



## **Request for Proposals For Conducting Budget Analysis on Education Programmes in Jamaica Ministry of Education and Youth**

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| <b>Location</b>               | <b>Jamaica</b>   |
| <b>Project Title</b>          | <b>Improving efficiency, effectiveness and equity in Public Expenditure in Jamaica for SDG acceleration.</b> |
| <b>Fund Name:</b>             | <b>Joint SDG Fund</b>  |
| <b>Type of Contract</b>       | <b>Institutional Consultancy</b>   |
| <b>Language Required</b>      | <b>English</b>   |
| <b>Duration of Assignment</b> | <b>Seven (7) Months</b>  |
| <b>Expected Start date</b>    | <b>14 March 2022</b>   |

### **Background**

The Government of Jamaica (GoJ) has made significant strides in localizing and integrating the Sustainable Development Goals (SDG) in its planning framework. This is evidenced by over 91% alignment with the country's Vision 2030 National Development Plan (NDP). The NDP is currently financed through the national budget; however, this financing model is challenged by tight budgetary constraints and limited fiscal space for additional debt.

In 2013, the Government of Jamaica (GoJ) embarked on a Programme of fiscal consolidation with the support of the International Monetary Fund (IMF), the Inter-American Development Bank (IDB) and the World Bank Group (WBG). The GoJ undertook an Economic Reform Programme (ERP) that included a wide range of reforms primarily to stabilize the economy, reduce debt, and fuel growth. Actions to achieve the objectives of this Programme included reducing the public debt, maintaining macroeconomic stability, facilitating job creation and improving labor force productivity.

Notwithstanding the valiant efforts to improve the economic situation, Jamaica continues to grapple with several social development challenges. These challenges are exacerbated by the diminishing fiscal space, limited resources across and within line ministries, as well as inadequate capacity in service delivery. Since it is unlikely that there will be additional resources available for social spending it becomes increasingly important to improve the management of public finances to focus on strategic priorities and maximize service delivery outcomes. The GoJ introduced Medium Term Results Based Budgeting (MTRBB) in 2015 aiming to reform the budget process and better align spending with anticipated results. The objective of MTRBB is to link budgeting with Government policy priorities through a gradual transition from annual expenditure planning to a fully functional Medium-Term Results Based expenditure framework which will improve accountability and ensure more efficient and effective allocation of resources. The MTRBB approach is an international leading practice for better aligning policy and planning to budgeting, integrating performance information into budgeting, and creating multi-year budgets. Unfortunately, there are still gaps in the Ministries Departments and Agencies (MDAs') capacity to fully implement the reforms.

Jamaica has been noted for its impressive investment in education which compares favourably with developed countries; however, the allocation of expenditure shows disparities. There remain considerable improvements needed to connect policy priorities and expenditure allocations. For example, a priority in the Education Strategy is to increase access to early childhood education and development programmes, requiring more resource allocation in the sector to improve the quality

of early childhood education and to implement the various life cycle-based intervention programmes. Yet, in 2019/2020, despite roughly 14 percent of the national budget (J\$109.4 billion) being allocated to the education sector, the early childhood sector, which goes up to Grade 3, received only 3.1 percent (J\$3.4 billion). There are also opportunities to enhance monitoring and evaluation capacity to improve data coordination and management on the efficiency and effectiveness of long-standing programmes.

**SDG United Nations Joint Programme (SDG JP)**

The United Nations through the Sustainable Development Fund has been supporting a Joint Programme (JP) designed to strengthen the Public Finance Management capacity of the Ministries of Finance and Public Service (MoFPS); Education and Youth (MOEY); and Health and Wellness (MoHW). The Joint Programme seeks to achieve efficient, effective and equitable resource allocation towards the attainment not only of the SDGs, but also of the country’s national outcomes reflected in Jamaica’s Vision 2030. The JP is being implemented in close collaboration with the Pan American Health Organization: PAHO/WHO, UNDP and UNICEF, and seeks:

1. To strengthen the Public Finance Management capacity of the MOEY and the MoHW.
2. To promote efficient, effective, and equitable resource allocation towards the achievement not only of the SDGs, but also of the country’s national outcomes reflected in Jamaica Vision 2030.
3. Develop effective, accountable, and transparent institutions as well as implement effective and targeted capacity-building.

