



Ministry of Finance & Planning

TERMS OF REFERENCE

**CONSULTANCY TO IMPLEMENT PROJECT MANAGEMENT TRAINING
PROGRAMME FOR THE GOVERNMENT OF JAMAICA**

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



Public Investment Management Secretariat

01 December 2015

1. BACKGROUND

The Government of Jamaica has pursued strategic public investment programmes for over thirty years¹. Though there has been institutional ownership of the process, it is believed that the programmes were not streamlined and cohesive enough to allow for the anticipated outcomes. Reviews of the previous public investment frameworks, including their weaknesses, indicate that the quality of the projects, project execution in terms of physical outputs and adherence to the timelines for project execution were problematic. Notwithstanding the weaknesses, many lessons were learnt and these lessons have informed the current process of strengthening the Public Investment Management System (PIMS).

In March 2014, the Honourable Minister of Finance and Planning brought the Cabinet a submission to institutionalize the PIMS and, in doing so, standardize the treatment of public investment across the public sector with respect to the entire project cycle. The Cabinet approved the policy intent and amendments were tabled to allow both the Financial Administration and Audit (FAA) and the Public Bodies Management and Accountability (PBMA) Acts to provide a legislative foundation for the future treatment of public investment in Jamaica.

A new section 48J was introduced into the FAA Act as well as a Fourth Schedule which specifies the elements of the Public Investment Management System including the main stakeholders and their roles and the intended outputs and outcomes of the PIMS. Key among these new statutes were definitions related to “public investment” and “public investment project”. Amendments were also made to the PBMA with respect to public investment given that much of the public investment in Jamaica is executed through public bodies.

Since these amendments, more legislative and regulatory work has been done to further refine the PIMS and, by extension, the Public Sector Investment Programme (PSIP). In February 2015, additional amendments to both the FAA and PBMA provided for exceptions to the definition of public investment. The exception limits public investment to those undertaken by entities within the “specified public sector”. The “specified public sector” is defined as the public sector minus those entities that will be certified as commercial by the Auditor General and, therefore outside of the fiscal rules, as at April 1, 2017. It is anticipated that only a few entities will qualify and the specified public sector will encompass much more than 90% of the public sector. The ambits of the PIMS and PSIP, therefore, is quite extensive in scope.

The Public Investment Management Secretariat (PIMSEC) is a very important stakeholder in this process as it provides a critical independent review of projects which is innate to any transparent and effective public investment management system. As such, the PIMSEC has a responsibility to ensure that its staff are trained and competent in the functions of the PIMS as well as all the various actors and stakeholders within the PIMS (Ministries, Departments and Agencies) who are active participants in the project cycle.

¹ The process pre-dates to 1978 but the World Bank Structural Adjustment Loan in 1982 sought to formalize.

2. STRATEGIC PUBLIC SECTOR TRANSFORMATION PROJECT (SPSTP)

The Government of Jamaica is the beneficiary of an investment loan from the World Bank. The **Strategic Public Sector Transformation Project (IBRD Loan No.-8406-JM)** will, *inter alia*, assist in strengthening the PIMS, of which the PIMSEC is focal point and establishing the capacity to appraise projects at the initial stages of the project cycle as well as monitor and evaluate the performance of projects during execution and post-execution.

The implementation of a public investment management training programme for the public sector is a key output under Component I of this loan. This output must: address the various stages of the project cycle and the multi-faceted stakeholders; and be tailored to meet the capacity needs of the entire group, as well as the distinct competencies that specified groups will require.

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 five components. This consultancy falls under Component I: Strengthening the Public Investment Management System (PIMS). 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:** Strengthening Property Tax Compliance and Administration.
- **Component V:** Fostering Industrial Growth and Trade Facilitation
- **Component VI:** Project Management

COMPONENT I

The objective of this component is for the PSIP to incorporate public investment projects, with estimated five-year operating and maintenance costs, fully linked to long term development goals and medium-term priority areas.

