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REPUBLIC OF LEBANON

OFFICE OF THE MINISTER OF STATE FOR ADMINISTRATIVE REFORM

NATIONAL ADMINISTRATIVE REHABILITATION PROGRAMME

(N.A.R.P.)

ASSISTANCE TO THE

RE-ESTABLISHMENT OF THE LEBANESE ADMINISTRATION

(A.R.L.A.)

PROJECT

PROGRAMME MONITORING CONSULTANCY

(P M C)

Terms of Reference

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**PROGRAMME MONITORING CONSULTANCY
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ABBREVIATIONS

ARLA	Assistance to the Re-establishment of the Lebanese Administration
AFESD	Arab Fund for Economic and Social Development
AWP	Annual Work-Plan and Budget
CAS	Central Administration of Statistics
CDB	Central Disciplinary Board
CDR	Council for Development and Reconstruction
CIB	Central Inspection Board
CIDA	Canadian International Development Association
CNSS	Caisse Nationale de Sécurité Sociale
CSB	Civil Service Board
EC	European Commission
EIS	Executive Information System
EU	European Union
GAO	General Accounting Office
GIS	Geographic Information System
GOL	Government of Lebanon
IDF	Institutional Development Fund
IDU	Institutional Development Unit
IT	Information Technology
ITT	Information Technology Team
LD	Legislative Decree
MCHE	Ministry of Culture and Higher Education
MHER	Ministry of Hydraulic and Electric Resources
MIS	Management Information System
MNEYS	Ministry of National Education, Youth and Sport
MOI	Ministry of Interior
MOL	Ministry of Labour
MOMRA	Ministry of Municipal and Rural Affairs
MOT	Ministry of Transport
MSA	Ministry of Social Affairs
MSC	Management Support Consultancy
NARP	National Administrative Rehabilitation Programme
NERP	National Emergency Recovery Programme
NIAD	National Institute of Administration and Development
OECF	Overseas Economic Co-operation Fund
OMSAR	Office of the Minister of State for Administrative Reform
OT	Office Technology
PMC	Programme Monitoring Consultancy
RIT	Restricted Invitation to Tender
TA	Technical Assistance
TALA	Technical Assistance to the Lebanese Administration
TCU	Technical Co-operation Unit
TOR	Terms of Reference
UNDP	United Nations Development Programme
WB	World Bank

TERMS OF REFERENCE

I. PREAMBLE

These Terms of Reference (TOR) form part of the Restricted Invitation to Tender (RIT) related to the provision of technical assistance (the Services) to the Office of the Minister of State for Administrative Reform (OMSAR) of the Republic of Lebanon.

The provision of these services is a component of the "Assistance to the Re-establishment of the Lebanese Administration" project (*the Project*), financed by the European Union (EU) under a grant.

The Project was devised within the context of the "National Administrative Rehabilitation Programme" (NARP) prepared by the OMSAR.

In the following text, the technical assistance (TA) to the OMSAR and related institutions will be denominated "Programme Monitoring Consultancy" and identified by the initials "PMC".

The Project will also cover, in its next stages, assistance to the implementation of NARP within various sector ministries/agencies and local governments. The other TA components, seconded to these institutions, will be directly concerned with the strengthening of basic management functions and capacities and, therefore, will be denominated "Management Support Consultancies" and identified by the initials "MSC".

The general setting of *the Project* is presented in the separate Background Note (Annex A2 of Document II of this RIT)

II. THE PROGRAMME MONITORING CONSULTANCY

2.1 Introduction

The Office of the Minister of State for Administrative Reform is responsible for co-ordinating all resources and efforts to meet the requirements of the rehabilitation and reform programme of the lebanese public administration.

In order to supplement its capacity to carry out this vital role, the OMSAR requests the assistance of the subject "Programme Monitoring Consultancy". Accordingly, the PMC will assist in the strengthening of the basic functions of the OMSAR with a special focus on the implementation of the whole EU *Project*.

The purpose of this section is to describe the specific context and objectives of this assistance.

2.2 Institutional Context

Consistent with the Government's administrative reform strategy, the OMSAR is co-ordinating with all of the ministries and public agencies concerned in order to prepare and implement all actions required for:

- the restoration of minimum working conditions and management capacity within the lebanese administration in order to restart basic public services (administrative rehabilitation programme);
- the revitalisation of the civil service and the modernisation of administrative and civil service structures and procedures.

The OMSAR is composed of two units:

- the "Technical Co-operation Unit" (TCU) which is primarily responsible for implementation of the "NARP".
- the "Institutional Development Unit" (IDU) in charge of matters and studies related to administrative reform;

The currently-identified scope of the NARP⁽¹⁾ encompasses 42 public institutions, including 24 Ministries.

As a component of NARP, the EU *Project* will provide assistance to²:

- 3 core administrative agencies;
- 8 line ministries (not including the OMSAR);
- 1 autonomous agency.

Project support to the line ministries and the autonomous agency will be implemented through the recruitment of the above-mentioned MSC, under the supervision of the OMSAR and the PMC.

While the major focus of the PMC will be to provide assistance to OMSAR's units and to co-ordinate the other components of the EU *Project*, the consultancy team will also support specific actions carried out by the following core administrative agencies:

- the Civil Service Board (CSB) and the National Institute for Administration and Development (NIAD);
- the Central Administration of Statistics (CAS).

The overall institutional context of *the Project* is depicted in the above-mentioned Background Note.

2.3 Responsibilities of the OMSAR

The main responsibilities of the OMSAR are the following:

- (a) co-ordinating all studies and actions required for the preparation and implementation of administrative reform measures and subsequent restructuring of public institutions;
- (b) overall NARP programming, scheduling and budgeting, and co-ordination of sector projects with beneficiary institutions concerned;
- (c) developing a consistent and standardised approach to information technology (IT) issues within the public administration;
- (d) co-ordinating training requirements of public institutions within the NARP framework;
- (e) overall NARP monitoring and regular reporting;
- (f) mobilising of funds to finance approved programmes and co-ordination of donors' assistance;
- (g) centralised procurement for all NARP activities;
- (h) defining policies, procedures and reporting requirements related to NARP management;

¹ Refer Background Note.

² The list of beneficiary institutions is indicative and could be reviewed in the course of the programme, according to the needs and existing activities and in accordance with the Financing Agreement relating to the present project.

- (i) ensuring inter-ministerial co-ordination, and setting up relevant steering committees wherever required;
- (j) ensuring visibility and acceptance of the overall administrative reform and rehabilitation process through carrying out workshops and seminars open to a wide range of participants.

2.4 Objectives of the PMC

The implementation of NARP, as well as the preparation of longer-term administrative reform measures, will involve a large number of inter-related activities within different organisations. Efficient allocation and co-ordination of resources between the various participants, well-defined reporting requirements, and an effective information system to support the prompt making of decisions and the monitoring of their application are thus fundamental to proper management of the overall administrative re-establishment process.

Consistent with the Government of Lebanon (GoL) administrative reform strategy and within the framework of the EU *Project*, the setting up of the PMC aims at strengthening those OMSAR functions which are dedicated to the implementation of NARP and the preparation of required technical input for the definition of administrative reform and modernisation measures.

Thus, the PMC team will be involved in the achievement, together with OMSAR's units, of the following main objectives:

- (a) design and implement appropriate programme management methods, tools and procedures;
- (b) ensure a timely, effective and efficient management of *the Project* implementation, and of the NARP as a whole;
- (c) ensure a proper monitoring of sector projects implementation, especially through MSC's reporting and co-ordination;
- (d) develop a pragmatic approach of the modernisation of the public administration, especially regarding (i) the accessibility of services to the public and (ii) the decentralisation and de-concentration processes;
- (e) ensure the viability and overall coherence of the programme in (i) bridging the gap between the short/medium-term rehabilitation process and medium/long-term administrative reform, and (ii) tightening co-ordination with fiscal reform carried out by the Ministry of Finance (MOF).

2.5 PMC/MSC Interface

Within the framework of *the Project*, the PMC will prepare the progressive mobilisation of the planned assistance (MSC) to beneficiary sector institutions. After the MSCs are mobilised, the PMC will have to ensure the appropriate co-ordination and monitoring of these consultancies, as well as the management of related contracts. The interface between the PMC and MSCs is a factor critical to (i) the effective performance of both, (ii) the overall coherence of *the Project* and (iii) the achievement of NARP objectives.

While the details are a priority for the PMC to develop, in close co-ordination with OMSAR, this interface is to be defined on the two following major considerations:

- the PMC is concerned, together with OMSAR, with the technical co-ordination and administrative and financial management of the sector components of *the Project* in association with the relevant MSCs, while the MSCs handle all other technical aspects of their sector component under the aegis of their sponsoring organisations;

- the MSC activities are carried out within their sponsoring organisations in keeping with the overall framework of *the Project* established by the OMSAR and the PMC in association with the sector sponsoring organisations.

