
Part 2

Operations Manual Supplement - Annexes

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ANNEX 1 – APPLICATION FORM

Jamaica Social Investment Fund Rural Economic Development Initiative (REDI)

PROJECT APPLICATION

Please read the 'Guidelines for Completing the Application Form' supplied with this application form BEFORE starting to fill in this form. Please read ALL of the questions on the form.

SECTION 1: APPLICANT SUMMARY

1.2 **Name of Organisation:**

1.3 **Organisation Type:** Benevolent Society [] Cooperative [] Friendly Society []
Community Based Organisation (CBO) [] Non-government Organisation [] Other []

If other, state

1.4 **Date of Formation:**

1.5 **Organisation's Main Area(s) of Focus:**

1.6 **Address:**

1.7 **Mailing Address if different from above**

(Please note that this will be our primary method of contact and must be accurate in order to process the application further)

1.8 **Parish** _____

1.9 **Contact Person:** _____ **Position** _____

Mobile Number _____

Alternate Contact _____ **Position** _____

Mobile Number _____

1.10 Authorized Signatures: (1) _____ Name: _____

Title: _____

(2) _____ Name: _____

Title: _____

SECTION 2: PROJECT INFORMATION

2.1 **Project Description** (please provide a short description of the proposed project activity)

2.2 **List the Objectives of the project** (Simple statement or statements describing what the group would like to achieve by doing this project).

1. _____
2. _____
3. _____

2.3 Is this proposed project (a) new or, (b) part of an ongoing effort

2.4 What is the estimated total cost for this project _____

2.5 How much money are you requesting for this project? _____

2.6 Can you provide the basic expected Income for the proposed project? No, not yet Yes (insert basic information in box below)

Income class	Projected Income Year 1	Projected Income Year 2
Sales		
Services		
Other		

2.7 **Who are your customers** (be specific)?

Do you have evidence of firm interest from potential buyers i.e. letters of support?

No Yes (attach)

2.8 Approximately how many persons are expected to be employed from this project?

Male _____ Female _____

2.9 JSIF requires a minimum 20% contribution (at least 10% in cash). Based on your project idea and cost please indicate with a tick how the Group will provide its contribution?

Cash Contribution		Provide the land	
Plan and organize sponsor signing and handing over ceremonies		Other (state)	
Clear / bush the site to accommodate construction work			
Finance costs of refreshment at ceremonies and meetings relating to the implementation of the project			
Provide venue for training			
Provide discounted labour			
Provide free labour			

2.10 What are the potential positive and negative consequences on the environment?

Positive or Negative

Please Note: LAND TENURE

The project cannot help to finance purchase of land. If JSIF is to assist with a project that involves use of land, you must state exactly what the land ownership/lease arrangements are. Please attach copies (not originals) of land titles or lease agreements. If JSIF is to construct a building the group must own or have a lease for the property of not less than 49 years. JSIF does NOT consider building projects where land tenure is not confirmed to the community requesting the project

SECTION 3: GROUP PROFILE

3.1 Describe your Group Executive Committee

Name	Position of Executive	Gender	Number of years served in this position	Other contact info (email or address)	Telephone number:

3.2 How many members are in the group (excluding the Executive)? _____

3.3 What do most people in your group do to earn a living?

Economic Activity of Group Members			
	# of members		# of members
Farming		Fishing	
Tour guide		Higgler or Transportation	
Business manager		Employee in tourism or enterprise	
Business owner		Unskilled labor	
Office, Clerical or accounting work		Unemployed	
Domestic or hotel worker		Other (specify)	
Teacher		Other (specify)	

2.11 Who will manage the project?

Key persons	Main responsibilities

3.4 What major physical assets does the group own, lease, or have clear access to and what is the approximate value (list only if more than J\$ 80,000)?

Main Asset Items	Approximate Value (J\$)

3.5 Does the group have a Business Plan for the proposed project? Yes [] , if yes, when was it prepared _____ No []

**3.6 Does the Group prepare annual financial statements? Yes [] No []
If yes please attach a copy of the last statement (audited or unaudited)**

**3.7 Does the Group hold Annual General Meetings? Yes [] No []
(If yes, please attach a copy of the Minutes)**

**3.8 Does the Group hold other regular meetings more than once per year? Yes [] No []
(If yes, please attach a copy of the last two (2) meetings minutes)**

**3.9 Has the group implemented any other projects in the last 5 years? No [] Yes []
(If yes, please provide brief information below)**

1. _____

2. _____

3.10 Name any Organisation / Group / Person that is presently working with your group

Name of Organization/Group/Person	How is this Organisation/Group/Person helping

For Office Use Only

Date Form was received: _____

Form Checked by (please print name): _____

Project meets eligibility criteria: Yes _____ No _____

If No, state briefly why _____

ANNEX 2 – PRIORITY SCORE SHEET

Priority Score Sheet

No	Criteria	Indicator	Ranking Guide	Score	
A	ECONOMIC				
1.	Market Potential	1.1 Target market(s) identified and sales estimates provided	Target markets identified Sales estimates provided Neither included	5 5 0	
		1.2 Letters of support from potential buyers included	One letter included Additional letters included Not included	5 5 0	
2.	Financial Feasibility	2.1 Has the applicant already prepared a business plan for the project?	Yes No	10 0	
		2.2 Financial projections (revenues and expenses) provided	Yes No	10 0	
3.	Financial Capacity of Applicants	3.1 Matching contribution pledged (cash and in-kind)	30% or more 25%-29% 20% (required)	5 3 1	
		3.2 Amount of matching cash contribution	> 20% 13 to 19% 10% (required)	5 3 1	
Maxim Potential Score/weighting				50	45%
Total Score					

