TERMS OF REFERENCE

CONSULTANCY SERVICE
FOR: BUSINESS ANALYSIS TRAINING

INSTITUTIONAL STRENGTHENING PROGRAMME

January 2020

DEFINITION OF ACRONYMS

ACRONYM	DEFINITION
BA	Business Analyst
CDU	Continuing Development Unit
eGovJa	eGov Jamaica Limited
GOJ	Government of Jamaica
G2B	Government-to-Business
G2C	Government-to-Citizens
G2G	Government-to-Government
IBRD	International Bank for Reconstruction and Development
ICT	Information Communications Technology
IIBA	International Institute of Business Analysis
MDA	Ministries, Departments and Agencies
MSET	Ministry of Science, Energy and Technology (formerly MSTEM)
PDO	Project Development Objective
PFMS	Public Financial Management Systems
SPSTP	Strategic Public Sector Transformation Project

1. BACKGROUND

eGovJa is a full service provider of ICT services such as ICT Consultancy, ICT Project Management, Data Centre (Hosting and Data Storage), Infrastructure Design and Development Services, and Software Development/Acquisition.

With a mandate to provide ICT services to the entire public sector of the GOJ, eGovJa was restructured to support critical business processes of government entities and to enhance the revenue collection capabilities of the Government of Jamaica. The mandate is further expanded in the Vision 2030 ICT Sector Plan that has the following action items assigned to eGovJa:

- Implement a Brand Jamaica portal organized in product streams. This should be done in collaboration with the Jamaica Trade and Invest.

- Assess, re-engineer and automate key government business processes to improve facilitation and service delivery. This should be done in collaboration with the Cabinet Office and the relevant MDAs.

- Develop more efficient electronic systems for engagement in G2G, G2B and G2C transactions. This should be done in collaboration with our parent ministry, MSET.

eGovJa has recognized the importance of the BA in facilitating the fulfilment of this mandate. A number of the BAs have been formally trained in the fundamentals of Business Analysis and Use Case Modelling. Additionally the Business Analysis Department was formed to further establish and standardize the business analysis practice within the organization.

The department has had opportunities to concretize the knowledge gained from the training sessions as well as knowledge from experience and personal development. However based on our current training and experiences the department has seen the need for further training in Business Analysis in order to be an effective support to the organization as it seeks to fulfil the mandate.

After the training the Business Analyst should be able to be more efficient in carrying out Business Analysis work in both agile and waterfall environment.

Project Funding Overview

The GOJ is the beneficiary of an investment loan from the World Bank. The Strategic Public Sector Transformation Project (SPSTP) (IBRD Loan No.-8406-JM) will, inter alia, assist in repositioning of eGov Jamaica Limited to be able to support the Public Financial Management Systems (PFMS).

The Project Development Objective (PDO) of the SPSTP 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 six components. This consultancy falls under Component III: Adaptive Public Sector Approaches to Promote Fiscal Sustainability. 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: Modernization of the Accountant General Department
- Component V: Fostering Industrial Growth and Trade Facilitation
- Component VI: Project Management

Training in Business Analysis will assist eGovJa in reducing solution development cost by reduced rework, identifying more effective solutions, and utilizing proven industry Business Analysis standards. By extension, this will also enhance the delivery of ICT services to GOJ and provide medium to long term support of the Public Financial Management systems under Component 3 of the Strategic Public Sector Transformation Project. This component will support activities that will contribute to the sustainability of GOJ's reform process in public administration, fiscal sustainability and growth.

2. OBJECTIVES

eGovJa is seeking to procure the services of a Consulting Firm to offer Business Analysis training at two levels:

1. Business Analysis Foundation
2. Advanced Business Analysis

2.1. Business Analysis Foundation Training

This course should provide the foundation skills required to deliver value to our stakeholders. On completion of this course, the Business Analyst should be able to assist the clients in articulating their needs, plan the business analysis activities and elicit the clients' real needs. The Business Analyst should also learn how to analyse, document, manage and communicate requirements.

2.2. Advanced Business Analysis Training

This course should result in an improvement in the BA's ability to enable change in an enterprise by defining needs and recommending solutions that deliver value to stakeholders and promote fiscal sustainability. This improvement should be noted by the enhanced quality of work produced by the BA department and by extension assisting clients in achieving their strategic goals through the identified solution.

The possibility of earning Continuing Development Unit (CDUs) would be an asset to the participants.

3. SCOPE

The business analysis training is required to enhance the capacity of at least sixteen (16) participants for each course. In achieving the objectives outlined above, the Consulting firm is expected to engage in the actions outlined below. The scope of work is not considered exhaustive and modifications will be considered during the course of the engagement. All changes to the scope of work shall be formally agreed by both parties.

