PLANNING INSTITUTE OF JAMAICA

VISION 2030 JAMAICA
National Development Plan

HOW-TO-GUIDE TOOLKIT
DEVELOPMENT CONCEPTS
(DEFINITION OF CONCEPTS)

"Jamaica, the place of choice to live, work, raise families and do business"

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How-To-Guide Toolkit

Development Concepts: Medium Term Socio-Economic Policy Framework (MTF) 2024 - 2027

(Definition of Concepts)

TABLE OF CONTENT

Introduction……………………….........……………………………………………...……. 1

Development Concepts……………………………………………………………..…………2-26

Development concepts A-C……………………………………..…………………………..2-4

Action 2
Alignment 2
Alignment (of Vision 2030 Jamaica and the Sustainable Development Goals (SDGs)) 3
Assumptions 3
Change Management 3
Costing 4

Development concepts D……………………..........……………………………………..4-8

Determinant of Development 4
Develop 4
Development Area 5
Development Financing 5
Development Framework 6
Development Partner 6
Development Problem 7
Development Programme 7
Development Programme Area 7
Development Result 7-8
Driver(s) of Development 8

Development concepts E-I………………………………………………………….……8-13

Engage 8-9
Environmental Scan 9
Fiscal Year 9
Impact 10
Implementation Framework 10-11
Indicator 11
Input 11
Institutional Framework 11
Integrated Evidence- and Results- Based Management 12
Integrated Results-Based Management 12
Intermediate Outcome 13

TABLE OF CONTENT

Development concepts L-N…………………………………………………….....13-17

Limitations 13
Means of Implementation 13
Medium Term Results-Based Budgeting (MTRBB) 13-14
Medium Term Socio-Economic Policy Framework 14
Monitoring and Evaluation 15
National Development Plan 15-16
National Goal 16
National Outcome 16
National Strategy 16
National Strategy Outcome 17
Nested Theory of Change 17

Development concepts O-R………….………………………………..…..…17-21

Ontological Security 17
Outcome 18
Output 18
Performance Measurement Framework 18-19
Resilient Growth 19
Responsible Entity 19
Results-Based Budgeting 20
Results-Based Costing 20
Results-Based Management 20
Results-Based Resource Management 20-21
Risks 21

Development concepts S-T…………………....………………………………22-26

Sector Output/Sector Strategy Output 22
Sector Plan 22
Sector Strategy 22
Sector Strategy Outcome 23
Situation Analysis 23
Strategy Objective 23-24
Strategy Outcome 24
Sustainable Development Goals (SDGs) 24
SWOT Analysis 25
Target 25
Theory of Change 25-26

Introduction

Thank you for viewing the publication "How-To-Guide Toolkit: Development Concepts - Medium Term Socio-Economic Policy Framework (MTF) 2024–2027". The publication presents main concepts and definitions used in Medium Term Socio-Economic Policy Framework (MTF) 2024–2027:

- Medium Term Socio-Economic Policy Framework (MTF) 2024–2027
- Medium Term Socio-Economic Policy Framework (MTF) 2024–2027 – Extended Version

The publication is intended to support stakeholders in aligning results-based planning, programming, budgeting, implementation, and evidence from monitoring and evaluation and research and analysis to the MTF 2024–2027. The definitions represent the specific operationalisations and adaptations of concepts and models as they are applied within Jamaica's long-term national development planning/Vision 2030 Jamaica framework. Hence, there may be some variations from standard definitions.

For further assistance in understanding and/or applying the concepts, you may contact the Vision 2030 Jamaica Secretariat, Planning Institute of Jamaica at:

- Email: vision2030jamaica@pioj.gov.jm with subject line: Development Concepts

Updates to the publication will be posted as follows:

- Website (Page – MTF): https://www.vision2030.gov.jm/medium-term-socio-economic-policy-frameworks/
- Data4Development Online Monitoring Platform (Page – Online Resource Library: https://data4development.gov.jm/library

Action

An intervention or a set of interventions that are implemented to contribute to the achievement of planned development results. These may include programmes and/or their constituent sub-programmes and projects (including sub-projects of larger projects), which consist of a group of related activities. A menu or portfolio of complementary programmes are typically designed to advance the achievement of sector and national outcomes.

The implementation of an action may be completed in the short-, medium- or long-term. Hence, the implementation of an action may crosscut several Medium Term Socio-Economic Policy Frameworks (MTFs). Actions may commence at any point in the life cycle of a long-term national development plan. Therefore, an action may extend beyond the end-date of one long-term plan and form part of the successor plan.

Alignment

Of policy, planning, programming, resource allocation (incl. budgeting), and evidence generation activities (monitoring and evaluation and research and analysis), with Vision 2030 Jamaica

Alignment is the matching and integration of all development policies, plans, programmes, resource allocation (incl. budgeting), and evidence generation activities (monitoring and evaluation and research and analysis) being undertaken in Jamaica, or on behalf of Jamaica, as in the case of international development partners (IDPs) and the diaspora, **with Vision 2030 Jamaica**.

Alignment facilitates the implementation of Vision 2030 Jamaica. It entails partners in development using the long- and medium-term results, national and sector strategies and related models and frameworks presented in the MTF as the overarching guiding framework for planning, programming, resource allocation and the measurement of results. Alignment should promote coherence and complementarity within the national development planning ecosystem.

Vision 2030 Jamaica serves as an overarching framework that guides the direction and focus for development interventions, including resourcing (financing, human resource deployment) and capacity building. It is also a tool for coordinating national development actions. It tells the type of development that is desired, the approaches to be utilised in achieving expected development results, and what represents the achievement of the desired development (results/targets).

