



Strategic Public Sector Transformation Project

TERMS OF REFERENCE

Strategic Public Sector Transformation Project
Loan No.:8406-JM

CONSULTING SERVICES – INDIVIDUAL SELECTION
Assignment Title: MONITORING AND EVALUATION SPECIALIST

BACKGROUND

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. In May 2013, International Funding Institutions (IFIs) agreed on a comprehensive package of assistance, comprising an IMF Extended Fund Facility (EFF), and financial support from the IDB and World Bank. The government continues to implement its economic reform programme, now supported by a three-year precautionary Stand-By Arrangement (SBA), approved by the Executive Board in November 2016. The government seeks to catalyze a positive cycle of growth and job creation with support from the private sector, improve citizen security while increasing support for the country's poorest citizens. To achieve these broad objectives, the government is re-orienting the budget composition toward growth-enhancing and social spending while progressively transforming the public sector to make it more efficient and effective.

The World Bank continues to provide support in the context of recognizing that reversing Jamaica's antecedent trajectory of low growth and high debt requires a wide range of deep reforms. The GOJ has embarked on a comprehensive and ambitious programme of fiscal adjustment and structural changes for which it has garnered national and international support. Complementing the IMF programme, the World Bank and IDB have coordinated their assistance around a range of key structural and institutional reforms aimed at laying the foundation for growth and competitiveness, and strengthening social protection, public sector management and resilience. Although the fiscal consolidation included in the programme will inevitably constrain growth outcomes in the short term, vigorous implementation of the reforms should help build conditions for economic recovery, growth and greater shared prosperity in the medium term (especially if accompanied by strategic investments). The World Bank in consultation with the government of Jamaica has structured a programme concentrated in three thematic areas: (i) public sector modernization (ii) enabling

environment for private sector growth and (iii) social climate resilience. The Bank provided a total financing envelop for this programme in the amount of US\$510m, to cover a series of Development Policy Operations (DPOs) and selective new investment operations focused on creating conditions for growth and resilience.

The Strategic Public Sector Transformation Project (SPSTP) forms part of the World Bank programme and the larger Economic Reform programme of the GOJ. 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.

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 IV: Strengthening the Accountant General’s Department.
- Component V: Fostering Industrial Growth and Trade Facilitation
- Component VI: Project Management

Component VI

This component will ensure adequate project management is in place for the implementation of the Project. More specifically, it will support Project management to: (i) carry out project audits, (ii) comply with financial management and procurement obligations under the project, (iii) monitor and evaluate project activities, (iv) provide training, and the acquisition of goods required thereof and finance operating costs. (See project overview at appendix 1)

OBJECTIVES OF THE MONITORING AND EVALUATION SPECIALIST ASSIGNMENT

The Monitoring and Evaluation Specialist (MES) will be responsible for:

- 1) Designing and implementing the overall monitoring and evaluation (M&E) framework and management information system (MIS) for the Project, including necessary instruments and tools.
- 2) Data collection, compilation, data cleaning and analysis, and reporting. This includes collecting data on both Intermediate, Project Development Objective indicators, and other relevant monitoring indicators (to be defined) from various agencies and sources, and preparing all of the Project’s M&E reports, in line with the Results Frameworks’ specifications, and on schedule.
- 3) Establishing as part of the M&E Framework metrics that capture the contribution of the project to the higher level outputs and outcomes of the government identified in but not

limited to the Memorandum of Economic and Financial Policies (MEFP), PSIP Policy Paper, Public Sector Transformation Policy Statement, Public Sector Master Rationalization Plan, Public Financial Management Reform Action Plan, Public Expenditure and Financial Accountability Report and Vision 2030.

SCOPE OF WORK

Under the direction of the Project Coordinator for the SPSTP, the MES is expected to perform the following tasks:

Data Collection

- Review all relevant documentation to establishing the M&E framework and MIS system for the Strategic Public Sector Transformation Project including the Loan Agreement and Project Appraisal Document and Project Operational Manual.
- Design the framework for undertaking M&E for the Project, including an Overall Project M&E Plan, Annual & Quarterly M&E Work Plans, identifying key performance indicators, timing, baseline data, data sources – organization and persons, data collection methodology and templates, key assumptions, cost implications, and flow chart (s).
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- Design and implement systems to collect all the necessary data to monitor the Project's Results Framework, with particular focus on identified high risk areas, and including as needed, the design of data collection instruments.
- Review all the deliverables of consultants contracted to the project, with a view to conduct relevant data mining, assist with contract management and populate the project's management information system.
- Undertake regular visits to the field to support implementation of Project's M&E framework and to identify where adaptations might be needed.
- Assist implementers/implementing agencies to establish monitoring systems for their project subcomponents
- Ensure that, in general, project monitoring arrangements comply with the Project Loan Agreement and Project Appraisal Document.