For each training course provided the following should be included to enhance the learning experience and the delivery of the course content outlined below:

- Course notes / training manuals
- Practical assignment
- Unit exercise

3.1. Business Analysis Foundation Training Outline

Business Analysis Foundation Training	
Target Audience: Participants are primarily from the business analysis department. Other participants will be selected based on areas to be covered	
Course	**Course Content**
Requirements Overview	- What is Business Analysis - Requirements and Business Rules - Differences between Requirements and Business Rules
Plan for Business Analysis	- Business Analysis Planning and Monitoring - How to capture the business need (problem or opportunity) - Determine the business requirements (business goals and objectives) - How to identify and analyse stakeholders - How to ensure that all stakeholders are identified - The Business Analyst Plan
Eliciting Requirements	- Elicitation overview - Preparing for elicitation - Elicitation techniques - Conducting elicitation and documenting the results
Document, Analyse and Manage Requirements	- How to ensure quality requirements - Characteristics of a good requirement - Trace and prioritize requirements - Requirements verification and validation - Review, approve and maintain requirements - Managing changes to requirements
Modelling Skills	- Process Mapping notation (ISO standards) - Use Cases

3.2. Advance Business Analysis Training Outline

Advanced Business Analysis Training	
Target Audience: Participants are primarily from the business analysis department. Other participants will be selected based on areas to be covered	
Course	**Course Content**
Business Analyst Roles and Responsibilities	• The Business Analyst in the systems development lifecycle • The roles and responsibilities of Senior Business Analysts • The correlation between different project types, attributes and Business Analysis approach
Business Analysis Application	• Ensuring that all requirements are captured • How to ensure that requirements are presented with sufficient detail for each stakeholder • Identify measures to analyse the success of the business analysis effort • How to determine if the implemented solution actually provides the expected business value and identify any limitations of the environment that might contribute to the performance of the solution • Role of the BA in an agile environment

Project Related Competencies	• Project Initiation
	    • Definition of the business need
	    • Conducting Gap analysis
	    • Evaluation of different options (build vs buy)
	    • Creation of the business case
	    • Financial analysis techniques
	        ▪ Return on Investment
	        ▪ Payback calculation
	        ▪ Discount rate
	        ▪ Net present value
	        ▪ From business case to project initiation

Supporting processes	• Processes, templates, tools and techniques suitable for the Business Analyst • Requirements management and its importance to the Business

Advanced Business Analysis Training	
Target Audience: Participants are primarily from the business analysis department. Other participants will be selected based on areas to be covered	
Course	**Course Content**
	Analysis function • The Business Analyst role in Quality Assurance and Control • The Business Analyst role in User Acceptance Testing
Communication	• The communication process • Communication objective and formats • Stakeholder collaboration and communication • The importance of communication in Business Analysis • Understanding the reasons for failed communication attempts • Active listening and barriers to listening • Methodologies for presenting and communicating requirements to different stakeholders • Stakeholders attitudes and how to manage these • Conflict management • Conflict resolution • The Business Analyst as a mediator
Leadership	• The Business Analyst as a team leader • Attributes of a good leader • Team motivation • Team emotions • Mentoring and coaching your team members •

Stakeholder Engagement	• Stakeholder identification
	• Stakeholder engagement process
	• Categories of stakeholders
	• When to involve stakeholders
	• Stakeholder analysis and management
	• Stakeholder engagement
	   o How to engage stakeholders
	   o Challenges in engaging stakeholders and how to handle these challenges
	   o Best practice for engaging stakeholders

Modelling Skills	• Process Mapping • Data Flow Diagram • Sequence Diagram • Entity Relationship Diagram

Advanced Business Analysis Training

Target Audience: Participants are primarily from the business analysis department. Other participants will be selected based on areas to be covered

Course	Course Content
	• Include other models that can be used to visualize the requirements for various stakeholder
Prototyping	• Prototype Overview • How to use prototypes to model requirements • Wireframes vs mockups •
Business Process Modelling and Improvement	• Business Process Modelling (BPMN) Concepts and Framework • Business Process Metrics • Critical success factors for Business Process Improvement • Identifying and analysing problems using process mapping • Business Process Analysis • Use of lean techniques in Business Process Improvement • Business Process Improvement results and requirements elicitation • Monitoring and reporting on process performance and efficiency
Transformation Processes	• The Business Analyst as a Change Agent • Identifying and addressing obstacles to change • Change Techniques • Best ways to recommend and manage change