Alignment

(of Vision 2030 Jamaica and the Sustainable Development Goals (SDGs))

The matching and integration of the main tenets of Vision 2030 Jamaica – National Development Plan (NDP) with the 2030 Agenda for Sustainable Development and its 17 Sustainable Development Goals (SDGs). This covers the integration of principles, planned development results, and approaches to development under Vision 2030 Jamaica and the 2030 Agenda.

The 2030 Agenda is not a plan and under its Means of Implementation, the importance of implementing the agenda through national development plans is highlighted. Hence, the alignment includes integrating the SDGs in the implementation of Vision 2030 Jamaica.

Assumptions

The evidence-based statements on contextual, resource, capacity, cultural and related factors/determinants that are deemed necessary for success. These statements are based on expectations that the factors/determinants deemed necessary for success will be sufficiently available to support and/or drive implementation and the achievement of planned development results.

Change Management

The management of the change process from one state of development to the next.

Change is defined as altering an object, perspective, system, structure, institution or behaviour. Within the context of national development planning, change refers to modifying or altering phenomena from an undesirable state of development to a planned state that reflects desired outputs, outcomes, goals and vision.

Hence change management, within national development planning, is the process of using a standardised and measurable process in efficiently and effectively executing change towards achieving planned development results. This includes conceptualising, defining, planning, implementing, financing, monitoring and evaluating change; and documenting lessons learned from the change management process and translating them into actionable policies, strategies, plans and programmes for continuous improvement and innovation. Change management is executed at different levels and in each stage of the development process.

Costing

(Results-Based Costing/Development Financing Need)

The Cost/Financing Need is the complete value of the financial resources (money) required to execute a development plan, programme, project, or individual activities While the ‘cost’ should cover contingencies, it is not to be formulated to cover anticipated expenses incurred due to inefficiencies based on inadequate performance management regarding resource/input and capacity allocation and use along with the execution of activities or processes.

Within an Integrated Results-Based Management (IRBM) Framework, the intersection of results-based planning and results-based budgeting allows for the computation of the costs of producing results. Programme and other activity related costs can be used to calculate the costs of the strategies that they operationalise and the results they are intended to produce.

In the case of costing to inform the MTF, financing/budgetary needs should be calculated for the sum of the three fiscal years covered by each MTF and aligned with the Fiscal Responsibility Framework.

Determinant of Development

A variable that determines or causes a development result.

Accordingly, it is assumed that the planned result will not be achieved if the determinant is not present. A determinative or causative effect is usually achieved when at least one of the variables associated with a specified result is demonstrated to be indispensable and if absent, the result would not have been achieved.

While there are many factors that impact implementation and the achievement of planned results, the determinants of development are the main factors that are necessary and indispensable within a Theory of Change (ToC) for causing/determining the planned results.

Develop

To improve and/or enhance from a state associated with dissatisfaction or lack to a desired and/or planned state characterised by desired quality of life and living standards. The ability to “develop” is typically supported by resources and capacities along with capacity building that capitalises on strengths and opportunities, addresses gaps that create weaknesses and limitations, and builds resilient systems for risk management.

Development Area

A sub-sector that is targeted for development intervention and/or has been determined to be in need of development. In development planning, a development area is a defined space, which encapsulates the inter- and multi-sectoral menu and portfolio of programmes/actions geared towards addressing or solving a development problem. The gap in development that it addresses should be defined within a Theory of Change (ToC).

Development Financing

/Sustainable Development Financing

The systems, mechanisms, and institutional arrangements for the financing of development activities.

Within the context of national development planning, development financing is supported by the sources of national income, donor financing, loans and related products from multi-lateral financial institutions, and private capital. These are channelled towards the financing of state-led development programmes, along with public-private and related partnerships to support development initiatives, which are aligned to public policy, at the national and local levels and across sectors. It also includes the process of national budgeting, which is central to the transferral and allocation of available financing to the priorities in the development enterprise.

Under Vision 2030 Jamaica, results-based development financing processes are a central tenet of Integrated Results Based Management (IRBM). The alignment of development financing and budgeting with planning is pivotal to the efficient and effective delivery of public goods and services and the achievement of planned development results.

Global partnerships for sustainable development financing are an important tenet of promoting equity within and among states. They include regional and global mechanisms for promoting the sustainability of financing for development; channelling technical assistance, grant funds, and concessionary loans to countries most in need; and aligning available financing with priority (implementation ready) initiatives for accelerating development and balancing social, economic and environmental results. Sustainable development financing is among the cross-cutting strategies of Vision 2030 Jamaica and a primary focus of National Outcome 6 “Effective Governance”. It is also one of the main tenets of the “Means of Implementation” under Goal 17 of the SDGs.

Development Framework

A structure that is characterised by principles/values, strategies, systems, mechanisms and institutional arrangements that give order, direction, and meaning to a development process.

A national development planning framework consists of the various elements, including sub-frameworks, that support planning and implementation. Within the context of Vision 2030 Jamaica, the national development plan framework is underpinned by seven Guiding Principles. It is results-based, strategy-based and policy-driven. It includes the National Development Plan (NDP), Sector Plans, successive Medium Term Socio-Economic Policy Frameworks (MTFs), Integrated Evidence- and Results-Based Management (IERBM) Framework (including the Monitoring and Evaluation Framework), and Communications, Stakeholder Engagement and Reporting Frameworks.

The framework defines the roles of its constituent parts and includes mechanisms for managing the relationships among them.

Development Partner

/Development Partnership

A development partner is an international/regional/national/local entity (institution, organisation) or individual that is actively engaged in supporting the realisation of planned results from a development process that is being led by a state (states) or non-state actor(s). This includes government and non-government entities supporting the Government of Jamaica in the development and/or implementation of a national development plan, sector plan, Local Sustainable Development Plan (LSDP), and related plans and programmes/actions.

