



**MINISTRY OF FINANCE AND THE PUBLIC SERVICE**

**TERMS OF REFERENCE**

**Strengthening the Plan and Implementation Framework of Vision 2030  
Jamaica – National Development Plan (NDP): *Review and Update of the 28  
Vision 2030 Jamaica – Sector Plans***



**July 2021**

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



## **1.0. BACKGROUND:**

In 2009, Jamaica launched, Vision 2030 Jamaica - National Development Plan (NDP), its first long term national development plan, which covers the 21-year period 2009 - 2030. Vision 2030 Jamaica was developed with the primary objective of providing a strategic framework to advance the achievement of developed country status towards ensuring a secure and prosperous future for all Jamaicans. Specifically, the Plan is geared towards the achievement of 4 interdependent and synergistic Goals and 15 related National Outcomes, with the focus of the vision achieved captured in the Vision Statement “Jamaica, the place of choice to live, work, raise families and do business”. Towards this end, Vision 2030 Jamaica constitutes a Road Map for the advancement of integrated and balanced sustainable, equitable and inclusive social, economic and environmental development, underpinned by good governance. The Road Map is built on an evidence-driven results-based management (RBM) framework, which constitutes an adaptation of the *Plan Do Check Act* model and facilitates continuous improvement throughout Plan Implementation as well as the integration of new and emerging development paradigms and agendas such as the 2030 Agenda for Sustainable Development and its 17 Sustainable Development Goals (SDGs). In 2015, Jamaica as one of the 193 member states of the United Nations (UN), adopted the 2030 Agenda and with the global community, commenced implementation of the Agenda on January 1, 2016. “A Road Map for SDG Implementation in Jamaica”, approved by Cabinet in 2017, identifies Vision 2030 Jamaica as the axis around which efforts to advance the 2030 Agenda in Jamaica will be organized.

The Plan Implementation Framework of Vision 2030 Jamaica – National Development Plan (NDP) is built on a results-based management (RBM) framework, which integrates evidence-based practice in:

- The implementation of the strategic Road Map for development and adaptation and responsiveness of the Road Map throughout Plan implementation, including strengthening of the results and strategic frameworks; and coherence between the supply and demand chains within the value chain for development, towards resilience and sustainability.
- Continuous improvement of the framework for plan implementation, including the methodologies and approaches to medium term prioritization and the mechanisms for

aligning development planning and practice across sectors and at all levels of development with the NDP.

- Development/strengthening of the results-based Monitoring and Evaluation (M&E) Framework and System; and reporting on the Plan implementation process.
- Strengthening of the strategic framework for results-based communication and social marketing.
- Development and strengthening of the Partnership Framework for Development.

The effective implementation of the RBM framework of Vision 2030 Jamaica requires a development eco-system, particularly in government, that is evidence-driven and underpinned by an integrated RBM policy and system. There is demonstration that this eco-system is being developed, evidenced in targeted initiatives including the introduction of Medium Term Results-Based Budgeting (MTRBB)<sup>1</sup> across government in 2019, led by the Ministry of Finance and the Public Service (MoFPS); an initiative to develop an Integrated Results-Based Management Policy (IRBM) for government led by the Cabinet Office; systems/processes for evidence- and results- based strategic human resource management; alignment of public sector investment with national development priorities within an RBM framework under the Public Sector Investment Management System (PIMS). These efforts are being financed, coordinated and/or implemented under the Strategic Public Sector Transformation Project (SPSTP). There are also efforts to develop a coordinated National Statistical System (NSS) led by the Statistical Institute of Jamaica (STATIN).

The Implementation Framework of Vision 2030 Jamaica includes:

- The 21-year National Development Plan (NDP)
- Twenty-eight (28) Sector Plans that build out the strategic road map to advance achievement of the national outcomes, presented in the National Development Plan.

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<sup>1</sup> MTRBB is essentially a management and planning tool which seeks to align resource allocation to specific, measurable results within a medium-term macroeconomic planning framework. Source: [https://mof.gov.jm/mof-media/media-centre/press/2222-signing-contract-deloitte-goj.html#:~:text=The%20implementation%20of%20Medium%20Term%20Results%20Based%20Budgeting%20\(MTRBB\)%20is,medium%20term%20macroeconomic%20planning%20framework](https://mof.gov.jm/mof-media/media-centre/press/2222-signing-contract-deloitte-goj.html#:~:text=The%20implementation%20of%20Medium%20Term%20Results%20Based%20Budgeting%20(MTRBB)%20is,medium%20term%20macroeconomic%20planning%20framework).

