

Planning Institute of Jamaica

TERMS OF REFERENCE

Consultancy to Assess and Update – Data 4 Development Online Monitoring Platform

April 2024

Background

The Planning Institute of Jamaica (PIOJ) has established a Data 4 Development Online Monitoring Platform as part of the Government of Jamaica's (GOJ) efforts to advance Integrated Results-Based Management (IRBM), digitalization, open government, and evidence-based decision-making within an information and knowledge society. It was officially launched on June 22, 2023, and is the successor to the JamStats Programme.

The Platform is geared towards supporting the performance and results-based management of national and sector development plans and programmes. Currently, it gives focus to Vision 2030 Jamaica – National Development Plan (NDP), which covers the 21-years, 2009-2030; and the 2030 Agenda for Sustainable Development and its 17 Sustainable Development Goals (SDGs), which is being implemented through Vision 2030 Jamaica. It also supports the monitoring of other relevant result-driven global development frameworks, such as those associated with the Post-2015 Development Agenda¹. The Post-2015 Development Agenda includes the Sendai Framework for Disaster Risk Reduction (2015); Paris Climate Agreement (2015); Addis Ababa Action Agenda (AAAA) on Financing for Development (2015); and New Urban Agenda (2016). The SIDS² Accelerated Modalities of Action (S.A.M.O.A) Pathway (2014) is complementary to and considered a part of the Post-2015 Development Agenda.

The development of the Platform commenced in 2019-2020 under the United Nations Development Programme (UNDP) supported "Advancing the Sustainable Development Goals (SDGs) through Vision 2030 Jamaica" project. The Platform was financed with counterpart funding from the GOJ. An international consultancy firm, Community Systems Foundation

¹ The Post-2015 Development Agenda includes the 2030 Agenda and complementary frameworks and agreements.

² Small Island Developing States (SIDS)

(CSF), was engaged to produce specified deliverables using its Data For All (DFA) software and applying expertise in the area of constructing monitoring platforms. Core elements of the Platform were completed, including an integrated JamData database/warehouse consisting of social, economic, governance, and environmental data; a Vision 2030 Jamaica Monitoring Dashboard; JamData, Child Protection, and Education Dashboards; and a Metadata Hub. A Mobile Application was also developed for open access in the Google Play and Apple Stores, free of cost.

Subsequently, the PIOJ has expanded the platform to include a Data Visualizer, which allows for exploration of the full suite of indicators and the creation of personal galleries; an Online Resource Library; and two additional Dashboards – a Local Development Dashboard with parish-level disaggregation of the National Outcome Indicators, and a Road Safety Dashboard. The functionalities of the Platform have also been enhanced to allow for improved accessibility to the complete time series data on indicators. The Mobile Application has also been upgraded with the latest technology available to the CSF.

The "JamData" data warehouse allows for the addition of new indicators and the creation of data files, thereby facilitating the capturing of important data and datasets as they become available. It also enables the upload and publishing of sub-national datasets as well as data from specific surveys and research studies. Currently, it accommodates national, parish, and community level data.

Rationale

The Data 4 Development Online Monitoring Platform provides access to developmental indicators and associated time series data and statistics as well as information products. These serve as part of the evidence-basis for the various components of an integrated results-based management (IRBM) cycle that underpins Jamaica's strategic approach to long-term national development - policy, planning and programming, budgeting, implementation, and monitoring and evaluation (M&E). Hence, its functions include, but are not limited to, supporting the monitoring and evaluation (M&E) of national, sectoral, and local level development performance and the development environment. It is titled a "Monitoring Platform" owing to its spotlight feature, a Monitoring Dashboard for Vision 2030 Jamaica and aligned SDGs, as well as the provision of complementary statistical dashboards, and reports that are largely the result of empirical research and M&E.

The platform has been developed based on guiding principles that inform the selection of relevant indicators and quality standards, accessibility, and ethics. These are applied to both national and international data sources. The principles promote adherence to legal and other normative frameworks that support evidence-, results-, and policy-driven sustainable and inclusive development.