Advanced Sessions (including CCBA and CBAP Preparation)	• BABOK overview & structure
	• BABOK Key Concepts
	• BABOK Knowledge Areas
	   o Business Analysis Planning and Monitoring
	   o Elicitation & Collaboration
	   o Requirements Life Cycle Management
	   o Strategy Analysis
	   o Requirements Analysis and Design Definition
	   o Solution Evaluation
	• Business Analysis Core Model
	• Underlying Competencies
	• Perspectives
	• Techniques
	• Business Analysis and Project Management
	• Enterprise Architecture and the Business Analyst

Advanced Business Analysis Training	
Target Audience: Participants are primarily from the business analysis department. Other participants will be selected based on areas to be covered	
Course	Course Content
	• The role of the Business Analyst in RFPs, RFIs, COTS

4. METHODOLOGY

For each course, the Consulting Firm is expected to use accepted and proven methodologies for carrying out the assignment. It is expected that the course material will be delivered onsite at least two (2) weeks prior to the start of the training. The Consulting Firm should prepare a detailed methodology and work plan indicating how the objectives of the assignment will be achieved.

The work plan submitted should be aided by detailed course outlines and schedule showing the allocation of time to each of the key components of each course. The Business Analysis Foundation Training should be scheduled and executed prior to the Advanced Business Analysis Training.

5. COORDINATION/REPORTING RELATIONSHIP

The Consulting Firm will report to and operate under the supervision of the Director of the Business Solutions Services or the designate, who will be the client's coordinator. The client's coordinator will accept physical and electronic copies of all reports for review and approval of the documents prepared by the Consulting Firm. The client's coordinator will have responsibility for the review and sign off of key deliverables as listed in section 6. The Director of Business Solutions Services or the designate will be supported by other members of the Business Analysis department.

6. DELIVERABLES

The deliverables under this project are as specified in the tables below. All documents submitted should conform to the following minimum standards:

1. Use language appropriate for a non-technical audience;
2. Be comprehensive, properly formatted and well presented;
3. Provide justifications for all assumptions

6.1. BUSINESS ANALYSIS TRAINING

The key deliverables for the Business Analysis Foundation and the Advanced Business Analysis Training are as specified in the table below.

The Consulting Firm should bring real-world experience to every session. Participants should be led through a combination of presentations and practical hands-on exercises.

The proposal must include a work plan and training plan as outlined in the table below.

Key Deliverables	Performance Standard
Instructional Strategy	The instructional strategy outlines the following elements and ties specific elements of training to the objectives: • Course description • Prerequisite for participation and learning outcome • Learning goals and learning objectives [1] • Training and learning methods • Learning materials • Evaluation and assessment methods • Course duration • Training implementation • Learning intervention requires active engagement on the part of trainers and learners • Follow-up and evaluation plans • Mechanisms that are in place to support the transfer of learning on the job.

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[1] Learning objectives are based on the essential skills, knowledge, and attitudes. Learning objectives include performance, conditions, and criteria.

Key Deliverables	Performance Standard
Learning resources	Printed materials, models, audio-visual equipment, training packages, etc. Are ready for use
Work plan	The Work plan is the operational document for the consultancy and is used to determine the required inputs for the development and delivery of the output of the consultancy. The Work plan is to include broad implementation strategy, activities, projected beginning and end times for major activities.
Training Plan	Must include: • Detailed course outlines addressing the objectives stated in the Scope of Work, and certification curriculum • The time-frame for achieving/covering the competencies • The number of teaching hours (not including breaks) and session options • Optimal class size • The entrance and exit competencies • Prerequisite for participation and learning outcome • The training approach and methodology which will be used • Who is responsible for the delivery of training to deliver each exit competency • The student evaluation/assessment methodology • Description of training material which will be provided, including the medium and rights and restrictions for the use of the training material. **Samples must also be included** • Any other specific requirements to be met in accordance with the particular training contract in question
Training Implementation	Must include: • Learning objectives for each course • Duration of each course • Manual/documentation - printed (and electronic where applicable) copies of the training material – one for each participant and one for the eGovJa Information Resource Centre • Teaching aids • Delivery of courses on the agreed dates for the identified target audience • Provision of course participation certificates
Training Evaluation Report	This report should contain but not be limited to: • A brief overview of the training with an emphasis on the most important points • Background information on the training program, the objectives and the questions it seeks to answer • Overview of evaluation results and key issues identified

Key Deliverables	Performance Standard
	• Discussion on the key findings with references to the collected data

At the end of each course, participants will be asked to complete eGovJa's training evaluation forms.

6.2. *"Sign-off" Procedure*

The Steering Committee will work with the Consulting Firm to ensure the deliverables align with the objective of this assignment. It is also expected that the Consulting Firm will present the deliverables to the Steering Committee.