- The successive 3-year Medium Term Socio-Economic Policy Framework (MTF), which serves as the central mechanism of the Plan implementation framework from 2009 - 2030.
- The institutional framework for plan implementation, which is coordinated by the Planning Institute of Jamaica (PIOJ) – Vision 2030 Jamaica Secretariat – and comprises the gamut of development actors, including ministries, departments and agencies (MDAs), municipal corporations (MCs) and other local level development actors, private sector, civil society, academia and regional and international development partners (IDPs).
- The monitoring and evaluation (M&E) framework which closely interacts with the implementation framework to facilitate evidence-based improvement of the Plan implementation framework and informs medium-term prioritization of development strategies. This ensures that Plan implementation is responsive to actual versus planned performance and changing/emerging realities. The institutional framework includes the stakeholder-driven Thematic Working Groups (TWGs) that serve as the main consultative mechanism for M&E to inform Plan implementation.
- The communications framework which includes performance reporting, knowledge and information sharing to stakeholders; and is a critical tenet of stakeholder engagement, necessary for evidence-based processes reliant on consultations with stakeholders and experts.
- The Partnership Framework which comprises strategies and institutional and other mechanisms to support a stakeholder-driven Plan implementation process and collaborative/partnership-based implementation of Vision 2030 Jamaica.
- The Road Map for SDG Implementation in Jamaica (2017) which identifies Vision 2030 Jamaica as the axis around which efforts to implement the SDGs in Jamaica should be organized, including implementation of the SDGs through the MTF.

## **2.0 INTRODUCTION:**

The MTF serves as the central tenet of the implementation framework of Vision 2030 Jamaica and the main vehicle for advancing the implementation of the 2030 Agenda and its 17 SDGs.

The MTF presents a package of prioritized national strategies, sector strategies and actions. The strategic framework for national development presented in each MTF is to be informed by the strategic roadmap presented in relevant Sector Plans as well as complementary policies and strategies. The determination of the priority strategies to be included in the MTF is based on the utilization of evidence-based processes – including expert and stakeholder consultations, monitoring and evaluation and the findings of empirical research, including national statistics – which signal which set of strategies will best address gaps, new and emerging development challenges and capitalize on available resources and capacity, strengths and opportunities to accelerate Jamaica’s development towards the 2030 national and global goals.

The MTF is implemented through the alignment of the development programme (including programmes, projects and routine operations) of ministries, departments and agencies (MDAs) and other development actors with the strategic framework for development presented in the MTF. To date, four MTFs (2009-2012, 2012-2015, 2015-2018 and 2018-2021) have been developed, covering the period fiscal year 2009/10 to fiscal year 2020/21.<sup>2</sup> The Fiscal year 2020/21 marks the 12<sup>th</sup> year of implementation of the 21-year plan and the third and final year of implementation of MTF 2018-2021. Plan implementation is executed at various levels of development action – national and local – with the implementation of the prioritized actions in each MTF primarily implemented by sectoral actors whose actions advance one or more of the 15 National Outcomes – MDAs; civil society organizations (CSOs), including Non-Governmental Organizations (NGOs); local level development actors such as Municipal Corporations (MCs), Parish Development Committees and Community Development Committees and other Community Based Organizations (CBOs); the private sector; and academia, among others.

To ensure that the planned results of development action is aligned to Vision 2030 Jamaica, each development actor is required to align the results, strategic and M&E frameworks of their development plans to the respective frameworks under Vision 2030 Jamaica. This requires alignment of their development plans to the respective sector plans and/or policies and strategies towards the achievement of the national goals and outcomes. With some variation, the Sector

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<sup>2</sup> Each MTF year covers a fiscal year which is in keeping with the national budget cycle.

Plans present the results and strategic framework and the implementation and monitoring and evaluation (M&E) frameworks for the respective sectors to advance the achievement of sector goals and outcomes towards the achievement of the national outcomes and goals. As we work to develop the next MTF to cover the period 2021-2024 and support the alignment of MTRBB and other RBM processes with the MTF, focus will be given to the clear identification of the medium-term sector outcomes aligned with the prioritized national and sector strategies. This will guide the determination of required programme results and the development of programmes to advance the achievement of these results. The role of the Sector Plans in guiding planning and M&E will increase within this context. The Sector Plans in use were developed during the planning phase of Vision 2030 Jamaica and cover the period 2009/2010 – 2030. Accordingly, there is need to review and update the Sector Plans to ensure their relevance in guiding Plan implementation to 2030.

**2.2. 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 the Public Service. 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.

