

# TERMS OF REFERENCE

## Consultancy Services to Develop a Digital Workspace for the Public Sector Investment Programme

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# BACKGROUND INFORMATION

## 1.1. Partner country

Belize

## 1.2. Contracting authority

The Contracting Authority is the Ministry of Finance, Investment, **Economic Transformation**, Civil Aviation, and E-Governance (MET).

## 1.3. Country background

The Government of Belize (GOB) has vested responsibility for public sector investment programme planning in the Economic Transformation portfolio, currently positioned in the Ministry of Finance, Investment, Economic Transformation, Civil Aviation and E-Governance.

Several recommendations have been made over the years towards the establishment of an effective framework for public investment management (PIM) in Belize, in line with the general rule of thumb that effective public investment has positive impacts on Gross Domestic Product (GDP) and broader national development objectives. Currently, however, the Ministry's involvement in the process is limited to participation in the preparation and monitoring of externally financed projects during implementation (in collaboration with funding and executing agencies) and preparing quarterly reports on the identified set of projects comprising the Public Sector Investment Programme (PSIP). Standardised operating procedures (SOPs) and criteria for project selection do not exist, and while external projects are generally appraised by the respective financing partners, government funded (Capital II) projects are not subjected to such scrutiny by an independent entity. Also, there is no functional management information system for effective PSIP reporting and monitoring.

A Public Investment Management Assessment (PIMA) conducted in 2020<sup>1</sup> pointed positively to a “fairly comprehensive, detailed, updated and monitored PSIP and related project database”. It however cited the need for a general update of the legal framework for public financial and public investment management, and project appraisal and selection processes and methods; improved oversight of major risks and coordination between public entities including government-owned corporations; inclusion of the PSIP in the budget law; and technological and human resource capacity development necessary to successfully meet future anticipated challenges. Specific recommendations of the PIMA included: (1) systematic ex-post reviews and audits; (2) alignment and harmonisation of PIM procedures; (3) establishment of a sound legal framework consistent with international good practices; (4) the elaboration of a more comprehensive PSIP, (5) revamping of the PIM process with a focus on project appraisal and selection; (6) passage of the legislation and regulations on PIM; and (7) elaboration of a capacity development strategy and information technology (IT) master plan.

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<sup>1</sup><https://www.imf.org/en/Publications/CR/Issues/2020/07/22/Belize-Technical-Assistance-Report-Public-Investment-Management-Assessment-49602>

#### 1.4. Current situation in the sector

In addition to legislation, regulations and SOPs, the project database is a key feature of the public investment management framework. The Ministry maintains an Excel-based project bank that is updated with information requested and provided on a quarterly basis by executing and/or funding agencies. While most executing agencies respond positively, an articulated framework governing public investment management and outlining the roles of entities involved in PSIP planning, implementation, and monitoring could assure greater compliance and accuracy in the PSIP reports.

The MET has made several attempts over the past decades to establish an electronic system that would more effectively support the planning, monitoring, and reporting aspects of its PSIP mandate. In 2014, the Government of Belize secured funding from the CARICOM Development Fund for the development of a management information system (MIS) intended to enhance the ability of the MET in this regard. The resulting PSIP MIS is a web-based application developed on the Linux, Apache, MySQL, and PHP (LAMP) frameworks, and deployed in a publicly and globally accessible IT environment. It mirrors the project lifecycle, capturing in several modules technical and financial information on interventions from identification through to the formulation, planning, and execution stages. The PSIP MIS project closed at the end of 2020, but rollout was delayed pending adjustments and enhancements considered necessary to promote the system's uptake by the intended users.

Additional delays resulted from the advice that critical upgrades to the system's architecture were required ahead of any further development. The components of the architecture reached end-of-life as follows: the operating system, Linux CentOS 6.10 - November 2020; the web application server, Apache 2.0 - July 10, 2013; and the host language, PHP 5.6.42 - January 19, 2017. Security support for the host language ceased on December 31, 2018.

