

**MINISTRY OF FINANCE AND PLANNING
TRANSFORMATION PROGRAMME
CHANGE AND CULTURE MANAGEMENT SPECIALIST**

TERMS OF REFERENCE

1.0 BACKGROUND

- 1.1 The Government of Jamaica (GOJ) charted in 2009 a path for national development and renewal which, inter alia, calls for the repositioning and transformation of the Public Sector to support the achievement of the National Outcomes delineated in *Vision 2030 Jamaica, the National Development Plan*.
- 1.2 Recognising the centrality of preserving a stable macroeconomic landscape as the fulcrum for sustainable national growth and development, the GOJ enunciated its commitments to ensuring that the macro and micro economies are poised to produce the conducive environment necessary to achieve *National Goal 3: Jamaica's Economy is Prosperous*, as indicated through the associated outcomes:
 - *National Outcome #7 – A Stable Macro economy*
 - *National Outcome #8 – An Enabling Business Environment*
 - *National Outcome #9 – Strong Economic Infrastructure*
 - *National Outcome #10 – Energy Security and Efficiency*
 - *National Outcome #11 – A Technology-Enabled Society*
 - *National Outcome #12 – Internationally Competitive Industry Structures*
- 1.3 The GOJ, in agreement with key multi-lateral /bilateral agencies and development partners, has also developed the Economic Reform Programme (ERP), an initiative designed to reduce the national debt burden; promote fiscal discipline; increase revenue; improve efficiency in GOJ operations; and, the implementation of key reforms, namely in the public sector, pension administration and taxation.
- 1.4 The roll out of the ERP will, of necessity, be led and managed by the Ministry of Finance and Planning (MOFP). The Ministry has overall responsibility for developing the GOJ's economic policy framework, collecting and allocating public revenue, and playing an important role in the socio-economic development of the country, in creating a society in which each citizen has every prospect of a better quality of life. Further, the key components of the ERP include tax reform, public sector transformation, pension reform, debt management, central treasury management system, and corporate governance, all of which fall within the remit of the Ministry.
- 1.5 In December 2013, the MOFP completed a comprehensive Strategic Review. The review identified a number of important deficiencies that reduce the MOFP's effectiveness and efficiency to promote economic growth and development, including: (i) a centralized decision making structure exacerbated by an excessive number of direct reports to the Financial Secretary; (ii) a prevalent culture of silo thinking with weak coordination and consultation between divisions; (iii) resistance to change; (iv) emphasis on transactional bureaucratic processes over policy-making functions, (v) insufficient skills and competencies for required tasks such as economic analysis and forecasting; (vi) prevalence of cumbersome processes; and (vii) unclear roles, duplication of tasks, and functions overlap.
- 1.6 The strategic review also provided a number of recommendations to address these deficiencies and improve the performance of the MOFP including: (i) revision of the vision and mission of the Ministry to focus on the creation of the environment for sustainable growth in Jamaica; (ii) organisational restructuring of the Ministry to better allow for the achievement of the above

strategic objectives; and (iii) enhancement of work processes and systems. In addition, recommendations were put forward to address deficiencies identified with regards to: (a) *leadership and accountability*: implement Accountability Framework and increase focus on strategic management activities; (b) *decision-making structures*: reduce bottlenecks and increase responsiveness by reducing the number of reports to the Financial Secretary; (c) *people*: build capacity to ensure that critical activities can be performed; (d) *work processes*: carry out a business process reengineering exercise to eliminate duplications and overlap; and (e) *culture*: reduce degree of “silo-mentality” by establishing new units that merge common functions (e.g., monitoring) that are currently duplicated across units.

1.7 The MOFP recognizes the need to realign its organisational structure and machinery to improve the efficiency of its operational management and internal processes, and to strengthen its policy-making and implementation capacity. The MOFP therefore must be transformed to better facilitate sustainable growth in the national economy, effective regulation of the country’s financial institutions, and the cost-effective delivery of public services. As such, the Ministry has embarked on a three (3) year Transformation Programme.