These include:

- Legal frameworks covering national development planning, statistics, fiscal responsibility, and data privacy protections, among other areas.
- Principles, standards and guidelines for Managing for Development Results (MfDR) / Results-Based Management (RBM).
- Global norms governing the production and/or use of quality data and statistics. The norms include the United Nations Fundamental Principles of Official Statistics, and international data quality standards such as those established under the International Monetary Fund's (IMF) Data Quality Assessment Framework (DQAF) as well as indicators for statistical capacity building developed by recognized international entities such as the Partnership in Statistics for Development in the 21st Century (PARIS21).

Jamaica has a functioning National Statistical Office (NSO), the Statistical Institute of Jamaica (STATIN), which is recognized regionally and among small island developing states (SIDS) as a premier institution. The Statistics Act (1984) mandates STATIN to serve as Jamaica's NSO and collect and maintain relevant data and produce official national statistics. The processes of STATIN are designed to produce data and statistics that adhere to relevant global statistical standards and principles. Regarding RBM, Jamaica is in the process of developing the policy framework for Integrated Results-Based Management in the Government of Jamaica (GOJ) and has been developing various RBM-based frameworks and systems, such as Vision 2030 Jamaica – National Development Plan (NDP), launched in 2009, and the phased roll-out of Medium-Term Results-Based Budgeting (MTRBB) across government, since 2019.

However, Jamaica currently does not have a coordinated National Statistical System (NSS). Hence, while there is a functioning NSO, data quality varies across entities and sectors in the absence of established national standards and/or governance mechanisms, such as a Statistics Commission, to promote adherence to data quality standards, across sectors. There are also data quality issues in the global space and a coordinated NSS would also facilitate the establishment of standards for interacting with international data and statistics. Some of the data quality challenges associated with the absence of an NSS are gaps in the communication of metadata, revisions to definitions, data collection and computation methods; and data revision and accessibility information. Datasets are sometimes subject to continuous or periodic revision in the absence of communication on a revision schedule and which elements of the datasets are subject to revision. The operationalization, research methods, and data analysis techniques for producing data and statistics are sometimes revised in the absence of communication to stakeholders and public education. These have implications for the validity and appropriate utilization of datasets and statistics that inform national development processes.

In the absence of a policy framework for IRBM, there are systemic gaps in the prioritization of and resource allocation to the development of the GOJ's RBM capacity across ministries, departments, and agencies (MDAs). This combined with gaps in national statistical

coordination have led to challenges in the availability of quality data to inform policy and planning in real-time and/or timely manners. It is also associated with a disproportionate focus on data production in some sectors above others, owing to an absence of data planning aligned with agreed prioritization criteria based on planned national development results. This, therefore, impacts the quality of data available to databases and data-related platforms, such as the Data 4 Development Online Monitoring Platform, and national capacity for evidence-based policy and planning for sustainable and inclusive development.

The proposed consultancy is intended to respond to some of the identified gaps through a process of assessment and update of data and metadata as well as supporting the creation of a framework for governance and institutionalization of quality standards and guidelines through developing Standard Operating Procedures (SOPs) and equipping the client to utilize the SOPs.

Objective(s) of the Assignment

The overall objective of the assignment is to enhance the Data 4 Development Online Monitoring Platform through improved provision of quality data, statistics, information and metadata and the capacity of the PIOJ to promote the sustainability of the platform in accordance with established global standards and an institutionalized governance framework.

The sub-objectives of the assignment are to:

- 1. Complete a Gap Analysis and update
 - a. JamData database, including completing data time series with all available data and statistics, adding datasets as relevant, and removing indicators and data that do not meet agreed quality standards.
 - b. Metadata Hub, including reflecting updates and revisions over time to data quality indicators and the association of data and statistics with relevant National Goals and Outcomes and Sustainable Development Goals (SDGs) as well as other relevant results frameworks.
- 2. Develop Standard Operating Procedures (SOPs) for the Platform; and develop a Training Manual and deliver Capacity Building Training to the client in the use of the SOPs, utilising the Training Manual developed.