**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

This assignment falls under Component II of the Strategic Public Sector Transformation Programme (SPSTP).

**3.0. OBJECTIVES OF THE ASSIGNMENT:**

It is intended that the firm is to be engaged to review and update the 28 Sector Plans of Vision 2030 Jamaica and identify any gaps, with consideration for existing complementary policy,

strategy, and plan documents, and will work closely with the Vision 2030 Jamaica Secretariat and the wider PIOJ. The primary objectives of the assignment are to:

- Update the Sector Plans, comprising:
  - The Situation Analysis,
  - SWOT Analysis,
  - Results Framework and Strategy Framework,
  - Theory of Change
  - Implementation and Monitoring and Evaluation (M&E) Framework, including Performance Measurement Framework; and
  - The identification of any gaps; and
  - Prepare Guidelines for use of the Sector Plans to inform each MTF in aligning results-based management processes, and strategic/corporate and operational planning to Vision 2030, Jamaica Plan implementation.
  
- Integrate the 2030 Agenda - Sustainable Development Goals (SDGs) and the wider Post-2015 Development Agenda as well as, other relevant global frameworks/agendas in the respective frameworks, theories of change, situation and SWOT analyses that constitute the Sector Plans.
  
- Prepare Guidelines for use of the Sector Plans to inform each MTF and in aligning results-based management processes, and strategic/corporate and operational planning to Vision 2030 Jamaica Plan implementation.

#### **4.0. SCOPE OF WORKS (SOW):**

Specifically, the firm shall execute the following functions as detailed below:

1. Undertake empirical research and stakeholder consultations to inform the update of the Situation Analysis in each of the 28 Sector Plans. These should include but not limited to:

- Desk review of core documents under Vision 2030 Jamaica relevant to Plan design, results and strategic frameworks, and implementation and M&E frameworks, namely: Vision 2030 Jamaica – National Development Plan; Medium Term Socio-Economic Policy Frameworks (MTFs) 2009-2012, 2012-2015, 2015-2018, 2018-2021; the 28 Sector Plans; and documentation on results-based management, monitoring and evaluation (M&E) and performance management. Also, review relevant documentation on the Agenda 2030 Sustainable Development Goals (SDGs), including the Road Map for SDG Implementation in Jamaica (2017);
  - Review of documentation, systems and processes regarding strategic/corporate planning, Integrated Results-Based Management System (IRBM), Medium-Term Results-Based Budgeting (MTRBB), Public Investment Management System (PIMS) and National Statistical System (NSS) in the GoJ;
  - Consultation with relevant stakeholder groupings, including the Planning Institute of Jamaica (PIOJ), Ministry of Finance and the Public Service, Cabinet Office and the Statistical Institute of Jamaica (STATIN). Key technocrats to be consulted include corporate planning and monitoring and evaluation (M&E) units in MDAs and municipal corporations (MCs); select experts/practitioners in various sectors, including academia and professional groups; chairs and select members of Thematic Working Groups (TWGs), and international development partners (IDPs).
2. Review the Strategic Framework for Development, including the 28 Sector Plans and complementary policy, strategy and plan documents aligned to the 4 Goals and 15 National outcomes with a view to identifying gaps in the Strategic Framework and recommending how to address those gaps, including the areas to be updated in the Sector Plans.
  3. Conduct a situation analysis relevant to each sector so as to update the existing situation analysis in the respective Sector Plans, with an emphasis on the main changes in the



country situation particularly in view of recent national crises [the pandemic and adverse weather].

4. Conduct a SWOT analysis relevant to each sector and update or revise as appropriate, the existing SWOT analysis in the respective Sector Plans.
5. Review the results and strategy frameworks as well as, the implementation and monitoring and evaluation (M&E) frameworks for each sector with a view to updating/revising these documents and developing Theories of Change for the respective sectors/National Outcomes to align with and be supported by work that is on-going to strengthen/develop the M&E framework of Vision 2030 Jamaica and the SDGs. The focus should be given to strengthening the mentioned frameworks for sectoral development, taking into consideration the following:
  - The results and strategy frameworks, and theory of change (ToC) for each sector is to be aligned to the ToC for Vision 2030 Jamaica - National Development Plan, the Vision 2030 Jamaica results, and M&E frameworks.
  - The review and update are to be informed by lessons learned, policy and strategy development since 2009 and unforeseen/emerging national and global development paradigms and planning models as well as opportunities and threats. The approach to the review and updates of the respective frameworks should also be informed by current approaches to system mapping, policy cycle and scenario analysis as well as change management.
  - There should be the integration of considerations for the 2030 Agenda Sustainable Development Goals (SDGs) and wider Post-2015 Development Agenda as well as other relevant agenda/global development frameworks, including the SIDs Accelerated Modalities of Action (S.A.M.O.A) Pathway.
6. Prepare Guidelines for use of the Sector Plans to inform each of the MTFs in aligning results-based management processes, and strategic /corporate and operational planning to Vision 2030 Jamaica - Plan implementation. This should include:

- The 2030 Agenda - Sustainable Development Goals (SDGs) and the wider Post-2015 Development Agenda as well as, other relevant global development frameworks.
- Engaging relevant evidence-based processes, including stakeholder consultations to develop the Guidelines for use of the Sector Plans to inform each MTF and in aligning strategic/corporate and operational planning to Vision 2030 Jamaica Plan implementation and the 2030 Agenda - Sustainable Development Goals (SDGs).

## **5.0. METHODOLOGY:**

The Firm is expected to perform the services required in accordance with the highest professional standards and international best practices, bearing in mind the objective of the assignment, and the desired outputs of the Vision 2030 Jamaica Secretariat. The firm is expected to work collaboratively with the stakeholders identified so as to contribute to a harmonious working relationship. The Firm is to engage and critically assess, among others: relevant literature, empirical evidence, best practice, relevant documentation on Vision 2030 Jamaica, relevant documentation on the SDGs with focus on processes and relevant analytical tools. The Firm's outputs are expected to be evidence-based and inclusive giving consideration to various stakeholders that include - public, private, public-private, civil society and international development partners.

## **6.0. DELIVERABLES:**

The deliverables under this engagement are to be presented in keeping with the highest professional standards and as specified in the table below. All documents submitted must conform to the following minimum standards:

- a) should use language appropriate for a non-technical audience;
- b) should be comprehensive, properly formatted and well presented;
- c) should be developed through a consultative process, ensuring feedback from key stakeholders.

- d) All deliverables must meet the performance standards and be accepted by the Vision 2030 Jamaica Secretariat.

6.1. The key deliverables under this engagement are as specified in the table below:

No.	Key Deliverables	Performance Standards
1	A detailed Work Plan is to be submitted <i>within 15 working days</i> of the start of the contract.	The Work Plan is to be agreed upon by the Consultant and the Vision 2030 Jamaica Secretariat/Planning Institute of Jamaica (PIOJ) prior to the commencement of work.
2	A Consultancy Inception Report is to be submitted <i>within 30 working days</i> of the start of contract.	The report should include the identification of challenges and risks to producing planned deliverables within schedule.
3	A draft Report on the review of the Strategic Framework for Development under Vision 2030 Jamaica, with focus on the 28 Sector Plans.	Deliverable should satisfy all tasks detailed at items (1) – (5) of the SOW ensuring inputs from all relevant stakeholders, documents reviewed and in accordance with international best practice/benchmarks.
4	A Consultancy Status Report is to be submitted, to include the identification of challenges and risks to producing planned deliverables within schedule.	The submission should include all issues encountered, risks and unintended outcomes from the assignment as detailed at items (1) – (5) of the SOW at Section 4 above.
5	Report on the review of the results and strategy frameworks as well as, the implementation and monitoring and evaluation (M&E) frameworks for each sector with a view to updating/revising these documents and develop Theories of Change (ToC) to align with and be supported by work that is on-going to strengthen/develop the M&E framework of Vision 2030 Jamaica and the SDGs.	Deliverable should satisfy all tasks detailed at item (6) of the SOW ensuring inputs from all relevant stakeholders, documents reviewed and in accordance with international best practice/benchmarks.
6	Final Drafts of the twenty-eight (28) updated Sector Plans are to be submitted within timeline.	Final drafts delivered in keeping with performance standards stated at #3, incorporating agreed inputs from stakeholders.
7	Draft Guidelines for use of the Sector Plans to inform each MTF and in aligning strategic/corporate and operational planning to Vision 2030 Jamaica Plan Implementation and the 2030 Agenda Sustainable Development Goals (SDGs).	Deliverable should satisfy all tasks detailed at items (7) of the SOW ensuring inputs from all relevant stakeholders, documents reviewed and in accordance with international best practice/benchmarks.
8	Final Completion report within 30 days from end of contract	The report should summarise the experience over the life of the assignment, outlining issues encountered, risks, unintended outcomes and lessons learned as well as recommendations.