With the increased capacity, as well as a coordinated focus on diagnostic budget analysis, the development of financial simulation models and budget tracking systems, Jamaica will realise timely advances on key socioeconomic outcomes through the reprioritization of funds, especially toward the most vulnerable populations including children and women and persons with disabilities.

Moreover, by building capacity, promoting accountable and transparent financial management systems and processes, and linking the budget programmes of the country to the SDGs, the JP will contribute to the achievement of SDG 16 and 17. The JP will thus accelerate progress to achieve SDGs 3 and 4, and in addition has the potential to contribute indirectly to SDGs 1, 8 and 10 by improving the health and education status of citizens, and focusing on the most marginalized groups of society. It will also contribute to achieving SDG 5 by prioritizing gender transformative interventions when conducting public expenditure analysis and defining key performance indicators.

**The Ministry of Education and Youth**

The Education Sector Plan (ESP) in the Vision 2030 Jamaica National Development Plan sets four major goals for the sector. These are: (i) Teaching and Learning Systems that are of International Standards; (ii) World Class School Environment; (iii) Attainment of equal and inclusive access and retention to ensure completion of secondary education and continuation to the Tertiary level; and (iv) Decentralized systems for quality leadership, management and resourcing

The education system is managed by the Ministry of Education and Youth (MOEY) from its head office, with additional oversight provided through several statutory bodies and agencies with varying elements of the overall mandate. For example, through the MOEY’s agencies, public educational institutions are broadly supported as follows:



Consistent with the Statutory Stages of Education under the Education Act, (1980) the Education System is required to provide education suitable to the requirements of students at the Primary, Secondary and Tertiary levels. Under the

MOEY's Modernization Programme, Operational management of each level is decentralized, and oversight and delivery of services is done through seven (7) Regional Education Agencies (REAs) which monitor and manages education in the regions across the country.

The most recent Public Expenditure Review (PER) on Education in Jamaica indicates that the level of public education spending over time is adequate<sup>1</sup>. The country's expenditure is high when compared to other Caribbean States and in line with international standards. Over the last three decades, public expenditure has averaged 5 per cent of GDP and up to 2019 expenditure represented 5.2 per cent of GDP and 19 per cent of total Government expenditure. Using pre Covid-19 assessments as a benchmark, the per-student expenditure as a share of GDP per capita for the GOJ is high and generally consistent with international benchmarks. There are however wide differences by education level. In 2019, the per-student expenditure at the primary level was 18 per cent; at the secondary level, 26 per cent and at the tertiary level, 35 per cent<sup>2</sup>. In contrast, in early childhood education the per-student government expenditure was 7 per cent, which was significantly lower than comparator countries within the Organization of Eastern Caribbean States (OECS<sup>3</sup>). While these levels point to an overall adequate allocation of public education spending, which has been sustained over time, there is room to examine education levels and student outcomes. The Education Expenditure Review suggests that despite the high expenditure levels in education it has not resulted in comparably high education outcomes and despite the learning-adjusted years of schooling, Jamaica is 10 per cent lower than expected when compared to countries within similar expenditure levels. There is therefore room to improve spending efficiency in critical areas.

### **Deep Dive Budget Diagnostics**

To explore and understand this situation, the Joint Programme will examine ways to improve the capacity of MOEY to identify and act on strategic areas around SDG 4, and bolster technical knowledge of its staff through training on Budget Analysis techniques. The JP will also conduct three (3) Deep Dive budget diagnostics & analysis to assess service delivery of three (3) key programmatic areas identified by MOEY. These analyses will seek to examine the flow of resources and materials from the Central Ministry to key service delivery points within the education sector, such as Regional Offices and Schools. Consistent with the GOJ's Medium Term Results Based Budgeting (MTRBB) framework which seeks to better align budget spending with anticipated results, and considering the recommendation of the PER on Education, the following Programme budgets have been proposed for assessment under this consultancy, within the context of adequacy, efficiency and equity toward optimizing investments across and within education levels:

- 1. The School Feeding Programme;**
- 2. The Textbook Programme; and**
- 3. Tertiary Education**

### **School feeding Programme**

The School Feeding Programme is managed by the MOEY and implemented through the School Feeding Unit which coordinates the Programme across the island impacting, in many cases, approximately 50% of students enrolled at the Primary and Secondary levels. The objectives of the Programme are to encourage regular school attendance and provide nutritional support to the most vulnerable students attending public institutions. Altogether, the Programme feeds over 50,000 children routinely with a recent target of increasing its coverage to over 70,000. Support is provided through the Nutrition Products Limited (NPL), however, approximately 98% of schools currently have their own cafeteria, providing daily meals for children. The government provides financial support to schools to engage approximately 1,000 cooks, thereby reducing their reliance on baked products from NPL.