Given further delays encountered in securing expertise to execute the upgrade, the Ministry intends to proceed with an alternative solution using IT products already available to the Government of Belize (GOB). This option is considered more sustainable as it limits the need for external, third-party support. MET therefore intends to engage consultancy services for the development of a digital workspace incorporating the requirements of the PSIP and providing a basis for further expansion to support the digitalisation and communication needs of the Ministry.

This alternative aligns with the GOB's thrust to promote good governance as stated in the Plan Belize Medium Term Development Strategy, 2022-2026<sup>2</sup>. It will contribute to enhanced accountability as it relates to public investment, budgeting and spending, and improved efficiency and delivery of Government services through digitalization. The project likewise aligns with the digital government pillar of the National Digital Agenda 2022-2025<sup>3</sup>, "*fostering open, inclusive, and transparent institutions to build trust in government structures and digital solutions by promoting e-participation, strengthening e-governance and releasing public data sets for multiple purposes.*"

It will support the MET's Policy and Planning Unit (PPU) in identifying, monitoring, evaluating, and reporting on public sector investment projects, and coordinating multilateral assistance by promoting:

1. Availability of comprehensive information on the PSIP, facilitating on-demand access;

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<sup>2</sup> <https://med.gov.bz/wp-content/uploads/2023/04/Belize-Med-Term-Dev-Strategy-Action-Plan-2022-to-2025.pdf>

<sup>3</sup> <https://digitalagenda.gov.bz/wp-content/uploads/2022/05/NATIONAL-DIGITAL-AGENDA-FINAL.pdf>

2. Efficiency and accuracy gains in reporting on the part of executing agencies and the PPU through the digitalisation of PSIP processes;
3. Opportunities for more robust analysis, monitoring, and evaluation of the PSIP given time saved in the reporting process and the deployment of enhanced technology; and
4. A strengthened institutional framework for public investment programming and management, capital budget preparation and management, and development partnership/donor coordination.

## **OBJECTIVES & EXPECTED OUTPUTS**

### **2.1. Overall objective**

The overall objective (Impact) to which this action contributes is:

- Improved macroeconomic planning and donor coordination.

### **2.2. Specific objective**

The specific objectives (Outcomes) of this assignment are as follows:

- Strengthened capacity of the MET to monitor and report on the Public Sector Investment Programme (PSIP)
- Enhanced accuracy and availability of PSIP data necessary to support decision-making and national planning

### **2.3. Expected outputs to be achieved by the contractor**

The expected outputs of this contract are as follows:

A PSIP MIS which allows timely updates of and access to project information, including expenditure, on a near real-time basis.

(1) Redesigned, digitalised PSIP MIS capturing the PSIP project lifecycle from project identification through to implementation and closure, including:

- Standardised workflows and operating procedures (SOPs) across MET, line ministries, and other project executing agencies
- Deployment of AI-enabled tools to improve productivity and reporting efficiency
- Real-time reports and dashboards
- Interoperability with existing government systems (e.g. SmartStream, Central Bank System where feasible)
- Centralised digital repository for PSIP documentation and reports
- User and Administrator Manuals
- Training sessions/workshops (including materials) designed and conducted for users and administrators; and
- System testing and validation, including user acceptance testing
- Maintenance and technical support provided to users and administrators

## ASSUMPTIONS & RISKS

### 3.1. Assumptions underlying the project

- (1) Entity with the requisite technical capacity identified and selected
- (2) Sufficient financing is allocated to cover the project's costs.
- (3) Project is implemented within the allotted time.
- (4) Personnel will be available to support the test phase.
- (5) The system will benefit entities beyond the MET.
- (6) Change management strategy is elaborated and implemented.
- (7) MET possesses the financial and human resources necessary to provide an enabling environment for the sustainability of the system.
- (8) The establishment of a system to facilitate and streamline PSIP reporting will be attractive to project executors, promoting uptake and regular use of the system, and enhancing data availability

### 3.2. Risks

#### Legislative, Regulatory, and Institutional Framework

The absence of a clear institutional framework for public investment management within the Public Service remains a risk to the success and efficacy of the system. While draft legislation and regulations exist, the MET has been urged to pursue the articulation of SOPs to subsequently guide any adjustments to the system. Best practice in software development for business process automation requires the elaboration of such processes so that the flows and procedures may be mirrored in the system. The lack of overarching legislation, regulations, and SOPs continues to present a hindrance to the sustainability and cost-effectiveness of the PSIP MIS.