Development partners typically have shared goals and/or principles and ideologies that create mutual interests as well as a basis for cooperation and collaboration. However, this does not negate the reality that in development partnerships, individual partners have their own self-interests and objectives that do not always fully align with that of the other partner(s). Development partners also typically have their own spheres of influence and power that dictate the power balance and ability to negotiate terms that are favourable to achieving individual agendas.

While there are some drawbacks to development partnerships, they are an indispensable tenet of maintaining global stability, peace and prosperity. Within a globalised world of competition and cooperation, development partnerships are determinants of the pace and quality of development within and across states.

Development Problem

A gap in development between a baseline condition and a planned or expected development result. A development problem defines unmet development needs across structural, systemic and institutional spaces.

There are different levels of problem analysis and categorisation:

- There are direct problems that often refer to the symptoms that people experience as challenges in their daily lives, and which are often used to define their situation and/or social positioning. For example, crime (persons committing crime and others being victims of crime) is a direct symptom of challenges in how individuals manage social negotiation, and institutionalisation of the rule of law.
- There are also root causes or determinants of the problem, which are those factors that drive the production of the symptoms.

Development Programme

A development programme is typically long-term oriented with sub-programmes and projects spanning medium-term periods as part of the overall development intervention.

Development Programme Area

A menu of actions consisting of programmes and/or a programme and its sub-programmes, projects etc. that are geared towards the achievement of a specified sectoral and/or national outcome.

Development Result

A product of development.

Development Results can be at various levels (including national, local, sectoral, programme) and often form part of a cascading or hierarchical "Results Chain".

A development result is typically SMART – Specific, Measurable, Achievable, Realistic and Timebound. Hence, a development result can be the product of the implementation of an action or actions, such as an output. It can be in the form of an outcome – the product of stakeholders/people interacting with outputs and consequently changing how they operate which impacts the quality of the development environment, and standard of living. Development results include societal transformations reflected in institutional, systemic, structural and related development impact at the national level. Development results can also be tied to processes, such as resource management and the coordination of the delivery of development results.

At the aspirational and highest levels of how we define and envision development, development results may be represented in the statements of goals and national visions.

Driver(s) of Development

Systems, mechanisms, structures and/or institutional arrangements as well as resources and capacities applied in the development process that facilitate and propel/accelerate change from one state of development to another.

The drivers of development are often interdependent and work together to achieve planned results. The drivers of development for a specific development plan and results are usually identified within an articulated or implied Theory of Change (ToC). There is a distinction between drivers and determinants of change/development.

Drivers of development are factors that support the development process. However, they may have an associational rather than causative relationship with the planned development result(s). Determinants of development, on the other hand, typically have a causative relationship with the planned development result(s).

Engage

(interacting with outputs in creating outcomes)

Engaging outputs in creating outcomes covers the process of stakeholders actively choosing to change behaviour followed by demonstrated behaviour change – in applying frameworks, systems, mechanisms, processes and opportunities for capacity building – towards changing the existing situation or status quo to achieve a planned result.

Hence, it involves the attitudes and actions to sequentially and simultaneously advance/achieve two sets of intermediate outcomes:

1. Choosing to interact with and use the output – aligning strategies and actions with the output
2. Using the output to advance the achievement of a planned outcome – through this change process, several forms and stages of intermediate outcomes may be achieved.

To achieve success in using an output to produce an outcome, stakeholders must deliberately and willingly embrace the changed reality brought about by the output. However, the transition from output to outcome is affected by the development environment, including unplanned for and emerging phenomena.

Hence, to engage with an output, within the context of MTF 2024 – 2027, means to do the following with the output:

- Use it as the basis and/or to facilitate the execution/implementation of actions in business or personal affairs.
- Support the development/strengthening of the output or use it in developing/ strengthening a broader process related to the planned outcome
- Promote effectiveness of the output, such as a framework, in producing the planned outcome

Environmental Scan

The broad examination of the gamut of variables, factors, processes and results that characterise the state and context of development, and opportunities and threats to development. An environmental scan usually has more breadth than depth. Within national development planning, it is, basically, a search to identify the main local and global factors that impact a country's development. It provides an evidence-based starting point for further analysis into how to manage key factors and deliver planned results

Environmental scanning should ideally be part of a structured process of monitoring the development environment. It would therefore include the monitoring of factors that have been assessed to be potentially or already impactful on the development process and results. It should also include searching for potential new factors that may impact the development environment and Jamaica's prospects for development along with developing explanatory models/frameworks and descriptions of the factors.

Fiscal Year

The fiscal year is equal to the financial year for the Government of Jamaica. It starts on the first day of April (April 1) in one year and concludes on the last day of March (March 31) in the following year.

Impact

The ultimate stage of achieving an outcome. Within long-term national development planning and societal transformation, the impact is typically experienced at the macro-structural, institutional and systemic levels. Simply put, the impact is a change in how society functions and is organised.

An example of an impact is the absence of food and other forms of poverty that relate to access to basic goods and services, based on the institutionalisation of a social protection floor or systems that allow for all to live above the poverty line. This in turn has implications for the class structure.


The achievement of the impact of ‘no poverty’ would have been supported by the institutionalisation of adequate and quality access, by citizens and all who interact with the state, to public and private goods and services and opportunities for social and income security. These changes would have commenced as outputs, which then transitioned to immediate outcomes, intermediate outcomes and ultimately impact.