In the 20/21 Estimates of Expenditure the Government allocated approximately J\$6.8B for School Nutrition Support, an amount of which J\$129M has been allocated for School Feeding Assistance; J\$1.1M for Direction and Administration; and J\$5.5M to assist beneficiaries registered on the Programme of Advancement Through Health and Education (PATH), Jamaica's flagship social protection programme. The 2021 Public Expenditure Review on Education highlighted that for the School Feeding Programme the unit cost per student is higher than median and mean average obtained in upper middle- and

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<sup>1</sup> Public Expenditure Review of the Education Sector in Jamaica June 2021 (UNICEF, World Bank)

<sup>2</sup> Jamaica PER on Education, 2021

<sup>3</sup> Organization of Eastern Caribbean States (OECS)

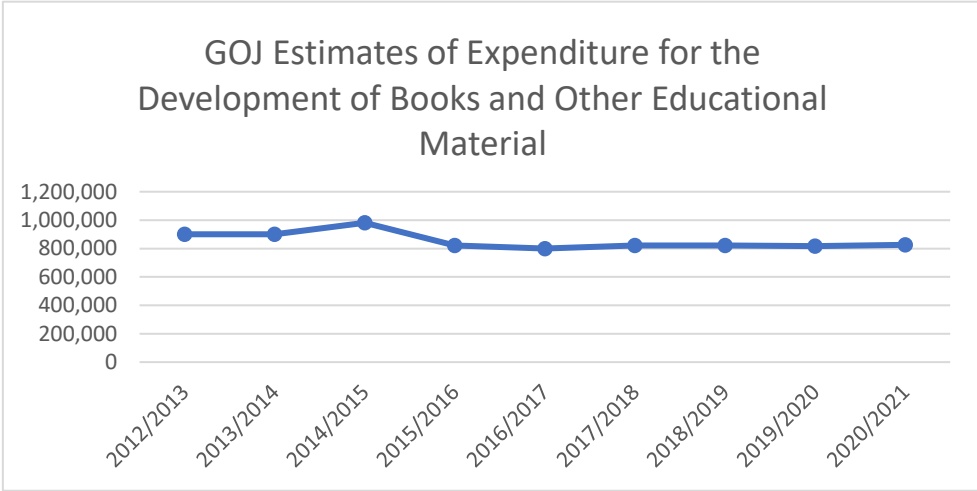
high-income countries. The implication is that there is room to reduce the current unit cost in line with international benchmark and realize critical savings. Other recommendations were aimed at improving the targeting of the school feeding Programme by reducing the percentage of wealthier students that receive free meals. With the importance of nutrition to student outcome, the School Feeding Programme could be further improved through enhanced targeting of the most marginalized students making the Programme more efficient.

**Tertiary Education**

Tertiary education is provided through universities and a variety of community and teachers colleges, some state-owned and some privately funded. Tertiary education is supervised by the University Council of Jamaica (UCJ) an external accreditation body to register and accredit diploma, certificate, and degree programs and the Jamaica Tertiary Education Commission (J-TEC), the regulatory and supervisory body for the tertiary sector. Both entities seek to ensure quality control and the management and development of the tertiary education system. Tertiary education is supported through a subvention provided by the Government of Jamaica and accounts for 18 percent<sup>4</sup> of expenditure under the MOEY’s annual budget. The Tertiary Unit has the responsibility of supervising tertiary educational institutions and manages the budget of all public tertiary institutions. A 2017 assessment conducted by J-TEC shows that direct institutional expenditure to provide for the educational services delivered to tertiary students includes a wide array of administrative expenses. This includes software licenses, laboratory and medical supplies; repairs and maintenance; security; and training and development<sup>5</sup>.

Despite this level of allocation year on year, recent data highlights that gross enrolment ratio in tertiary education for Jamaica is approximately 27.2 %; an increase from 6.7 % in 1981 to 27.2 % in 2015, growing at an average annual rate of 9.39%. <sup>6</sup>. The 2018 JSLC records tertiary enrolment at 78,097 students for the 17/18 academic year, compared with 73,002 students in 2016/17<sup>7</sup>. In considering the current investment of the GOJ in tertiary education, Jamaica’s allocation has been, in most cases, higher than comparator countries within the OECD, the Caribbean and among high-income countries. Additionally, the distribution of school attendance, by socioeconomic quintile groups, as highlighted in the PER on education shows that at the tertiary level existing investments often disproportionately benefit the richer quintile. There is therefore an opportunity to explore efficiencies within the existing fiscal space to optimize allocation of resources and engender greater returns on investment.