While this intervention is expected to support the articulation of SOPs to guide PSIP planning, implementation, monitoring, and reporting processes, the MET will still require assistance to analyse and develop the institutional framework for public investment management, including of existing draft legislation and regulations. The articulation of SOPs will include the identification of roles and responsibilities of the PPU MET, line ministries, project executing entities, and others, as it relates to the PSIP. These roles and responsibilities should be reflected in the system.

#### Change Management Strategy

While several entities comply with MET's requests for information through manual processes, the transition to a digital PSIP MIS will require a structured change management approach to ensure effective adoption and sustained use. The strategy should address potential resistance by establishing clearly defined roles and responsibilities, supported by appropriate governance and enforcement mechanisms. It should also include stakeholder engagement, user training, and continuous communication to promote awareness, build trust, and encourage system utilization across all participating entities.

In addition, the strategy should consider risks associated with technological change, including the potential for system obsolescence. This will require the adoption of scalable and adaptable system architecture, along with provisions for periodic review, updates, and long-term sustainability.

Overall, the change management approach should ensure a smooth transition from manual to digital processes, while strengthening institutional ownership, accountability, and system effectiveness.

### MET Capacity

A key challenge relates to the availability and sustainability of in-house technical capacity to support, maintain, and enhance the proposed PSIP MIS. At present, MET does not have a dedicated System Administrator or Software Developer on staff, which presents a risk to the long-term institutionalization, maintenance, and continuous improvement of the system.

This capacity gap may affect the Ministry's ability to independently manage system updates, troubleshoot technical issues, and implement future enhancements in response to evolving operational needs. Addressing this limitation will be critical to ensuring the sustainability and effectiveness of the MIS beyond the implementation phase.

In addition, competing priorities among key PPU personnel may limit their availability to actively participate in project activities, including requirements validation, testing, and system rollout. This may impact timelines and the overall quality of output if not adequately managed.

To mitigate these risks, the project should incorporate measures such as capacity building, knowledge transfer to relevant technical personnel, and resource planning to ensure that MET is adequately equipped to support and sustain the system over time.

## **SCOPE OF THE WORK**

### **4.1. General**

#### **4.1.1. Description of the assignment**

The assignment is to design and implement a sustainable, government-owned Public Sector Investment Programme (PSIP) digital platform within the Microsoft ecosystem, that streamlines project submission (identification), evaluation (formulation and appraisal), approval, monitoring, and reporting across Government and entities executing projects on behalf of the GOB; supported by standardized workflows and operating procedures, dashboards, and integration with other government systems as may be feasible. The system is to be accessible by executing agencies and incorporate AI and other tools that will enhance reporting and data visualisation.

The assignment will include:

The review of the existing MIS and related documentation to understand its structure and functions; review of the public investment management framework and operating procedures, as applicable, to ensure clarity on any additional features necessary to align process flows in the new platform to any updated procedures; identification of other items that would render the system more user-friendly; and implementation of the required features.

#### **4.1.2. Geographical area to be covered**

The PSIP MIS is web-based and will allow capture and reporting of information (including locations) on projects being implemented throughout Belize. This is in line with the national mandate of the MET.

### 4.1.3. Target groups

The system aims to support the work of the MET's Policy and Planning Unit (PPU). It therefore targets PPU and wider MET personnel, and other governmental and quasi-governmental agencies executing public sector investment projects. The Ministry of Finance (MOF), Statistical Institute of Belize (SIB), and the Central Bank of Belize (CBB) are key agencies that will potentially benefit from the operationalisation of the system.