Scope of Consulting Services, Tasks (Components) and Expected Deliverables

The PIOJ seeks to engage a Consultancy Firm to provide technical support to enhance the Data 4 Development Online Monitoring Platform. The Consultancy will advance the development of the database of indicators to support the monitoring of Vision 2030 Jamaica (including Medium Term Socio-Economic Policy Framework (MTF) and Sector Plans) and the Sustainable Development Goals (SDGs) as well as other relevant results frameworks; update the database to reflect data revisions and the most recent available data; and further develop the Metadata Hub to ensure that it is comprehensive, up-to-date and meets international standards and user needs. The Consultant will engage stakeholders and utilize relevant documentation and other material in completing the assignment, including review in house publications from the PIOJ, which contain relevant indicator data such as the Jamaica Survey of Living Conditions (JSLC), The Economic and Social Survey Jamaica (ESSJ), and other relevant publications and data sources. The consultant will also be tasked to produce Standard Operating Procedures (SOPs) for the Platform; and develop a Training Manual, which will be utilized to build the capacity of the PIOJ to utilize the SOPs.

Main Activities

There are two main activities in the assignment:

- 1. Conduct a Gap Analysis and utilize the findings to Update:
 - a. the JamData database, including promoting data quality, completing data time series with all available data, and enhancing the suite of datasets. Indicators and data that do not meet agreed quality standards are to be recommended for removal and removed from the database subject to approval by the client. Relevant developmental indicators identified by the consultant, through research, should also be included in the update of the database. The JamData database currently houses approximately 550 indicators with 2,650 sub-groups and 52,400 data points. There may be some variation regarding the number of indicators as the PIOJ team will be interacting with the data prior to the commencement of work.
 - b. Update the Metadata Hub to promote data integrity and improved quality, including reflecting changes in data quality indicators (including serviceability, periodicity, timeliness, consistency, methodological soundness and computation) over a time series; incorporating information on the relevance of indicators in measuring performance relating to National Outcomes and Goals, SDGs and other relevant results frameworks. Metadata should be created for indicators, which currently lack metadata, as well as for indicators newly introduced under the consultancy.
- 2. Develop Standard Operating Procedures (SOPs) for the Platform; and design a Training Manual and deliver Capacity Building Training to the client/PIOJ in the use of

the SOPs. The consultant should develop one coherent document, containing SOPS relevant to the different elements of the Platform.

- a. The SOPs should present standards and guidelines for interacting with local and international data, statistics, information, and metadata; maintaining the Platform and its various offering/features; and promoting sustainability, continuous improvement and relevance.
- b. The Training Manual should consist of a capacity building training module(s) to guide use of the Standard Operating Procedures (SOPs) prepared under the consultancy. The Training Manual will be used to deliver training to the client in the use of the SOPs as well as serve as a resource for training relevant stakeholders subsequent to the end of the consultancy.

Duration

The assignment is for a period of 135 working days over seven months, commencing Wednesday, June 5, 2024.

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 expected outputs. The Firm is expected to work collaboratively with relevant stakeholders to contribute to partnership building, and data and information sharing. The Firm is to engage and critically assess, among others: relevant documentation on Vision 2030 Jamaica and the SDGs, data, and metadata, information on international standards and best practice regarding quality indicators, data and statistics, metadata, and SOPs for databases supporting evidence-based decision making and results-based management. The Firm is expected to collaborate with the client in ensuring that all relevant permissions are received, and all intellectual property and data privacy rights are adhered to and protected. The Firm's outputs are expected to be evidence-based and support sustainable and inclusive development, with consideration for data disaggregation, and the range of data and data providers across the public and private sectors, academia, civil society and non-governmental organizations, and international institutions/entities.

The Firm is to:

• Undertake the assignment in a structured and systematic manner, starting with a Work Plan that includes a schedule, which links the deliverables to the budget and assigned working days, monitoring and reporting plan, resources, and key inputs. The work plan should also include a risk management plan, which responds to the challenges presented in the rationale for the assignment along with other relevant considerations.