This component will support the GOJ reform efforts through, *inter alia*, the following activities:

- (i) migration of the current web-based database to a robust platform to manage all information about public investment across the project cycle and linked to the budgeting and financial systems of the country (expected to be compiled into IFMIS);
- (ii) design and **implementation of a public investment management training program for public sector**; and
- (iii) reviewing legislation and carrying out dissemination activities to integrate the PIMS with the administrative systems (including procurement and human resources)

3. PIMS SECRETARIAT AS INSTITUTIONAL SUPPORT FOR PIMC

The role and the responsibilities of the Public Investment Management Committee (PIMC) and the Public Investment Management Secretariat (PIMSEC) are laid out in the Fourth Schedule of the Financial Administration and Audit (Amendment) Act 2014, hereinafter referred to as ‘the Act’.

PIMC and PIMSEC have both been given central roles in the new Public Investment Management System (PIMS). The establishment of these bodies and clarity about their roles and responsibilities is critical to the success of the PIMS.

It is intended that PIMC will be the principal authority on PIMS in Jamaica and as such will be a key adviser to the Cabinet in terms of their executive decision making regarding the PSIP, in terms of which projects are included and which ones are not.

PIMSEC directly supports the work of PIMC and as such has a pivotal role in the whole system. It is PIMSEC that is the ‘Gatekeeper’ of the entire system. Its primary objective is to provide focus, co-ordination and direction to the PIM system and in doing so, improve the quality of the projects that are approved for funding whilst at the same time weeding out unsuitable or unaffordable projects early before they can waste the country’s limited resources. Like PIMC, it has no executive powers, only an advisory role; therefore it can only be sustainable if it achieves credibility and respect. This will happen if its decisions, based objectively on policy and supporting data, are in the main accepted by PIMC and, subsequently, the Cabinet.

Whilst all project proposals have to pass through the PIMSEC to stand any chance of approval and funding, the PIMSEC reports to the PIMC with its technical recommendations. The PIMC, in turn, reports to and makes recommendations to the Cabinet, which legally has executive authority for the PSIP. Under the revised legislation, projects cannot enter the PSIP without Cabinet approval. The PIMSEC, therefore, must have the capacity, experience and technical competence if it is to effectively advise the PIMC and interface with other stakeholders that comprise the PIMS to ensure that the projects that come to the PIMSEC for independent review are developed according to certain standards.

4. OBJECTIVES OF THIS CONSULTANCY

The consultancy is required to enhance the capacity of at least 300 public sector officers through a Project Management Training Programme. At the conclusion of this consultancy, public sector workers would have been upgraded in project management techniques involving planning, scheduling, controlling, resource allocation, and performance measurement activities required for the successful implementation of a project. This course should take the learner from project idea to approval and from approval to *ex post* evaluation. At the end of the training programme participants will be required to sit an internationally accredited Project Management Certification Examination.

Through this consultancy, the following objectives are expected to be met:

- Strengthen the project management skills of public sector project managers and officers, thereby providing a well-trained technical workforce.
- Improve the overall design and conceptualization of public sector investment projects

- Adopt international *best practices* in how projects are designed, monitored and evaluated throughout the project life cycle.
- Develop a forum where project managers within the various MDAs can communicate and share experiences in the design, financial structuring, implementation and monitoring of projects to lift the standards throughout the public sector.
- Discuss project management in the context of today's era of downsized government, in which many key functions are routinely outsourced.

5. SCOPE OF WORK

In order to achieve these objectives, the consultant will be required to:

A. Review all the relevant literature, including legislation, regulations, institutional assessments, PIMS Guidelines, other technical work that will directly inform the PIMS Training Programme curriculum.

B. Implement a project management training programme to a varied cross section of public sector employees including, but not limited to the general project management discipline:

- Definition of the role that projects and project management play in accomplishing the country's strategic objectives, as well as the Sustainable Development Goals.
- Assess major schedule, cost, and performance risk elements and understand the approach for managing risks using qualitative as well as quantitative techniques.
- Establish ways of monitoring schedule and cost performance using earned value techniques.
- Determine key elements of a communications plan to keep stakeholders abreast of progress, problems, and controls.
- Use project management software to plan, implement, control, and report on a project.
- Establish a closeout strategy that will maximize the value of the project experience to the country by capturing best practices and lessons learned.