## 4.2. Specific work

The specific tasks under this assignment are as follows:

The Contractor will:

- (1) Conduct an analysis of the PSIP through stakeholder consultations and review of the existing MIS to identify any lessons learned; identify gaps in the PSIP process and develop the requirements specification document and system architecture concept design.
- (2) Review the processes currently employed for the PSIP, as applicable, to gain understanding of the business processes and user roles that should be captured in the system.
- (3) Conduct mapping of the current, "as-is" workflow, documenting the full PSIP process including MET's and ministries' roles from project identification to closure, and identifying any gaps, inefficiencies, and/or bottlenecks. Develop the "to-be" optimised standard workflow design.
- (4) Develop standard operating procedures capturing MET's internal processes and line ministry engagement, define user roles and responsibilities, and configure user roles and access permissions.
- (5) Develop the system's architecture, database, and UX/UI designs; and deliver prototypes of modules including but not limited to the proposed/pipeline, approval workflow, monitoring, and dashboard modules, along with the system specifications document and SmartStream integration, if feasible.
- (6) Development of the first phase of the functional system including initial dashboards, user authentication system, and core operational modules, including:
  - PSIP Proposed and Pipeline Modules
  - Project (Evaluation) Formulation and Appraisal Module
  - Approval Workflow Module
  - Project Monitoring Module
  - Financial Tracking Module
  - Dashboard and Reporting Module
  - Document Management Module
  - User Management and Role-Based Access
  - Notification System
  - Audit Trail System
  - Line Ministry Portals

- (7) Deploy advanced features including advanced analytic dashboards and AI/Copilot to support automated report generation, presentation creation, reminders, smart search, etc.; and explore the feasibility of integration with SmartStream, Central Bank, and other GOB systems, subject to the availability of APIs, system access permissions, and Government approval. If integration is determined to be outside the original scope, a Technical Integration Assessment Report and Change Request shall be submitted for review and approval before work may proceed.
- (8) Conduct testing, training and change management activities including user acceptance, security, and performance testing; user training guided by user manuals and interactive training videos; change management support; and documentation and incorporation of feedback at all levels.
- (9) Fully deploy the system, formally hand over the source code repository and all documentation, and support transition of the system to the MET with guidance from MOEG and CITO. Conduct training for system administration personnel.
- (10) Provide support, maintenance, and bug fixes for a warranty period of one (1) year following system acceptance or go-live, during which full technical support shall be provided.

The Contractor must also comply with the latest Communication and Visibility Requirements for EU-funded external action, laid down and published by the European Commission.

### **4.3. Project Management**

#### **4.3.1. Responsible body**

The project will be managed through the Policy and Planning Unit of the Ministry of Finance, Investment, **Economic Transformation**, Civil Aviation, and E-Governance.

#### **4.3.2. Management structure**

The PPU is under the Economic Transformation portfolio in the Ministry. The portfolio is led by a Chief Executive Officer (CEO), and the work of the PPU is supervised by a Director. An officer from the PPU will be assigned general oversight responsibility for the Project.

A Core Working Group (CWG) will be established to support the implementation and oversight of the Project. The CWG will comprise representatives from, but not limited to, the Ministry of Finance (MOF), MET (including the Systems Administrator), and the Ministry of E-Governance (MOEG) (Business Analyst). Technical guidance on matters related to infrastructure, cybersecurity, and hosting may be sought on a case-by-case basis from the Central Information Technology Office (CITO).

The Director of the PPU will serve as Chair of the CWG, while the assigned PPU Project Officer will serve as its secretary in an *ex-officio* capacity. The CWG will be responsible for reviewing project deliverables, reports, and presentations submitted by the Contractor. Members of the CWG will be provided with a specified period in which to assess submitted documentation and provide consolidated feedback.

Technical support for user acceptance testing (UAT) will be provided by personnel within MET's project units and from other relevant ministries and agencies. Training activities under the Project will target users from key stakeholder entities to support effective adoption and utilization of the updated system.

The decision-making and governance process for the Project will include the following:

1. Identification and engagement of relevant stakeholders, agencies, and end users to support the testing, validation, training, and implementation activities of the project.
2. Review and evaluation of the Contractor's deliverables by the Core Working Group (CWG) to ensure that the system meets the required functionality, quality standards, and operational requirements as modules and enhancements are developed and delivered.
3. Technical recommendations from the CWG regarding the acceptance, revision, or rejection of deliverables and other key project outputs.
4. Application of a formal change control process throughout the Project. Any proposed changes affecting the scope, deliverables, timelines, technical specifications, or resource requirements shall be documented by the Contractor and submitted to the CWG for review and recommendation prior to implementation. Final approval of significant changes shall be granted by the CEO.
5. Authorization to proceed to subsequent phases of the assignment issued in writing under the authority of the CEO based on recommendations submitted by the CWG through its Chair.
6. Approval of payment by the CEO, with disbursements processed by the Imprest Officer upon confirmation from the CWG that agreed deliverables have been satisfactorily completed in accordance with the contract requirements.

