



**Meeting of the CARTAC Steering Committee**

*Appendices to  
Programme Coordinator's Report*

**November 12, 2009**

**Radisson Hotel  
Belize City, Belize**

**CARTAC 2008-2010 Phase III**  
**Status of External Funding as of October 2009**

2008-2010 Budget	Actual Commitments As of October 2009		Status	Comments
	Donor Currency	US Dollars		
<b>Total Budget</b>		<b>34,486,398</b>		
IMF		1,423,470	Definite	In-kind contributions
CDB		34,345	Definite	In-kind contributions - 1st quarter 2008
Host Country		300,000	Definite	In-kind contributions
<b>Total in-kind</b>		<b>1,757,815</b>		<b>Total in-kind contributions</b>
<b>Total Cash Budget</b>		<b>32,728,583</b>		Incl. 15% overhead
Canada	Ca\$20,000,000	19,544,613	Definite	Ca\$15mil received
European Union	€ 3,500,000	5,131,000	Definite	Under discussion - Via 10th EDF
European Union	€ 500,000	733,000	Definite	PEFA/PFM special assignment for St. Vincent & Grenadines
UNDP		200,000	Definite	Confirmed
Interest		840,936	Definite	appr 4% interest on total donor budget
CARICOM Countries		760,000	Definite	\$10k for 2008; \$15k for 2009-10
CDB		600,000	Definite	Confirmed
IDB		650,000	Definite	Confirmed - special arrangement - direct payment for training activities
DFID	£455,000	746,200	Definite	confirmed
<b>Total Definite Commitments</b>		<b>29,205,749</b>		<b>Signed agreements and country contributions</b>
Carry-over		3,386,338		Unspent balance from Phase 2 [1].
<b>Total available</b>		<b>32,592,087</b>		
<b>Funding Surplus/ Gap</b>		<b>(136,496)</b>		<b>Cash budget minus definite pledges</b>

NB. US\$426,040.64 interest earned on cost sharing for 2008

**CARTAC - Project ID 00011326**  
**STATUS OF CONTRIBUTIONS PHASE III**  
**(Subject to confirmation by UNDP)**

<b>DONOR</b>	<b>CONTRIBUTIONS PAID</b>
Canada	14,884,781.00
Carry-over from Phase II	3,386,338.00
DFID	654,664.00
IDB	140,524.57
EU (Special assign SVG)	581,395.35
UNDP	100,000.00
Interest for 2008	426,040.64
<b>Sub-Total</b>	<b>20,173,743.56</b>

<b>DONOR</b>	<b>IN KIND CONTRIBUTIONS</b>
IMF	1,423,470.00
Host Country	300,000.00
CDB	34,345.00
<b>Sub-Total</b>	<b>1,757,815.00</b>

<b>DONOR</b>	<b>CONTRIBUTIONS PLEDGED BUT NOT DISBURSED</b>
CIDA	4,659,832.00
CDB	600,000.00
UNDP	100,000.00
DFID	91,536.00
EU (Special assign SVG)	151,604.65
EU/CARICOM	5,131,000.00
IDB	509,475.43
Interest	414,895.36
<b>Sub-Total</b>	<b>11,658,343.44</b>

**CARTAC - RLA/01/011**  
**STATUS OF CONTRIBUTIONS PHASE III**  
**(Subject to confirmation by UNDP)**

**PARTICIPATING COUNTRIES****CONTRIBUTIONS PAID**

Bahamas	25,000.00
Belize	10,000.00
Bermuda	25,000.00
British Virgin Islands	25,000.00
Cayman Islands	25,000.00
Dominica	20,000.00
Dominican Republic	10,000.00
Jamaica	15,000.00
St. Kitts & Nevis	25,000.00
Suriname	25,000.00
Trinidad and Tobago	25,000.00
<b>Sub-Total</b>	<b>230,000.00</b>

**CONTRIBUTIONS NOT PAID**

	<b>2008</b>	<b>2009</b>	<b>2010</b>
Anguilla	10,000.00	15,000.00	15,000.00
Antigua	10,000.00	15,000.00	15,000.00
Bahamas	-	-	15,000.00
Belize	-	15,000.00	15,000.00
Bermuda	-	-	15,000.00
British Virgin Islands	-	-	15,000.00
Cayman Islands	-	-	15,000.00
Dominica	-	5,000.00	15,000.00
Dominican Republic	-	15,000.00	15,000.00
Grenada	10,000.00	15,000.00	15,000.00
Guyana	10,000.00	15,000.00	15,000.00
Jamaica	-	10,000.00	15,000.00
Montserrat	10,000.00	15,000.00	15,000.00
St. Kitts & Nevis	-	-	15,000.00
St. Lucia	10,000.00	15,000.00	15,000.00
St. Vincent & the Grenadines	10,000.00	15,000.00	15,000.00
Suriname	-	-	15,000.00
Trinidad and Tobago	-	-	15,000.00
Turks and Caicos Islands	10,000.00	15,000.00	15,000.00
<b>Sub-Total</b>	<b>80,000.00</b>	<b>165,000.00</b>	<b>285,000.00</b>
<b>Grand Total</b>	<b>34,349,902.00</b>		