## 6.2. Sign-off Procedure

The Team Lead/ the firm will report directly to the Programme Director, Vision 2030 Jamaica Secretariat, Planning Institute of Jamaica (PIOJ). The deliverables are to be submitted to the office for acceptance and sent to the Technical Coordinator, Component 2, of the SPSTP for sign off for payments. Approval for payments will be done by the Project Manager, SPSTP.

## 6.3 Variations

All proposed changes to the deliverables must be discussed with the Project Manager SPSTP and recommended by the Technical Coordinator Component 2, on the advice of the Programme Director, Vision 2030 Jamaica Secretariat, Planning Institute of Jamaica (PIOJ) and as guided by the Procurement & Administrative Manager, SPSTP. Revisions to the ToR may be accommodated through mutual discussion and agreement with the parties within the SPSTP as detailed above.

## 7.0. CHARACTERISTICS OF THE CONSULTANCY

Level of Effort	150 days over a 7-month period; a day is defined as 8 hours
Start date	August 2021; no extension can be granted beyond <b>March 2022</b>
Location	Kingston, Jamaica at offices to be provided by the Firm. The PIOJ will make available venues for meetings. Where health and safety protocols remain in effect virtual meetings will be accommodated by the Vision 2030 Secretariat/PIOJ
Type of Consultancy	Firm
Type of Contract	Lump sum
Payment responsibility	The SPSTP will be responsible for all payments
NB: The contract amount includes all costs related to undertaking the consultancy. The firm should provide a financial proposal to undertake this assignment. Procurement of services will be in accordance with the <b>QCBS</b> method of procurement.	

## 8.0. CONDITIONS ASSOCIATED WITH THE ASSIGNMENT:

All materials and documents accessed during the conduct of this consultancy remains the property of the PIOJ and is not authorized for use by the Firm for any other purpose than for the effective conduct of the assignment, unless expressly authorized in writing by the Director General of the PIOJ. No unauthorized public communication on the substance of the assignment

is permitted under the terms of this assignment. Terms of engagement shall be as detailed in the contract of engagement.

## **9.0. QUALIFICATION, EXPERIENCE & COMPETENCIES REQUIRED:**

### **Qualifications of the Firm:**

- At least 5 years' experience in national development planning on similar type assignments for GOJ or elsewhere in the Caribbean Region;
- Minimum 3 years' experience in research of a similar nature;
- Testimonials from at least three (3) previous clients.

### **Team Leader should have:**

- A Post-Graduate Degree in Public Administration **or** Social Policy Planning or a related field from an accredited educational institution;
- At least eight (8) years' experience in executing consultancy services, including consultancies geared towards social policy analysis, strategic planning and situation analysis to support development-oriented processes;
- At least 5 years demonstrable experience in development planning and/or related field;

### **Team members should have:**

- A Post Graduate Degree in Public Policy from an accredited educational institution;
- A first degree in the social sciences with minimum three years' experience working with a public body;
- At least two (2) years' experience in social policy planning and/or related field;
- Professional certification in Project Management – PMP certification, preferably;
- Certification and experience in results-based monitoring and evaluation (M&E)
- Knowledge and experience in the application of relevant theoretical and applied literature and models, including best practice to strengthen the content and presentation of the Sector Plans.

- Demonstrable experience in Change Management policy and strategic planning would be an asset;

**Competencies:**

- Experience in working with a range of stakeholders;
- Demonstrated ability to deliver timely and quality outputs according to specifications;
- Experience in the planning and/or delivery of at least one programme/project etc. with direct linkages to the Sustainable Development Goals (SDGs) would be an asset;
- Excellent writing & presentation skills.

**10.0. EVALUATION CRITERIA:**

<b><i>I. Qualification and requirements stated for the firm</i></b>	<b>10%</b>
▪ <i>Required/relevant experience</i>	7%
▪ <i>Testimonials</i>	3%
<b>II. Team Leader’s qualification &amp; experience</b>	<b>20%</b>
▪ <i>Required qualification;</i>	5%
▪ <i>Knowledge and experience in national development planning;</i>	10%
▪ <i>Required experience in social policy analysis &amp; strategic planning;</i>	3%
▪ <i>Required experience in executing consultancy services, preferably in related fields/areas.</i>	2%
<b>III. Team Members:</b>	<b>25%</b>
▪ <i>Required qualifications</i>	10%
▪ <i>Required years’ experience</i>	10%
▪ <i>Meeting the competencies required</i>	5%
<b>IV. Understanding of the Terms of Reference</b>	<b>20%</b>
<b>V. Approach &amp; methodology</b>	<b>25%</b>