1.8 The objectives of the Transformation Programme are to: (1) make the operations, machinery and internal processes of the MOFP more efficient; (2) improve the development and execution of policy associated with public fiscal management; (3) improve the policy making capacity and, in particular, strengthen institutional arrangements to analyse and formulate economic and fiscal policy; and, (4) develop the relevant organisation structure, culture and accountabilities required for sustained operations of the MOFP and execution of its strategic objectives.

1.9 The Transformation Programme has three (3) components that will:

1. Re-organise the Ministry in line with the Value Chain Approach to enable the effecting of core responsibilities that can lead to strategic success;
2. Build capacity within the MOFP to enable the transformation to a High Performing Organisation; and,
3. Develop, implement and sustain supporting change and culture management programmes and initiatives to support renewal across the Ministry.

1.1

1.2 **Component 1 - MOFP Re-organisation**

1.3 This component supports the Ministry's organisation restructuring. Main activities include:

- Develop a comprehensive three-year implementation plan for the MOFP Transformation Programme with assigned responsibilities, cost, timelines and milestones;
- Conduct a business process reengineering exercise to eliminate red tape, merge duplicating functions and eliminate redundant and unnecessary ones;
- Definition of functional profiles and job descriptions for the new structure;
- Implementation of HR transition strategy and plan to move MOFP staff from the old structure to the new one;
- Adoption of new MOFP organisation structure (i.e., organisational chart, staffing levels, operating procedures);
- Prepare procedures manuals to support new/improved business processes;
- Conduct space audit to inform the reallocation of staff work space based upon new organisation structure;
- Establish ICT Governance Framework to enhance systems management; and

- Develop Performance Management and Accountability Framework, including the development of Service Level Agreements with clients.

1.4

1.5 Component 2 - MOFP Competencies and Capacities

1.6 This component provides a competency framework along with a robust capacity building programme to address skill and competency gaps. Activities include:

- Design and implement a competency framework for the Ministry;
- Carry out a comprehensive training needs assessment, followed by a training plan based on the needs assessment findings; and,
- Conduct training impact evaluations.

1.7 Component 3 - Change Management and Communication

1.8 This component supports the transformation of the Ministry's organisational culture. It should also lead to an improved understanding of the needs and behaviour of employees transitioning within macro-level organisational change and to promote transformation programme activities across the MOFP. This will be executed in collaboration with an external change management consulting firm. Main activities include:

- Design and implement a change management and communication plan to mitigate re-organisation related risks;
- Apply behavioural insights to external business processes;
- Apply behavioural insights to internal business processes as part of the Transformation Programme, focusing on improving staff engagement, productivity and change management;
- Enhance capacity of MOFP staff to respond positively to change;
- Assure key stakeholders engagement throughout the MOFP transformation process.

1.10 To carry out its Transformation Programme, the MOFP will establish an implementation management structure with the following core elements:

- i) creation of a dedicated Programme Management Office (PMO), responsible for ensuring full implementation of the programme. The PMO will be comprised of both consultants and MOFP staff who will provide the technical and advisory support to MOFP senior management for Programme implementation. The MOFP staff will work exclusively and on a full time basis in the PMO. The PMO will include:
 - a. **PMO Director** - manage the day to day operations of the PMO and have primary and direct responsibility for components one (1) and two (2);
 - b. **Change Management consulting firm** - will have direct and primary responsibility for component three (3) which will design and implement a change management strategy and plan based on the application of behavioural economics, as well as the attendant communication plan;
 - c. **Project Technical Specialists** - provide the management analysis and organisational development functions including business process reviews and the development of job descriptions;

- d. **Change Management and Culture Management Specialist** - assist in the implementation of the change management strategy and plan as well as the implementation of the communication plan;
 - e. **Portfolio Analyst** - provide the financial management and project management support required for the successful operation of the Programme, as well as assisting in financial reporting and performance updates to International Development Partners.
- ii) establishment of a Transformation Steering Committee (TSC) to support and supervise the implementation of the programme. The TSC, chaired by the Financial Secretary and composed of key stakeholders, will ensure robust program governance, strategic direction and oversight.
- iii) designation of change leaders and change agents in every unit of the organisation, selected from the MOFP staff.