No.	Criteria	Indicator	Score Guide	Score
B SOCIAL				
4.	Potential Social Impact	4.1 Number of direct beneficiaries (employees)	One point for each job created, up to a maximum of 20	1-20
		4.2. Community Poverty Level (as indicated by the PIOJ Poverty map)	Quintile 3 - 5 Quintile 1 - 2	10 5
Maxim Potential Score/weighting				30 27%
Total Score				
No.	Criteria	Indicator	Score Guide	Score
C ENVIRONMENTAL				
5.	Environmental impacts (Projects with negative impacts that cannot be mitigated will not be considered)	5.1 Potential positive environmental impacts identified in application	Yes No	10 0
Maxim Potential Score/weighting				10 9%
Total Score				
No.	Criteria	Indicator	Score Guide	Score
C Organizational				
6.	Legal Status of Applicant	6.1 Registration status	Registered Registration in process Not registered	5 3 0
7.	Organisational capacity to implement and monitor project	7.1 Level of experience of applying group	Established 2+ years Established >2 years Not Established	5 3 0
		7.2 Project management plan defined	Yes No	10 0
Maxim Potential Score/weighting				20 18%
Total Score				
TOTAL MAXIMUM SCORE				110 100%
TOTAL SCORE				

ANNEX 3 – INTER MINISTERIAL TERMS OF REFERENCE

RURAL ECONOMIC DEVELOPMENT INITIATIVE (REDI) PROJECT INTER-MINISTERIAL STEERING COMMITTEE TERMS OF REFERENCE

BACKGROUND TO REDI

The Government of Jamaica has received a loan of US\$15m to implement the Rural Economic Development Initiative (REDI) project. The project development objective of REDI is to improve market access small-scale rural agricultural producers and rural tourism product and service providers. REDI will be implemented by the Jamaica Social Investment Fund (JSIF) through a dedicated Project Management Team.

Given the multi-sectoral nature of REDI an Inter-Ministerial Steering Committee has been established to provide oversight and policy coordination for REDI. This TOR outlines the membership and roles and responsibilities of the Committee.

SCOPE OF WORK

The Inter-Ministerial Steering Committee will provide oversight of activities involved in the implementation of the Rural Economic Development Initiative (REDI), and will have the responsibility for policy coordination. Specifically, the Steering Committee will undertake the following:

- Ensure collaboration and strong partnerships between the primary State Agencies and the JSIF
- Review quarterly and annual REDI project work plans and make recommendations in keeping with agriculture and tourism sectoral policy directions to enhance the implementation of REDI
- Review quarterly and annual reports and budgets on the implementation of REDI
- Review and comment on the strategy and direction of technical assistance and capacity building to rural subprojects and institutions under Component 1 and Component 2
- Address any other issues that may be deemed necessary to ensure effective and efficient implementation of REDI

MEMBERSHIP

The Steering Committee will consists senior representatives from the Planning Institute of Jamaica, Ministry of Agriculture, Ministry of Tourism, Ministry of Finance, Rural Agricultural Development Authority, Tourism Product Development Company, Office of the Prime Minister, Ministry of Finance and Jamaica Social Investment Fund.

The Steering Committee will have two technical sub committees (Agriculture and Tourism). The Steering Committee will co-opt technical expertise relating to the two sectors, Agriculture and Tourism, to sit on

these technical committees to provide advice to the Steering Committee. The Technical Sub-Committees will comprise a minimum of three and maximum of nine persons.

LOGISTICS

The Steering Committee will be convened on the implementation of REDI and will initially meet monthly for the first six months, or longer, until the Steering Committee considers the project sufficiently established to warrant less frequent review. Thereafter, the Steering Committee will meet quarterly.

The REDI Project Management Team will provide all necessary support services to ensure the adequate functioning of the Steering Committee.

Full Minutes of each meeting of the Steering Committee will be recorded by the appointed Recording Secretary. Copies of each Minutes will be submitted to each member of the Steering Committee.

The Steering Committee will determine the reporting and logistical arrangements for the Technical Sub-Committees.

ANNEX 4 – TOR REDI PROJECT MANAGER

RURAL ECONOMIC DEVELOPMENT INITIATIVE (REDI) Project Manager Draft Terms of Reference

1. GENERAL INTRODUCTION

The Jamaica Social Investment Fund (JSIF) was established in December 1996 as a component of the Government of Jamaica’s strategy to reduce and eradicate poverty. JSIF helps to build local capacity to sustain and extend development initiatives.

The JSIF is an autonomous government company designed to provide investments in community-based projects island wide and is a demand-driven financial intermediary. It works in partnership with communities, the private sector, non-governmental organizations (NGOs), and donor agencies, in seeking to channel benefits to the poorest communities across the country.