**4) National Textbook Loan Scheme and the Primary Textbook Programme**



The Primary Textbook Programme and the National Textbook Loan Scheme form part of Jamaica’s social assistance architecture providing text-based literature for students at the primary and secondary levels. Under the programmes, workbooks and textbooks are provided to students through their schools, covering core curriculum content areas in over 28 subject areas including the Sciences, Mathematics, Languages,

Figure 1 GOJ Estimates of Expenditure for the Textbook Loan Scheme

<sup>4</sup> UNICEF/World Bank: Public Expenditure Review on Education, 2020  
<sup>5</sup> JTEC-CAPRI, Cost of Education Research (2017)  
<sup>6</sup> Knoema  
<sup>7</sup> Economic & Social Survey Jamaica, 2018

Business Studies, Technical Studies, Information Technology, Agricultural Science and Drama. As seen in figure 2 average estimates suggest that between the 2012-2021 fiscal cycles the Government has allocated approximately \$JMD850M for the acquisition of textbooks and other educational material per annum. Improvements to the Programme have been realized since the introduction of the full roll-out of the National Standards Curriculum in FY 15/16. Since 2017 the Ministry has accelerated its digital learning strategy with the provision of e-learning solutions for teachers and students. In the current budget cycle just over J\$820 million was allocated to acquire textbooks, including electronic books (e-books) and learning apps. Amid the COVID-19 pandemic, digital learning has presented an opportunity to transform education management and information systems to close the digital divide reaching marginalized learners, reduce costs, diversify teaching, and offer flexible ways for students and teachers alike to acquire 21<sup>st</sup> Century skills, especially for the Labour Force. Consistent with the recommendations from the recently concluded Public Expenditure Review there is need to support the strengthening of the Public Financial Management systems, in keeping with the proposed reforms and recommendations from external audits on education. There is also need to examine the procurement processes, the purchase of goods and services and the framework/support closer monitoring and evaluation of the use by end-users to assess the cost-effectiveness of the Programme.

### **Purpose of the Consultancy**

The firm selected for this consultancy is expected to conduct three (3) budget diagnostics analysis (deep dives) to assess service delivery of key programmatic areas of the Ministry of Education and Youth. The consultancy also includes a training component to key staff in the Ministry on budget analysis techniques that will take place concurrently to the implementation of the deep dives.

The Budget Analysis should include, but not limited to the following:

1. Baseline data and diagnostic information on expenditure of programmes examined
2. Quantitative and qualitative evidence on the execution of the budget, focusing specifically on the transfer of resources from the central ministry to the regional level and implementing organizations.
3. Assessment of the Programme objectives and indicators to measure progress for the Programme at national, regional and school level.
4. Assessment of the mechanism of resource allocation and alignment between Programme targets and allocations.
5. Assessment of the cost to achieve expected results while maintaining quality outcomes.
6. Assessment of the effectiveness, - degree of fulfillment of objectives and effect relationship between projected and actual results.
7. Identification of potential leakages of recurrent resources through an in-depth analysis of the procurement process, the distribution of resources, and the management of resources; in the process identifying and segregating the major contributors to leakages across the regions
8. Assessment of the impact of delays and potential leakages on resource adequacy, efficiency and quality of service delivery.
9. Examine opportunities to improve disaggregation of budget data by gender, age and location (parishes).
10. Make recommendations to improve service delivery and budget efficiencies in the programmes under review.