- Utilize an evidence- and results-based approach to the assignment. There should be
 engagement of relevant material and stakeholders, with demonstration of the
 implementation of the risk management plan. The stakeholders to be consulted
 include MDAs, with special consultations with the PIOJ, STATIN, Ministry of Finance
 and the Public Service, and Cabinet Office. Non-government actors, such as the private
 sector, civil society organizations, academia, and international development partners,
 should also be consulted. The consultant should review the suite of indicators in the
 JamData database and metadata in the Metadata Hub as well as all other
 data/statistics/information offerings and site functionalities. The relevant documents
 for review, include but are not limited to:
 - Vision 2030 Jamaica National Development Plan (NDP)
 - o 28 Sector Plans
 - All available Medium-Term Socio-Economic Policy Frameworks (MTFs) five completed and one draft
 - Transforming Our World: the 2030 Agenda for Sustainable Development
 - Documents relevant to the Post-2015 Development Agenda, including the Sendai Framework, Paris Climate Agreement, SIDS Accelerated Modalities of Action (S.A.M.O.A) Pathway, Addis Ababa Action Agenda on Financing for Development and New Urban Agenda
 - Economic & Social Survey Jamaica (ESSJ)
 - Jamaica Survey of Living Conditions (JSLC)
- Apply relevant global and/or national adaptations of global data quality, statistical capacity building, metadata, and RBM frameworks in the execution of the assignment.
- Develop first drafts of deliverables for review that can be shared with stakeholders and reflect the quality requirements of the deliverables. While zero drafts (basic drafts) can be discussed and collaboratively developed with the client, they should not form part of official submissions.
- Develop final drafts of deliverables that reflect stakeholder and client feedback and quality requirements of the deliverables. Final drafts should be presented in a format that is ready for use.
- The capacity building training in the use of the SOP should be delivered by the consultant to the client, using a Training Manual.
- The Training Manual to guide capacity building training in the use of the SOP should be appropriately designed and suited for a non-technical audience. It should clearly state the andragogical approach(es) being utilized and include relevant content and guidelines for delivery of the training. It should be results-based and include a results framework and performance measurement instruments, such as pre- and post- tests and other relevant monitoring and evaluation tools.

Qualification, Experience & Competencies Required

General Qualifications of the Firm:

- Evidence of the development and population of at least 2 Development Monitoring Databases and Dashboards on similar of type assignments for state or international development partner entities, provided;
- Minimum 4 years' experience in results-based management (RBM), particularly resultsbased monitoring and evaluation (M&E);
- Minimum 3 years' experience in data collection, production, and analysis of a similar nature;
- Evidence of the development of at least one related Standard Operating Procedure (SOP);
- Evidence of the development of at least one training manual for building client/stakeholder capacity to use SOPs for database and dashboard management.

The Team Lead should have:

- Graduate qualification in Data Analytics, Data Science, Statistics, or a related field from an accredited educational institution;
- At least 4 years' experience in gathering and producing both quantitative and qualitative data, statistics, and metadata;
- Certification in Project Management PMP or related/comparable certification;
- Minimum 8 years' demonstrable experience in executing consultancies geared towards statistical capacity building, and database management to support development-oriented processes, with at least 4 of the 8 years serving as a manager;
- Certification/Training in results-based management (RBM) and at least 5 years demonstrable experience.

Team Members should have:

- Minimum 2 team members, other than the Lead Consultant, should have at least a graduate degree in Statistics, Data Science or Data Analytics, or a related field from an accredited educational institution;
- Minimum 1 team member, other than the Lead Consultant, should have certification and at least 4 years' experience in results-based monitoring and evaluation (M&E);
- Minimum 1 team member, other than the Lead Consultant, should have graduate certification in research (quantitative and qualitative);
- Minimum 2 team members should have at least three (3) years' experience in developing development indicators;

- Minimum 1 team member, other than the Lead Consultant, should have
 - Minimum 2 years' experience working in a National Statistical Office or related state agency;
 - Minimum 4 years' experience in database development, management, and administration;
 - Minimum 5 years' experience in gathering and producing data and statistics;
 - Minimum 2 years' experience in developing metadata;
 - Minimum 5 years' experience utilizing statistical/database programmes, such as SPPS, STATA, SAS, and Microsoft Word, Excel, and Access;
 - Minimum 4 years' experience in business process engineering specific to the development of SOPs, with knowledge and experience in developing SOPs for database management, preferable;
 - Minimum 3 years' experience in developing training manuals for delivering stakeholder capacity building training in the use of SOPs, and using the training manuals to deliver training;
 - Certification in learning facilitation;
 - Demonstrable experience in change management.

