

EFMIS – TOR

International Training Expert

Proc ref **C5-IC-27**

1. Project Background

The Government of Lebanon received a grant of US\$4.0 million from the International Development Agency (IDA), the administrator of the Trust Fund for Lebanon (TFL) for an Emergency Fiscal Management Reform Implementation Support Project (EFMIS-TA), to be implemented by the Ministry of Finance (MoF) over a period of two years and a half.

Consistent with the broader fiscal and budgetary reform program presented by Lebanon at the Paris III Donor Conference in January 2007, and building on initial progress already made by the Ministry of Finance, the project includes five components. The first component will support strengthening macroeconomic programming and policy analysis in the Ministry of Finance. The second component will provide assistance to improve the management of public expenditure. The third and fourth components will provide advisory services to strengthen debt and aid management, respectively. The fifth component will assist in the provision of targeted training related to the other components of the project. To these ends, the project will finance international and local advisory services and training and capacity building related to the envisaged reform measures. The fourth component, Aid Coordination and Management, will build on the MoF's efforts to improve aid coordination and manage donor relationships for effective collaboration. The fifth component assists in the provision of targeted training connected to the other components of the project. To these ends, the project finances international and local advisory services, as well as training and capacity building directly related to the envisaged reform measures.

This assignment comes within the 5th fifth component of the project which is related to the Training and Capacity Building, core mission of the Institut des Finances Basil Fuleihan (IOF), training and communication agency of the Ministry of Finance. The Institute -established in 1996 - provides training to the **four main** directorates of the Ministry of Finance: the Directorate General of Finance (DGF), the Directorate General of Customs (DGC), the Directorate General of Cadastre and Land Registry (DGCLR), and the Directorate General of National Lottery (DGNL). The Institute is also the main provider of training in public financial management to public sector institutions in Lebanon. Staff training and development have been precursors to, and concomitants of, the main categories of reform and of the introduction of new technologies. However, the Institute needs to refocus its efforts on training in the most optimal way that would serve the Ministry's need. A core issue in this context is having a well-determined job profiling and related competencies framework covering the main job families related to PFM. Also, of utmost importance is to have a well-set customized methodology to implement regular training needs assessment for the staff of the Directorate General of Finance. Based on that, the DGF will be able to better define its needs in terms of training and capacity building, and be able to embark into a Capacity dialogue with the Institute leading to the design and implementation of well framed close to needs, demand-driven training strategies and plans that benefits not only DGF staff but also employees in other administrations and institutions that form part and parcels of the national network that manages public money.

This initiative comes as a core activity to fulfill EFMIS dual mission of assisting the Ministry in developing its reform plan and modernizing its operation on one hand, and on the other hand in supporting the Institute of Finance in the preparation and implementation of selected training, communication and outreach activities under the different components of EFMIS.

2. Objective of the assignment

The overall objective of the assignment is to develop (i) a training policy document and (ii) a medium term training strategy that would frame, guide and inform the Human Resource Development efforts pursued by the Directorate General of Finance. This effort comes within a broader context of an overall reform agenda followed by the Ministry to modernize the public financial management system.

The training policy document should enable the Directorate General of Finance to develop structured and systematic training plans to build the knowledge and skills of the employees and to enable DGF staff to perform their duties at an optimum level of efficiency.

The strategy document should help the DGF in:

- Planning training activities linked to the PFM core services and functions
- Delivering the training through the most suitable modalities
- Assessing the impact of training delivered in terms of improvement of services
- Ensuring that training delivered matches the needs of the Ministry

The training policy and the Medium-term training strategy should be developed in participatory approach to ensure the Ministry's ownership and to follow a demand-driven approach in developing HR skills.