2. BACKGROUND

The Government of Jamaica has received a US\$15m loan from the International Bank for Reconstruction and Development (World Bank) to support a **Rural Economic Development Initiative (REDI) Project**. The Project Development Objective for REDI is to “improve market access for micro and small-scale rural agricultural and rural tourism product and service providers”. The success of the project will be measured against four (4) key indicators as well as secondary level indicators.

The REDI project will support the implementation of subprojects under two components; **Component 1:** Rural subprojects in agriculture and rural tourism; and, **Component 2:** National Technical Assistance and Capacity Building

- **Component 1** has two types of rural subprojects that will be implemented:
 - *Type A:* small-scale revenue generating activities by rural enterprises¹ in agriculture and rural tourism
 - *Type B:* provision of critical small-scale public infrastructure, marketing and management
- **Component 2** will finance technical assistance and capacity building for National organizations and agencies that deliver support services in agriculture and rural tourism at the local level.

¹ “Rural enterprises” refer to groups of people with common economic interests (i.e., farmers, fishermen, agro-processors, tour guides, craft makers etc.), who have formed a legally recognized organization to carry out business activities.

3. SCOPE OF WORK

The REDI project will be implemented by the Jamaica Social Investment Fund (JSIF) through a dedicated Project Management Team which will comprise full-time and part-time consultants. The primary responsibility for the Project Manager (PM) will be to lead the Project Management Team and coordinate the project implementation activities for the Rural Economic Development Initiative (REDI) project. The PM will be required to supervise various contracts and facilitate the work of consultants and contractors.

Specifically the tasks of the EDO will include but not limited to:

- Prepare the project's annual work plan and procurement plan;
- Ensure adherence to the work plan and procurement plan. Ensure timely execution of procurement activities as require by the annual work plan.
- Prepare the annual budget for the REDI project for inclusion in the JSIF budget;
- Monitor and manage day-to-day activities of international and local consultants and staff working on project implementation activities;
- Monitor inter-institutional arrangements/memorandum of understanding with relevant national and municipal government agencies including Ministry of Agriculture and Fisheries, Ministry of Tourism, Rural Agricultural Development Authority, Tourism Product Development Company, Department of Local Government, Social Development Commission etc.
- Assist in the development of implementation strategies for engagement of potential beneficiaries of the project's funding;
- Coordinate, monitor, and review the project's interface with partner institutions and agencies including donor agencies, NGOs, micro-finance institutions and related partners;
- Report regularly to JSIF management and the World Bank on implementation progress;
- Conduct additional REDI project implementation-related assignments as per the demand of JSIF management;
- Ensure the preparation of reports, publications, speeches, statements, impact assessment and intervention to inform and improve JSIF appraisal, and supervision of projects.
- Authorize payments, coordinate preparation of projects IFR's and Statement of Expenditure
- Represent the organization at external fora and projects, make presentations and speeches as these relate to the implementation of the REDI project. Contribute to the newsletters, annual reports, executive meetings, and maintain close links with the media.
- Ensure monitoring and evaluation format is adhered to
- Assist in the establishment and of the REDI Project Inter-Ministerial Steering Committee and provide ongoing technical support to the committee.
- Provide input into the performance evaluation of the PMT consultants

4. QUALIFICATIONS

Education: An Advanced Degree in Public Administration, Public Policy, Rural Development or a related field

Experience:

- 3 - 5 years Management experience
- Project Management training and experience in managing projects
- Strong demonstrated ability in rural development
- Understanding of issues related to agriculture and tourism, specifically at the community level
- Proven leadership skills including the ability to work in a collegial partnership style environment
- Proven ability to network and develop collaborative partnerships within the community, public and private sectors
- The successful candidate will show good written and verbal communication skills;
- Experience in procurement and contract management
- An appreciation and understanding of gender and environmental issues.

Reporting Arrangements:

The successful candidate will report to the General Manager – Technical Services

ANNEX 5 – TOR M&E SPECIALIST

RURAL ECONOMIC DEVELOPMENT INITIATIVE (REDI) Monitoring and Evaluation Specialist Draft Terms of Reference

1. GENERAL INTRODUCTION

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2. BACKGROUND

The Government of Jamaica has received a US\$15m loan from the International Bank for Reconstruction and Development (World Bank) to implement a **Rural Economic Development Initiative (REDI) Project**. The Project Development Objective for REDI is to “improve market access for micro and small-scale rural agricultural and rural tourism product and service providers”. The success of the project will be measured against four (4) key indicators as well as secondary level indicators.

The REDI project will support the implementation of subprojects under two components; **Component 1:** Rural subprojects in agriculture and rural tourism; and, **Component 2:** National Technical Assistance and Capacity Building

- **Component 1** has two types of rural subprojects that will be implemented:
 - **Type A:** small-scale revenue generating activities by rural enterprises² in agriculture and rural tourism
 - **Type B:** provision of critical small-scale public infrastructure, marketing and management
- **Component 2** will finance technical assistance and capacity building for National organizations and agencies that deliver support services in agriculture and rural tourism at the local level.

² “Rural enterprises” refer to groups of people with common economic interests (i.e., farmers, fishermen, agro-processors, tour guides, craft makers etc.), who have formed a legally recognized organization to carry out business activities.

3. SCOPE OF WORK

The REDI project will be implemented by the Jamaica Social Investment Fund (JSIF) through a dedicated Project Management Team which will comprise full-time staff and part-time consultants. The primary responsibility for the Monitoring and Evaluation (M&E) Specialist will be to coordinate the delivery of the monitoring and evaluation outputs of the REDI project.