C. Ensure that the following modules² are incorporated into the training plan:

Note: This plan must provide step-by-step instructions for each stage of the project cycle i.e. the process that is required to complete each stage.

- Module 1: Project Fundamentals
- Module 2: Proposals, Bidding and Procurement; Project Overview
- Module 3: Project Structure
- Module 4: Resource Management
- Module 5: Project Personnel
- Module 6: Project Communications and Organizational Issues
- Module 7: Monitoring and Evaluation - this module should present methodologies for both performance as well as results-based monitoring.

² This list is not exhaustive. Consultant shall review to ensure other important project management topics are covered.

- D. Develop for, the use of the participants, the required learning material that is aligned to the curriculum of the accreditation process that will be facilitated through the training programme. The consulting firm is also required to ensure that the material is specific to the needs of the public sector.
- E. Case study: the presenters will guide the participants in consideration of *live* project ideas within their purview which will be used to demonstrate how project management works at each stage, while building capacity of both those who develop the projects as well as those who appraise, monitor and evaluate.

6. DELIVERABLES

No.	Deliverable	Weight
1	Detailed workplan detailing the schedule for content delivery, logistics for programme delivery to at least 300 public sector workers, methodology for testing and accreditation of individuals who have met the requirements	10%
2	Course outline document detailing: Instructional Strategy, Content, example of learning and assessment strategy for participants, monitoring matrix for course progress	30%
3	Four (4) progress reports detailing among other things: student participation and other agreed output indicators, assessment results including student assessments and 360 degree feedback.	30%
4	A final report detailing among other things the results of the accreditation of participants with Project Management Certification	30%

7. CHARACTERISTICS OF THE CONSULTANCY

- **Level of effort:** Full time level of effort of six (6) consulting months will be required.
- **Duration of contract:** Three months (February – July 2016)
- **Location:** Jamaica
- **Type of Consultancy:** Consulting firm.
- **Type of contract:** Lump sum.

8. QUALIFICATIONS

The firm should possess the following:

- At least 6 years experience in the design and delivery of project management training to large organisation (with at least 200 staff members)
- Should be able to provide evidence of the validity of their accreditation with a major international project management training organization
- Should have provided training to at least one Government Agency or Public Body over the last three years

- Trainers must possess a Project Management Institute certification **and** a Masters' degree in Project Management, Economics or related Social Science area
- Training in aspects of project cycle management, especially appraisal and M&E methodologies
- Certification or qualification in training and/or knowledge dissemination
- Documented experience using information technology (IT) systems to disseminate knowledge
- Internationally acceptable accreditation of the institution.

9. REPORTING

The consultants shall report all matters to the **Executive Director, Public Investment Management Secretariat (PIMSEC), Planning Institute of Jamaica** has overall responsibility for the delivery of this consultancy.

The consultants should include a communication strategy in the Work Plan to ensure that the Executive Director is kept abreast during all stages of the execution of the consultancy.

No variations are to be made to the agreed time or cost without prior approval by the Executive Director. The communication strategy ensures that once there is any indication of a variation in the scope of work which may result in changes to the timeline or additional costs, the Project Implementation Unit is made aware and can update the Procurement Plan accordingly.

10. RESOURCES

The following is a list of some of the key resources that are important to implement the PIMS Training Programme.

- ✓ The Financial Administration and Audit (FAA) Act, 2014 & 2015
- ✓ The Public Bodies Management and Accountability Act, 2014 & 2015
- ✓ The FAA (Fiscal Responsibility Framework) Regulations 2015
- ✓ The Public Sector Investment Programme Policy Paper, FY 2014/15
- ✓ The Public Investment Management System Guidelines 2015
- ✓ Institutional Capacity Assessment of Government of Jamaica's Readiness to Implement the PIMS
- ✓ Jamaica: Policy and Institutional Framework for the Implementation of a Public-Private-Partnership Program
- ✓ The Public Sector Investment Programme (PSIP) in Jamaica, 1982 – 2000: Lessons Learnt
- ✓ The Government Extension to the PMBOK® Guide Third Edition (2006)