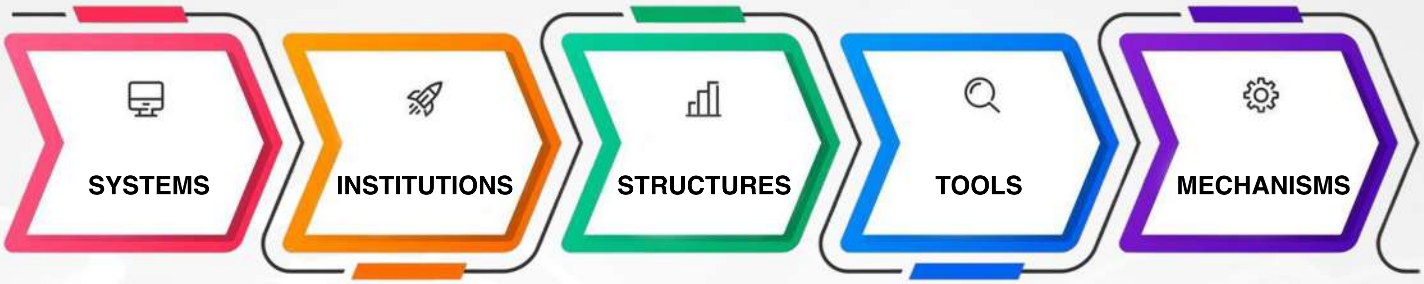
Implementation Framework

In the case of Vision 2030 Jamaica, the Implementation Framework consists of the structured guides and plans, including approaches, methods, and theories, for developing and operationalizing systems, institutions, structures, mechanisms and tools for implementing a long-term national development plan. This includes the Sector Plans and successive Medium Term Socio-Economic Policy Frameworks (MTFs), which facilitate continuous improvement and relevance in the implementation of the long-term plan.

The Implementation Framework also consists of the guiding principles that inform the approach to implementation, such as principles of partnership, and transparency and accountability. It includes the theories of change for coordinating and providing the resources and capacities for results-based implementation.

To further elaborate, the Implementation Framework includes the guides and plans for defining development inputs, processes, and products. This encompasses governance arrangements and management tools that are applied in the development, acquisition, and allocation of resources and the approaches to capacity building.

The main management tool applied in the implementation of Vision 2030 Jamaica is the Integrated Evidence- and Results- Based Management (IERBM) Framework. The IERBM Framework is an adaptation of several management models. It was crafted and is being built out by the Planning Institute of Jamaica based on the application of lessons learned.



Indicator

The basis for measuring performance and/or progress towards achieving a planned development result. An indicator is a variable. It is a criterion or yardstick for measuring performance. It serves as a measurable representation of an output/outcome/impact or tenets of these. It can be qualitatively or quantitatively measurable.

An indicator does not speak to the direction or nature of the planned change. Targets speak to the direction or nature of the planned change.

Input

A resource utilised to execute activities geared towards producing development results. Inputs include human resources, financing, technology, and data.

Institutional Framework

A comprehensive system of laws, rules, regulations, procedures, guidelines and organisational structures along with informal rules and behavioural norms, relating to a particular sector or sub-sector. It is social organisational with the constituent elements designed to work coherently to advance the achievement of planned development results. Institutional frameworks are mechanisms for providing goods and services with which stakeholders interact to address needs, bridge gaps in development, and advance social transformation. They are also used to entrench, institutionalise, or sustain development gains.

Integrated Evidence-and Results-Based Management

Integrated Evidence- and Results- Based Management (IERBM) represents evolution and growth of the RBM framework upon which the National Development Plan (NDP) and associated plans and frameworks were built. The IERBM framework equitably prioritises (1) evidence from monitoring and evaluation (M&E) of programme and sector processes and outcomes and (2) evidence from environmental, contextual, and capacity analysis. This is geared towards the interpretation and explanation of national development performance and results along with characterising unexpected and emerging realities in the local and global environment.

This is owing to an appreciation that long-term national development goals are advanced by a mixture of (1) development context and environment, (2) policy outcomes based on aligned programming and implementation, and (3) the policies, plans and programming that are geared towards governance and coordination. Also, typically, the development environment is assessed as part of the context in evaluating programme effectiveness. However, within the ambit of long-term national development planning, the development environment is a determinant of the translation of programme outputs and successes into national impact and the sustainability of development outcomes.

The actions related to governance and coordination are often viewed as supportive. However, in their absence, areas for policy coherence and cross-sectoral linkages are insufficiently identified and operationalized; and partnerships and institutional arrangements are not established or properly managed.

Integrated Results-Based Management

Integrated Results-Based Management (IRBM) is a framework and model for managing the formulation and execution of policy, planning and programming resourcing, (incl. financing and budgeting), implementation, and monitoring and evaluation (M&E) geared towards the efficient and effective production of planned results and reducing the occurrence and/or impact of unintended consequences. IRBM emphasises the adoption of country-relevant institutional frameworks and mechanisms for integrating the individual components, such as developing systems for integrating planning and budgeting.

IRBM is among the prevailing and preferred models being promoted globally for the management of the development process towards the best use of resources and capacities for achieving planned results. It is the approach being advanced by the Government of Jamaica to optimise efficiency and effectiveness in state governance and the delivery of public goods and services.

Intermediate Outcome

Within the context of long-term national development planning, intermediate outcomes are the outcomes achieved after an output and then immediate outcome are achieved and before the impact is achieved. Owing to the extended implementation period of a long-term plan, there may be several intermediate outcomes over successive medium-term periods. Also, the schedule for achieving each intermediate outcome may extend over several medium-term periods.

Intermediate outcomes include the initial behaviour change necessary to engage with an output and/or immediate outcome. They also cover the various stages of development, experienced as incremental changes in behaviour and the state of development, until the impact is achieved.

Intermediate outcomes provide the results-basis for process and performance monitoring and evaluation in transitioning from outputs, through outcomes to impact.