### **Communications:**

As part of the Project's change management approach, a structured communication strategy will be implemented by the Contractor in close coordination with the designated Project Officer from MET and relevant stakeholders, including the CWG.

The Contractor shall be responsible for developing the communication strategy, messaging content, and related materials to support stakeholder engagement, user readiness, and awareness of the PSIP MIS. The designated Project Officer shall serve as the primary coordination point for communication activities, ensuring alignment with Ministry priorities, consolidating feedback, and facilitating internal review and approval processes prior to dissemination.

All communication outputs shall be subject to review and approval by the Contracting Authority through the established governance structure before dissemination.

The Contractor shall support the implementation of communication activities through appropriate channels, including workshops, presentations, digital platforms, and other dissemination mechanisms as required.

The Contracting Authority, supported by the Project Officer, shall facilitate dissemination of approved communications through official government channels, where applicable.

Where appropriate, feedback from stakeholders shall be collected and integrated into the implementation process to support continuous improvement, user readiness, and effective system adoption.

#### **4.3.3. Facilities to be provided by the contracting authority and/or other parties.**

Office space and facilities required by the consultant will be discussed during contract negotiations or the project inception phase.

## LOGISTICS AND TIMING

### 5.1. Location

The project location is Belmopan City, Cayo District, specifically the Ministry of Economic Transformation, Ground Floor, Sir Edney Cain Building.

### 5.2. Start date and period of implementation of tasks

The intended commencement date is July 16, 2026, and the period of implementation of the contract will be **11 months** from this date. Please see Articles 19.1 and 19.2 of the special conditions for the actual start date and period of implementation.

## REQUIREMENTS

### 6.1. Staff

Note that civil servants and other staff of the public administration of the partner country, or of international/regional organisations based in the country, shall only be approved to work as experts if well justified. The justification should be submitted with the tender and shall include information on the added value the expert will bring as well as proof that the expert is seconded or on personal leave.

#### 6.1.1. Key experts

The assignment requires a software engineering team with demonstrated expertise in web application development, system administration, software lifecycle management, and secure application deployment. The work will involve reviewing and enhancing the existing PSIP MIS application, validating business and technical requirements, improving system functionality, strengthening security and performance, and supporting long-term sustainability of the-platform.

The profiles of the key experts for this contract are as follows:

#### **Key expert 1: Team Leader /Systems Analyst**

The Team Leader will be responsible for the overall coordination, technical oversight, and delivery of the assignment. The expert will lead requirements gathering and analysis activities, support the enhancement of the system architecture, coordinate testing and deployment activities, prepare technical and functional documentation, and oversee implementation of the software development lifecycle.

The Team Leader shall also coordinate project planning, stakeholder engagement, reporting, risk monitoring, quality assurance, and implementation scheduling throughout the assignment.

#### Qualifications and skills:

- Bachelor's degree in Computer Science, Information Technology, Software Engineering, Information Systems, Project Management, or related field.
- A master's degree in the above will be considered an asset.

### General professional experience:

- (1) A **minimum of three (3) years'** experience in software development or ICT system implementation.
- (2) A **minimum of one (1) year** of proven experience as a System Analyst, in software solution design, or application architecture.
- (3) Demonstrated experience coordinating or leading software development, digital transformation, or ICT implementation assignments.