Specifically the tasks of the M&E Specialist will include but not limited to:

- Develop an action plan that will facilitate timely monitoring of the outputs of the Project
- Develop mechanisms to identify and document 'best practices' and lessons learned
- Conduct periodic evaluations of the Project and sub-projects as stipulated in the Monitoring and Evaluation Framework
- Ensure reporting templates used by the EDOs provide adequate progress reports
- Review periodically the JSIF's MIS system to ensure that accurate project information is available on the system
- Participate in project reviews undertaken by the organization and the World Bank from time to time
- Report regularly to JSIF management and World Bank missions on implementation progress;
- Conduct additional project implementation-related assignments as per the demand of JSIF management;

4. QUALIFICATIONS

Education: Bachelors Degree in a Social Science discipline or a Humanities Discipline

Experience:

- Specialized training in Monitoring and Evaluation and at least 3 years experience in monitoring and evaluating projects
- Strong demonstrated ability in evidence-based research and planning, analytical and strategic thinking,
- Knowledge conduct research using qualitative and quantitative research methods
- Experience using statistical software example SPSS
- Ability to work as part of a team
- The successful candidate will show good written and verbal communication skills;

Reporting Arrangements:

The M&E specialist will work exclusively on M&E tasks related to the REDI project and will report directly to the Project Manager of the Project Management Team.

ANNEX 6 - TOR TOURISM SPECIALIST

RURAL ECONOMIC DEVELOPMENT INITIATIVE (REDI) Tourism Specialist Draft Terms of Reference

1. GENERAL INTRODUCTION

The Jamaica Social Investment Fund (JSIF) was established in December 1996 as a component of the Government of Jamaica's strategy to reduce and eradicate poverty. JSIF helps to build local capacity to sustain and extend development initiatives.

The JSIF is an autonomous government company designed to provide investments in community-based projects island wide and is a demand-driven financial intermediary. It works in partnership with communities, the private sector, non-governmental organizations (NGOs), and donor agencies, in seeking to channel benefits to the poorest communities across the country.

2. BACKGROUND

The Government of Jamaica has received a US\$15m loan from the International Bank for Reconstruction and Development (World Bank) to implement a **Rural Economic Development Initiative (REDI) Project**. The Project Development Objective for REDI is to "improve market access for micro and small-scale rural agricultural and rural tourism product and service providers". The success of the project will be measured against four (4) key indicators as well as secondary level indicators.

The REDI project will support the implementation of subprojects under two components; **Component 1:** Rural subprojects in agriculture and rural tourism; and, **Component 2:** National Technical Assistance and Capacity Building

- **Component 1** has two types of rural subprojects that will be implemented:
 - **Type A:** small-scale revenue generating activities by rural enterprises³ in agriculture and rural tourism
 - **Type B:** provision of critical small-scale public infrastructure, marketing and management
- **Component 2** will finance technical assistance and capacity building for National organizations and agencies that deliver support services in agriculture and rural tourism at the local level.

³ "Rural enterprises" refer to groups of people with common economic interests (i.e., farmers, fishermen, agro-processors, tour guides, craft makers etc.), who have formed a legally recognized organization to carry out business activities.

3. SCOPE OF WORK

The REDI project will be implemented by the Jamaica Social Investment Fund (JSIF) through a dedicated Project Management Team which will comprise full-time and part-time consultants. The Tourism Specialist will be a full time consultant of JSIF stationed in the project area (not in Kingston), reporting to the REDI Project Manager.

Specifically the tasks of the Tourism Specialist will include but not limited to:

- Manage and monitor the implementation of all tourism subprojects, Components 1 and 2 under REDI;
- Provide supervision and direction to Enterprise Development Officers – Tourism
- Provide technical advice on tourism matters to the REDI Project Manager
- Participate in the strategic planning, monitoring and evaluation of REDI, particularly the tourism aspects
- Participate in the review of applications for tourism subprojects
- Keep informed of the latest advancements in tourism, including but not limited to; barriers to entry, new technologies and methodologies both local and international
- Create a database of all stakeholders (international donors, government and non-government) involved in implementing/supporting tourism
- Develop networks and linkages with tourism stakeholders (tour operators, government and non-government actors, hoteliers etc)
- Ensure continued effectiveness and efficiency of the REDI subproject cycle and propose modifications as needed;
- Review Business Plans / Proposals submitted to ensure quality and acceptability
- Maintain close collaboration with the Ministry of Tourism and TPDCo and ensure activities under the Memorandum of Understanding between JSIF and Ministry of Tourism are fulfilled
- Provide feedback to the project manager and JSIF management on implementation progress, constraints and possibilities for implementation improvement.
- Assist in the selection of Enterprise Development Officers - Tourism
- Prepare the monthly work plans and progress reports and any other necessary reports as needed
- Other duties which the REDI Project Manager may assign.