Capacity Building and Effective Cooperation

- Organize meetings with those responsible for data collection related to the Project to identify shared objectives, and ways to work together and support each other.
- As needed, organize and conduct capacity-building and training workshops to support and strengthen the Project's M&E, including with data collection consultants, external partners involved in data collection, primary stakeholders and the various partner organizations involved in implementing the Project.
- Collaborate with staff and implementing partners on qualitative monitoring to provide relevant information for ongoing evaluation of project activities, effects and impacts.
- Identify implementation lags and advise on appropriate corrective measures

Dissemination of Information

- Design and prepare Annual Implementation Progress Reports that include the required data, as well as any explanatory or additional information that is valuable for understanding, interpreting, and responding to what is seen in the data.
- Guide PIU staff and implementing partners in preparing their progress reports, including through standardized templates as appropriate.
- Draft consolidated quarterly implementation progress reports working closely with the Component Coordinators, technical and fiduciary staff and implementing partners, for the PIU to submit to the relevant bodies, in accordance with approved reporting formats and timing.
- Guide the regular sharing of the outputs of M&E findings with project staff, implementing partners and primary stakeholders.
- Inform and participate in external supervision and evaluation missions.

Resource Management

- Prepare a budget for expenditures for all activities and expenses related to M&E.
- Prepare and produce Terms of References for individuals and firms hired to support the M&E activities.
- Supervise M&E consultants to ensure that work is carried out in accordance with specifications and plans.

General

- Perform other related functions assigned from time to time by the Project Coordinator
- Review progress reports submitted by implementers and advise accordingly
- Archive lessons learnt from M&E practices

DELIVERABLES

Deliverable	Minimum Content	Submission Deadline
Inception Report	Analysis of existing situation and work plan for the contract	Within 2 weeks of contract start
Project M&E Framework, including MIS	Structure for undertaking M&E for the Project, including an Overall Project Plan, Annual & Quarterly Work Plans, identifying key performance indicators, timing, baseline data, data sources – organization and persons, data collection methodology and templates, key assumptions, cost implications, and flow chart (s). The Annual Implementation Progress Reports should also detail how each number was arrived at: i.e. the original source of the data	Within 6 week of contract start

	<p>being used for each indicator, and how the data was collected, compiled, and any assumptions underpinning the final number.</p> <p>Templates for Quarterly and Monthly Reports must be included.</p>	
Monthly consultant progress reports	Description of achievements including problems encountered and recommendations to improve project output	Within 2 weeks after the end of the reporting period
Quarterly Project Implementation Progress Reports	Collated information on all components of the Project with particular reference to the Results Framework, identifying risk areas, challenges, and mitigation measures.	Within 2 weeks after the end of the reporting period
Annual Implementation Progress Report	Same as the Quarterly Project Implementation Progress Reports.	Within 3 weeks after the end of the reporting period

PROFILE OF MONITORING AND EVALUATION SPECIALIST

- Masters in statistics, economics, development studies, business administration, international development, and/or related field.
- At least five years of M&E experience.
- At least three years' experience supervising, designing, and implementing data collection and/or field work activities, would be a distinct asset.
- Previous experience in a strategic planning role of using data to inform strategic decisions.
- Demonstrated ability to manage collaborations between multiple organizations.
- Strong oral and written communications skills in English.
- Advanced user of Microsoft office suite (Excel, Word, Power Point), and the internet.
- Previous work experience in Jamaica, the Caribbean and/or other developing countries is essential.

REPORTING RELATIONSHIP

The consultant will report directly to the Project Coordinator

REQUIRED COMPETENCIES

- Understand basic monitoring and evaluation (M&E) concepts and the purpose of M&E
- Ability to clearly define the project cycle and results chain (activities/process/outputs/outcomes/impact)
- Ability to harmonize goals, objectives and design and apply different types of frameworks used for monitoring and evaluation

- Knowledge of qualitative and quantitative techniques for data collection
- Ability to define and develop good indicators
- Sound knowledge and ability to select appropriate evaluation designs/methods and develop evaluation study
- Ability to make effective decisions about data collection
- Knowledge of techniques for representing information and good report writing skills
- Knowledge of relevant software and database packages

PERFORMANCE STANDARDS

- Work is to be completed on schedule
- Accurately estimate the time required to complete a task appropriately in order to meet assigned deadlines
- Exercise due professional care in the performance of professional services
- Plan effectively, anticipating issues, taking the initiative to address issues, and developing innovative approaches to resolving issues
- Demonstrate an understanding of the urgency of tasks and the impact of tasks on the project
- Demonstrate integrity, honesty, a sense of responsibility, and loyalty in the performance of all tasks
- Use clear, concise language to provide timely and accurate written and oral communication
- Act appropriately to ensure the accuracy and reliability of information

DURATION OF CONTRACT

The Contract will be for a period of 19 months. The anticipated date for commencement of the assignment is July 2018.