### Specific professional experience:

- (1) Proven experience with the system development life cycle (SDLC) including requirements gathering, analysis, design, testing, and deployment, maintenance, and user support.
- (2) Strong understanding of system analysis, application architecture, and database design principles.
- (3) Experience with web application development technologies, relational databases (e.g. MySQL or PostgreSQL), APIs, and modern software development tools
- (4) Familiarity with secure software development principles, version control practices, and system integration approaches.
- (5) Demonstrated ability to prepare technical documentation, process flows, system specifications, user requirements, and implementation plans.
- (6) Strong communication and stakeholder engagement skills, including the ability to translate technical concepts for non-technical audiences.
- (7) Experience supporting user acceptance testing (UAT), troubleshooting, deployment activities, and post- implementation support.
- (8) Experience with cloud-based infrastructure, scalable application architecture, or modern front-end/back-end development frameworks will be considered an asset.
- (9) Strong understanding of system analysis, application architecture, and database design principles

### **Key expert 2: (System Administrator/ Software Developer)**

The expert will support the administration, enhancement, maintenance, and optimization of the PSIP MIS application and supporting infrastructure. Responsibilities will include system administration, application enhancement, deployment support, security management, troubleshooting, performance optimization, backup and recovery support, and ongoing technical maintenance of the platform.

The expert will also contribute to software development activities, including reviewing existing code, implementing enhancements, supporting front-end, and back-end functionality, conducting testing activities, and assisting with deployment and user support.

### Qualifications and skills:

- Bachelor's degree in Information Technology, Computer Science, Software Engineering, or related fields.

### General professional experience:

- (1) A **minimum of three (3) years'** experience in system administration, software development, or web application support.
- (2) Demonstrated experience supporting application deployment, maintenance, troubleshooting, and system administration activities.

- (3) Proven working experience managing servers, user accounts, access controls, system security, and operational support.
- (4) Proven working experience in implementing system backup and disaster recovery plans to ensure data integrity without compromising organizational performance.

Specific professional experience:

- (1) Strong working knowledge of web application development technologies, including PHP, JavaScript, SQL, databases, and related development frameworks.
- (2) Experience with Linux and/or Windows Server environments, networking configuration, monitoring, troubleshooting, and system optimization.
- (3) Experience supporting front-end and back-end application development and maintenance.
- (4) Knowledge of secure coding practices, system patching, backup and disaster recovery strategies, and cybersecurity best practices.
- (5) Familiarity with relational databases such as MySQL, or PostgreSQL, and experience supporting database performance and maintenance activities.
- (6) Familiarity with APIs, cloud-based environments, virtualization technologies, or modern software development frameworks will be considered an asset.
- (7) Demonstrated experience in performance monitoring and reporting to support operational sustainability and future system enhancements.

**All experts must be independent and free from conflicts of interest in the responsibilities they assume.**

#### **6.1.2. Other experts, support staff & backstopping**

Tenders may propose additional non-key experts, advisory personnel, or support staff, where necessary, to strengthen the implementation approach and ensure successful delivery of the assignment.

Where the proposed Team Leader has limited formal project management experience, the tenderer shall demonstrate access to adequate project management advisory or backstopping support to assist with project planning, coordination, monitoring, stakeholder engagement, risk management, and quality assurance throughout the assignment.

Such support may be provided on an as-needed basis and does not require the proposed advisory personnel to serve as full-time project resources. The Team Leader shall remain the primary point of contact and shall retain overall responsibility for the coordination and delivery of the assignment.

The tenderer shall ensure that all proposed experts and support personnel involved in the assignment are free from conflicts of interest in relation to the responsibilities they assume under the contract.

#### **6.2. Office accommodation**

Office accommodation for each expert working on the contract will be discussed with the successful consulting firm.

### **6.3. Facilities to be provided by the contractor**

The Contractor shall ensure that experts are adequately supported and equipped. The Contractor must ensure that there is sufficient administrative, secretarial, and interpreting provision to enable experts to concentrate on their primary responsibilities.

It must also transfer funds as necessary to support their work under the contract and to ensure that its employees are paid regularly and in a timely fashion.

### **6.4. Equipment**

No equipment is to be purchased on behalf of the contracting authority/partner country as part of this service contract or transferred to the contracting authority/partner country at the end of this contract. Any equipment related to this contract which is to be acquired by the partner country must be purchased by means of a separate supply tender procedure.