Support and follow up of PMC's activities by the OMSAR will be co-ordinated through a "Project Co-ordinator" specially appointed by the Minister of State for Administrative Reform.

The OMSAR supervision of *the Project* will encompass (but not be limited to) the following activities: (i) co-ordination, (ii) monitoring and evaluation, (iii) reporting and correspondence and (iv) procurement. In order to monitor the PMC and MSCs' activities, the OMSAR will also define performance indicators based upon short, medium and long-term goals and objectives of *the Project*.

Additional information outlining the respective responsibility of the PMC and MSCs, regarding procurement and contract management procedures, is provided in appendix C to the TOR.

III. SCOPE OF WORK OF THE CONSULTANCY

Under the responsibility of its Team leader, the PMC will mobilise a team of long-term and medium/short-term experts, complete with management tools, procedures, software and supporting equipment in order to provide assistance to:

- the OMSAR's TCU and IDU;
- the Civil Service Board and the NIAD;
- the Central Administration of Statistics.

The scope of work of the PMC will encompass:

- (a) upon request from OMSAR, the PMC will provide necessary support to its technical units in leading and co-ordinating the implementation of NARP and in preparing the required technical input for the definition and implementation of administrative modernisation measures;
- (b) preparing the ground for implementation of the proposed assistance to beneficiary sector institutions⁽³⁾ by: (i) fine-tuning and updating those institutions' requirements, (ii) preparing terms of reference and other technical input for the recruitment of technical assistance for the institutions concerned and (iii) ensuring local co-ordination of the various tenders;
- (c) assisting in the modernisation of the CSB administrative, financial and operational management;
- (d) assisting the CAS in improving the effectiveness of its activities and enhancing its institutional role;
- (e) organising and managing training sessions and seminars, including specific actions to be carried out in co-ordination with the CSB and NIAD;
- (f) assuring overall management, co-ordination, monitoring, evaluation and reporting of *the Project* in compliance with OMSAR and EC procedures and monitoring set-up.

Under the aegis of the OMSAR, the consultancy team shall devise and implement an appropriate action plan which will:

⁽³⁾ Under the supervision of the European Commission, and in close co-ordination with the OMSAR and other institutions concerned.

- (a) be developed in close co-ordination with TCU, IDU, and where relevant with CSB, NIAD and CAS, in order to ensure full understanding and acceptance;
- (b) cover all activities of the PMC including co-ordination, training, management of change and communication issues;
- (c) schedule the progressive mobilisation of, and prepare terms of reference for the sector MSCs;
- (d) define clearly and urgently the interfaces with the MSCs and their sponsoring organisations, the MOF, CDR, the donors and others as required, including associated reporting requirements and formats;
- (e) define a project management method and set up all necessary guidelines in order to ensure the overall coherence of *the Project* implementation;
- (f) be complemented by all necessary systems and tools, including management information systems, to maximise efficiency and performance;
- (g) detail procurement and contract management procedures, including tender evaluation processes, in compliance with the European Commission (EC) standard procedures and OMSAR methods and formats;
- (h) define approval processes and delegation of authority.

IV. REQUIRED SERVICES

4.1 Overview

The services provided by the staff of the PMC are to be applied to enhance the functioning of the OMSAR's TCU and IDU, and to strengthen the capacity of the CSB (including NIAD) and CAS. The PMC shall provide staffing and management tools and expertise for the accomplishment of the services over a planned period of three years. The services shall be performed to the highest professional standards under the supervision of the PMC Team leader. Unless otherwise required and approved by the OMSAR, all services shall be performed in Lebanon.

The following summary of advisory and management services are therefore those envisaged for an efficient support of the PMC to the OMSAR and associated institutions (CSB, NIAD, CAS).

The activities of the PMC shall encompass the following major areas:

- Programming and monitoring of NARP;
- Establishment and co-ordination of MSCs;
- Administrative modernisation;
- Information technology standardisation;
- Training and communication;
- Assistance to the CSB and NIAD;
- Assistance to the CAS;
- Contract administration.

The PMC should also benefit from an appropriate and efficient support from its Head-office.

The above activities are briefly reviewed hereafter. Task descriptions related to the staff activities are outlined in appendix B to this TOR.

4.2 Programming and Monitoring of NARP

The major focus is on the programming and scheduling of the NARP components, especially those included in the *EU Project*, to achieve the goals established for the overall programme, within the constraints imposed by funding or similar conditions.

This includes further work, in association with the TCU and involved ministries and public agencies, in updating the currently-identified components of NARP to account for:

- on-going institutional changes including public sector restructuring;
- developments in the scope of NARP associated with new secured financing (including *the Project*).

This also includes the development of (i) sectoral and functional reviews of NARP, (ii) a sectoral and cross-departmental programming approach of the programme, and (iii) co-ordinated actions with the MOF and any other relevant activities related to public financial management.

Subsequently, the project evaluation capacity of the TCU will need strengthening in order to carry out, in close co-operation with sector institutions concerned, all necessary identification, scheduling, selection and packaging of sector projects.

Another focus of PMC activities will be on the development of a comprehensive monitoring and evaluation system which will include key indicator of achievements and, wherever relevant, indicators of impact. OMSAR reserves the right to extend this system to include other NARP components.

Notwithstanding, the nature of the rehabilitation and reform process and the overall climate of the country itself indicate that there will likely be constant changes in priorities, institutional context, scopes, financing, budgets and schedules affecting planning as well as implementation of the programme.

Thus, flexibility in approaches to staffing and provision of the services will be an on-going requirement for the PMC.

4.3 Establishment and Co-ordination of MSCs

In close co-ordination with OMSAR, the EC and *the Project's* beneficiary institutions, the PMC will expeditiously:

- review and update the needs of these institutions and re-assess their requirements within the overall framework of *the Project*;
- prepare terms of reference and other required tender documents for the recruitment of sector MSCs.

One of the critical early tasks of the PMC will also be to define the overall co-ordination set-up, reporting framework and management rules of *the Project*, in close liaison with OMSAR, beneficiary institutions and EC.

After the MSCs are established, the PMC will be responsible for regular co-ordination with and among MSCs.

A special concern will be ensuring the overall coherence of *the Project's* assistance and the development of consistent approaches in the MSCs to the sector staff training, institutional development and administrative modernisation.

Another major focus is on the supervision, co-ordination and assistance to the MSC's in carrying out public expenditure reviews within their sponsoring organisations. This will require the prior definition of consistent methods, tools and reporting framework in association with the OMSAR's TCU and IDU, the MOF and *the Project's* beneficiary institutions.

The co-ordination of *the Project* will be set up on a sector basis through the TCU organisation⁽⁴⁾. The PMC will assist OMSAR in establishing steering committees at sector level in order to provide general guidance to the MSCs. Inter-sectoral co-ordination will be ensured through OMSAR.

4.4 Administrative Modernisation

A wide range of expertise⁽⁵⁾ will be required from the PMC in order to assist the IDU in developing a pragmatic approach to the modernisation of public administration.

Wherever required, a primary focus of PMC support to the IDU will be on the technical preparation of administrative reform/restructurisation measures related to the sector institutions concerned by *the Project*. Moreover, other specific studies related to the restructuring of public autonomous agencies may be required from the PMC.

A special concern of PMC will be contributing with the IDU to the overall simplification of administrative formalities and improvement of the service delivery to the public. As far as feasible, this contribution shall target the rapid implementation of proposed improvement measures in order to induce an increased visibility of the administrative renovation process. *It should also take into account or instruct, where appropriate, actions aimed at improving the effectiveness of public finance management, financial programming and accounting transparency.*

Another major focus of PMC's assistance to the IDU will be on the development of a comprehensive approach to:

- the de-concentration of public services, including delegation of responsibilities and associated accountability;
- the requirements of the decentralisation process.

The above activities shall be carried out within the framework of a participatory process of reform (working groups, best practise workshops) already set up by the OMSAR.

In developing these activities, the PMC will also be involved with the IDU and a number of central and local government institutions in defining objectives, scope, TOR, schedule, and co-ordination for additional studies, services and/or bankable projects.

4.5 Information Technology Standardisation

(4) Refer section 5.3, below.

(5) Mostly medium and short-term.

Within the TCU, an IT Team (ITT) is responsible for the co-ordination and implementation of IT and OT⁽⁶⁾ projects included in the NARP.

Notwithstanding, the recent widespread initiation of IT within public administration urgently requires an unified view and policy of practices and standards. The ITT is currently addressing this issue in implementing a national IT strategy definition process. The PMC will be involved in this rationalisation and standardisation process at various levels.

Of early special importance is the establishment of unified procedures and standards for *the Project* IT related issues, consistent with those promoted by the ITT and those already developed, within the framework of the on-going EU assistance to CDR and other⁽⁷⁾, by the consultancy team⁽⁸⁾ attached to CDR. Among other, this will include co-ordinating, with MSCs concerned, *the Project's* assistance to the computerisation of municipalities.