Limitations

These are the characteristics of a tangible or intangible “product” or phenomenon which make it less suitable or applicable for a specific purpose, within defined contexts. Limitations refer to gaps in the quality of a phenomenon or product which make it insufficient or inadequate to support the achievement of planned development results.

Means of Implementation

The means of implementation consist of the systems, institutional and other mechanisms, tools, resources, and development strategies used to guide and/or execute development actions. The concept is largely associated with global agendas such as the 2030 Agenda for Sustainable Development - Sustainable Development Goals - along with national development plans.

Medium Term Results-Based Budgeting (MTRBB)

Medium Term Results-Based Budgeting (MTRBB) is the alignment of the planned allocation of projected available development financing for a specified medium-term period with planned development results. In the case of Jamaica, there is a phased roll-out of MTRBB, which is in train. This includes a requirement that relevant state entities prepare and submit annually, a rolling four-year forward estimate, which should be reflected in a costed rolling four-year Corporate Plan along with a costed one-year Operational Plan and requisite documentation presenting the aligned budget request and justification.

Currently, budgetary resources are allocated to state entities annually, based on an annual budget ceiling determined by the Ministry of Finance and the Public Service (MoFPS).

Medium Term Socio-Economic Policy Framework

The successive three-year Medium Term Socio-Economic Policy Framework (MTF) is the main mechanism in the Implementation Framework of Vision 2030 Jamaica. It directly drives the results-based implementation of the National Development Plan (NDP) and aligned global frameworks and agreements which have been integrated in the implementation of the NDP, including the 2030 Agenda for Sustainable Development-Sustainable Development Goals (SDGs). Each MTF covers three fiscal years, with a fiscal year commencing on April 1 of one year and ending on March 31 of the following year. The structure of the MTF supports integrated results-based management in government – linking policy, planning, and programming, resourcing, implementation and monitoring and evaluation.

The MTF is not an aspirational document. It is directly linked to medium term budgetary allocations and projections based on the Medium-Term Fiscal Framework (MTFF) in the Fiscal Policy Paper (FPP), which is aligned with the Fiscal Responsibility Framework (FRF). It presents the prioritised policy-driven results-based strategies to guide Jamaica's development in the medium-term. It includes the main planned state-led actions for operationalising the strategies. These actions are primarily implemented through partnerships among ministries, departments and agencies (MDAs) of government as well as public-private partnerships (PPPs), and partnerships between government and international development partners (IDPs), and non-government entities.

Programmes/actions included in the MTF should be part of a Theory of Change (ToC), which presents implementation ready and financed actions that will best lead to the achievement of planned results.

The development of each MTF is guided by state policy, and evidence on the development situation and capacity for development. These inform the adaptation of long-term national and sector strategies to address development gaps and build on development gains towards achieving medium-term milestones and advance the long-term goals and outcomes.

Each MTF serves as the guiding policy framework for advancing Jamaica's national development and, therefore, comes into force through Cabinet approval. The MTF is implemented through partners in development aligning results- based planning with the Vision 2030 Jamaica guiding principles, and the medium-term national results and strategy frameworks and performance measurement framework, which are presented in the MTF.

Monitoring and Evaluation

Monitoring and Evaluation (M&E) refers to the measurement of development results to generate evidence to inform management of the development process. Monitoring refers to on-going observation, tracking and review of performance based on planned activities and results. Monitoring largely measures efficiency and gives focus to answering when, what and where questions, such as - What proportion or percentage of a target has been achieved? How many or what proportion of planned activities were implemented and were they executed according to the planned timeline and expenditure? Evaluation primarily measures the effectiveness of the theories, strategies and approaches, methods, tools and actions geared towards producing a planned result. Measures of effectiveness give focus to the extent to which the planned result is achieved and the level of statistical and other association that are established between what we implement and the results we planned to achieve.

The M&E Framework for Vision 2030 Jamaica has been reviewed and updated over time in response to lessons learned, technical advancements in the field, and emerging needs. The current framework is a Monitoring, Evaluation, Accountability, Learning and Action (MEALA) Framework.

National Development Plan

A National Development Plan (NDP) presents a road map for addressing the cross- and inter-sectoral challenges impacting a country towards achieving planned development results.The Plan typically tells us how we will approach the bridging of development gaps, and the main actions that will be implemented as part of the approach (what). It also tells us why an issue is a development challenge to be addressed as well as why we are utilising specific development strategies and actions. The national development plan also tells us who will be driving the achievement of specific development results, where actions will be implemented, and when.

The issues addressed, areas of focus and planned approach to development are based on the model and principles for development being utilised. Hence, a NDP may be geared towards development in the long term or medium term. The NDP may be results-based or implementation-based. It may be policy-driven or programme-based. It may be geared towards integrated sustainable development or be disproportionately focused on one dimension of development, such as the economic dimension. The NDP may be geared towards treating everyone equally or inclusive development, where there is a focus on giving targeted, equitable and demand-driven attention to the diverse groups in society.

Under Vision 2030 Jamaica, the NDP is long-term, results-based, policy-driven and geared towards sustainable and inclusive development.

National Goal

The highest level of national development result to be achieved. There are four national goals under Vision 2030 Jamaica.

A Goal encompasses the various dimensions and priorities in advancing social, economic or environmental development, and good governance. It serves as a summary statement on what the development situation in the social, economic, environmental or governance dimensions should be when the objectives of the National Development Plan are achieved. There is typically a timeline associated with the achievement of a goal, and in the case of Vision 2030 Jamaica, it is 2009—2030. However, if a goal is not achieved within a planned timeline and the planned development results are not abandoned, the timeline for achieving the goal may be shifted to one that is determined to be more feasible or realistic.

National Outcome

The second highest level of national development result to be achieved. Unlike goals, outcomes are measurable.