4. QUALIFICATIONS

Education: At least a Bachelors Degree in Tourism or related subject

Experience:

- At least 10 years of experience in tourism sector in Jamaica or similar island countries;
- At least 5 years experience leading the implementation of tourism related projects in communities, showing management skills in organization, planning and supervision of programs (preferably in rural areas) and staff
- At least 5 years Project Management experience
- General knowledge of environmental sustainability issues related to tourism development
- Experience monitoring and evaluating tourism projects
- Strong analytical and operational knowledge of the tourism market and supply chains
- Proven leadership skills and strong interpersonal skills
- The successful candidate will show good oral and written communication skills

ANNEX 7 - TOR AGRICULTURAL SPECIALIST

RURAL ECONOMIC DEVELOPMENT INITIATIVE (REDI)

Agricultural Specialist Draft Terms of Reference

1. GENERAL INTRODUCTION

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The JSIF is an autonomous government company designed to provide investments in community-based projects island wide and is a demand-driven financial intermediary. It works in partnership with communities, the private sector, non-governmental organizations (NGOs), and donor agencies, in seeking to channel benefits to the poorest communities across the country.

2. BACKGROUND

The Government of Jamaica has received a US\$15m loan from the International Bank for Reconstruction and Development (World Bank) to implement a **Rural Economic Development Initiative (REDI) Project**. The Project Development Objective for REDI is to "improve market access for micro and small-scale rural agricultural and rural tourism product and service providers". The success of the project will be measured against four (4) key indicators as well as secondary level indicators.

The REDI project will support the implementation of subprojects under two components; **Component 1:** Rural subprojects in agriculture and rural tourism; and, **Component 2:** National Technical Assistance and Capacity Building

- **Component 1** has two types of rural subprojects that will be implemented:
 - **Type A:** small-scale revenue generating activities by rural enterprises⁴ in agriculture and rural tourism
 - **Type B:** provision of critical small-scale public infrastructure, marketing and management
- **Component 2** will finance technical assistance and capacity building for National organizations and agencies that deliver support services in agriculture and rural tourism at the local level.

⁴ "Rural enterprises" refer to groups of people with common economic interests (i.e., farmers, fishermen, agro-processors, tour guides, craft makers etc.), who have formed a legally recognized organization to carry out business activities.

3. SCOPE OF WORK

The REDI project will be implemented by the Jamaica Social Investment Fund (JSIF) through a dedicated Project Management Team which will comprise full-time and part-time consultants. The Agricultural Specialist will be a full time consultant of JSIF stationed in the project area (not in Kingston), reporting to the REDI Project Manager.

Specifically the tasks of the Agricultural Specialist will include but not limited to:

- Manage and monitor the implementation of all agriculture subprojects, Components 1 and 2 under REDI;
- Provide supervision and direction to Enterprise Development Officers – Agriculture
- Provide technical advice on agricultural matters to the REDI Project Manager
- Participate in the strategic planning, monitoring and evaluation of REDI, particularly the agricultural aspects
- Participate in the review of applications for agriculture subprojects
- Keep informed of the latest advancements in agriculture, including but not limited to; tariff issues, new technologies and methodologies both local and international
- Create a database of all stakeholders (international donors, government and non-government) involved in agriculture
- Develop networks and linkages with suppliers and buyers of agricultural goods and services
- Ensure continued effectiveness and efficiency of the REDI subproject cycle and propose modifications as needed;
- Review Business Plans / Proposals submitted to ensure quality and acceptability
- Maintain close collaboration with the Ministry of Agriculture and RADA and ensure activities under the Memorandum of Understanding between JSIF and Ministry of Agriculture are fulfilled
- To provide feedback to the project manager and JSIF management on implementation progress, constraints and possibilities for implementation improvement.
- Assist in the selection of Enterprise Development Officers - Agriculture
- Prepare the monthly work plans and progress reports and any other necessary reports as needed
- Other duties which the REDI Project Manager may assign.

4. QUALIFICATIONS

Education: At least a Bachelors Degree in Agriculture or related subject

Experience:

- At least 10 years of experience in agriculture, agribusiness or rural development in Jamaica or similar island countries;
- At least 5 years experience leading the implementation of agricultural projects showing management skills in organization, planning and supervision of programs (preferably in rural areas) and staff
- At least 3 years experience facilitating innovative mechanisms of strengthening post-production market linkages for agriculture
- At least 5 years Project Management experience
- General knowledge of environmental sustainability issues related to agriculture
- Experience monitoring and evaluating agricultural projects

- Strong analytical and operational knowledge in agricultural supply chains and competitiveness
- Proven leadership skills and strong interpersonal skills
- The successful candidate will show good oral and written communication skills

Enterprise Development Officer - Agriculture Draft Terms of Reference

1. GENERAL INTRODUCTION

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2. BACKGROUND

The Government of Jamaica has received a US\$15m loan from the International Bank for Reconstruction and Development (World Bank) to implement a **Rural Economic Development Initiative (REDI) Project**. The Project Development Objective for REDI is to “improve market access for micro and small-scale rural agricultural and rural tourism product and service providers”. The success of the project will be measured against four (4) key indicators as well as secondary level indicators.

The REDI project will support the implementation of subprojects under two components; **Component 1:** Rural subprojects in agriculture and rural tourism; and, **Component 2:** National Technical Assistance and Capacity Building

- **Component 1** has two types of rural subprojects that will be implemented:
 - *Type A:* small-scale revenue generating activities by rural enterprises⁵ in agriculture and rural tourism
 - *Type B:* provision of critical small-scale public infrastructure, marketing and management
- **Component 2** will finance technical assistance and capacity building for National organizations and agencies that deliver support services in agriculture and rural tourism at the local level.