INDICATIVE PAYMENT TERMS

The Monitoring and Evaluation Specialist shall be paid based on satisfactory performance in accordance with an agreed work plan and on the basis of approved deliverables. Payment terms are as follows:

Deliverable	Payment Schedule
Inception Report	5%
Project M&E Framework, including MIS	10%
Monthly consultant Progress Reports	45%
Quarterly Project Implementation Progress Reports	25% ¹
Annual Implementation Progress Reports	15%

DATA, LOCAL SERVICES AND FACILITIES TO BE PROVIDED BY CLIENT

¹ Divided according to the # of quarters

The MOFPS will provide full office accommodation at its offices in Kingston, Jamaica. The Ministry will also provide any resources necessary to conduct workshops necessary to carry out the assignment.

APPENDIX 1 – PROJECT OVERVIEW

Project Objectives

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

The program is structured in six components, briefly described in the following paragraphs. A full description of the components is found in the Project Appraisal Document. The specific project goals, performance indicators and means of verification are described in the Results Matrix presented in Annex 1 of this manual.

Component I. Strengthening the Public Investment Management System (PIMS)

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 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; (iii) reviewing legislation and carrying out dissemination activities to integrate the PIMS with the administrative systems (including procurement and human resources); (iv) strengthening monitoring through Citizens Participation; (v) designing a fund for the funding of pre-investment financial and economic analysis and post-investment evaluations of the public investments; and (vi) provision of technical assistance for the implementation of the Public Financial Management Action Plan.

Component II. Strengthening the Budget Preparation Process and Results Based Budgeting (RBB)

The objective of this component is to link budgeting with government policy priorities through a gradual transition from annual expenditure planning to a medium-term results-based expenditure framework. effectiveness, and can be updated if needed at a later stage. This proposed process will be submitted to the Bank for its no objection.

Component III. Adaptive Public Sector Approaches to Promote Fiscal Sustainability

This component will support measures to institutionalize the process of behavioral 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.

Component IV. Modernizing of the Accountant General's Department

Provision of financing of payments under the Eligible Expenditure Program (EEP) in support of modernizing the AGD, in accordance with the provisions set forth in Section IV of Schedule 2 to this Agreement, including: (a) developing a conceptual model of the treasury single account, clarifying its scope, coverage and main operational processes; (b) reforming the organizational structure of AGD; (c) improving the central treasury management system's general ledger capabilities to provide the required level of controls and information; and (d) training to build the treasury's capacity in cash forecasting and management.

Component V. Fostering Industrial Growth and Trade Facilitation

The main objective of this thematic area is the development and implementation of an integrated border clearance process through an National Single Window mechanism in which Customs and the participating border agencies will eliminate sequential interventions/inspections and either conduct joint inspections or delegate discrete primary functions to Customs.

Component VI. Project Management

This component will ensure adequate Project management is in place for the implementation of the Project. The activities under this component will include: (i) carry out Project audits; (ii) comply with the financial management and procurement obligations under the Project; (iii) monitor and evaluate Project activities; (iv) provide training, and the acquisition of goods required thereof and finance Operating Costs.

Executing Agency and Beneficiary

The executing agency will be the Ministry of Finance and the Public Service (MOFPS), and it will also be the main beneficiary of many of the activities proposed by this IPF. The Project Implementation Unit (PIU) that will be established within the MOF will be responsible for implementing the project. Institutional arrangements have been designed and an implementation support plan will be in place to ensure that if capacity problems arise, these will be addressed promptly. MOFPS will coordinate activities across other beneficiaries of the Project which are mainly executive agencies and divisions spread across Ministries. The project will support activities across selected service delivery ministries, departments, and agencies (MDAs), particularly for components I, II and III with significant coordination efforts that will be contributed by the Public Expenditure Division in MOFPS and the Planning Institute of Jamaica (PIOJ). The two key entities reporting to the MOFP that will be the key actors for the second thematic area on industrial growth and trade facilitation covered by Component V are the Bureau of Standards of Jamaica and the National Regulator and Compliance Agency (NCRA) as well as other border agencies that may eventually also be supported by the project.