TERMS OF REFERENCE

CONSULTANCY SERVICE
For Training in
Programme and Portfolio Management

INSTITUTIONAL STRENGTHENING PROGRAMME

NOVEMBER 2016

DEFINITION OF ACRONYMS

ACRONYM	DEFINITION
CIO	Chief Information Officer
CITO	Central Information and Technology Office
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
MDA	Ministries, Departments and Agencies
MSTEM	Ministry of Science, Technology, Energy and Mining
MSET	Ministry of Science, Energy and Technology (formerly MSTEM)
NICTAC	National Information and Communications Technology Advisory Council
PDO	Project Development Objective
PFMS	Public Financial Management Systems
PIMS	Public Investment Management system
PMO	Programme Management Office
PPMC	Programme Portfolio Management Committee
PSIP	Public Sector Investment Programme, a rolling 5-year plan of Cabinet-approved public investment projects
SPSTP	Strategic Public Sector Transformation Project

1. BACKGROUND

eGovJa is a full service provider of ICT services such as ICT Consultancy, GOJ Validation Web Services, 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.

The GOJ is embarking on an Information Communications Technology (ICT) transformation process in an effort to improve services to citizens and businesses in Jamaica. It is recognised that currently there is no one organization that has full responsibility for ICT and related services and this has resulted in a number of challenges. Due to these challenges, Cabinet approved the implementation of an ICT Governance Framework model on January 12, 2013 and further approved through Cabinet decision 28/16, the establishment of a Road Map and an Action Plan for transformation of the entire ICT services for the GOJ through the establishment of an ICT Authority. The ICT Governance Framework is a component of the

GOJ's Public Investment Management system (PIMS) which manages intake for all public investment projects. In the Cabinet-approved ICT Governance Framework, all significant ICT investments must be approved by the ICT Council, supported by a Programme Portfolio Management Committee (PPMC), prior to making their way to the PIMS. The foregoing places eGovJa in a front row centre position in this transformation.

Due to the lack of Programme and Portfolio Management, the GOJ has been experiencing the following challenges:

A. Lack of a comprehensive and cohesive approach to solution acquisition, and implementation which often result in the duplication of ICT solutions and extended implementation times.

B. Fragmented, costly, and inefficient manner in which ICT solutions are implemented which are not supporting or aligned with the GOJ strategic and operational priorities;

C. Inadequate information and absence of an objective method for approving and prioritizing projects has led to the inefficient use of resources (human and financial);

Consequent on the newly approved ICT governance structure, the GOJ is not fully equipped to support the operations of the Programme Portfolio Management Committee (PPMC) without adequately trained resources being put in place. It is expected that the training of eGovJa resources will provide the foundation necessary to support the PPMC. eGovJa currently has a Programme Management Office (PMO) and this training will further strengthen the capabilities of the eGovJa PMO.

Project Funding Overview

The GOJ 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 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: Strengthening Property Tax Compliance and Administration.
- Component V: Fostering Industrial Growth and Trade Facilitation
- Component VI: Project Management

eGov Jamaica Limited requires Programme and Portfolio Management strengthening support as it proceeds with its transformation and transition programmes in line with its new mandate. Programme Management and Portfolio Management represent two approaches that can significantly enhance productivity in modern business. Both approaches contribute to efficiently using limited resources to accomplish organizational goals.

2. OBJECTIVES

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

1. Training in Programme Management and Portfolio Management consistent with international standards.
2. The respective certification curriculum will be covered and staff will be prepared to sit the Program Management Professional (PgMP) and Portfolio Management Professional (PfMP) exams. The possibility of earning PDUs would be an asset to the participants.

Training in Programme and Portfolio Management will advance the goal of eGovJa to create and maintain a highly successful Project Portfolio Management practice that:

- Aligns project portfolio to strategic and operational priorities;

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- Eases the burden of project selection for the executive team;

- Continually reconciles imbalances between supply and demand for time and money;

- Ensures appropriate project management processes and governance; and

- Informs executive decision makers via perpetually useful reporting and dashboard.

3. SCOPE

The Programme and Portfolio Management training consultancy is required to enhance the capacity of at least 25 participants. At the conclusion of the consultancy, participants should gain a common understanding of Programme and Portfolio Management along with exposure to many of the tools and techniques necessary to successfully execute these practices. In achieving the objectives outlined above, the Consulting firm is expected to engage in the actions outlined below. This scope of work is not considered exhaustive and modifications will be considered during the course of the project. All changes to the scope of work shall be formally agreed by both parties