1.11 STRATEGIC PUBLIC SECTOR TRANSFORMATION PROJECT

This is a project that is financed through a loan from the World Bank and is being implemented by the Ministry of Finance and Planning. The Project Development Objective (PDO) 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(5) main components:

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

Component III. Adaptive Public Sector Approaches to Promote Fiscal Sustainability

This component will support measures to institutionalize the process of behavioural change to support new policy processes and provide just-in-Time Technical Assistance (TA) to take into account ad hoc needs of the government and to effectively take advantage of opportunities of intervention when they arise, enabling to bridge policy and implementation gaps revealed in the course of project implementation.

2.0 NATURE AND DURATION OF ASSIGNMENT

- 2.1 The Ministry has embarked on implementing the accepted recommendations and various proposals arising from the 2013 Strategic Review along with recommendations from previous work done. To this end, the Ministry is seeking to secure the services of a Change and Culture Management Specialist for a **period of two (2) years** with the potential for renewal based on satisfactory performance and the needs of the Programme.

3.0 SCOPE OF WORK

3.1 Reporting directly to the PMO Director and working closely with the international change and culture management partners, other stakeholders and the other members of the PMO team, the Change and Culture Management Specialist will support the development and implementation of the change and culture management strategy and plan. The incumbent will create and implement change management strategies and operational plans that maximise employee adoption and usage, and minimise resistance throughout the Ministry's streamlining process. Special emphasis will be placed on applied behavioural insights to drive employee behavioural changes, to build inherent compliance into selected business processes, and, to execute communication strategies geared at enabling the transformative processes at individual and group levels.

3.2 The Change and Culture Management Specialist will perform the following duties:

1. To develop, implement and sustain supporting change and culture management programmes and initiatives to support continued renewal across the Ministry.

- a) Manages the application of a structured methodology and lead change management activities through the development and adoption of appropriate change and culture management strategies by:
 - i. Assessing the change impact and complete change management assessments;
 - ii. Identifying, analysing and preparing risk mitigation tactics in order to identify and manage anticipated resistance;
 - iii. Creating a change management strategy;
 - iv. Managing the interface between programmes/projects and daily operations to secure the delivery of programme outcomes and realisation of benefits whilst maintaining business as usual through holding regular meetings to discuss the programmes/projects and their impact on operational areas in order to provide appropriate interventions to support operational managers in maintaining operational stability during the transition process; and,
 - v. Coordinating efforts with other specialists and human capital/talent managers across the Ministry's divisions, departments and agencies to integrate change management activities into the project plans.

- b) Consults and coaches project teams to better communicate and engage staff through organisational transformation and macro level programmes of change by:
 - i. Ensuring the creation of actionable deliverables for the five (5) change management levers: communication plan, sponsor road map, coaching plan, training plan and resistance management plan;
 - ii. Supporting organisational design and definition of roles and responsibilities; and,
 - iii. Supporting and engaging senior leadership, and coaching managers and supervisors to better handle individual and team change.

