open Data portal;
    - Open-source code customization;
    - User administration;
    - Management and usage information;
    - Security.
  - Publication of data:**
    - Publishing of datasets;
    - Data wrangling, data cleaning, and troubleshooting techniques;
    - Using metadata functions available;
    - Handling data requests;
    - Provision of documentation, online help pages, and other content.

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**This quotation should not be considered under the bid price for this assignment.** The firm should, in this financial proposal, detail cost associated with the data preparation and unload as requested at item vi of the SOW.

**-Use of the portal:**

- Discovery/search for datasets;
- Use of various geospatial features;
- Creation of visualizations using available tools;
- Use of APIs;
- Downloading of data;
- Data dictionary.

- Any other relevant training the prospective consultant may wish to specify.

- xiv. Design a training of trainers' programme targeted at the designated individuals to be identified by MSET to include:
- training manual(s) – may be prepared in modules adapted for the local context;
  - guidance manual(s) – may be prepared in modules adapted for the local context;
  - “how-to” guides/handbook
  - online training videos with help pages/support
  - electronic slide presentations, or other similar documentation with the data standards for current and future portal needs.

**4.0. METHODOLOGY:**

The conduct of this assignment is expected to follow established quality standards for the WCMS agreed with the Coordinator of the consultancy. The Consultant/firm engaged under **Lot 2** is required to share all relevant information and collaborate with the firm contracted under **Lot 1** as needed to advance work aimed ultimately at upgrading of the Open Data Portal (ODP). The assignment requires a high degree of consultation in a manner that is sensitive to cost and time.

**5.0. DELIVERABLES:**

Key Deliverables	Proposed Timeline	Standard for delivery	Client's Turnaround Time
1. Work Plan	5 days	Workplan to include broad implementation strategy & methodology, to the related activities; projected beginning and end times for major activities and resources/support required for stakeholder access.	Within 2 weeks of submission of report

Key Deliverables	Proposed Timeline	Standard for delivery	Client's Turnaround Time
2. Report of the technical assessment and recommendations for an upgrade of the current Drupal system	10 days	Report should satisfy the activities described at items (i) & (ii) of the Scope of work (SOW).	Within 2 weeks of submission of report
3. Report for presentation (should include virtual demonstration) to the OGP-PAC which demonstrates how the overall requirements of the upgraded Drupal WCMS have been met.	20 days	Report should satisfy the activities described at items (iii) – (viii) of the SOW.	Within 2 weeks of submission of report
4. Report for presentation to the OGP-PAC which details plans for initial technical assistance, rectification, backup & disaster recovery and monitoring for correction of faults, portal hosting & security.	5 days	Report should satisfy the activities described at item (ix) of the SOW. This deliverable is a no cost submission for the purpose of OGP-PAC acceptance. Billing to be done in the 3-month post upgrade period.	Within 1 week of submission of report
5. Report on the conduct of the data preparation and upload from selected public sector data suppliers. UAT to be undertaken by agreed sample of data suppliers/users; UAT to be done using data uploaded.	30 days	Report should satisfy the activities described at items (x) & (xi) of the SOW.	Within 2 weeks of submission of report
6. Report on training delivered (including training of trainers) registers signed by participants to be included together with copy of the training materials.	17 days	Report should satisfy the activities described at items (xii) – (xiv) of the SOW.	Within 2 weeks of submission of status reports

Key Deliverables	Proposed Timeline	Standard for delivery	Client's Turnaround Time
7. Provide a close-out report including issues, risks, interactions with <b>LOT 1</b> and any other information deemed important based on tasks listed in the SOW.	3 days	Report should summarise the experience with the execution of all tasks as detailed in the SOW at items (i) – (xiv).	Within 1 week of submission of close out report.

The consultants will make presentations on the deliverable produced as required on the direction of the Coordinator of the consultancy.

Deliverables will also be reviewed for technical soundness by a Project Advisory committee consisting of selected representatives of MOF&PS, MSET, eGov Jamaica Ltd and civil society representatives of the OGP Multi-Stakeholder Forum (MSF).

The Team Leader from the consultancy firm has overall responsibility for the successful delivery of the assignment.

### **6.1. "Sign-off" Procedure**

The consultant will report directly to, and be subject to the directions and instructions of the Coordinator of the Consultancy, **SPSTP**. Sign-off for payment will be done by the Coordinator of the Consultancy, **SPSTP**, in keeping with the defined and agreed performance standards for delivery.

### **6.2. Variations**

Revisions to the TOR will be accommodated through mutual discussion and agreement with the Project Manager, **SPSTP**. All proposed changes to the deliverables must be discussed initially with the Coordinator of the consultancy. The Project Manager, **SPSTP**, as advised by the Procurement Manager, **SPSTP**, will issue formal notification concerning any request for variation.

## **7.0. CHARACTERISTICS OF THE CONSULTANCY**

- **Level of effort:** Full time level of effort (FTE) for 90 days
- **Duration of contract:** The Consultancy is expected to be **90 days** over 6 months
- **Location:** Jamaica
- **Type of Consultancy:** Firm
- **Methodology:** Consultant's qualifications-based selection (CQS)



## **8.0. CONDITIONS**

The consultant/firm is expected to provide his/her own tools & resources to undertake this assignment; where necessary the client will provide a venue for meetings. Office space will be the responsibility of the consultant during the conduct of the assignment. All materials and documents accessed during the conduct of this consultancy remain the property of the MOF&PS and is not authorized for use by the consultant 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 and should therefore be included as an expense in the consultant's financial proposal.