3. SCOPE OF WORK

⁵ “Rural enterprises” refer to groups of people with common economic interests (i.e., farmers, fishermen, agro-processors, tour guides, craft makers etc.), who have formed a legally recognized organization to carry out business activities.

The REDI project will be implemented by the Jamaica Social Investment Fund (JSIF) through a dedicated Project Management Team which will comprise full-time and part-time consultants. The Enterprise Development Officer (EDO) will be a full time consultant of JSIF stationed in the project area (not in Kingston), reporting to the REDI Agricultural Specialist

Specifically the EDO will be required to:

- To provide information in the project areas on the modalities through which agricultural and tourism rural enterprises and local institutions can participate in the REDI project. The EDO will participate in local workshops, and liaise with agricultural organizations and local authorities to stimulate participation and the presentation of viable subprojects to the REDI project.
- Conduct field visit appraisal of selected subproject applications
- Assist with the mobilization of subproject applicants for the preparation of business plans by external entities
- To assist the rural enterprises / subproject management financed by the REDI project in the implementation of their subproject including:
 - (a) Coordination of information and resource between JSIF and the subproject beneficiaries;
 - (b) Training in simple procurement or financial management questions related to subproject implementation;
 - (c) Monitoring the implementation of the subproject including the technical implementation and the use of project funds through the monitoring of the subproject accounting;
 - (d) advising on the need and availability of specialized technical assistance to support the rural enterprise/ community/ institutional activities and marketing;
 - (e) Assist in identifying potential markets for subproject goods and services
- To carry out the above, the EDO will visit the rural enterprises on a regular basis, meeting with the manager and Directors of the enterprise or subproject and discuss the progress, constraints and performance of the subproject and help to resolve some bottlenecks at the level of JSIF;
- To report to JSIF and provide feedback to the agricultural advisor on subproject implementation progress, constraints and possibilities for subproject implementation improvements.
- To participate in the data collection for JSIF monitoring purposes.
- The EDO will remain informed of the main agricultural policy issues in his geographical area and professional field through liaison with the local RADA officers, the private sector and academia.
- Upon request, the EDO will represent JSIF and REDI at workshops and events.
- The EDO will prepare reports which include but is not limited to: Subproject Appraisal Reports, Monthly Reports
- Other duties which the REDI Agricultural Specialist may assign.

4. QUALIFICATIONS

Education: At least a Bachelors Degree in Agriculture, Rural Development, Small Business Development or related subjects;

Experience:

- At least 5 years of experience in rural areas dealing with farmers and livestock holders; agriculture, livestock or rural development in Jamaica, preferably with farmer/livestock groups;

- At least 2 years experience in agricultural/livestock marketing;
- At least 12 months experience in issues related to rural business development, or cooperatives, or within marketing organizations
- The successful candidate will show good verbal communications skills;
- Interpersonal skills may be evaluated through psychological testing

RURAL ECONOMIC DEVELOPMENT INITIATIVE (REDI)
Enterprise Development Officer - Tourism
Draft Terms of Reference

1. GENERAL INTRODUCTION

The Jamaica Social Investment Fund (JSIF) was established in December 1996 as a component of the Government of Jamaica’s strategy to reduce and eradicate poverty. JSIF helps to build local capacity to sustain and extend development initiatives.

The JSIF is an autonomous government company designed to provide investments in community-based projects island wide and is a demand-driven financial intermediary. It works in partnership with communities, the private sector, non-governmental organizations (NGOs), and donor agencies, in seeking to channel benefits to the poorest communities across the country.

2. BACKGROUND

The Government of Jamaica has received a US\$15m loan from the International Bank for Reconstruction and Development (World Bank) to implement a **Rural Economic Development Initiative (REDI) Project**. The Project Development Objective for REDI is to “improve market access for micro and small-scale rural agricultural and rural tourism product and service providers”. The success of the project will be measured against four (4) key indicators as well as secondary level indicators.

The REDI project will support the implementation of subprojects under two components; **Component 1:** Rural subprojects in agriculture and rural tourism; and, **Component 2:** National Technical Assistance and Capacity Building

- **Component 1** has two types of rural subprojects that will be implemented:
 - *Type A:* small-scale revenue generating activities by rural enterprises⁶ in agriculture and rural tourism
 - *Type B:* provision of critical small-scale public infrastructure, marketing and management
- **Component 2** will finance technical assistance and capacity building for National organizations and agencies that deliver support services in agriculture and rural tourism at the local level.

⁶ “Rural enterprises” refer to groups of people with common economic interests (i.e., farmers, fishermen, agro-processors, tour guides, craft makers etc.), who have formed a legally recognized organization to carry out business activities.