General Competencies:

- Excellent research, analysis, and computation skills;
- Experience in working with a range of stakeholders;
- Demonstrated ability to deliver timely and quality outputs according to specifications;
- Strong presentation, verbal and written communication skills;
- Experience in the planning and/or delivery of at least one programme/project etc. with direct linkages to developing data for monitoring national development plans would be an asset.

All experts must be independent and free from any conflict of interest.

Reporting Requirements and Time Schedule for Deliverables

Reporting Requirements

The Firm will report to the Programme Director, Vision 2030 Jamaica Secretariat, Planning Institute of Jamaica. Management of the Contract should include monthly Project Monitoring Meetings between the Consultant and the Client.

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:

- 1. should use English Language for all reporting;
- 2. should use language appropriate for a non-technical audience;

- 3. should use the Chicago Manual of Referencing Style the most recent version;
- 4. should be comprehensive, properly formatted, and well presented;
- 5. should be developed through a consultative process, ensuring feedback from key stakeholders.

All documents should be submitted via encrypted email, accompanied by a spiral-bound printed copy.

All data and statistics should be presented in a Microsoft Excel Format/Document attached to an MS Word document detailing processes including data collection and validation methods, outputs, and lessons learned.

All deliverables must meet the performance standards and be accepted by the Planning Institute of Jamaica.

The key deliverables and time schedule for this engagement are specified in the table below.

No.	Key Deliverables	Performance Standards	Review Period &	Comply
			Feedback	(Yes/No)
	A detailed Work Plan is	The Work Plan should not	The PIOJ is to	
1	to be submitted within	represent any significant	provide feedback	
	the first five days from	deviations from the Work	to the Consultant	
	the effective start date	Plan accepted as part of the	within three	
	of the contract.	Technical Proposal.	working days of	
		Revisions are to reflect joint	receipt of the	
		decisions made by the client	Draft Work Plan.	
		and consultant during the		
		contract negotiation phase	The Work Plan is to	
		as well as necessary	be agreed upon by	
		adjustments linked to	the Consultant	
		schedule and other project	and the Planning	
		management	Institute of	
		considerations. The Work	Jamaica. (PIOJ)	
		Plan is to be aligned with the	prior to the	
		Scope of Work (SOW) with	commencement	
		consideration for the	of work.	
		Objectives, Rationale, and		
		other relevant tenets of the		
		ToR.		
	A Consultancy Inception	The Consultancy Inception	The PIOJ is to	
2	Report, of no more than	Report should include	provide feedback	
	15 pages, excluding	success criteria and any	to the Consultant	

No.	Key Deliverables	Performance Standards	Review Period & Feedback	Comply (Yes/No)
	annexes, is to be submitted within 15 days after submission of the Work Plan.	challenges and risks to producing planned deliverables within schedule.	within five working days of receipt of the Draft Consultancy Inception Report.	
3	A Draft Report on the Review and Update of the JamData database is to be submitted within the first three months from the effective start date of the contract.	The deliverable should satisfy all tasks detailed at item 1.a under "Main Activities", and "Methodology" of the Scope of Work (SOW), ensuring inputs from all relevant stakeholders, documents reviewed, and international standards/best practice/benchmarks are considered.	to the Consultant within 10 working days of receipt of the Draft Report.	
4	A Consultancy Status Report of no more than 20 pages, excluding annexes, is to be submitted by the middle of the fourth month from the effective start date of the contract.	The submission should present an assessment of performance in executing the consultancy based on agreed metrics/indicators and targets. It should also include all lessons learned, issues encountered, risks and unintended outcomes from the assignment regarding items 1-2 of the SOW.	The PIOJ is to provide feedback to the Consultant within five working days of receipt of the Status Report.	
5	A Draft Report on the Review and Update of the Metadata Hub is to be submitted within five months from the effective start date of the contract.	The deliverable should satisfy all tasks detailed at item 1.b under "Main Activities", and "Methodology" of SOW ensuring inputs from all relevant stakeholders, documents reviewed and in accordance with international best practice/benchmarks.	The PIOJ is to provide feedback to the Consultant within 10 working days of receipt of the Report.	
6	Draft Standard Operating Procedure (SOP) and Training	The deliverable should satisfy all tasks detailed at item 2 under "Main		