6.3. *Variations*
All proposed changes to the work plan and deliverables must be discussed with the Project Sponsor, and where necessary will be submitted for approval to the Steering Committee.

6.4. *Schedule of Payment*

Payments for the services will be specified in the Contract.

7. QUALIFICATION AND TECHNICAL EXPERTISE REQUIRED

7.1. The Consulting Firm
The Consulting Firm should have the following minimum qualifications and demonstrate the following competencies:

a) At least 8 years experience in working with large organizations to deliver on similar scope.

b) Should be able to provide evidence of the validity of experience and qualification, including work done for an IT organization.

c) Must be accredited to deliver training at the requisite level.

d) The Consulting Firm will meet the minimum score of 70% in relation to the criteria listed in the Appendix.

7.2. Key Skills/ Qualifications
A primary and secondary resource for each component should be identified to ensure project continuity if required.

The firm must demonstrate that they have key personnel with skills and/or qualification in the areas outlined below.

7.2.1. Business Analysis Training

a) Certified instructor in delivery of training to adults, from a recognized institution.

b) Individual trainers must be certified to teach the respective courses.

c) Certified in Business Analysis preferably Certified Business Analysis Professional (CBAP) or Certified Business Analysis Thought Leader (CBATL).

d) Practitioner in Business Analysis with at least 5 years relevant experience and demonstrated competence.

e) Bachelor's degree in Computer Science/IT related field or equivalent working experience.

f) Ability to translate theory.

g) Ability to tailor, implement and embed best practices.

8. CHARACTERISTICS OF THE CONSULTANCY

Type of Consultancy:	Consulting Firm
Duration of Contract	30 days
Place of Work:	Jamaica, at eGovJa Offices
Type of Contract:	Fixed Price Contract
Payment Responsibility	MOFPS Project Office
NB: The contract amount includes all costs related to undertaking the consultancy.	

APPENDIX 1: Evaluation Criteria for Scoring Technical Proposals

	Evaluation Criteria	Maximum Points
1.	***Adequacy of Qualification and Experience of the Consulting firm for the Assignment***	***20***

	1.1. The Consulting firm has experience in successfully leading the development and implementation of at least eight courses with similar scope in the past 8 years:
	
	• *Accredited to deliver training in Business Analysis Principles and Practices*
	   o *Accredited (5)*
	   o *No Accreditation (0)*
	• *Number of Courses*
	   o *eight or more courses, at least five in the last 8 years (10); or*
	   o *Four to seven courses, at least three in the last 8 years (5).*
		15

	1.2. Evidence of the validity of experience and qualifications working on a project of similar scope in an IT environment	5
2.	***Adequacy of Qualification and Experience of Consulting Firm/Instructor for the Assignment***	***25***
	2.1. Business Analysis Certification • *IIBA Certified Practitioner (Level 3 or Level 4) (10)* • *No Certification (0)*	*10*
	2.2. Experience in successfully delivering Business Analysis Training of similar scope in the past five years with at least three courses: • *Four or more courses, four in the last 5 years (10); or* • *Four or more courses, three in the last 5 years (7); or* • *Three courses, at least two in last 5 years (4).*	*10*

	2.3. Experience in the practice of Business Analysis:
	• *Years of experience*
	   o *Five years or more (5pts); or*
	   o *Three to Four years (2 pts);*
	   o *Less than three years (0 pt)*
		5

3.	***Adequacy of Proposed Instructional Strategy, Work Plan and Training Plan in Response to TOR***	***25***
	3.1. Instructional Strategy, Work Plan and Training Plan reflects a clear understanding of the assignment and suitably responds to each element of the scope of work and deliverables	25
4.	***Exposure to Business Analysis Practices and Software Development in Government***	***10***
	4. 1 Consulting Firms will provide a description of the specific exposure to Business Analysis Practices and Software Development in Government	*10*
5.	**Professional References**	**20**
	5.1 A selected list and brief description of relevant training conducted by the firm.	10
	5.2 Client statement for at least three courses attesting to the fact that Work submitted met the assignment goals	10
	Total	**100**

The Degree Of Responsiveness to the Requirements

1. The procuring entity will assess the Consulting Firm's response to each requirement as follows:

Degree of Responsiveness	Score
Excellent	95 - 100%
Very Good	80 - 94%
Good	70 - 79%
Satisfactory	60 - 69%
Poor	50 - 59%
Unsatisfactory	0 - 49%

2. The degree of responsiveness will be used to determine what percentage of the maximum scores allocated for each requirement is attained by each bidder.