### **Scope of Works**

The consultant is expected to:

- Work under the general direction of the Project Secretariat.
- Prepare a detailed workplan outlining anticipated timelines and resources required for successful completion of all deliverables under the consultancy.
- Conduct a mapping / process documentation exercise to understand the flow of resources through the different levels of the MOEY, in consultation with key stakeholders.
- Analyze existing systems to identify funding flows, redundancies, areas of leakage, that can support informed policy decisions based on survey findings
- Document the mechanism used to determine resource allocation nationally and across regions
- Investigate operational accounts and recommend mitigation strategies to support greater efficiency.
- Review of the Chart of Accounts to examine if future expenditures can be more effectively tracked including how expense types are aggregated to form expenditure reporting categories

- Review of literature, reports, and past budgets to, amongst other things, secure understanding of the budgeting process, the resolution of past challenges and to inform future approach and structure
- Conduct interviews with an array of key stakeholders, and hold focus group /similar sessions with a view to securing feedback, their considered inputs into how the expenditure process may be enhanced
- Develop methodology to identify efficiency gains.
- Develop an M&E framework for the selected programmes.
- Facilitate the improved capacity of MOEY staff to identify and act on strategic areas of improvement around SDG 4 with an emphasis on approaches that can promote gender and inclusive education strategies.
- Review expenditure and related data from the various cost centers.
- Train select MOEY staff on budget analysis techniques to support their capacity to conduct further diagnostics.
- As necessary, provide updates on training implementation and challenges which may require immediate action or troubleshooting of the Secretariat.
- Record/document all training to support replication and scaling-up. Training can be done virtually.

## **Methodology**

The consultant will be required to outline a strategy to be used to conduct a detailed assessment of select programmes of the MOEY and the development of a training plan to improve operational efficiency and promote human capital development. The analysis should take into consideration the Zero-based and Activity- based budgeting approaches used by the Ministry and seek to understand and recommend improvements in how resources are allocated, disbursed and managed.

## **Qualification Requirements of Experts/Team**

### **Professional background**

- Relevant Master's Degree in Public Finance Management, Social Development, Development Studies or related areas.
- At least a minimum 3 years' Experience and skills in Budget Analysis, Financial Management Systems, Results-Based Budgeting and
- At least a minimum 3 years Costing Social Policies. (experience in Public Financial Management in the Caribbean and Latin America would be an asset)
- A proven track record of working within a team and with multiple stakeholders at various levels.
- At least a minimum of 5 years' experience as a Certified Training of Trainers.
- Experience in developing and executing training in financial management, budget analysis and monitoring or related areas.

### **Comprehensive General professional experience:**

- At least 5-10 years' experience in public finance policy assessment (incl. PEFA), formulation, implementation and evaluation.
- Demonstrated engagement in policy and strategy development and dialogue, good leadership and communication, plus excellent writing and reporting skills
- Institutional experience and expertise in Public Finance Management in the context of international development.
- Working with UN institutions, governments (at all levels), or civil societies in the specific area is an advantage
- In-depth experience in social sector costing and planning public Finance for Children in education would be an asset..  
Working knowledge of Government of Jamaica financial management procedures and policies would be an asset.
- Ability to provide services in English

## Structure of Deliverables

| Deliverable No. | Deliverable Name   | Description  | Delivery Date (end of month) |
|-----------------|--|--|------------------------------|
|                 |  | Stakeholder Consultations  |                              |
| D-1             | Final Workplan   | Interim Report and Workplan should outline the actions required to achieve the project objectives and provide the deliverables laid out in the Terms of Reference  | Month 1                      |
| D-2             | Inception Report   | A detailed review of the three (3) selected programmes and their related sub-programmes for Analysis and Deep Dives. The review should include, but not limited to the following: <ol style="list-style-type: none"> <li>1. The Policy Framework/Regulation</li> <li>2. The Operational Plans, (Logical Framework)</li> <li>3. The Strategic Business Plans</li> <li>4. The Budget Planning, Monitoring and Review/Management Processes</li> <li>5. The current human resource technical capacity &amp; an assessment of existing systems</li> </ol> | Month 2                      |
| D-3             | <ol style="list-style-type: none"> <li>a) 1<sup>st</sup> Draft Budget Analysis Report</li> <li>b) Draft Training and Logistics Plan</li> </ol> | <ol style="list-style-type: none"> <li>1. Report on the Budget Deep Dives, with at least one programme review completed.</li> <li>2. Report on progress-to-date, incorporating the feedback and discussions with key personnel to date, detail of issues and challenges encountered</li> <li>3. Proposed solutions/recommendations</li> <li>4. Organisation of a consultation workshop to review and discuss the findings and recommendations</li> <li>5. A draft Budget Techniques Training Plan for key staff of the MOEY.</li> </ol>              | Month 3 ½                    |
| D-4             | Training Report  | Completed Report on training in Budget Techniques for MOEY and related technocrats   | Month 5                      |
| D-5             | Final Report   | A Final Report with findings, interpretative analysis, and recommendations   | Months 7                     |

### Contract Duration

The period of performance for the contract is seven (7) months commencing March 2022 through to September 2022.