3. SCOPE OF WORK

The REDI project will be implemented by the Jamaica Social Investment Fund (JSIF) through a dedicated Project Management Team which will comprise full-time and part-time consultants. The Enterprise Development Officer (EDO) will be a full time consultant of JSIF stationed in the project area (not in Kingston), reporting to the REDI Tourism Specialist

Specifically the tasks of the EDO will include but not limited to:

- Provide information in the project areas on the modalities through which agricultural and tourism rural enterprises and local institutions can participate in the REDI project. The EDO will participate in local workshops, and liaise with agricultural organizations and local authorities to stimulate participation and the presentation of viable subprojects to the REDI project.
- Conduct field visit appraisal of selected subproject applications
- Assist with the mobilization of subproject applicants for the preparation of business plans by external entities
- To assist the rural enterprises / subproject management financed by the REDI project in the implementation of their subproject including:
 - Coordination of information and resource between JSIF and the subproject beneficiaries;
 - Training in simple procurement or financial management questions related to subproject implementation;
 - Monitoring the implementation of the subproject including the technical implementation and the use of project funds through the monitoring of the subproject accounting;
 - advising on the need and availability of specialized technical assistance to support the rural enterprise/ community/ institutional activities and marketing;
 - Assist in identifying potential markets for subproject goods and services
- To carry out the above, the EDO will visit the rural enterprises on a regular basis, meeting with the manager and Directors of the enterprise or subproject and discuss the progress, constraints and performance of the subproject and help to resolve some bottlenecks at the level of JSIF;
- To report to JSIF and provide feedback to the agricultural advisor on subproject implementation progress, constraints and possibilities for subproject implementation improvements.
- To participate in the data collection for JSIF monitoring purposes.
- The EDO will remain informed of the main tourism policy issues in his/her geographical area and professional field through liaison with the local TPDCo officers, the private sector and academia.
- Upon request, the EDO will represent JSIF and REDI at workshops and events.
- The EDO will prepare reports which include but is not limited to: Subproject Appraisal Reports, Monthly Reports
- Other duties which the REDI Tourism Specialist may assign.

4. QUALIFICATIONS

Education: At least a Bachelors Degree in Tourism or related subjects;

Experience:

- At least 5 years of experience in the tourism sector preferably working with community based tourism projects;

- At least 2 years experience in marketing tourism products and services;
- At least 12 months experience in issues related to rural business development, or cooperatives, or within marketing organizations
- The successful candidate will show good written and verbal communication skills;

Ideally an EDO - Tourism will possess a combination of Tourism and Business knowledge and experience

ANNEX 10 - CBC ASSESSMENT TOOL

*Capacity Assessment Instrument of Community Based Organisation (CBO)
for Community Based Contracting (CBC) Readiness*

BACKGROUND

1. What year was this Enterprise / CBO established (launched)? _____
2. Which of the following best describes the Enterprise / CBO?
 a) Benevolent Society b) Friendly Society c) Cooperative d) Other type
3. Please describe the role of the management / executive positions in the organization

Position	Function

LEGITIMACY & TRANSPARENCY OF LEADERSHIP

4. Are members of the management / executive elected?
 Yes No
5. How are officers elected?
 Secret voting Open voting Persons are nominated without voting
 Other method _____
6. How often do you hold elections for the executives of the enterprise / organization?
 Every year Every 2 years Every 3 years Other _____
7. How many elections have been held in the last _____ years? [*prompt: number of years that would have covered 3 terms*] _____

8. Consider the executive members that were serving up to two elections/terms ago. How many *new* persons joined the executive since the last two elections/terms? _____

PARTICIPATION AND GOVERNANCE STRUCTURES

9. Are executive meetings held separately from the general meetings?
Yes No N/A (only one type)

10. What is the schedule for executive and general meetings?
General meetings: Every 2 weeks Monthly Every 2 months Other
Executive meetings: Every 2 weeks Monthly Every 2 months Other

11. How many scheduled general meetings were actually held in the last six months? _____

12. How many scheduled executive meetings were actually held in the last six months? _____

13. Do you prepare minutes of the enterprise / CBO meetings?
Yes No [Indicate if evidence of minutes exist

14. Is the preparation of minutes assigned to a specific member of the executive
Yes No

15. How do you attract new members to increase general membership?
Explain: _____

16. Has the enterprise / CBO ever received any training in how to increase the participation of the wider community into activities of the group? Yes No

What kind: _____

17. Has the enterprise / CBO ever received any training to build the ability of the group to carry out its functions?
Yes No

What kind: _____

18. Is there a formal way for members of the enterprise / CBO to be registered
Yes No (skip q19)

19. How many registered members do your group have? _____

20. How many persons make up the executive committee? _____

21. What is the average attendance at executive and general meetings during the last six (6) months?

General meetings _____ Executive meetings _____

22. What percentage of the executive committee is female?
<20% 21-40% 41-60% 61-80% >80%

23. What percentage of the executive membership is over 50 years old?
<20% 21-40% 41-60% 61-80% >80%

24. How are decisions or commitments for the organization made at executive meetings?

- a) With debate and vote count
- b) Motion is put to vote without debate
- c) The leader's recommendation is accepted
- d) The leader and a few persons would decide
- e) There is no defined method of deciding
- f) Other _____

25. If a CBO, how can residents of the community introduce items for consideration at the meeting?

- a) Attending meetings and raising motions from the floor
- b) They would have to be part of the executive
- c) They would have to try and influence the main leaders of the executive
- d) Other _____

SUSTAINABILITY AND ACCOUNTABILITY

26. Does the enterprise / organization have a budget?

- a) Yes
- b) No (Skip questions 27 and 28)