Another special concern may be co-ordinating with the ITT regarding the provision of equipment, software, implementation support and training to *the Project's* beneficiary institutions under the IT component of the World Bank assistance project⁽⁹⁾, or any other donor's project, managed by the ITT.

Moreover, the PMC will be involved with the ITT in carrying out and/or supervising and co-ordinating surveys and studies identified within the framework of the above national IT strategy definition process. Where required, the PMC will also provide advisory services to the ITT and develop related activities.

4.6 Training and Communication

A key PMC support function relates to training, communication and management of change.

A major concern will be to strengthen the capacity of TCU's training function, especially regarding *the Project's* beneficiary institutions. This includes ensuring (i) appropriate identification of needs and priorities, (ii) consistent approach of training requirements, and (iii) effective design, planning, scheduling co-ordination and implementation of training activities. This also includes fostering appropriate co-ordination with the CSB, NIAD and other relevant institutions (e.g. MOF), and with the various international donors having interest in providing funding for actual training assistance.

Within the framework of *the Project*, the PMC will be responsible for co-ordinating with the MSCs and their sponsoring organisations in the definition of a sectoral and cross-departmental training programme. This programme shall encompass:

- on-the-job training activities to be carried out by the MSCs;
- short-duration, need-based in-service training sessions within the sector institutions concerned.

(6) Office Technology

(7) "Technical Assistance to the Lebanese Administration" (TALA) project.

(8) Programme management Unit Consultancy (PMUC).

(9) "Administrative Rehabilitation Project" (Refer Background Note).

It will also include organising and implementing, through the NIAD⁽¹⁰⁾, a number of seminars specifically defined to complement the support provided to the sector institutions concerned in *the Project*. These seminars will develop topics of cross-departmental interest (e.g. public policy formulation, programming and budgeting, public accounting, project management,) but will be organised by sector according to *Project*-specific requirements.

In co-ordination with the IDU, the PMC will also be responsible for proposing, organising and implementing workshops and seminars focused on administrative modernisation issues.

Other areas of special importance to the PMC is the development, with the TCU and the IDU of:

- a consistent approach to the management of change;
- an improved communication function within the OMSAR (relations with target institutions, popularisation of Programme and *Project* achievements).

4.7 Assistance to the CSB and NIAD

The actual involvement of the Civil Service Board, regarding *the Project* and NARP as a whole, is a key success factor in the implementation of both. Of special early importance to the PMC and its Team leader is the establishment of close and positive relations with the CSB (and NIAD), not limited to the scope of *the Project* support to this core administrative agency.

The specific services required for the CSB⁽¹¹⁾ will be focused on the improvement of:

- the Board's administrative and accounting management functions;
- the management and control of documents;
- the streamlining of the organisation for administrative examinations;
- the organisation of training sessions abroad⁽¹²⁾ for civil servants from all central government institutions.

Project support to the NIAD will not require the provision of direct technical assistance by the PMC. In actual fact, this support will be focused on the following activities (refer section VIII, below):

- organising and implementing, through the NIAD^(??), a number of seminars defined to complement the assistance provided to the sector institutions concerned in *the Project*; these seminars will develop topics of cross-departmental interest (e.g. public policy formulation, programming and budgeting,....), but will be organised by sector according to *Project*-specific requirements;
- contributing to the organisation of a regional workshop⁽¹¹⁾ on administrative reform issues;
- supporting the creation of a library for the NIAD;
- providing for the acquisition of equipment for simultaneous translation.

4.8 Assistance to Central Administration of Statistics

(10) A specific budget is earmarked for these seminars under the project support to the NIAD (refer section VII). The Project does not provide for any specific TA to the NIAD.

(11) Short-term advisory services only.

(12) Financed by the project.

(13) These activities will be co-ordinated within the framework of PMC's assistance to TCU training function.

The Project support to the CAS aims at strengthening the present role of CAS and ensuring that it can perform its institutional role, which is a pre-requisite for the development of any proper statistical work. Assistance to the CAS will, first, concentrate on the development of a comprehensive workplan in order to define the priority areas of action, with a view to improve the production and dissemination of official statistics and the coordination of statistical activities among the various Ministries and Agencies involved.

This exercise should be done in association with all institutions involved and take into account relevant activities undertaken by the EC and other donors (especially UNDP).

It should also define in detail the use of technical assistance to CAS provided for under the present programme (40 m/m).

4.9 Contract Preparation and Administration

Procurement procedures for services and equipment provided under *the Project* are detailed in Appendix C. These procedures will be implemented by the PMC, as required, in:

- compliance with EC regulations.
- close co-ordination with the TCU's financial and procurement officers;

4.10 Head-Office Supervision and Support

An appropriate supervision and back-up of the PMC team is also expected from the selected consultancy firm/consortium.

The selected firm/consortium shall:

- designate a highly qualified head-office supervisor;
- set up a suitable organisational framework for the supervision and support of the PMC;
- demonstrate its capacity to mobilise relevant backstopping facilities wherever required.

V. METHODOLOGY AND ORGANISATION

5.1 Methodology

Upon signature of the contract, the selected PMC shall expeditiously (within 30 days) mobilise members of team of experts to Beirut to commence preparation, with the OMSAR and other related institutions, of its operating framework, methods and procedures. It is envisaged that the Team leader mobilize before his team in order to make appropriate arrangements. This work shall be undertaken in the context of the intent of this TOR, the government administrative reform strategy, NARP and its priorities and planned schedule, and the material presented by the PMC in its proposal as approved by the OMSAR. As a priority, the PMC shall assess:

- the OMSAR and related Core Administrative Agencies' organisational set-up, existing IT/OT facilities and information system, available procedures and co-ordination requirements;
- the current status of NARP implementation, especially regarding *the Project's* beneficiary institutions.

The PMC shall then develop in detail the plans, staffing requirements and schedules for its proposed operations, and define and prepare the detailed organisation, methods and procedures

required for an efficient performance of the consultancy. The PMC shall also finalise an accurate definition of its proposed activities. This includes preparing organisation and schedule for the establishment of the MSCs. Moreover, the PMC shall identify and mobilise, as approved, the associated support staff, equipment and materials (including computer software) to commence proper management and execution of its activities.

A tentative schedule of PMC major activities over the first few months of the consultancy (refer also section VII) is shown on the next page. This schedule should be considered indicative only.

During the performance of its services, the PMC Team leader shall continually appraise the PMC performance and projected needs, and develop recommendations for meeting changing needs and circumstances.

5.2 Organisation

The overall organisational setting of *the Project* is presented in the background note attached to this RIT. While the expected organisation of the PMC is outlined hereafter, it is recognised that the PMC may evolve modifications in detail, according to actual or developing circumstances.

The PMC Team will be attached to, and provide its expertise to the TCU and IDU, and to the CSB and CAS. The PMC Team leader will be responsible for PMC activities as a whole. He will report to the Minister of State through the TCU Director and the appointed *Project Co-ordinator*. As a rule, the long-term consultants of the PMC team will be assigned to specific Units of the OMSAR and associated institutions. However, cross-divisional support cannot be ruled out.

Under the supervision of their Team leader, the above PMC staff will:

- be integrated into their assigned unit;
- perform their own tasks in close with the unit head and staff;
- assist, where required, these unit head and staff in the overall management of NARP.

The PMC medium-term and short-term staff may provide, as requested, cross-divisional services or may be specifically seconded to a unit.

Within each unit, the assigned PMC experts will assist the unit heads and staff in implementing the tasks described in section IV above and in the streamlining of related departmental work.

The PMC Team leader will be responsible for the technical adequacy of the tasks performed by the PMC staff and for the proper management of the PMC organisation.

Moreover, the Team leader shall monitor the matching of the PMC team size and expertise with the needs of the OMSAR, CSB and CAS departments and the availability of counterpart staff.

He will recommend, as necessary, appropriate adjustments within the limits of the overall *Project* allocation of man/months to its sponsoring organisation and the constraints of available and/or potential funding. These adjustments might entail either expansion or reduction in the size and range of expertise of the PMC team, responding to work load or type changes.

The PMC Team leader will also be responsible for co-ordinating with CSB, NIAD and CAS.

The working relationship between OMSAR and the PMC will be further detailed in the implementation agreement to be signed between the Head of Delegation of the European Commission and the Minister for Administrative Reform.

5.3 Co-ordination

The OMSAR/TCU will assume the co-ordination of *the Project* activities with the PMC and MSCs concerned within the following framework:

⇒ *Intra-sectoral co-ordination*

Upon PMC mobilisation, the OMSAR will set up sector steering committees composed of the following members:

- TCU appointed representatives;
- representatives from the beneficiary institutions;
- the monitoring and evaluation specialist of the PMC;
- representatives of the MSCs concerned.

In close consultation with the OMSAR, the beneficiary institutions will also designate specially appointed representatives. These representatives will:

- complement the existing staff capacity of the beneficiaries;
- facilitate the MSC intervention and assure an appropriate co-ordination with other NARP activities carried out by the sponsoring organisations concerned;
- ensure an appropriate and effective transfer of the MSC know-how to existing civil service staff.