## **REPORTS**

### **7.1. Reporting requirements**

The Contractor will submit all reports in English in one original and two copies, unless otherwise agreed electronically by the Contracting Authority or CWG

#### **7.1.1. Deliverables**

The Contractor will deliver to the Contracting Authority, the MET, the following reports:

- **Inception Report** to be submitted 21 days from commencement of the project. This report outlines the project scope, objectives, stakeholders, governance structure, stakeholder roles and responsibilities, reporting arrangements, methodology, implementation approach, timeline, initial requirements, work programme, and any preliminary findings, risks, constraints, or anticipated challenges. The Contractor shall proceed with the assignment unless comments are provided by the Contracting Authority.
- **Draft final report** to be submitted no later than one (1) month before the end of the assignment. The report shall summarize activities undertaken, deliverables completed, findings, system enhancements, testing outcomes, implementation progress, challenges, encountered, recommendations and any supporting annexes as required.
- **Final report** to be submitted with twenty-one (21) days after receipt of comments on the Draft Final Report. The report shall incorporate all agreed revisions and include final recommendations, supporting analyses, lessons learned, and all relevant annexes.

#### **7.1.2 Technical, Non-Technical, and other Reports**

The Contractor will prepare and deliver the following technical, non-technical and other reports to the MET. These reports will inform the draft final and final reports and will be prepared as necessary:

## Technical Reports:

- (1) **Business and System Requirements Report:** A consolidated report detailing the existing and proposed business processes, system analysis, data structures, data dictionary updates, PSIP report and dashboard requirements, and all functional and non-functional software requirements, including user stories or use cases.
- (2) **Technical Design Document:** A consolidated document describing the overall system architecture, detailed system design, technical specifications, interfaces, data models, workflows, frameworks, libraries, tools, and development environment.
- (3) **Development and Configuration Plan:** Outlines the development methodology, implementation approach, configuration activities, deployment strategy, and environment setup.
- (4) **Source Code and Technical Documentation:** Documentation of source code, including inline comments, API documentation, repository structure, configuration guidance, and README/setup instructions sufficient for system maintenance and sustainability.
- (5) **Testing and Quality Assurance Report:** A consolidated report including the testing strategy, test plans, test cases, scripts, testing outcomes, defects identified, resolutions applied, and overall quality assurance results.
- (6) **Deployment and Sustainability Plan:** Details on deployment activities, production environment configuration, maintenance, approach, support arrangements, and sustainability considerations for post-implementation operations.
- (7) **User Manual:** A guide for end-users and administrators outlining system usage, operational procedures, troubleshooting guidance, and key functionalities. Where appropriate, the manual may also include interactive training materials, visual guides, screenshots, and video tutorials to support user onboarding, knowledge transfer, and ease of system adoption. how to use the software, including instructions and troubleshooting tips.
- (8) **Maintenance and Support Plan:** Outlines how the software will be maintained post-deployment, including support processes and contact information.

## Non-Technical Reports:

- (1) **Progress Reports:** Regular progress updates outlining completed activities, ongoing tasks, upcoming milestones, implementation challenges, risks, mitigation measures, and key decisions. Risk management, stakeholder engagement, and change management updates may be incorporated into these reports where appropriate.
- (2) **Meeting Minutes:** Records of meetings held during the project, including attendees, topics discussed, decisions made, and action items.
- (3) **Stakeholder and Change Management Updates:** Documentation of stakeholder engagement activities, consultations, communications, significant changes, and their associated impacts on implementation activities where applicable
- (4) **Final Project Report/Closure Report:** A comprehensive summary of the project, including objectives achieved, final deliverables, lessons learned, and post-project recommendations.

## Additional Reports (if applicable):

- (1) **Security Assessment Report:** Details the security measures implemented, vulnerabilities found, mitigations applied, and compliance with applicable standards, regulations and technological best practices.
- (2) **Performance Report:** Analysis of system performance, including infrastructure requirements, hardware considerations, scalability, system responsiveness, and operational capacity requirements where applicable. A retention arrangement for future system enhancements and

support services may be considered to ensure evolving business and technology requirements can be addressed as necessary.

## **7.2. Submission and approval of reports**

The reports referred to above must be submitted to the Chief Executive Officer through the PPU Project Officer identified in the contract. The Project Officer shall coordinate the review of the reports by the CWG and submit them to the CEO for formal feedback, subject to the recommendations of the CWG. The CEO shall provide formal feedback within (7) calendar days of submission thereof.