## **9.0. QUALIFICATION & EXPERIENCE:**

Consulting Firms shall possess the following:

1. At least 3-5 years' experience involving management of open data portals or similar systems;;
2. At least 2 years' experience in establishing Open Data portals or similar systems and associated training programs for both members of government and civil society;
3. Team members with knowledge of the specific requirements set out in this TOR for the agreed WCMS;
4. Excellent communication skills in English (written and oral), and strong teamwork skills;
5. Team members with at least 5 years' experience of relevant IT development and implementation;
6. Must have an understand of the role and function of the MOF&PS & MSET in the context of the OGP;
7. Members of the firm must have qualifications at the graduate levels or specialised certification in areas relevant to their assignment;
8. Knowledge and or experience working in or with the public sector on similar assignment would be an asset;
9. Experience working on similar assignments in the Caribbean.

**Team Leader should have:**

- Minimum of First Degree in IT or computer science;
- Sound knowledge of WCMS including Drupal;
- A solid understanding of public sector culture and processes;
- At least 5 years' relevant experience and knowledge of the processes, methodologies and tools relevant to this assignment;
- Demonstrated competence in planning and time management;
- Knowledge of local Open Data community and ecosystem, including policies, political economies and context, etc. in Jamaica and the Caribbean desirable;
- Exceptional listening & communication skills, both written and verbal;
- Experience or training in project management;

**Team Members should have:**

- Minimum of a First degree or relevant specialist certification from a recognised institution in the following areas:
  - Degree in Computer science or related discipline
  - Training/certification in HTML, CSS, MySQL, PHP, JavaScript, XML and Flash;
  
  - At least 2 years' experience in designing web-based content management systems;
  - Certification/experience as a trainer and development of technical training materials;
  - Excellent human relations skills – effective communication, empathy, conflict resolution, multi-tasking, organisation.

## ANNEX A

### EVALUATION CRITERIA FOR TECHNICAL PROPOSAL ONLY

#### Consultancy Firm to undertake related works to support the upgrading of the open data portal and system for Jamaica

#### LOT 2: Technical Evaluation

ITEM	DESCRIPTION	MINMUM SCORE	MAXIMUM SCORE
<b>1.</b>	<p><b>The firm:</b></p> <ol style="list-style-type: none"> <li>1. <i>At least 3-5 years' experience involving management of open data portals or similar systems;</i></li> <li>2. <i>At least 2 years' experience in establishing Open Data portals or similar systems and associated training programs for both members of government and civil society;</i></li> <li>3. <i>Team members with knowledge of the specific requirements set out in this ToR for the agreed WCMS;</i></li> <li>4. <i>Team members with at least 5 years' experience of relevant IT development and implementation;</i></li> <li>5. <i>Members of the firm must have qualifications at the graduate levels or specialised certification in areas relevant to their assignment;</i></li> <li>6. <i>Knowledge and or experience working in or with the public sector on similar assignment would be an asset;</i></li> <li>7. <i>Experience working on similar assignments in the Caribbean.</i></li> </ol>	<b>16%</b>	<b>28%</b>
		3	5
		3	5
		2	4
		3	5
		2	4
		2	3
		1	2
<b>2.</b>	<p><b>The team leader: [Must have]</b></p> <ul style="list-style-type: none"> <li>▪ <i>Post graduate qualification in IT or computer science;</i></li> <li>▪ <i>Sound knowledge of CMS such as WordPress; Drupal; Joomla; Megento; Movable Type, Mambo, TypePad, Gawker CMS, Scoop, Plone and Blogger;</i></li> <li>▪ <i>At least 5 years' relevant experience and knowledge of the processes, methodologies and tools relevant to this assignment;</i></li> <li>▪ <i>Knowledge of local Open Data community and ecosystem, including policies, political economies and context, etc. in Jamaica and the Caribbean desirable;</i></li> <li>▪ <i>Demonstrated competence in planning and time management;</i></li> </ul>	<b>20%</b>	<b>20%</b>
		4	4
		4	4
		4	4
		4	4
		4	4
<b>3.</b>	<p><b>Team members:</b></p> <ul style="list-style-type: none"> <li>- <i>Degree in Computer science, Humanities/English</i></li> <li>- <i>Training/certification in HTML, CSS, MySQL, PHP, JavaScript,</i></li> </ul>	<b>14%</b>	<b>22%</b>
		3	5

<b>ITEM</b>	<b>DESCRIPTION</b>	<b>MINMUM SCORE</b>	<b>MAXIMUM SCORE</b>
	<i>XML and Flash;</i> - <i>Degree in Communications/Integrated Marketing Communications;</i> - <i>At least 2 years' experience in designing web-based content management systems;</i> - <i>Certification/experience as a trainer and development of technical training materials;</i>	3	5
		3	4
		3	4
		2	4
<b>4.</b>	<b>Competencies: [Must meet at least 6]</b>	<b>20%</b>	<b>30%</b>
	- <i>Exceptional listening &amp; communication skills, both written and verbal;</i>	4	5
	- <i>Excellent human relations skills – effective communication, empathy, conflict resolution, multi-tasking, organisation.</i>	3	5
	- <i>A solid understanding of public sector culture and processes;</i>	3	5
	- <i>Experience working on similar assignments in the Caribbean.</i>	4	5
	- <i>Must have an understand of the role and function of the MOF&amp;PS &amp; MSET in the context of the OGP;</i>	3	5
	- <i>Team members with knowledge of the specific requirements set out in this ToR for the agreed WCMS;</i>	3	5
	<b>TOTAL</b>	<b>70%</b>	<b>100%</b>

A minimum score of 70% is required in the Technical Evaluation for the firm's financial proposal to be reviewed.