



**JOB DESCRIPTION & SPECIFICATION**

<b>Job Title:</b>	Director, Planning and Review
<b>Classification/ Grade:</b>	Level 8
<b>Functional Area:</b>	Strategic Services Division - Strategic Planning and Research Branch
<b>Reports to:</b>	Chief Strategic Planning and Research Officer
<b>Manages Directly:</b>	<ul style="list-style-type: none"><li>• Performance Analysts</li></ul>
<b>Manages Indirectly:</b>	N/A

**This document is validated as an accurate and true description of the job as signified below.**

\_\_\_\_\_  
*Employee*

\_\_\_\_\_  
*Date*

\_\_\_\_\_  
*Head of Division/Unit*

\_\_\_\_\_  
*Date*

\_\_\_\_\_  
*Date received in HRM&D Division*

\_\_\_\_\_  
*Date created/revised*

*TAJ's Core Values: Integrity Mutual Respect Professionalism Accountability Customer Centric Teamwork*

*Director, Planning & Review,  
Strategic Services,  
Amended September 2016*

## **JOB PURPOSE**

To initiate and manage the operational planning process; collaborate in the development of the Operation Plans; monitor and analyse the performance of the organization; plan and organize performance reviews at the executive level as well as instigate research.

## **KEY OUTPUTS**

- Operational planning process announced, guided and monitored;
- Operational Plans reviewed and checked for alignment with the supporting budgets;
- Adequate assistance with preparation of the Department's Operational Plan provided;
- Organizational Performance Review system developed and implemented;
- Performance Reviews conducted;
- Statistical data gathered and analysed;
- Report prepared and submitted;
- Human and financial resource managed.

## **KEY RESPONSIBILITY AREAS**

### ***Management and Administrative Duties***

- Provides leadership, support and guidance to all staff to ensure that Branch is effectively managed;
- Guides the development of the Operational and Work Plans with the supporting budget for the Branch ensuring that all the relevant activities to be under taken and required resources are considered and that expenditures are made within the budgetary allocations;
- Plans, coordinates and directs all the activities of the functional areas;
- Establishes and enforces standards and rules of professional conduct for staff within the Branch in order to maintain the highest degree of confidence in its integrity and efficiency;
- Ensures staff is aware of and operates in accordance with all relevant laws and policies;
- Maintains effective working relations with external and internal stakeholders and ensuring that the Branch provides a consistently high level of service;

### ***Technical and Professional Duties***

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- Plans, organizes and guides the operational planning process throughout the Department;
- Develops and submits recommendations on how to accomplish Divisional objectives;
- Ensures the development of Operational Plans and oversees the development of the Units' Work Plans;
- Examines, consolidates and reviews the budgets with the Heads of each Division/Unit to ensure that priorities are aligned to strategic objectives and that these objectives are properly funded;
- Collaborates in the development of the high level Operational Plan;
- Monitors performance results through the design and implementation of reporting systems;
- Collaborates with the Human Resource Unit for monitoring of the development of performance indicators;
- Oversees the collection and maintaining of a database and leads the analysis of external trends to determine impact on the organizations strategic goal;
- Develops and implements management information and programme evaluation systems for effective monitoring of TAJ's plans;
- Establishes, communicates and facilitates the use of appropriate methodologies, tools and techniques;
- Analyses monthly and quarterly reports submitted by each Division/Unit to determine achievements and coordinates island-wide quarterly reviews, recommending and soliciting corrective actions to deviations;
- Directs the collection and analysis of data;
- Guides the assessment of the progress of work in relation to the Operational Plans and recommends that action be taken to address any variances between Operational Plans and Management reports;
- Conducts coaching sessions with staff to ensure that managers and line staff understand their scope;
- Monitors the progress of the implementation of projects that impacts the fulfilment of TAJ's core obligations pertaining to project agreement, such as provision of counterpart resources in case of externally funded projects;

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- Monitors the progress of the development and maintenance of databases to ensure that they are updated with relevant and accurate information and facilitates/creates opportunities consolidation or review of strategic direction;
- Implement established enterprise risk culture within teams/sections that is aligned to TAJ's enterprise risk management objectives;
- Maintains, manages and provides aggregated reports (Sub-risk Register) on ERM activities under the purview of the Section as per required;
- Plans, coordinates and directs the Performance Review Process;

### ***Human Resource Responsibilities***

- Develops and manages the Branch's HR plan that addresses staff requirements and succession planning and liaises with the Chief Strategic Planning and Research Officer;
- Participates in the recruitment of staff for the Branch and ensures that they are aware of and adhere to the policies and procedures of the Department;
- Conducts periodical reviews of supervisees in accordance with the Work Plan;
- Completes final performance assessments and recommends appropriate training and development programmes;
- Initiates and participates in disciplinary proceedings relating to staff members within the Branch and implements corrective measures;
- Performs other related duties assigned by the Chief Strategic Planning and Research Officer.

## **PERFORMANCE STANDARDS**

This job is satisfactorily performed when:

- The operational planning process is announced throughout the Department, properly guided and effectively monitored;
- The divisional Operational Plans with the supporting budgets are reviewed to ensure they are realistic, with proper indicators and compiled by the specified time;
- Adequate assistance is provided with the preparation of the Department's Operation Plan for submission by the stipulated time;
- Organizational Performance Review system is developed and implemented as projected;
- Performance Reviews are organized and executed as planned;
- Statistical data is gathered and analysed and submitted to the relevant Heads;

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- Human resource policies and procedures are administered equitably and without discrimination in accordance with established policies and guidelines and expenditure is planned and made within the budgetary allocation;
- Accurate, comprehensive reports are prepared in the stipulated format and submitted by the due date.

**AUTHORITY TO:**

- Recommend and assist in the formation of organizational goals;
- Recommend amendments to the Division's/ Sections Operation Plans;
- Recommend, implement and monitor planning procedures and projects;

CONTACTS	NATURE OF CONTACT
<i>Internal</i> Divisional/Unit Heads	For technical support
<i>External</i> Planning Unit, Ministry of Finance & Planning Cabinet Office MDAs	For information gathering -do- -do-

**REQUIRED COMPETENCIES**

**(a) Specific Knowledge**

- Excellent knowledge of strategic and operational planning;
- Excellent knowledge of management principles and practices;
- Excellent knowledge of the objectives, operation and functions of Tax Administration Jamaica;
- Comprehensive knowledge of budget planning and budgeting techniques;
- Working knowledge of computer systems and the relevant applications;

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- Working knowledge of statistical tools.

**(b) Required Skills and Specialised Techniques**

- Excellent planning, organizing and time management skills;
- Excellent judgement and decision-making skills;
- Excellent leadership and negotiation skills;
- Excellent communication skills and interpersonal skills;
- Excellent analytical and research skills.

**(c) Qualification and Experience**

- M.Sc. Degree in Public Administration or Management Studies or equivalent;
- Specialized training in strategic and operation planning;
- Certificate in Project Management;
- Five (5) years related work experience with at least three (3) at a senior level.

**WORKING CONDITIONS**

- Normal office environment;
- Irregular working hours at times;
- Travel (30-40%).

## **Vision Statement**

A World-Class Tax Administration

## **Mission Statement**

To collect the Revenue due in an equitable and cost-effective manner, foster voluntary compliance, provide excellent service to our customers through an engaged and empowered staff.

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