# **MONITORING AND EVALUATION**

## **8.1. Definition of indicators**

### **Overall Objective (Impact):**

Improved macroeconomic planning and donor coordination.

### **Indicators:**

1. Percentage (%) of approved projects initiated within the system
2. Percentage (%) of ongoing projects in the PSIP MIS reflected in the national budget

The specific objectives (Outcomes) of this contract are as follows:

### **Specific objective (Outcome) 1:**

Strengthened capacity of the MET to monitor and report on the Public Sector Investment Programme (PSIP).

### **Indicators:**

- (1) Percentage of projects for which all required information is inputted by executing entities
- (2) Percentage of executing agencies utilising the system
- (3) Percentage of PSIP reports generated within 6 weeks of the close of the relevant quarter

### **Specific objective (Outcome) 2:**

Enhanced accuracy and availability of PSIP data necessary to support decision-making and national planning.

### **Indicators:**

- (1) Number of system-generated reports produced outside the quarterly cycle

### **Specific objective (Outcome) 3:**

Improved project implementation.

- (1) Reduction in the percentage (%) of projects that require an extension to the execution period due to implementation delays
- (2) Percentage (%) of eligible projects that receive a minimum assessment of “satisfactory” (or its equivalent) at mid-term and ex-post evaluations

## **8.2. Special requirements**

None

# ANNEXES

## Annex I. Final Report Structure

- (1) Executive Summary
  - (a) Summary of the project objectives, activities undertaken, key findings, outcomes, challenges, and recommendations.
- (2) Introduction
  - (a) Background and context of the project
  - (b) Project objectives and scope
  - (c) Methodology and implementation approach
- (3) Project Problem Statement
  - (a) Problem statement
  - (b) Decomposition into sub-problems
  - (c) Existing challenges and operational considerations
- (4) Governance and Stakeholder Engagement
  - (a) Governance structure and reporting arrangements
  - (b) Stakeholder roles and responsibilities
  - (c) Stakeholder engagement and consultation activities
  - (d) Summary of feedback and key decisions
- (5) System Requirements and Analysis
  - (a) Business and system requirements
  - (b) Functional and non-functional requirements
  - (c) User cases and user stories
  - (d) System sequence diagrams
  - (e) Traceability matrix
  - (f) Existing and proposed process flows
- (6) System Architecture and Design
  - (a) Application architecture Diagrams
  - (b) System architecture overview
  - (c) Technical design specifications
  - (d) Data modelling
  - (e) Process modelling
  - (f) Entity relationship diagram (ERDs)
  - (g) Data dictionary and metadata
  - (h) Data flow diagrams
  - (i) Network architecture diagrams
  - (j) System hardware architecture.
- (7) User Interface and User Experience
  - (a) User interface design and implementation
  - (b) Accessibility and usability considerations
  - (c) Screenshots and workflow illustrations where applicable.
- (8) Development, Testing, and Deployment
  - (a) Development methodology and implementation activities

- (b) Testing approach and quality assurance activities
  - (c) Test cases, testing outcomes, and resolutions
  - (d) Deployment approach and configuration activities
- (9) Security, Compliance, and Performance Considerations
- (a) Security measures implemented
  - (b) Compliance considerations and applicable standards
  - (c) System performance and scalability considerations
- (10) User Training and Knowledge Transfer
- (a) User onboarding and training activities
  - (b) User manual and operational guidance
  - (c) Interactive training material, visual guides, and video tutorials where applicable
- (11) History of Work, Current Status, and Future Enhancements
- (a) Summary of work completed
  - (b) Current implementation status
  - (c) Recommendations and future enhancement opportunities
- (12) Conclusion and Recommendations
- (a) Overall project outcomes
  - (b) Key recommendations and next steps
- (13) References
- (14) Annexes
- (a) Interim reports
  - (b) Supporting technical documentation
  - (c) Meeting minutes
  - (d) Stakeholder consultation summaries
  - (e) Additional deliverables and supporting materials where applicable