1. Deliver work and training plans to cover the course content outlined below.

Programme and Portfolio Concepts	Portfolio Management Overview
- Defining project, programme and portfolio management - Contrasting the relationship between projects, programmes and portfolio - Benefits of these concepts - Factors for success in programme management - Factors for success in portfolio management **Programme Management Life Cycle** - Typical programme management life cycle overview - Phase gate process	- Benefits of portfolio management - Requirements for project portfolio management - Introduction to the project portfolio management process groups - Key stakeholders in portfolio management **Portfolio Component Selection** - Strategic Plan - Identify portfolio components - Categorize components - Evaluate components - Pair-wise comparison - Two criterion comparison grid - Scoring models

- Pre-programme preparations
- Programme initiation
- Programme charter

Programme Set-Up
- Programme management planning
- Detailed planning process steps
- Key stakeholder identification
- Programme scope
- Programme governance
- Programme organizational structure
- Programme infrastructure development
- Programme architecture development
- Programme work breakdown structure development
- Programme schedule development
- Programme risk management

Delivery of Programme Benefits and Programme Closure
- Authorize and monitor projects
- Communication and coordination
- Change management
- Performance measurements
- Escalation actions
- Programme closure

- Select components

Balancing the Portfolio
- Portfolio risk management
- Prioritize components
- Balancing the portfolio
- Probability analysis
- Graphical methods
- Communicate portfolio adjustment
- Authorize components

Monitoring and Controlling the Portfolio
- Monitor and control portfolio risks
- Review and report portfolio performance
- Monitor business strategy changes

Tools and technology
- Review the latest categories of project and portfolio management systems
- Real-world examples of pros and cons of implementing enterprise project management tools and technology.

2. Ensure that training is consistent with Project Management Institute (PMI) standards for Programme and Portfolio Management.
3. Recommend best-practice solutions for issues identified by the participants.

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4. METHODOLOGY

The Consultant is expected to use accepted and proven methodologies for carrying out the assignment. The Consultant 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 a Work Breakdown Schedule showing the allocation of time to each of the key components of the project. Detailed scheduling should be provided to support the methodology outlined.

5. COORDINATION/REPORTING RELATIONSHIP

The Consultants will report to and operate under the supervision of the Senior Director, Programme Management Division.

The director will be supported by the PMO and a Steering Committee, who will co-ordinate the review and approval of the documents prepared by the Consultant. The Steering Committee will have responsibility for the review and sign off on key deliverables as listed in section 6.

6. DELIVERABLES

The deliverables under this consultancy are as specified in the table below. All documents submitted must 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.

The Senior Director, Programme Management Division will work with the consultant to schedule the course(s).

The consultant will conduct the course on the agreed dates for the identified target audience, and will provide each participant with a printed copy of the training material along with a copy for the eGovJa Information Resource Center.

The key deliverables under this consultancy are as specified in the table below.

Key Deliverables	Performance Standard	Percentage (%)
1. 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 be submitted with proposal and to include broad implementation strategy, activities, projected beginning and end times for major activities.	15
2. Training Plan	Training plan to be submitted with proposal and must include: - Detailed course outlines addressing the objectives stated in the Scope of Work, and certification curriculum - The entrance and exit competencies - The time-frame for achieving/covering the competencies - The number of teaching hours (not including breaks) and session options - Optimal class size - 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	25
3. Delivery of training	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 Center - Teaching aids	50

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Key Deliverables	Performance Standard	Percentage (%)
	- Delivery of courses on the agreed dates for the identified target audience - Provision of course participation certificates	
4. Training Evaluation Report	This report should contain but not be limited to: - A brief overview of the report 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 - Discussion on the key findings with references to the collected data.	10

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

6.1 *"Sign-off" Procedure*

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

6.2 *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.

6.3 *Schedule of Payment*

Payments for the services will be specified in the Contract.

7. QUALIFICATION AND TECHNICAL EXPERTISE REQUIRED

1.1. The Consulting Firm

The Consulting firm should have the following minimum qualifications and demonstrate the following competencies:

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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 Consultant will meet the minimum score of 70% in relation to the criteria listed in the Appendix.

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

1.2. Key Skills/ Qualifications

Of key interest to the GOJ are the key instructor(s) assigned by the Consulting firm to the Project. Specific attention will be paid to the depth of expertise of these individuals and their presence and communication capabilities. The key instructors should have the following minimum qualifications and demonstrate the following competencies

a. Professional Certification in Programme Management and Portfolio Management.

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

c. Practitioners of Programme Management and Portfolio Management with at least 5 years relevant experience and demonstrated competence.

d. Experience in Programme Management and Portfolio Management in Government is desired.

e. Ability to translate theory, and to tailor, implement and embed best practices.

A primary and secondary resource should be identified to ensure project continuity if required.

8. CHARACTERISTICS OF THE CONSULTANCY

Type of Consultancy:	Consulting Firm
Duration of Contract	3 months (non-consecutive days)
Place of Work:	Jamaica

Type of Contract:	Fixed Price Contract
Payment Responsibility:	MOFP Project Office
NB: The contract amount includes all costs related to undertaking the consultancy.	