**CARTAC - Project ID 00011326**  
**STATUS OF CONTRIBUTIONS PHASE II**  
**(Subject to confirmation by UNDP)**

<b>DONOR</b>	<b>CONTRIBUTIONS PAID</b>
Canada	8,386,816.00
Ireland	199,014.00
DFID	3,107,041.00
World Bank	1,000,000.00
EU	567,376.00
DFID (Macro-fiscal Unit)	845,066.00 *
USAID (OECS Tax Reform)	221,709.00
UNDP	200,000.00
Carry-over from Phase I	2,633,790.00
Interest	660,910.00 <sup>1</sup>
<b>Sub-Total</b>	<b>17,821,722.00</b>

<b>DONOR</b>	<b>CONTRIBUTIONS PLEDGED BUT NOT DISBURSED</b>
EU	165,624.00
<b>Sub-Total</b>	<b>165,624.00</b>

<b>DONOR</b>	<b>IN KIND CONTRIBUTIONS</b>
IMF	3,362,684.00
Host Country	240,000.00
CDB	324,646.00
<b>Sub-Total</b>	<b>3,927,330.00</b>

<sup>1</sup> Interest earned from CIDA and EU contributions for Phase I and 2005 and 2006 for Phase II.

\* Macro-fiscal Unit was completed as of March 31, 2007

**CARTAC - RLA/01/011**  
**STATUS OF CONTRIBUTIONS PHASE II**  
**(Subject to confirmation by UNDP)**

**PARTICIPATING COUNTRIES****CONTRIBUTIONS PAID**

Anguilla	30,000.00
Antigua	20,000.00
Bahamas	30,000.00
Belize	30,000.00
British Virgin Islands	30,000.00
Cayman Islands	30,000.00
Dominica	30,000.00
Dominican Republic	30,000.00
Grenada	30,000.00
Guyana	30,000.00
Jamaica	30,000.00
Montserrat	30,000.00
St. Kitts & Nevis	30,000.00
St. Lucia	30,000.00
St. Vincent & the Grenadines	30,000.00
Suriname	30,000.00
Trinidad and Tobago	30,000.00
Turks and Caicos	20,000.00
<b>Sub-Total</b>	<b>520,000.00</b>

**CONTRIBUTIONS NOT PAID**

	<b>2005</b>	<b>2006</b>	<b>2007</b>
Antigua & Barbuda	-	-	10,000.00
Belize	-	-	-
Dominica	-	-	-
Haiti	10,000.00	10,000.00	10,000.00
Turks and Caicos Islands	-	-	10,000.00
<b>Sub-Total</b>	<b>10,000.00</b>	<b>10,000.00</b>	<b>30,000.00</b>

**Grand Total** **22,484,676.00**

**TRAINING COURSES, CONSULTANTS/EXPERTS, ATTACHMENTS:  
SUMMARY  
May - October 2009**

	<b>Current Report May - October 2009</b>	<b>Previous Report November 2008 - April 2009</b>
<b>International Experts</b>	104 assignments	102 assignments
<b>Regional Experts</b>	52 assignments	33 assignments
<b>Professional Attachments/ Internships</b>	<u>Total 25 persons totalling 653 days</u>  Regional & International attachments <i>MAC - 9 person - 595 days</i> <i>TAX - 12 persons - 30 days</i> <i>CMD - 4 person - 28 days</i>	<u>Total 25 persons totalling 152 days</u>  Regional & International attachments <i>PFM - 1 person - 7 days</i> <i>TAX - 19 persons - 95 days</i> <i>STA - 5 person - 50 days</i>
<b>Training Courses</b>	<u>Total 66</u>  PFM - 17 MFM - 10 FSS - 5 CMD - 9 STA - 7 TAX - 17 MAC - 1	<u>Total 43</u>  PFM - 7 FSS - 9 CMD - 2 STA - 6 TAX - 17 MAC - 2
<b>Number of persons trained</b>	<u>1360 participants</u>  PEM - 572 MFM - 156 FSS - 178 CMD - 83 STA - 89 TAX - 414 MAC - 24	<u>926 participants</u>  PEM - 136 FSS - 299 CMD - 20 STA - 57 TAX - 351 MAC - 63