27. What is the annual budget? \$ _____

28. What proportion of the annual budget is the enterprise / CBO able to provide through existing revenue sources?

- a) <20%
- b) 21- 40%
- c) 41- 60%
- 61- 80%
- >80%

29. How does the enterprise / organization raise funds?

30. Do you have a bank account? Yes No

31. Which executive members have the authority to make payments using funds of the enterprise / CBO?

32. Does the enterprise / CBO maintain records of funds received and how funds are spent? Yes No

PROJECT MANAGEMENT SKILLS/RESOURCES

33. What are some of the projects that the enterprise / CBO completed under this or previous executives?

34. Is this enterprise / CBO affiliated to any larger group based in Jamaica or overseas? Yes No

- a. Which group _____

35. Do you know of persons in the community with these skills?

- Masonry
- Architect
- Draftsman
- Carpentry
- Legal representation/secretary
- Accounts/Finance
- Foreman
- Contractor
- Plumbing
- Electrical wiring

GENERAL ISSUES

36. What problems do you anticipate from using the CBC method for your project?

37. What areas of training do you think the enterprise / CBO would benefit from

38. Do you see politics influencing the successful implementation of your project Yes No

Explain: _____

THE MONFIS TOOL

Community Based Organization Capacity Assessment Tool

MONFIS

Six components of organizational effectiveness are identified:

1. Management
2. Organization
3. Networking and mobilization
4. Financial management and fund raising
5. Impact
6. Sustainability

This is called the **MONFIS**. This tool can be used to identify relative, not absolute values of organizational development weaknesses and develop interventions to address these. The progress of a CBO is measured on change observed from one assessment to another.

The tool should be administered in a participatory way with the CBO members.

The relevant parts of the MONFIS for each module should be administered at both the beginning and the end of the training period. This will assist in evaluating the impact and effectiveness of the training.

Name of CBO: _____

Date of Assessment: _____

Conducted by: _____

Rating Scale

- 6 - Needs urgent attention
- 5 - Needs attention
- 4 - Needs improvement on fairly wide scale, but not major or urgent
- 3 - Needs improvement in limited aspects
- 2 - Minor adjustments needed
- 1 - No need for immediate improvement

MANAGEMENT

	Description	1	2	3	4	5	6
1.1	The enterprise / CBO has a development plan with clearly defined objectives and performance indicators						
1.2	Information and records are maintained systematically, can be easily retrieved and are consistently used						
.3	Planning is done in a participatory way						
1.4	Regular self-evaluation exercises are conducted where executive members and the wider community can review success and failure and modify management practices and programmes.						
1.5	Communication is broad and communication systems are simple but informative						
1.6	Meetings are regular, participatory, productive and action oriented						

ORGANIZATION

	Description	1	2	3	4	5	6
2.1	The CBO has a clear, simply articulated vision/mission						
2.2	The vision/mission is understood by the executive/task teams, membership and wider community						
.2.3	The executive/tasks teams have a clear understanding of their roles and responsibilities which are all documented						
2.4	The executive /task teams have a clear understanding of their roles and responsibilities which are well documented						
2.5	The VBO has carefully considered the value of registration with its membership and has well documented justification for its position on registration						
2.6	The executive is strongly representative of its constituency, there is evidence of a democratic selection process and cross section of age, gender etc.						
2.7	Members have a clear understanding of their roles and responsibilities						

NETWORKING & MOBILIZATION

	Description	1	2	3	4	5	6
3.1	The CBO has excellent relations with members and wider community and can mobilize and motivate persons to support projects and activities						
3.2	The CBO is a member of the CDC, actively participates in these activities and keeps own organization informed of Development Area activities and progress.						
3.3	The CBO maintains productive relations with service providers, inviting them to provide information on a regular basis and cooperates with them						
3.4	The Cbo is well known/respected outside its own constituency						
3.5	The CBO has the capacity to reach and involve marginal persons						
3.6	The CBO is able to identify and manage conflict						

	Description	1	2	3	4	5	6
	speedily and effectively						
3.7	The CBO is able to interest and elicit the support of external resource persons.						

FINANCIAL AND FUND RAISING

	Description	1	2	3	4	5	6
4.1	The CBO's financial and accounting records are up to date, easy to understand and accurate.						
4.2	The CBO's budget is developed each year, is based on the previous year's experience, is accurate to within 10% and is developed in consultation with executive members.						
4.3	The CBO is audited by independent persons each year.						
4.4	The CBO produces accurate, complete and timely financial reports, which are made available to members, the wider community and others.						
4.5	The CBO has fund raising plans each year and is able to organize the fund raising events and raise funds to within 20% of predictions.						
4.6	The CBO is able to cover recurrent costs easily.						

IMPACT

	Description	1	2	3	4	5	6
5.1	The CBO's members and the wider community benefit from its services and programmes.						
5.2	The CBO meets priority needs of members and with wider community.						
5.3	The CBOs members and the wider community perceive its services and programs as sufficient and cost effective.						
5.4	The CBO develops impact indicators for all objectives and these are assessed on a regular basis.						
5.5	The community sees the CBO as credible and trustworthy						

SUSTAINABILITY

	Description	1	2	3	4	5	6
6.1	The CBO understands and has a plan for its continuity						
6.2	The CBO has a diversified financial resource base, and this includes a cost recovery system						
6.3	Community persons value membership						
6.4	The CBO is capable of adapting to meet emergency situations						
6.5	The CBO continues to attract volunteer support						
6.6	The CBO has a functioning succession planning strategy						