- c) Ensures the evaluation of stakeholder readiness for proposed projects and/or programme initiation to better manage stakeholder expectations and attitudes while tracking and reporting issues; the definition and measurement of success metrics; and, the monitoring of change progress, portfolio and change load.
 - d) Implements methodologies and approaches for integration of the project's change management initiatives, including:
 - i. Identifying and monitoring potential risks and points of resistance impacting the project and developing plans to mitigate same.
 - ii. Organising and coordinating all project communication material and activities; and evaluating the effectiveness of change management and communication initiatives.
 - e) Manages stakeholders by:
 - i. communicating with senior leadership to impart updates on the progress, issues and developments in change programmes;
 - ii. providing appropriate briefing to enable informed decision making about the approach and direction of programmes and/or projects; and,
 - iii. communicating with staff affected by change to maintain morale and support for change.
 - f) Builds support and commitment, and promotes cooperation and teamwork across participating groups by providing leadership in the resolution and/or escalation of issues that may impact project schedules and deliverables as well as developing team capability through training, coaching and mentoring.
 - g) Measures and monitors business Key Performance Indicators (KPIs) affected by change by:
 - i. identifying the impact on KPIs of change and what this will mean for business as usual;
 - ii. agreeing with senior leadership on the deviation allowed in performance whilst changes are taking place;
 - iii. assessing management information reports, identifying risks and issues and briefing senior managers on major implications for programmes; and,
 - iv. recommending whether to proceed or stop with transition.
- 2. To design, develop, implement, coordinate, and facilitate Ministry-wide coaching, training and development programmes on change and culture management for all levels of employees in support of achieving the Ministry's priorities.**
- a) Facilitates information sharing sessions/presentations pertaining to change management, team building and project planning and implementation.
 - b) Manages benefits by:

- i. supporting PMO in the definition of benefits and development of a Benefits Management Strategy;
 - ii. developing benefits models, testing benefit assumptions and defining appropriate measures to assess benefits realisation;
 - iii. writing, refining, updating programme benefits profiles and undertaking regular reviews with divisional/department/agency Programme/Project Managers and teams to assess the benefits and disadvantages arising in the course of programmes; and,
 - iv. managing benefits release through scheduling outputs from the programme into the business.

- c) Manages the transition of change in the business processes by:
 - i. working with operational managers to embed changes within the business;
 - ii. identifying what changes in processes, procedures and practices are needed to achieve change and deliver the planned benefits;
 - iii. meeting with unions and staff to identify potential problems areas and ensuring that managers have the necessary information to communicate changes and their impact to staff; and,
 - iv. visiting work locations to meet staff and user groups to discuss change issues and encourage and motivate them to embrace the change and realise the benefits.

- d) Manages Culture Change Team for the Ministry by leading change management activities across the Ministry and in business operations and working closely with Change Ambassadors.

- e) Schedules and coordinates all training with managers and supervisors – schedules location, date/time, materials, and attendance – in tandem with the HRD Section, by:
 - i. developing, coordinating, facilitating and maintaining a training management system as well as all training courses and programmes;
 - ii. collecting, compiling and reporting results of evaluation, attendance and training data, and communicating data and reports as needed;
 - iii. maintaining management training tracking processes, entering data, tracking completion and processing communication and certification to recipients and market leadership; and,
 - iv. researching and partnering with training suppliers as appropriate to deliver tailored courses, including details, cost comparison, and timelines.

4.0 QUALIFICATIONS/ EXPERIENCE

- Master's degree in Social Sciences, Public Administration or related field from an accredited institution.

- Certification in Change and/or Culture Management, or equivalent, preferred.
- Minimum of seven (7) years' experience of specifically implementing change management enabling multiple organisations to navigate successfully through a business realignment process as well as experience in the field of Mass Communications.

5.0 SPECIFIC KNOWLEDGE AND SKILLS

- Demonstrated experience in change and/or culture management and institutional development.
- Proven experience in risk management and how to assess, document and manage risks, including the development of contingencies and mitigation plans.
- Sound understanding of government machinery and operations in order to meet the needs of the Ministry and an ability to provide realistic expectations.
- Sound understanding and knowledge of standard project management tools and techniques to schedule, plan and correct project performance.
- Sound understanding and knowledge of the Ministry's core business strategies to inform business process reviews.
- Excellent critical reasoning, quantitative and qualitative analysis skills.
- Strong environmental scanning, analysis and interpretive skills.
- Strong negotiating and persuasive presentation skills.
- Proficiency and experience at working with multidisciplinary teams and cultivating strategic alliances with local and international organisations.
- Proficiency in the use of the relevant computer applications.