A National Outcome encompasses the long-term transformations of a main sector or a group of related sectors. It serves as a summary statement on the level of development that the sector/related sectors would have achieved by the end of the implementation of a long-term plan. When development is intended to be internationally comparable, such as the objective to achieve developed country status, the Performance Measurement Framework (PMF) is globally benchmarked. Global benchmarking requires the use of internationally comparable and recognised indicators and targets.

National Outcomes can be measured as immediate and intermediate outcomes and impact. Intermediate outcomes are associated with the period covered by an MTF or MTFs. They are the planned or expected medium-term results from the implementation of an MTF. There are several intermediate outcomes, which serve as milestones in advancing towards a development impact. A development impact is the long-term outcome that is to be achieved by the end of the period covered by the National Development Plan, which is 2030, in the case of Vision 2030 Jamaica.

National Strategy

The overarching strategic approach for developing a sub-sectoral area in advancing a National Outcome. National Strategies typically represent the main sub-sectoral areas in the Theory of Change (ToC) for achieving the National Outcome.

National Strategy Outcome

A National Strategy articulated in its result format. The National Strategy Outcome presents the intent of a strategy achieved.

The achievement of a National Strategy Outcome is most directly attributable to the successful implementation of a National Strategy. However, the broader environmental and contextual factors as well as the interdependencies within the National Strategy Framework, should also be included as key considerations in planning and analysis.

Nested Theory of Change

A Nested Theory of Change (ToC) presents sub-theories or segmentation of a complex ToC and the various pathways and causal linkages. Within the context of Vision 2030 Jamaica, the nested ToC presents a cascade of interdependent sub-theories. These start from an overarching ToC and then cascade into sub-theories aligned to the levels of the results and strategy frameworks. A nested ToC for a long-term national development plan links planned structural, systemic and institutional transformation results and pathways at the upper level or tier with changes in stakeholder behaviours at the level below, which are associated with and/or determined by changes in access to goods, services, knowledge and competencies/skills at the lower level (outputs).

The Nested ToC covers all levels and spaces for planning from the national to the local and programme/action levels within organisations, and across sectors. It also takes into consideration temporal related progression, performance and transformation. Hence the ToC addresses the dynamics that influence long-term planning, such as emerging trends, shocks and crises that are often unplanned for and/or unforeseen, and the challenges in addressing them within a long-term planning framework.

Ontological Security

A state of well-being associated with confidence or assurance in the consistency and predictability of social patterns, including modes of behaviour and ways of thinking.

For example, there is ontological security if expectations regarding how others will respond to gestures and the stability of the social environment are typically met.

Outcome

Change in capacity and/or behaviour of the intended beneficiaries of development action, in the immediate- to medium- term (intermediate period).

Outcomes also include changes in systemic, institutional and structural processes, capacity, and characteristics.

A development impact is also an outcome. The impact is the final or ultimate stage of the achievement of an outcome, which is demonstrated in a change in how society itself is organised and functions.

Output

The immediate result of the implementation of a planned activity. An output typically relates to changes in quality, availability, and access to goods and services that are geared towards empowerment and enablement for behavioural change and eventual societal impact.

An output can be crafted from a supply or demand perspective. Hence, the supplier will say that the output is that a school was successfully built. However, from a demand and social transformational perspective, the same output could be worded as an increase in available school spaces and increased access to secondary education facilities by students within a community.

Within the results chain of Vision 2030 Jamaica, outputs are defined from a demand-driven, social transformational perspective. Also, the MTF presents sector outputs which speak to changes in capacity to deliver planned development outcomes at the sector level.

Performance Measurement Framework

The Performance Measurement Framework (PMF) includes the indicators, baseline year and targets that will be utilised to measure performance in advancing the achievement of planned development results. The indicators may be quantitative, qualitative and represent different levels of results along the results chain from outputs through outcomes and impact. The PMF also addresses only development results that are measurable. Hence, goals that are typically conceptually abstract, inform but are not assigned measurements in the PMF. The indicators in the PMF represent different levels of development (national, local, programme etc.), performance (efficiency, effectiveness), and types of change (institutional, structural, systemic, behavioural).

The PMF is underpinned by the Guiding Principles of the Policy and/or Plan for which performance is being measured. Hence, if inclusion is a principle, disaggregation to measure the experience and development results for different groups is prioritised. The PMF is also defined by the management framework for the development process for which performance is being measured.

Hence, if Integrated Results Based Management (IRBM) is the management framework, then there is focus on indicators that allow for the measurement of efficiency and effectiveness in performance based on the interactions and integrations of policy, planning and programming, resourcing, and monitoring and evaluation (M&E).

Within the context of long-term national development planning, the PMF is aligned with a nested Theory of Change (ToC) that is geared towards coherent development throughout all phases and levels of the cyclical planning and implementation process. The ToC is also geared towards supporting evidence- and results-based implementation of Vision 2030 Jamaica over its 21-year life with continuous relevance and improvement, priorities. Hence there are intermediate targets or milestones in the journey to the 2030 targets. Also, while the National Outcome Indicator Framework (NOIF) for Vision 2030 Jamaica gives focus to the impact level indicators and/or proxies, aligned sector, local and programme level frameworks are critical and indispensable elements of the PMF.

Resilient Growth

The capability of a country, and its national development planning framework, to agilely adapt to dynamism and change, including shocks and crises. This includes the capability for speedy recovery, minimising or preventing slippages, maintaining development gains and achieving and/or maintaining a comparatively high growth trajectory that demonstrates responsiveness to the opportunities present in the midst of crises.

Responsible Entity

The entity responsible for governance and/or the management of implementation, and performance reporting in the national development process. The responsible entity may not be an implementor of the actions designed to advance the planned development result. It may also execute its functions in partnership with other entities, which are also considered "responsible".