⇒ *Inter-sectoral co-ordination*

OMSAR will be responsible for this co-ordination with the PMC Team leader and the contribution of the monitoring and evaluation specialist (PMC), the MSC Team leaders and beneficiaries concerned.

5.4 Implementation context of the consultancy

The Government of Lebanon is initiating NARP, as well as several administrative reform measures, on an urgent basis. Moreover, the fiscal reform is already under implementation. In this context, it is essential that the mobilisation of the PMC to Beirut be planned and carried out expeditiously, in order to allow the MSCs to mobilise within a reasonable time-frame. The PMC staffing and work plans shall reflect this requirement.

The TCU and the IDU are staffed and equipped with the assistance of several donors. While not comprehensive, this support covers most of the OMSAR's basic needs and enables the TCU and the IDU to be staffed with qualified senior personnel. However, the existing institutional capacity of the CSB and the CAS will require strengthening through on-the-job training.

The Consultancy firms should also be aware of the fact that a significant part of the information processed by the Lebanese Administration will be available *in the Arabic language only*. Therefore, the PMC's access to basic data may often require preliminary translation work and availability of qualified Arabic-speaking staff.

VI. STAFFING AND QUALIFICATIONS

6.1 PMC staffing

The desired level of PMC staffing has been estimated by the OMSAR, the associated institutions and the EC at a total of 410 man-months (m/m) over the three-year period of the Consultancy, distributed as follows:

Institution	Total m/m	Long-term m/m	Short-term m/m
OMSAR	350	220	130
CSB	20	0	20
CAS	40	<i>to be defined</i>	
Total	410	220	150

However, the size and composition of the team presented below shall be considered indicative and could require adjustments in the course of the services, as mentioned previously.

As preliminary studies and system design are completed and on-the-job training takes effect, it is expected that the size of the team would be progressively reduced.

Notwithstanding, a temporary increase in the size of the team cannot be ruled out during the first year of the services, especially while preparing the establishment of the MSCs. A key finding to be presented by the PMC in the required inception report (refer section VII) shall be a detailed staffing plan developed in relation with the evaluation of OMSAR specific needs, available staff, and budget constraints.

The composition of the PMC team and a provisional allocation of the above m/m are detailed in the table below. The PMC will assist the OMSAR in updating these requirements during the inception phase of the Project.

Expertise	m/m	Function
Long-term Expertise		
- Public Administration	30	PMC Team leader
- Programming	30	Programming & Monitoring
- Project Management	30	-ditto-
- Monitoring & Evaluation	30	-ditto- & MSC co-ordination
- Public Service Modernisation	30	Administrative Modernisation
- Information Technology	20	IT Standardisation
- Training	20	Training & Communication
- Procurement & Contract Management	30	Contract Administration
- Statistics expert	<i>to be defined</i>	Central Administration of Statistics
Sub-Total Long-term	220 <i>minimum</i>	
Medium-term & Short-term Expertise	150 <i>mini</i>	Unallocated, refer below
TOTAL	410	

While medium-term and short-term expertise may be required to supplement the long-term team of experts, it will also include (but not be limited to) the following specialities:

⇒ OMSAR (130 m/m)

- Sectoral expertise (refer *Project* indicative target sectors): such expertise will be essential in order to ensure that programmes in sub-sectors are designed according to the specifics of each sub-sectors.
- Procurement,
- Contract management,
- Institutional development,
- Public expenditure management,
- Administrative procedures,
- Administrative documents standardisation,
- Public services delivery,
- Compared administrative law,
- Administrative de-concentration,
- Decentralisation,
- Local government finance,
- Organisation of training,
- Management of change,
- Communication,
- IT architecture,
- MIS/EIS,

⇒ CSB (20 m/m)

- Organisation and administrative management systems,
- Public accounting and finance,
- Organisation of public examinations,
- Organisation of training,
- Document management and control,
- Archiving systems.

⇒ CAS

- to be defined according to workplan mentioned in 4.8

Part of the above unallocated m/m budget can be used to associate local expertise to the consultancy team. This contribution of local associates will be contained within the cost-equivalent of 51 (fifty one) man/months of short-term foreign expertise. Such a contribution shall not prevent the tendering firm from providing the above-listed short-term expertise, wherever requested.

6.2 Qualifications

The staff provided by the PMC shall be fully-qualified senior professionals properly experienced to assume their assigned senior positions within the OMSAR and capable of applying state-of-the-art practical expertise in fulfilling their assignments as PMC team members and on-the-job trainers. Proven experience in public administration and public sector management will be required for all proposed experts.

Moreover, the consultants should also demonstrate professional fluency in the English and/or the French language. A good working knowledge of both languages⁽¹⁴⁾ would be of considerable value in the performance of the services.

Notwithstanding, the consulting firm should bear in mind the above-mentioned implementation context of the consultancy (refer § 5.4). Prior institutional building assignments in the region would be an asset for the PMC proposed experts.

Appendix B provides the general qualifications expected of the PMC team.

6.3 Counterpart staffing

As mentioned above (refer § 5.4), the TCU and the IDU are staffed with qualified senior personnel. However, the existing (and foreseen) staffing of these units would not allow the OMSAR to operate:

- the increased work-load resulting from the implementation of *the Project*;
- all aspects of NARP management and administrative modernisation activities.

Thus, while it is expected that the PMC will provide highly specialised advisory services to both units, the major contribution required from the consultancy team will consist in supplementing OMSAR's capacity to operate the overall re-establishment process.

However, the context of the PMC support to CSB and CAS cannot be compared to OMSAR's. Current staff levels within these institutions are not fully re-established yet.

This assistance shall be devised as a standard TA institutional support. This includes providing on-the-job training to counterpart staff. Therefore, the OMSAR and core administrative agencies concerned will ensure, wherever possible, the availability of adequate counterpart staff required for the most efficient use of PMC expertise.

VII. PMC REPORTING REQUIREMENTS

7.1 Inception report

Following its initial investigations, discussions and evaluations with the OMSAR, related institutions and *the Project's* beneficiary institutions, the PMC shall submit an "Inception Report".

This report shall contain its plan for the execution of its assignment and, wherever required, its evaluation of the counterpart staff availability and needs, as well as working facilities to be provided by the OMSAR and/or associated core administrative agencies.

The Inception Report shall address the following main issues:

- (a) the assessment of detailed operations of the OMSAR in relation to the scope of work of the PMC and the resulting related plans and recommendations concerning methodologies, procedures, organisation, detailed activities and staffing of the Consultancy;
- (b) the assessment of the current status of the NARP programmed activities, implementation progress and funding, with a special focus on *the Project* target sectors;

(14) See special conditions

- (c) a provisional action-plan and estimated schedule for the establishment of the MSCs;
- (d) the assessment of critical information flows between the OMSAR/PMC and *Project's* beneficiary institutions, and the resulting organisation, allocation of tasks, definition of responsibilities and information framework proposed to ensure appropriate mutual transfer of required information;
- (e) the allocation of PMC man-months effort, staff, and operations to the tasks described in section IV above;
- (f) the definition of the key functional and support specialist positions and a list, with qualifications and estimated phasing of deployment of such staff to be provided by the PMC;
- (g) any other requirements for or constraints to a timely implementation of *the Project*.

The OMSAR will assist the PMC in:

- defining its operating framework, methods, procedures and information systems related to the Office itself, the core administrative agencies concerned and other beneficiaries;
- assessing/updating the needs of sector level beneficiaries and finalising *Project* activities to be carried out through the establishment of MSCs;
- providing all necessary information regarding the above, including access to the Office monitoring and evaluation system.

The draft Inception Report shall be submitted in 5 (five) copies no later than 60 (sixty) days after the signature of the contract.

Then, OMSAR will review and approve:

- the PMC overall action plan, including detailed organisation, methods and procedures, proposed activities and schedule;
- the preliminary organisation and planning for the establishment of the MSCs;
- the staffing requirements, fields of specialisation and schedule of proposed intervention for medium and short term specialists and local consultants;
- proposed reporting formats and procedures.

Following the review of this inception report by the OMSAR and the EC (to take no longer than 30 days), the final version shall be prepared, incorporating all comments and requests made, and submitted in 20 (twenty) copies.

7.2 Other reports

Besides reporting regularly on project/study progress as required for the performance of the PMC function, the PMC shall submit to the OMSAR:

- Monthly Status Reports (within 7 days of the elapsed calendar month),
- Quarterly Progress Reports (within 15 days of the elapsed calendar quarter),
- Annual Progress Reports (within 30 days of the elapsed calendar year),
- a Mission Completion Report (within 60 days of the completion of the contract).

The Monthly Status Reports shall summarise the activities performed by the PMC over the elapsed month and raise all relevant issues concerning the *Project's* implementation.

The Quarterly Progress Reports⁽¹⁵⁾ shall cover all activities performed by the PMC and encompass all advisory, management, monitoring, staffing and administrative services provided during the passed quarter.