No.	Key Deliverables	Performance Standards	Review Period & Feedback	Comply (Yes/No)
	Manual are to be submitted within five months from the effective start date of the contract.	Activities", and "Methodology" of SOW, ensuring inputs from all relevant stakeholders, documents reviewed, and in accordance with international best practice/benchmarks.	within 10 working days of receipt of the SOP and Training Manual.	
7	Final Drafts of the updates to the suite of indicators, database, and Metadata Hub are to be submitted by the middle of the sixth month from the effective start date of the contract.	The Final Drafts should be delivered in keeping with performance standards stated at items 1.a – 1.b of "Main Activities", and "Methodology" of the SOW, incorporating agreed inputs from stakeholders.	•	
8	Final Draft Standard Operating Procedure (SOP) and second Draft Training Manual are to be submitted by the middle of the sixth month from the effective start date of the contract.	The deliverable should satisfy all tasks detailed at item 2 under "Main Activities" and Methodology of SOW ensuring inputs from all relevant stakeholders, documents reviewed and in accordance with international best practice/benchmarks.	receipt of the Final Draft SOP and	
9	A Capacity Building Session to equip the Client (PIOJ) to use the SOP is to be conducted	The deliverable should satisfy all quality specifications detailed under item 2 of "Main	The PIOJ is to provide any feedback on the Capacity Building Session within two	

No.	Key Deliverables	Performance Standards	Review Period & Feedback	Comply (Yes/No)
	by the end of the first week in the seventh month. Approximately 15 staff members of the PIOJ and key stakeholders will be trained in the use of the SOP.	Activities", and Methodology of SOW. A report on the Capacity Building Session, including findings from the analysis of performance measures (such as pre- and post- tests) should be included in the Final Completion Report.	working days of its completion.	
10	Final Draft Training Manual is to be submitted by the end of the second week in the seventh month	The deliverable should satisfy all quality specifications detailed under item 2 of "Main Activities" and Methodology of SOW. The Final Draft Training Manual should reflect any relevant lessons learned from the execution of the Capacity Building Training.	The PIOJ is to provide feedback/approval to the Consultant within three working days of receipt of the Final Draft Training Manual. Any requested amendments are to be completed by the Consultant within five days of receipt of comments.	
11	Final Completion Report is to be submitted by the last working day in the seventh month (December 31, 2024).	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.	The PIOJ is to	

Variations

Proposed changes to any part of the ToR must be addressed within formal discussions among the PIOJ and Consultant prior to any decisions and/or actions by the parties. Any subsequent agreed revisions to the ToR may be accommodated through written documentation that clearly states the parameters and terms and conditions of the revisions.

Level of Effort	135 days over 7 months; a day is defined as 8 hours	
Start date	June 5, 2024; no extension can be granted beyond	
	February 2025	
Location	Kingston, Jamaica at offices to be provided by the Firm.	
	The PIOJ will make available venues for meetings.	
Type of Consultancy	Firm/Team	
Type of Contract	Lump sum	
Payment responsibility	The PIOJ 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. The procurement of		
services will be in accordance with the Least-Cost method of procurement.		

Characteristics of the Consultancy

Conditions Associated with the Assignment

All materials and documents accessed during the conduct of this consultancy remain the property of the PIOJ and are not authorized for use by the Firm for any other purpose than 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. The terms of engagement shall be as detailed in the contract of engagement.

Payment Schedule

Deliverable	Payment (%)
Detailed Work Plan	10
Consultancy Inception Report	2
Draft Report on the Review and Update of the JamData database	25
Consultancy Status Report	2
Draft Report on the Review and Update of the Metadata Hub	25
Draft Standard Operating Procedure (SOP) & Draft Training Manual	15

Deliverable	Payment (%)
Final Drafts of the updates to the suite of indicators, database, and	10
Metadata Hub	
Final Draft Standard Operating Procedure (SOP) & Second Draft Training	4
Manual	
Capacity Building Session & Final Draft Training Manual	5
Final Completion Report	2
Total	100