The responsible entity will be held accountable for producing the output(s) and/or outcome(s) associated with the implementation of an action(s). It should be noted that an entity responsible for achieving a planned output, may not be the entity responsible for the achievement of intermediate outcomes and impact.

Results-Based Budgeting

Results-Based Budgeting (RBB) represents the allocation of available financial resources to prioritised development results that are operationalised by policy-driven development programmes/actions within a specified period. Within a context where there is a fiscal responsibility framework, RBB is implemented with consideration for fiscal policy and management strategies.

Results-Based Costing

Results-Based Costing (RBC) gives focus to assigning the costs of development to the planned results instead of the activities undertaken towards achieving the results. While the actual determination of costs starts at the level of development actions (programmes, sub-programmes, projects and their activities), the focus lies on the costs of the results. Performance measurement is linked to monitoring and evaluation based on budget and expenditure aligned with the achievement of planned results.

Jamaica is exploring the development of a two-pronged approach to results-based costing within the parameters of fiscal responsibility frameworks, and results-based assessments of financing needs and budgeting frameworks. The development of the costing framework and execution of the two-pronged process of costing sector planning to identity long-term development financing needs and aligning medium-term prioritisation with budgetary resources is a work in progress.

Results-Based Management

Results-Based Management is a management approach that is geared towards the efficient and effective production of planned results and reducing the occurrence and/or impact of unintended consequences. “In operationalising RBM, it is the management element that should take precedence and for which systems, institutions, and tools should be developed.”

Results-Based Resource Management

The process of creating/building, acquiring and assigning and allocating/distributing resources for the efficient and effective execution of actions to produce specified development results. These resources include capital/financing (budget), human (labour, knowledge and creativity), and physical assets such as land, materials, equipment and technology.

Capacity building, strategic timing, and evidence generation, including monitoring and evaluation, research and analysis, are also key tenets of ‘results-based resource management’. These actions inform and facilitate the availability and timely allocation of the appropriate resources for the efficient and effective delivery of development-related goods and services that are aligned with achieving planned results. They also support the construction of the relevant systems, mechanisms and institutional arrangements for resource management that drive societal transformation, sustainability and inclusivity, and resilience in development processes and results.

Risks

Probable but indefinite/uncertain occurrences that, if experienced, are likely to undermine efficiency and effectiveness in the implementation of a plan and the achievement of planned results.

A risk is a concern or factor that impacts planning but not the lived experience. When risks graduate to disaster, shock, or crisis, then development and the quality of life of individuals are impacted. Risks result from the interactions between threats, and weaknesses/limitations and vulnerabilities.

The likelihood of a risk progressing from an indefinite occurrence to a disaster, shock or crisis, has two main conditions:

- The threat level increasing.
- The limitations and vulnerabilities that create opportunities for the threat to impact the development process not being remedied and/or cannot be remedied within a timeline to impede the risk translating to a disaster, shock, or crisis.

Sector Output/Sector Strategy Output

Development oriented change intended to impact the development environment, including systems, structures, and institutional arrangements and institutionalisation. The output should be accessible to stakeholders for the result/output to be considered achieved. The output is geared towards empowering and enabling stakeholders to actively participate in and contribute to the implementation of strategic policy-driven development actions and the achievement of planned results.

This includes the development and/or transformation of frameworks, mechanisms/ modalities, or capacity that forms the basis for the Government of Jamaica delivering public goods and services. For example, increasing inclusive access to healthcare by constructing/renovating state of the art health centers and hospitals across all parishes; improving the provisions for decent work through the enactment of relevant labour-related legislation. Also, sector outputs often serve to increase access and/or improve the quality of public goods and services. Typically, a sector output is a composite representation of several programme/action outputs.

Sector Plan

A Sector Plan is the results-based Road Map for development of a key sector(s) that is recognised as a sectoral driver in advancing the achievement of a National Outcome(s). The Sector Plan presents the planned results, strategies, programmes, and monitoring and evaluation framework. It also includes the situation analysis and other considerations that informed the Plan.

The Sector Plan should form the basis for an assessment of development financing needs.

Sector Strategy

The strategic approach to advancing policy imperatives through programming and implementation. Hence, the government's policy priorities are represented in the medium-term iterations/objectives of Sector Strategies presented in the successive MTFs.

Sector Strategies typically represent the strategic approaches for advancing the Theory of Change (ToC) for National Strategies.

Sector Strategies indicate the sub-sectoral areas to be developed and the type of development desired. Importantly, sector strategies provide a framework for the areas of development that should be adequately resourced with associated programmes/actions financed in the national budget over the long-term.

Sector Strategy Outcome

The expected change in behaviours, quality of life and the development environment associated with the implementation of a Sector Strategy.

Situation Analysis

Presents an analysis of the development situation at a particular point in time or for a specified period. A Situation Analysis is typically an empirical process that utilises a systematic process of data gathering and analysis to examine, describe and explain the main elements of the internal and external factors impacting a particular phenomenon or development concern. A Situation Analysis tends to incorporate several types of analysis, methods and tools. These include environmental assessment, which encapsulates SWOT and Contextual Analyses, and assessments of performance as part of results-based monitoring and evaluation (M&E).

Strategy Objective

This is a statement on the overarching time-bound planned development result for a sector associated with a sector related strategy. In other words, the Strategy Objective is what a sector will be directing its resources and capacity to achieve within a specific time frame/by a specific deadline.

MTF 2024-2027 gives focus to the component of the results framework related to transforming structures, systems, institutions, governance arrangements, mechanisms and capacities, and creating enabling environments for development. The results at this level are largely intermediate and focused on behavioural change, which is necessary for transforming systems and processes to institutionalise an enabling environment for development.