This report shall include a short presentation of the overall NARP and *Project* implementation progress. It will also include a short survey of MSC's activities⁽¹⁶⁾. The Quarterly Progress Reports shall also provide a detailed forecast on the up-coming 3-month period.

At the end of each calendar year, the PMC shall prepare an "Annual Progress Report" summarising the activities performed during the elapsed year, and detailing its work-plan for the following year.

The Annual Progress Report shall also consolidate major issues raised by the MSCs in their respective annual reports. This report shall be submitted in 20 (twenty) copies.

About the end of each calendar year, the PMC shall consult the OMSAR, the MSCs and their sponsoring organisations in order to prepare the Annual Work-Plan and Budget (AWP) of *the Project*.

Where required, the PMC may also prepare a mid-year update of this AWP.

The PMC shall submit the AWP to the Delegation of the European Commission in Lebanon^(??). This Annual Work-Plan and associated Budget will be approved by the EC.

The format and contents of this AWP will be agreed upon between the EC, the OMSAR and the PMC.

The PMC will also be responsible for providing the Delegation of the Commission will all information required for the EC's own monitoring and evaluation of *the Project*. The framework of this specific reporting will be agreed upon between the Commission and the OMSAR.

A PMC Mission Completion Report shall be submitted at the end of the 3-year contract detailing the performance achieved over the mission period. This report shall include the PMC recommendations for future activities and staffing of the OMSAR.

The PMC Mission Completion Report shall be submitted, hard-bound, in 25 (twenty five) copies.

VIII. BUDGET

Within the framework of EC regulations, the PMC will be responsible for the management of the overall budget of *the Project*.

This budget includes provisional allocations for:

(15) A "Monthly Report" is not required when a "Quarterly Report" is issued.

(16) Monthly, quarterly and annual reports will also be required from the MSCs.

(17) The first AWP/Budget will be prepared shortly after the inception period of the project and will cover the remaining months of the current year.

- contracted studies and services;
- the organisation of training sessions, seminars and workshops;
- equipment;
- operating costs.

The following provisional figures⁽¹⁸⁾ are provided for enabling the PMC to evaluate the volume of required procurement activities only. These figures should not be considered as binding on either the Commission or the OMSAR.

(in '000 ECU)

Institutions	Total	Studies & Services	Training	Equipment	Operations
- OMSAR	1640	900	290	200	250
- CSB	270	0	250	0	20
- NIAD	825	0	500	300	25
- CAS	225	200	0	0	25
Σ PMC	2960	1100	1040	500	320
Sector Institutions (MSCs)	5935	1250	630	3215	840
TOTAL BUDGET	8895	2350	1670	3715	1160

IX. OFFICE EQUIPMENT AND MATERIAL

The sponsoring organisation will provide the PMC with office space and equipment as listed in Appendix D.

Equipment required for the PMC's proper functioning (including computers and software) other than those listed in Appendix D shall be identified by the PMC/OMSAR and, after approval⁽¹⁹⁾, purchased in accordance with the procedures detailed in Appendix C, and within the bounds of the above provisional budget.

Any other equipment, supplies, materials or other support needed by the PMC in fulfilling its obligations shall be deemed to be provided by the PMC from its own resources.

More particularly the PMC team is expected to be equipped with its own computer hardware and working software for the accomplishment of the PMC internal works.

⁽¹⁸⁾ These figures do not include the cost of technical assistance for the MSCs.

⁽¹⁹⁾ Within the framework of the AWP.

TERMS OF REFERENCE

PROGRAMME MONITORING CONSULTANCY

(P.M.C.)

OFFICE OF THE MINISTER OF STATE FOR ADMINISTRATIVE REFORM

DOCUMENT II - ANNEX A.1

Terms of Reference

APPENDICES

- | |
|--|
| <ul style="list-style-type: none">A. The OMSAR and associated Core Administrative AgenciesB. Task Descriptions and Consultant ProfilesC. Project and Contract Management ProceduresD. Office Space and Equipment Provided by the OMSARE. Counterpart Staffing |
|--|

TERMS OF REFERENCE

APPENDIX A

The OMSAR and associated Core Administrative Agencies

In order to provide the bidders with the most up-to-date description of the institutional context of the consultancy, the OMSAR and core administrative agencies concerned will seize the opportunity of their visit to Beirut for the bidders' meeting, to organise a presentation of:

- the general background to the technical assistance required,
- the main issues facing the OMSAR, the CSB and NIAD, and the CAS within the scope of work of the consultancy,
- the latest developments in their organisational setting,
- the scope of intervention of other on-going TA projects,

and to answer all possible questions of the consultancy firms regarding *the Project* implementation.

I. OFFICE OF THE MINISTER OF STATE FOR ADMINISTRATIVE REFORM

The Minister of State for Administrative Reform is carrying out his responsibilities through a high level Bureau, within the Prime Minister's Office. This Bureau is composed of two units:

- the Institutional Development Unit (IDU), responsible for designing an institutional development strategy and preparing proposals for policies and projects aimed at putting this strategy into effect.
- the Technical Co-operation Unit (TCU), responsible for programming, co-ordinating, implementing and monitoring institutional rehabilitation projects within the framework of the National Administrative Rehabilitation Programme (NARP);

Figure 1 and Table 1, on pages 22 and 24 below, display the organisation chart and existing staffing of the IDU and TCU.

In addition to the above units is the Minister's administrative office which handles all administrative matters related to the Bureau's operations.

1.1 The Institutional Development Unit

The major tasks of the IDU include:

- contributing to and co-ordinating the development of an overall administrative renovation and institutional development strategy;
- reviewing, consolidating and updating the regulatory and procedural framework governing administrative structures and operations;
- reviewing the existing structures and mandates of all government institutions, and preparing appropriate restructuring policies;
- reviewing the existing management policies within the public institutions and developing and monitoring an overall administrative renovation and modernisation process, in line with the Government's administrative reform strategy;
- ensuring the overall acceptance and popularisation of the administrative reform and modernisation processes with a view to increase the visibility and legitimacy of government action.

1.2 The Technical Co-operation Unit

The main function of the TCU is to assist all government bodies in programming, implementing and monitoring the assistance required for the institutional rehabilitation of these institutions. This includes:

- assisting line ministries and other government agencies in identifying and assessing their rehabilitation needs;
- developing and monitoring the preparation of programmes and projects in order to respond to these requirements;
- co-ordinating with the Ministry of finance and international donors in order to secure the appropriate funding of these programmes and projects;
- consolidating the above into a National Administrative Rehabilitation Programme (NARP);
- supervising, co-ordinating, monitoring and evaluating the implementation of NARP and reporting on progress;
- assisting the beneficiary institutions in the implementation of the NARP components;
- assisting in the promotion of human resources development within the public administration;
- co-ordinating with the IDU and other institutions concerned in order to ensure the overall consistency of the rehabilitation process.

OMSAR'S COMPUTER NETWORK SETUP

(end of May 1996)

1. Pentium 133 MHz as a network server running Windows NT;
2. Pentium 133 MHz used as a file and printing server;
3. 30 PCs (50/50 between Pentiums and 486s) all connected to the network and all using Email;
4. Most users running Arabic applications work under Windows 3.1, while those using English applications are already using Windows 95. All systems will be upgraded further to the release of Windows 95 with Arabic support (expected during summer 1996);
5. All users operate Microsoft Office Pro (Word, Excel, PowerPoint and Access). Those under Windows 3.1 use the versions for that O/S while the Windows 95 staff use the version 7;
6. Other applications in use: Textbridge, Microsoft schedule, Sidekick, Norton Utilities, etc...;
7. Exclusions: Novell, Lotus and WordPerfect are not used.
8. OMSAR has 15 Internet accounts and is using Email through a local service provider. However, users still rely on modems at these workstations. Soon, OMSAR will be installing a modem on the server.

II. CIVIL SERVICE BOARD AND NATIONAL INSTITUTE OF ADMINISTRATION

The Civil Service Board was established in June 1959 through Legislative Decree No 114, issued by the Council of Ministers.

Simultaneously, LD No 112 was issued installing a new "Personnel Law", as was LD No 113, covering "Civil Service Retirement Pensions and Termination of Service".

The missions of the CSB, such as specified by LD No 114 (12-06-1959) and amended by Legislative Decree No 1802 (27-02-1980) are the following:

- the CSB practices the authority vested in it by laws and regulations with regard to appointment, promotion, benefits, transfer, disciplinary measures, and of service and all personnel matters pertaining to civil servants;
- the CSB aims at upgrading the level of personnel performance, especially through pre-service and in-service training.

The CSB is in authority over the whole public administration, including public agencies and municipalities but excluding justice, army, security forces and customs brigades.