### Payment Rendition

Payments will be made by UNICEF, in consultation with the MOEY on the deliverables submitted by the Consultant. The deliverables and payment rendition schedule are as follows:

| Deliverable No. | Deliverable      | Percentage (%) |
|-----------------|------------------|----------------|
| D-1             | Final Workplan   | 10%            |
| D-2             | Inception Report | 20%            |

|     |  |     |
|-----|--|-----|
| D-3 | 1 <sup>st</sup> Draft Budget Analysis Report & Draft Training and Logistics Plan | 35% |
| D-4 | Training Report  | 15% |
| D-5 | Final Report   | 20% |

**For every child, you demonstrate.....**

UNICEF’s core values of Commitment, Diversity and Integrity and core competencies in Communication, Working with People and Drive for Results.

UNICEF is committed to diversity and inclusion within its workforce, and encourages all candidates, irrespective of gender, race, sexual orientation, nationality, culture, appearance, socio-economic status, ability, age, religious and ethnic backgrounds to apply to become a part of the organization.

UNICEF has a zero-tolerance policy on conduct that is incompatible with the aims and objectives of the United Nations and UNICEF, including sexual exploitation and abuse, sexual harassment, abuse of authority and discrimination. UNICEF also adheres to strict child safeguarding principles. All selected candidates will, therefore, undergo rigorous reference and background checks, and will be expected to adhere to these standards and principles.

***Child Safeguarding***

|  |
|--|
| <p>Is this project/assignment considered as “Elevated Risk Role” from a child safeguarding perspective?</p> <p><input type="checkbox"/> YES    <input checked="" type="checkbox"/> NO    If YES, check all that apply:</p> <p>Direct contact role</p> <p><input type="checkbox"/> YES    <input checked="" type="checkbox"/> NO</p> <p>If yes, please indicate the number of hours/months of direct interpersonal contact with children, or work in their immediately physical proximity, with limited supervision by a more senior member of personnel:</p> |
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Payment of professional fees will be based on submission of agreed deliverables. UNICEF reserves the right to withhold payment in case the deliverables submitted are not up to the required standard or in case of delays in submitting the deliverables on the part of the consultant

**Evaluation Criteria**

Candidates will be evaluated based on a cumulative methodology, i.e., the award of the contract will be made to the candidate whose offer has been evaluated and determined as:

1. Responsive/compliant/acceptable, and
2. Having received the highest score out of a pre-determined set of weighted technical and financial criteria specific to the solicitation.

|                            |                        |
|----------------------------|------------------------|
| Technical component score  | Max. 80 points         |
| Economical component score | Max. 20 points         |
| <b>TOTAL score</b>         | <b>Max. 100 points</b> |

Only candidates obtaining a minimum of 60 points (of the total technical points) will be considered for the financial evaluation.



## HOW TO APPLY

Companies under UNICEF's Long Term Agreement (LTA) and others are invited to present a technical and a financial proposal that includes total cost and the timeline for completing the assignment

The technical proposal should include

1. Curriculum vitae (for all accompanying team members)
2. Methodological note suggested for the consultancy including the type of analysis recommended for the deep dives.
3. The proposal should include details on how the consultant intends to conduct fieldwork in a timely manner.
4. Financial proposal and timeline for completing the assignment based on team availability.
5. Three contact references from previous work experience.

Interested and suitable parties are invited to submit their technical proposal and budget proposals on or before 23:59 Kingston Jamaica time, 7<sup>th</sup> of March 2022 to [jam-procurement@unicef.org](mailto:jam-procurement@unicef.org)

Details will be posted on our website: <http://www.unicef.org/jamaica/>

**[Technical Proposals should be submitted titled "Technical Proposal – SDG JP - Budget Analysis for MOEY"](#)**

**[Financial Proposal should be submitted titled "Financial Proposal – SDG JP - Budget Analysis for MOEY"](#)**

**[Documents should be attached in PDF format only; no physical proposals will be accepted at the Office.](#)**

To apply submit the Proposal and the supporting documents and the 3 references to to [jam-procurement@unicef.org](mailto:jam-procurement@unicef.org).

In case of doubts please send your queries to Charlene [Buckley \(cbuckley@unicef.org \)](mailto:cbuckley@unicef.org) at least 3 working days before the deadline.

*Approved: February 8<sup>th</sup> 2022.*