Within Jamaica's national development process, the transformation of the drivers and environment for development is an area that is lagging. This element of the results framework is "process" related. This is owing to the results at this level being largely those related to transforming development drivers through behavioural change towards creating enabling environments for development. This is a prerequisite for achieving development impacts represented in high living standards and quality of life. Hence, lags in achieving these development results have been demonstrated to be major blockages to achieving sustainable and inclusive development and accelerated growth.

The MTF is a framework to guide implementation by development partners towards establishing the necessary conditions and enabling environments for all to engage in creating the Jamaica we want. In MTF 2024-2027, the National Strategy Objective covers the period up to 2030, and the Medium-Term Sector Strategy Objective covers the period up to 2027. The Medium-Term Sector Strategy Objective states the planned result associated with the implementation of a Sector Strategy in the medium term. Hence, the statement includes a caveat that the intent is to achieve the objective "in part" or "partially". This is due to the allocated period for achieving the development results associated with the objective extending beyond one medium-term period. Hence, the programme (actions) targets for the medium-term will advance the achievement of the Sector Strategy Objective "in part" or "partially". Note: the referenced results are at the output and intermediate outcome levels of the results chain and include process-related results at these levels.

Strategy Outcome

A Strategy Outcome is the intended change in behaviours, systems, institutions, structures, and development environment from the implementation of a strategy.

It is a Strategy articulated in its result format. The Strategy Outcome presents the intent of a strategy achieved.

Sustainable Development Goals (SDGs)

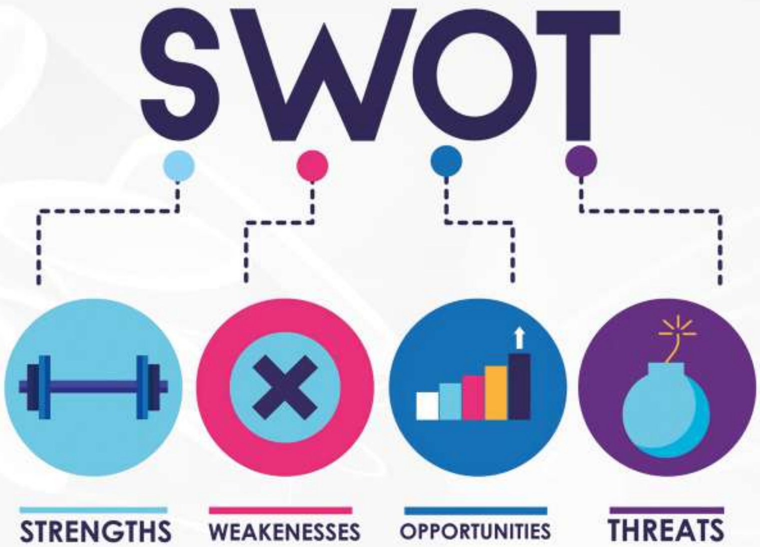
The Sustainable Development Goals (SDGs) are the main development results under the 2030 Agenda for Sustainable Development, which was adopted by the 193 member states of the United Nations (UN) in September 2015. The SDGs will be implemented from January 1, 2016 to December 31, 2030.

The main document on the 2030 Agenda is titled "Transforming Our World: the 2030 Agenda for Sustainable Development". It presents the 17 SDGs, targets and the principles that guide the 2030 Agenda. Among the 17 SDGs is Goal 17 which speaks to the "Means of Implementation / Partnerships for the Goals". The 17 SDGs cover the three dimensions of sustainability – social, economic, and environmental.

The SDGs represent a global commitment to a more equitable world and "leaving no one behind" within and among states. It is centred on five principles or 5 Ps – People, Planet, Peace, Prosperity and Partnership.

SWOT Analysis

A SWOT Analysis is the assessment of the internal and external environment of a process and the identification of the main factors that will promote and/or impede success. It engages an assessment and statement of the **Strengths** and **Weaknesses** that are internal to a process. It also includes an assessment and statement of the **Opportunities** presented from external but related sources/factors, and external **Threats** which when combined with vulnerabilities/limitations (weaknesses), pose different types and levels of risks.



Target

Qualitative statement and/or quantitative value/number that serves as a representation of a development result achieved. Targets are typically tied to a time period and also reflect the direction of the planned change (up or down/increase or decrease, or constant/no change).

Theory of Change

A descriptive statement of integrated hypotheses, which posit that development problems will be addressed or in other words, desired change/planned development results (goals, outcomes, outputs) can be achieved based on the application of a particular change model within a defined change pathway.

Simply put, a Theory of Change (ToC) states that planned change or development results will be achieved if a particular set of evidence-driven development approaches and interventions are implemented. These are implemented within a context of defined and managed resource accumulation and allocation, capacity development, and management of the development environment.

Theories of Change in development planning tend to include a mix of cause-and-effect and associational relationships for advancing the achievement of planned development results. The literature shows gaps in the availability of information and lessons learned to inform the development of ToCs for long-term development plans. The National Development Plan and Sector Plans include implied and incomplete ToCs. A nested ToC that is long-term focused, results- and strategy-based, and policy-driven is being developed.

The medium-term adaptations and applications of the ToC model are based on the existing and projected development situation and country capacity for planning and implementing development action, including consideration for assumptions and anticipated risks. The assumptions in a ToC can include drivers such as development actors and their relationships with the development and planned results, other actors, resources, and power. The availability of resources, potential for capacity building, and the extent to which these are available over time and to whom, should also be defined within the assumptions. There are typically risks that can be matched with assumptions. The efficient and effective delivery of the development factors stated in assumptions, and capacity to effectively manage risks, are determinants of success in translating implementation into planned development results.

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