The two major functions of the CSB⁽¹⁾ are as follows:

- Personnel Administration including (i) personnel files, (ii) job classification, (iii) assessment of personnel needs, (iv) recruitment, (v) pre-qualification, (vi) testing, (vii) appointment, (viii) promotion, (ix) transfer, (x) end of service.
- Training including (i) organisation of tests and examinations, (ii) training for new employees, (iii) in-service training, and (iv) specialisation abroad.

A National Institute of Public Administration was also established in 1959 within the CSB. The existing National Institute of Administration and Development was established in 1964⁽²⁾ through the transfer of the activities of a "Development Training Institute"⁽³⁾ to the Directorate General of Training of the CSB.

The Institute assumes the recruitment and pre-service training of grade III and IV personnel for the public administration. It also ensure in-service training sessions for grade I to IV civil servants.

Both institutions are deeply involved in the administrative re-establishment process with the support of a number of multi-lateral and bi-lateral donors.

Figure 2 and 3, on the next pages, display the existing organisation chart of the CSB and NIAD, while the current staffing of these institutions is shown in Table 2, end of this Appendix.

III. CENTRAL ADMINISTRATION OF STATISTICS

The aftermath of war, left the Administration of Statistics reduced to a mere skeleton, without offices and equipment.

(1) Refer Figure 3, page 23.

(2) Executive Decree No 16066, April 10, 1964.

(3) Created in 1961, as an independent agency under the tutelage of the Ministry of General Planning.

All archives had been destroyed or lost. In the early 1994, the CAS staffing was hardly 12% of its established posts.

However, the CAS is undertaking the methodical re-establishment of a proper and consistent statistical framework with the support of a number of donors (including EU), and in co-ordination with the Ministry of Finance and the Central Bank.

The existing structure of CAS is shown in Figure 4 on the next page. The current staffing of this institutions is shown in Table 3, end of this Appendix.

The CAS managed to publish annual statistics for the years 1992-1993⁽⁴⁾ and initiated the publication of a "monthly bulletin of statistics" early in 1995.

This institution also supervises and co-ordinates the work on a number of basic surveys and studies undertaken by line ministries (e.g. "Housing and population database", "Labour force survey", "Industrial survey").

Notwithstanding the initial achievements with respect to statistics, much remains to be done to rebuild core statistical capacity and to make available statistics on the real sectors, economic accounts, public finance and the balance of payments.

(4) Refer "Development Co-operation - Lebanon", UNDP 1994-95 report.

APPENDIX B

Task Descriptions and Consultant Profiles

The task descriptions and profiles are presented, by function of assignment, for each of the long-term experts identified in the above sub-section 6.1 "PMC staffing" of the TOR.

The task descriptions are indicative only and should not be construed as restrictive. These tasks shall be ascertained during the inception period of the consultancy and may include all other activities required for the adequate strengthening of the targeted functions of the OMSAR, CSB and CAS.

Furthermore, the PMC team is expected to collectively provide the full range of expertise required to assist in the strengthening of the management capacity of its sponsoring organisations. It should be noted that all of the PMC staff shall:

- develop in co-ordination with the OMSAR and associated agencies' staff the methods, work allocation and procedures to streamline the targeted activities and improve efficiency;
- provide on-the-job training of the CSB and CAS staff in the use of methods and tools, and the application of procedures;
- advise and assist Units or Department Heads as required;
- perform actual tasks.

These requirements underlie all task descriptions and are not specifically stated, except where they are of particular significance. It is also reminded that:

- a proven experience in public administration management and organisation,
- an actual professional fluency in the English and French languages,

will be required for all proposed experts.

I. PMC TEAM LEADER

The PMC Team leader will manage his team of consultants to ensure proper performance and adequate co-ordination with OMSAR, CSB, NIAD and CAS staff. Specific duties will include:

- (a) preparing and co-ordinating the timely mobilisation of his team of experts in accordance with the OMSAR and associated agencies requirements and the agreed overall action-plan of the consultancy;
- (b) supervising and co-ordinating the preparation of the inception report, and assisting the TCU and IDU Directors in the assessment of their final requirements;
- (c) Co-ordinating sector reviews, need assessments, preparation of TOR and tender dossiers for the establishment of the MSCs;
- (d) supervising and co-ordinating the bidding process for, and timely mobilisation of these sector consultancies;
- (e) supervising and co-ordinating the preparation of the methods, work allocation and procedures, as well as the development of the tools and systems required for a proper implementation of *the Project* and assist the OMSAR and associated agencies in improving the efficiency of their related activities;
- (f) advising TCU and IDU Directors on all matters related to the PMC scope of work;

- (g) reporting to the TCU Director on PMC activities and advising on issues affecting the performance of *the Project*, including staffing matters;
- (h) reporting to and advising the President of CSB, the Director of NIAD and the Director General of CAS on all matters falling within the scope of PMC's assistance to these core administrative agencies;
- (i) participating in Steering Committee meetings and other meetings⁽⁵⁾ as required;
- (j) co-ordinating with the other TA projects within the sponsoring organisations under the aegis of the TCU Director;
- (k) supervising the PMC team's activities and performance;
- (l) adjusting the size and fields of expertise of the team as required and approved⁽⁶⁾ to match the needs of the OMSAR and associated agencies;
- (m) reporting to and co-ordinating with the EC Delegation on all matters related to *the Project*.

The proposed Team leader shall be a public administration specialist and shall have an appropriate advanced degree level qualification in management/economics. He shall also have a minimum of 15 years of increasingly responsible experience, at least 5 of which in a similar position on comparable projects. The PMC Team leader should preferably demonstrate a practical knowledge of EC procedures. Previous assignments in the region would be a valuable asset.

II. OTHER LONG-TERM EXPERTS

□ *Programming & Monitoring of NARP / Establishment & Co-ordination of MSCs*

2.1 Senior Programming Expert

Under the supervision of its Team leader, the senior programming expert will assist in strengthening the programming and monitoring function of the TCU. This expert will work closely with the TCU Director and staff. He will also co-ordinate with the IDU. His main duties of this expert will include:

- (a) reviewing and assessing the existing programming process and information flows between and among TCU and IDU, and between the TCU and the NARP targeted institutions;
- (b) assessing the existing data backing up the NARP and projects components, with the support of the "project management" and "monitoring and evaluation" experts;
- (c) assisting TCU in devising a sectoral and cross-departmental approach to the NARP programming process, integrating relevant administrative reform and modernisation measures/activities;
- (d) assisting TCU staff in the drawing up of an upgraded NARP database structure, with the support of the "project management" and "monitoring and evaluation" experts and, where required, short-term MIS specialists;
- (e) assisting in the implementation of this revised programming system and the subsequent production of a new updated version of NARP;
- (f) assisting in the establishment of an appropriate programming function within the TCU;
- (g) designing and implementing updating procedures for the sectoral sub-programmes, in liaison with the MSCs, and setting up data collection and reporting frameworks and responsibilities, with the support of the "monitoring and evaluation" expert;

⁽⁵⁾ e.g. meetings with other related institutions such as the MOF and CDR.

⁽⁶⁾ Within the budgetary constraints of the project.

- (h) assisting the TCU in extending the above to the overall NARP within the framework of the OMSAR's information system;
- (i) preparing Programme and *Project* schedule presentations and reports to OMSAR senior management and others as required;
- (j) assisting the MSCs and their sponsoring organisations in setting up consistent and compatible programming systems;
- (k) analysing sector programmes and projects for impact on the overall NARP situation, developing appropriate responses at the overall planning level, and advising the MSCs and their sponsoring organisations accordingly;
- (l) participating in, and contributing, where required, to all co-ordination activities and meetings.

The proposed senior programming expert shall have an advanced degree level qualification in economics, management and/or public administration and a minimum of 15 years post-graduate experience, including at least 7 years specific advanced international experience in the fields of national and sectoral planning, public expenditure programming and public administration management.

2.2 Senior Project Management Expert

This expert will assist the TCU project co-ordinators and work closely with the "programming" and "monitoring/evaluation" experts in assessing the consistency and feasibility of the NARP sector projects. The project management expert will strengthen the TCU capacities to ascertain the materiality of individual projects and the overall coherence of sector programmes.

Specific duties will include:

- (a) reviewing and assessing the existing project identification and appraisal procedures both within TCU and the relevant institutions in charge of the NARP sectoral implementation;
- (b) reviewing and assessing the EU *Project* targeted institutions' needs and requirements, with the support of PMC short-term sectoral expertise, in order to validate the proposed scope of intervention of the MSCs;
- (c) preparing terms of reference and tender documents for the recruitment of sector MSCs, in close co-ordination with the beneficiary institutions and in compliance with EC regulations, procedures and formats;
- (d) supervising, with the PMC Team leader, the establishment and mobilisation of the sector MSCs;
- (e) assisting the TCU in reviewing NARP sectoral projects cost-estimates, in order to validate sectoral programmes consistency and feasibility;
- (f) drawing up, with the support of the "monitoring/evaluation" expert, a standard project management method and the basic data structure requirements, consistent with the programming, scheduling and monitoring activities of the TCU;
- (g) appraising and preparing TOR and other technical input for all studies and services to be contracted out, within the framework of *the Project*, for the OMSAR and associated core administrative agencies;
- (h) providing assistance to the MSCs with respect to project management and evaluation;
- (i) assisting in establishing and implementing effective procedures for periodic project and programme evaluation, together with the "monitoring/evaluation" and "programming" experts.