3. Tasks and Responsibilities

The International Training Expert is expected to work in close coordination with IoF team, with the Ministry of Finance and with the local and International advisors working on the various components of the EFMS project. The tasks and responsibilities to be carried out by the consultant are as follows:

A. Develop Job Profiles

The International Training Expert should identify in coordination with MoF, the EFMS experts, the Civil Service Board and OMSAR an exhaustive list of the main and core job families in the different departments addressed by EFMS components (i.e. accountant, debt officer, cashiers, budget preparation officer...) and develop accordingly a set of job descriptions and competencies framework for these job families (job families are not expected to exceed 30). The job profiles should explicitly define the job undertaken, the main activities and tasks assigned, in addition to the needed skills, knowledge and training to achieve the optimum performance in PFM functions. A special attention will be devoted to the existing and required IT skills and knowledge of the current information systems, in view of the planned development of an integrated financial management information system.

B. Methodological Approach for the training needs analysis

The expert should carry out an organizational assessment including an assessment and analysis of the competencies and skills of the existing employees handling the PFM functions mainly in the areas of budget preparation, budget execution, accounting, auditing, financial reporting, internal and external control, and procurement. This assessment will be based on a selected random sample of job profiles and families. The assessment will be done through interviews with key staff at the concerned departments, interviews with the training team at the IoF as well as with the existing and potential trainers. The assessment should also build on the findings of available documentation and reports on training and HR within the Ministry of Finance and the Institute of Finance. The assessment should pay a particular attention to the current reform of Ministry's core functions, supported by EFMS, notably on macro-fiscal analysis, debt management,

budget preparation (and new classification), accounting and bookkeeping, information systems, cash management and financial controls.

On the supply side, the consultant should assess the current training activities delivered to MoF staff, be it through IoF or other providers, and to assess the existing resources including training material, training methods, and quality of training and recruitment. He should also examine the on-going organizational aspects from need identification to delivery to evaluation and follow-up.

Based on the aforementioned assessments, the consultant should be able to identify the gaps between the current status of PFM training—in the selected sample- and the future targets in terms of training and capacity building in order to set the ministry training objectives in PFM.

The consultant should develop in this context a clear methodology for the training needs assessment and analysis - that can be carried further by the DGF- in order to ensure that training standards are continuously in place. The methodology would include questionnaires, analysis tools, frequency of assessment, approaches (interviews, workshops, reviews) and other relevant methodological aspects. The methodology should be customized to fit the DGF structure and needs.

C. Develop training policy document

In close coordination with international and local advisors working on the various components of the EFMS projects and in direct cooperation with the DGF and IoF team, the international advisor should develop a **“Training policy”** document in the area of PFM, targeting existing staff (including senior), newly recruited staff at DGF as well the concerned staff in the Line Ministries and Public Agencies. The training policy shall include a competencies-based recruitment plan, a mandatory training profile per job family, recommendations on related training rules and regulations. The policy shall establish a mandatory training framework for all HR handling PFM Functions in order to achieve a better performance in the Public Accounting, Treasury, Public Debt, Budget and Commitment Control and Public Expenditures Directorates. It should specify as well strategic objectives, means to achieving them, learning targets, quantitative and qualitative indicators, training requirements in case of staff mobility, and conditionality for recruiting new staff in order to increase the efficiency and effectiveness of the process applied currently at the ministry. It should explore different options to mainstream training across the MoF and the establishment of training focal points and trainers in each department/ job family. The consultant shall also explore the option of introducing certification training.

D. Develop a “Medium term Training Strategy”

The international advisor should develop a **“Medium Term Training Strategy”** that would include the following:

- Training and development objectives
- Target audience
- Type of training activities to be applied for existing staff, new recruits, and transferred (i.e. on the job training, training curriculum, continuous training, technical training, online training...)
- Evaluation and performance indicators to measure the degree of meeting training objectives.
- Trainers’ profiles needed for training activities and the methodology to be used in defining the potential trainers in each department
- A template memorandum of understanding to be signed between the selected MoF trainers and the IoF.

- Standardized training guidelines to be used by other International advisors working on the various project components, for the development of related training material.
- Validation and quality control of the training modules contents and support learning tools including case studies and examples.

E. Building capacity of Stakeholders

Based on the aforementioned steps, the international training consultant should carry out capacity building workshops for the different stakeholders (in the DGF and IoF) to assure that they have the right skills and competencies to use and further develop the tools generated through the assignment (developing job profiles, TNA methodology, training policy document, and training strategies).