The proposed senior project management expert shall have an advanced degree in economics and/or management and a minimum of 12 years post-graduate experience, including at least 5 years specialisation in public sector programmes and projects management and evaluation.

2.3 Senior Monitoring and Evaluation Expert

The senior monitoring and evaluation expert will assume three basic functions:

- permanent monitoring evaluation of, an reporting on *the Project*;
- strengthening of the NARP monitoring and evaluation function;
- co-ordinating the establishment and operations of the sector MSCs.

This expert will work closely with the TCU monitoring specialist. He will also ensure tight connection with the IDU.

The tasks to perform or assist in performing include:

- (a) reviewing and assessing the existing monitoring and evaluation process and systems within the TCU and at sector level;
- (b) contributing, together with the "programming" and "project management" experts, to the overall NARP review and assessment, in co-ordination with the OMSAR and the sector institutions concerned;
- (c) contributing, together with the "project management" expert and short-term sectoral expertise, to the review and assessment of needs and requirements of the EU *Project's* targeted institutions in order to validate the proposed scope of intervention of the MSCs;
- (d) contributing to the preparation of the MSC terms of reference and to the establishment of these sector consultancies;
- (e) co-ordinating with the TCU in designing and implementing a comprehensive monitoring evaluation system and associated data collection, procedures and reporting frameworks, and participating in computerisation;
- (f) establishing and implementing procedures for effective monitoring and periodic evaluation of *the Project* sector components, including formats and contents to be applied by the MSCs;
- (g) assisting the TCU in extending the above, where required, to the overall NARP monitoring and evaluation, within the framework of OMSAR's information system;
- (h) providing the TCU with all *Project*-related information required for proper monitoring of NARP by the OMSAR;
- (i) evaluating periodically the overall coherence and progress of *the Project* (and, where required, of the whole NARP), and establishing procedures for identifying needs for and effecting changes in *the Project* and NARP;
- (j) ensuring permanent co-ordination and co-operation between the PMC and the MSCs through all appropriate procedures, including meetings and seminars, in order to ensure the overall coherence of *the Project* implementation and the consistency of applied methods, tools and approaches to the administrative re-establishment;
- (k) reporting on *Project* and NARP progress (including specific reporting to the EC Delegation) and submitting recommendations to improve the implementation effectiveness of both;
- (l) ensuring appropriate co-ordination with other donors related assistance projects under the supervision of its Team leader.

The senior monitoring and evaluation expert shall have an advanced degree qualification in economics, management and/or public administration.

He shall have a minimum of 15 years of increasingly responsible experience, including at least 7 years advanced experience in the fields of monitoring and evaluation applied to public sector institutions, and preferably gained with major international organisations.

□ **Administrative Modernisation**

2.4 Senior Public Service Modernisation Expert

Under the supervision of its Team leader, the proposed expert will assist and advise the IDU Director and staff in the establishment and implementation of a specific expertise capacity focused on two major issues:

- improving efficiency, accountability and service delivery within the public administration through upgrading/simplifying procedures and formalities, and initiating pilot actions aimed at increasing the accessibility of services to the public;
- developing a consistent and co-ordinated approach to the decentralisation and de-concentration processes;

It should also take into account or instruct, where appropriate, actions aimed at improving the effectiveness of public finance management, financial programming and accounting transparency.

This expert will also co-ordinate with other PMC experts, attached to the TCU, in order to ensure the overall coherence of *the Project's* assistance and the streamlined implementation of proposed administrative modernisation measures.

He will be responsible for mobilising, as requested and approved, all necessary medium-term and short-term expertise required for the development of the administrative modernisation related activities and studies.

The public sector modernisation expert will assist the IDU in performing the following main tasks:

- (a) reviewing the scope of desirable and feasible short-term to medium-term modernisation priority actions and measures;
- (b) carrying out a review of all existing contributions to the definition of decentralisation and administrative de-concentration issues;
- (c) preparing, proposing and assisting in the implementation of an appropriate action-plan covering all additional studies, administrative measures, pilot actions and other activities required for an efficient development of the modernisation process;
- (d) co-ordinating with the MSCs and their sponsoring organisations in order to identify, design and implement specific modernisation actions providing rapid, visible and measurable impact on public service efficiency and delivery;
- (e) initiating the definition process of a "public service charter" consistent with the orientations and objectives of the Government's administrative reform strategy;
- (f) contributing, in due course, to the establishment and co-ordination of the MSCs seconded to the MOMRA, the MOI and selected groups of municipalities;
- (g) carrying out and/or co-ordinating and supervising all necessary studies in respect of the above tasks;
- (h) contributing, where required, to all IDU related activities;
- (i) participating in, and contributing, where required, to working groups, seminars and workshops, and co-ordinating with the PMC "training" expert in the organisation of such activities;
- (j) contributing to the identification of training requirements related to the modernisation and decentralisation/de-concentration processes;
- (k) ensuring the complementarity between PMC's assistance to the IDU and TCU;

- (l) reporting on *the Project's* activities of specific relevance to the modernisation and decentralisation/de-concentration processes.

The public sector modernisation expert shall have an advanced degree level qualification in economics, management and/or public administration.

He shall have a minimum of 15 years of increasingly responsible post-graduate experience preferably gained with major international organisations and/or public agencies. This will include at least 10 years specific advanced international (and diversified) experience in the fields of application to the IDU.

Information Technology Standardisation

2.5 Senior Information Technology Expert

The senior IT expert will co-ordinate all *Project's* IT related activities and contribute to the IT strategy definition process initiated by the TCU.

Therefore, this expert will work closely with the ITT, within the TCU, and co-ordinate with *the Project* MSCs and their sponsoring organisations. Specific duties will include:

- (a) reviewing the existing IT facilities and information systems of the OMSAR, and advising the PMC team on subsequent equipment and information systems design and implementation requirements;
- (b) assist the PMC team in the drawing up of an integrated programme management and monitoring system, in liaison with the ITT and other OMSAR staff concerned;
- (c) mobilising, co-ordinating and supervising the short-term expertise required for the timely implementation of PMC's information systems;
- (d) contributing, where required, to the development or upgrading of OMSAR's own information systems, together with the ITT;
- (e) supporting and advising the MSCs in the drawing-up and implementation of specific information systems within their sponsoring organisations;
- (f) co-ordinating with the ITT in the definition and implementation of appropriate and consistent information systems within the scope of PMC's assistance to the CAS;
- (g) defining unified procedures and standards for all EU *Project* related activities;
- (h) carrying out and/or co-ordinating and supervising surveys and studies within the framework of the national IT strategy definition process;
- (i) assisting and advising the ITT, wherever requested, and mobilising appropriate short-term resources required;
- (j) reporting on all IT/OT related issues.

The senior IT expert shall have an advanced degree level qualification and a minimum of 15 years post-graduate experience, including at least 7 years specialisation in IT master-planning and MIS design.

He shall also have a proven responsible experience of public administration IT issues, preferably gained with a major international organisation on comparable projects.

Training and Communication

2.6 Senior Training Expert

The senior training expert will assist in the strengthening of TCU's training and communication functions.

He will work closely with the TCU training specialist and co-ordinate with all other PMC experts under the supervision of its Team leader.

Together with the Team leader, he will ensure permanent co-operation with the CSB and the NIAD.

As required and approved, the training expert will mobilise, in due course, the support of medium-term and/or short-term specialists in the fields of communication and management of change.

The main duties of this expert will include:

- (a) reviewing and assessing the existing NARP training requirements and related OMSAR's capacities and organisation;
- (b) assisting and advising the TCU specialist in the planning and management of NARP training activities and projects;
- (c) assessing, together with the MSCs and their sponsoring organisations, the scope of the sectoral and cross-departmental seminars to be organised and carried out by the NIAD with *Project* support;
- (d) co-ordinating with, and assisting CSB and NIAD in organising and implementing the above seminars;
- (e) supervising and managing the overall implementation of this in-service training programme;
- (f) maintaining a permanent co-ordination with the CSB, the NIAD and other institutions concerned in respect of all other training activities carried out within the framework of *the Project*;
- (g) co-ordinating with IDU, CSB and NIAD, and assisting the NIAD in organising and implementing a regional round table⁽⁷⁾ on administrative reform;
- (h) assisting the MSCs in the organisation of training activities for their sponsoring organisations and co-ordinating the development of consistent approaches to sector staff training and institutional development;
- (i) maintaining contacts with local and regional universities, and co-ordinating, through TCU, with other donors' training assistance projects;
- (j) preparing and assisting in the mobilisation of PMC's medium-term "communication" and "management of change" specialists.

The training expert shall have an advanced degree in social sciences, management and/or education.

This consultant shall have a minimum of 15 years experience, including at least 7 years international experience in management of large training programmes for the public administration and other sizeable organisations.

Contract Preparation and Administration

2.7 Senior Procurement and Contract Management Expert

⁽⁷⁾ Co-ordination should be established with the EC on this subject for a possible extension to European countries participation.

The procurement and contract management expert will strengthen TCU capacities in order to manage the EU *Project* related tenders and contracts. Specific duties will include:

- (a) reviewing the existing organisation and procedures of the TCU finance and procurement functions;
- (b) acquainting TCU staff with EC regulations, procedures and formats;
- (c) ensuring that all *Project* procurement and contract management activities are in accordance with EC requirements;
- (d) contributing to the preparation of the tender dossiers for the recruitment of the sector MSCs;
- (e) supervising and co-ordinating all *Project's* tendering processes;
- (f) developing tender evaluation procedures and supervising the evaluation process in accordance with EC rules;
- (g) preparing contract administration procedures for use by the TCU and the MSCs;
- (h) assisting the MSCs in the management of their sector contracts;
- (i) ensuring appropriate contract management under *the Project* in co-ordination with CDR;
- (j) maintain complete administrative and financial files on all *Project's* contracts;
- (k) issue periodic reports by contract;
- (l) provide general guidance and assist the TCU finance and procurement officers in implementing appropriate procurement and contract management procedures for the overall NARP projects.

The procurement and contract management expert shall have an appropriate first degree level qualification.

He shall have a minimum of 10 years experience in procurement and contract management, preferably gained with major international organisations.

The consultant shall be skilled in developing related procedures and shall have assumed, for at least 5 years, similar responsibilities on comparable projects. This expert shall also demonstrate a practical knowledge of EC procedures.

Assistance to Central Administration of Statistics

2.8 Senior Statistics Expert

The scope of the work of such an expert will be defined in detail in accordance with the workplan mentioned in 4.8

Whilst the final scope of this specific assignment will require further assessment during the inception phase of the consultancy, the proposed expert would be expected to provide technical guidance and assist the CAS in fulfilling its institutional role both on the technical side and on the administrative side and to ensure contact with and involvement of all institutions and local governments concerned.

The proposed senior expert shall have an advanced degree level qualification in statistics.

He shall also have a minimum of 12 years experience, including at least 5 years international experience in various aspects of statistics development, preferably gained on comparable projects with major international organisations.

III. MEDIUM-TERM/SHORT-TERM SUPPORT SPECIALISTS

The PMC shall identify the specific needs for medium-term and short-term support specialists as most responsive to the OMSAR, CSB and CAS needs, within the constraints of budget allocations.

These duties may include the following activities:

- surveys and studies within the scope of work of the consultancy;
- budgetary/public expenditure reviews;
- sector surveys;
- diagnosis of specific functions or issues;
- financial and management audits;
- system design;
- implementation assistance;
- development of procedures;
- appraisal of projects and preparation of TOR.

Potential support specialist fields are detailed under section 6.1 "PMC Staffing" of the TOR.

More specifically, tendering firms/consortia "technical proposals" are expected to include, at least, one curriculum vitae for each of the following fields of expertise:

- Institutional development;
- Organisation and management systems;
- Procurement and contract administration;
- Administrative procedures;
- Compared administrative law;
- Document standardisation/management/control;
- Archiving systems;
- Public expenditure management;
- Public accounting and finance;
- Public services delivery;
- Administrative de-concentration;
- Decentralisation;
- Local government finance;
- Local governance;
- Organisation of training;
- Organisation of public examinations;
- Management of change;
- Communication;
- IT master-planning;
- MIS/EIS;
- Statistics;
- Education sector planning and organisation;
- Labour and social security;
- Public services networks.

The PMC shall have staff resources to cover such fields and demonstrate its capacity to provide such expertise. In general, the proposed support specialists, as a minimum, shall have:

- advanced degrees in their respective fields of competence,
- at least 15 years total experience,

- a minimum of 7 years specific advanced experience in the field of application to the OMSAR and/or associated agencies;
- a diversified international experience gained on comparable projects

The PMC Team leader shall submit the credentials and planned duties of proposed support specialists for approval, and none shall be mobilised prior to the approval of the TCU Director.

At the end of each mission, the support specialists shall produce reports, procedure manuals, and other such documentation as agreed in the definition of their assignments.

IV. LOCAL EXPERTS

All local experts incorporated into the consultancy team shall be associated to long-term experts or medium-term specialists in the performance of the services such as described in section IV of the TOR.

Within the scope of work of the consultancy, the local experts will supplement the capacity of the other members of the consultancy team to respond efficiently to the requirements of their above-defined activities.

Their duties may include (but not be limited to) the following tasks:

- surveys and studies within the scope of work of the consultancy;
- analysis of specific functions or issues,
- data collection and processing,
- system development,
- implementation assistance,
- financial and management audits;
- drawing-up of procedures.

Potential fields of intervention encompass all services required from the consultancy team (refer section IV of the TOR).

More specifically, tendering firms/consortia "technical proposals" are expected to include, at least, one curriculum vitae for each of the following fields of expertise:

- Investment programming;
- Project management;
- Monitoring and evaluation;
- Administrative modernisation;
- Information technology;
- Training and communication;
- Procurement and contract administration;
- Organisation and management systems;
- Public accounting and finance;
- Statistics;
- Education sector planning and organisation;
- Labour and social security;
- Public services networks.
- Local governance;
- Management of change.

In general, the proposed local experts, as a minimum, shall have:

- advanced degrees in their respective fields of competence,
- at least 10 years total experience,
- at least 5 years specific advanced experience in the fields of application to the OMSAR, the CSB and the CAS.

V. HEAD-OFFICE SUPERVISOR

As outlined in sub-section 4.10 of the TOR, an appropriate supervision and backstopping of the PMC by its home head-office will be of considerable value in implementing PMC services efficiently.

Thus the organisation of head-office supervision and support proposed by the tendering firms/consortia will be accounted for in the evaluation of technical proposals.

In addition, tenderers are requested to clearly designate one of their head-office managers as supervisor of the consultancy and provide a detailed curriculum vitae demonstrating his/her capacity to carry out this responsibility.

TERMS OF REFERENCE

APPENDIX C

Project and Contract Management Procedures

The following summarised commentary is provided to outline the associated respective responsibilities of the PMC and of the MSC in respect of project and contract management. It is purely indicative and without prejudice of the terms of the Financing Agreement concerning the present project.

1) Procurement

Regarding other services, studies, equipment and goods to be procured within the framework of *the Project*, applicable procurement procedures, consistent with EC regulations, will be defined by the PMC and OSMAR in liaison with the Delegation of the Commission.

The MSC will define the packaging of all such procurement falling within the scope of their consultancy, including preparation of required technical input and/or TOR, and will furnish this material to the PMC for review and processing according to EC procedures.

2) Contract Administration

The MSC will provide direct administration and supervision and will be responsible for technical assessments and monitoring of all contracts related to their consultancy. They will provide the OMSAR/PMC with regular reports on the status of these contracts (including claims and change order information) in accordance with approved procedures. The PMC role will be essentially that of :

- defining and implementing procedures applicable to the MSC, including regular and timely reporting;
- maintaining overall control of *Project*-related contracts;
- providing supervisory control of the contract administration performed by the MSC;
- handling overall reporting to OMSAR and EC;
- reviewing and processing *Project*-related finance and accounting input under appropriate approval procedures;
- Processing of all invoices, claims and change orders through the Beneficiary

Under the aegis of OMSAR and EC Delegation, the PMC will co-ordinate with the sponsoring organisations concerned in handling all aspects of contract administration of the MSC consultancies.

TERMS OF REFERENCE

APPENDIX D

Office Space, Furniture and Equipment provided by the OMSAR

Office space and equipment to be provided by the sponsoring organisation will be agreed upon during the bidders' meeting to be held in OMSAR offices in Beirut as specified in the invitation to tender.

Duly appointed representatives from the sponsoring organisations will attend this meeting and will organise a visit of their headquarters and show the bidders the office space and equipment to be provided.

Notwithstanding, OMSAR already took all necessary steps and made arrangements in order to host the PMC team properly and ensure the most appropriate environment for an efficient implementation of the consultancy.

These arrangements, summarised in Table 4 on the next page, are based upon the assumption of an average 18 staff working on the *EU Project* (including TCU and IDU staff assisting the PMC).

TERMS OF REFERENCE

APPENDIX E

Counterpart Staffing

Available counterpart staffing will be specified during the bidders' meeting to be held in OMSAR offices in Beirut as specified in the invitation to tender.

Duly appointed representatives from the sponsoring organisations will attend this meeting and provide appropriate information based upon the latest assessment of staff availability⁽¹⁾ and possible specific requirements expressed by the bidders.

⁽¹⁾ Also refer sub-sections 5.1, 6.3 and 7.1 of the TOR and Appendix A, above.