4. Reporting requirements and Deliverables

A. Deliverables:

The International Training Expert should submit the following reports and documents:

- A document detailing the job Profiles for the main and core job families identified by the expert in the PFM area (3.A)
- A report detailing the Methodological approach for the training needs assessment and analysis to be applied by the Ministry of Finance (3.B)
- Training Policy Document for existing and newly recruits staff at the DGF (3.C)
- Medium-Term Training Strategy Document (3.D)
- Capacity building workshops delivered on each of the developed tools and methodologies (3.E).

B. Reporting Requirements:

- Inception Report: 2 weeks following contract signature, the International Consultant is expected to submit an inception report detailing the assignment's objectives, methodology, expected risks, and delivery schedule.
- Final Report: the final report shall be submitted one month following the end of the assignment and shall comprise an assessment of the work executed, the challenges encountered for reaching the objectives set in the inception report as well as recommendations for ensuring sustainability of the project.

5. Institutional and Organizational Arrangements

The Ministry of Finance, as the grant recipient, will have primary responsibility for overseeing project implementation and ensuring the Bank's guidelines and procedures are adhered to. To facilitate comprehensive and continuous oversight, MoF established a Project Implementation Unit (PIU), financed by grant proceeds, with primary responsibility for daily project implementation.

The Expert will report to and work under the direction of Project Manager (PM). The PM will facilitate the Expert's access to the necessary documentary materials as well as access to the key stakeholders to the assignment.

In conducting this assignment, the Expert shall coordinate and cooperate with the Ministry of Finance management at the different levels, the Institute of Finance and with target beneficiaries.

In the Expert's working relations with the MoF and all the key stakeholders, the Expert will be expected to be self-sufficient and conduct him/herself in the highest professional manner.

6. Resources Provided

The MoF shall be responsible for all basic logistics, staff office accommodation in Lebanon, and internal administration, required for performing the assignment, as well as all interpretation, translation services and other expenses.

7. Restrictions

In addition to the standard conflict of interest restrictions specified in the consulting contract, all materials created under this Contract will remain the sole property of the MoF. Re-use of the materials will require the formal, written approval of the MoF.

The Expert shall have no material interest in any of the outputs of this assignment. On the commencement of the assignment, the Expert will jointly prepare with the MoF a statement of confidentiality that will bind the Expert to nondisclosure of any sensitive information that the Expert may become knowledgeable of during the course of the assignment. The terms of this agreement shall be made consistent with the relevant privacy laws of the Republic of Lebanon.

8. Consultant Qualifications and Experience

A. Knowledge Qualifications:

- University degree in Economics, Finance, Business Administration, Human resources, psychology, or other related fields;
- A minimum of ten (10) years of national/international professional experience in Human resource management and training policies and instruments;
- Over 7 years of extensive experience in designing and implementing PFM training programs, including in developing countries;
- Relevant experience in similar projects/assignments at regional or national levels would be a distinct advantage;
- Thorough knowledge of the issues involved in Public Financial Management;
- Thorough knowledge of the public sector environment in developing countries;
- Ability to elaborate, execute and promote training and or other programs;
- Excellent organizational and managerial skills; bilingual Arabic-French, or Arabic -English.

B. Competencies and Skills:

- Proven capacity to manage and work effectively as a facilitator with peers involved in training and capacity building;
- Ability to monitor, assess, document and report on progress;
- Excellent organizational, communication and presentation skills;
- Adaptable, flexible and capable of resolving conflicts (or finding solutions to emerging problems) in a collaborative way in an intercultural setting;
- Willingness to reside in Lebanon for at least the duration of the assignment;
- Good command of the relevant technology tools;

- Relevant experience in similar projects/assignments at a regional level would be an advantage.

9. Duration of the Assignment

- The timeframe of the assignment is set for 7 consecutive months with an estimated input of 5 person-months. Assignment is expected to start end of August 2012.