**CARTAC - UNDP RLA/01/011**  
**Short-Term Experts/Consultants Engaged**  
**May - October 2009**

International Experts/Consultants						
Area	Name	Country/Source	Duration	Purpose	Compensation	Requested By
PFM	John B. Moore	USA	7 days	TA	T,P/D,F	Belize
PFM	Giselle Suire	France	14 days	TA	T,P/D,F	Haiti
PFM	Bill Rafuse	Canada	7 days	TA	T,P/D,F	Jamaica
PFM	Jack Diamond	USA	15 days	TA	T,P/D,F	Montserrat
PFM	Bill Rafuse	Canada	14 days	TA	T,P/D,F	St. Vincent & the Grenadines
PFM	Denis Lepage	Canada	26 days	TA	T,P/D,F	St. Vincent & the Grenadines
PFM	John B. Moore	USA	16 days	TA	T,P/D,F	St. Vincent & the Grenadines
PFM	Denis Lepage	Canada	6 days	TA	T,P/D,F	The Bahamas
MFM	John A Turner	USA	3 days	P	T,P/D,H	Regional
MFM	Oliver Paddison	USA	3 days	P	T,P/D,H	Regional
MFM	James Edward Duggan	USA	10 days	TA	T,P/D,F	St. Kitts & Nevis
MFM	Stanley McRoberts	Canada	15 days	TA	F	St. Vincent & the Grenadines
TAX	Patrick Beynon	Canada	9 days	TA	T,P/D,F	Barbados
TAX	David Garlick	UK	7 days	TA	T,P/D,F	Barbados
TAX	Ruby Howard	Canada	8 days	TA	T,P/D,F	Barbados
TAX	Gloria Reid	Canada	16 days	TA	T,P/D,F	Belize
TAX	Maureen Catherine Kidd	Canada	12 days	TA	T,P/D,F	Belize
TAX	Glen MacNeil	Canada	20 days	TA	T,P/D,F	Belize
TAX	Glen MacNeil	Canada	22 days	TA	T,P/D,F	Belize
TAX	John Gillan	Canada	11 days	TA	T,P/D,F	Canada
TAX	Janet A Forest	USA	12 days	TA	T,P/D,F	Dominica
TAX	Robert William Hugh Taitt	Canada	14 days	TA	T,P/D,F	Dominica
TAX	Jorge Trujillo Puentes	Chile	25 days	TA	T,P/D,F	Dominican Republic
TAX	Robert William Hugh Taitt	Canada	35 days	TA	T,P/D,F	Grenada
TAX	Mark Hillaire Connolly	Canada	25 days	TA	T,P/D,F	Grenada
TAX	Donald Anthony Collins	Canada	16 days	TA	T,P/D,F	Grenada
TAX	Gloria Reid	Canada	15 days	TA	T,P/D,F	Grenada
TAX	Shirley D. Gerry	Canada	17 days	TA	T,P/D,F	Grenada
TAX	Jette Bukjaer Jensen	USA	9 days	TA	T,P/D,F	Regional
TAX	Ruby Howard	Canada	9 days	TA	T,P/D,F	St. Kitts & Nevis
TAX	Gregory Goatbe	Canada	26 days	TA	T,P/D,F	St. Kitts & Nevis
TAX	Mark Hillaire Connolly	Canada	35 days	TA	T,P/D,F	St. Kitts & Nevis
TAX	Eric Hutton	USA	15 days	TA	T,P/D,F	St. Kitts & Nevis
TAX	David Garlick	UK	35 days	TA	T,P/D,F	St. Kitts & Nevis
TAX	Joseph F. Meade	USA	8 days	TA	T,P/D,F	St. Kitts & Nevis
TAX	Gregory Goatbe	Canada	16 days	TA	T,P/D,F	St. Kitts & Nevis
TAX	Janet A Forest	USA	12 days	TA	T,P/D,F	St. Kitts & Nevis
TAX	Glen Schmidt	Canada	40.5 days	TA	T,P/D,F	St. Kitts & Nevis
TAX	Robert William Hugh Taitt	Canada	11 days	TA	T,P/D,F	St. Kitts & Nevis
TAX	John Michael Foers	UK	15 days	TA	T,P/D,F	St. Kitts & Nevis
TAX	Ruby Howard	Canada	8 days	TA	T,P/D,F	St. Lucia
TAX	Joseph F. Meade	USA	10 days	TA	T,P/D,F	St. Lucia
TAX	Maureen Catherine Kidd	Canada	38 days	TA	T,P/D,F	St. Lucia
TAX	Jerome Johnson	USA	17 days	TA	T,P/D,F	St. Lucia
TAX	Mark Hillaire Connolly	Canada	9 days	TA	T,P/D,F	St. Lucia
TAX	Donald Anthony Collins	Canada	10 days	TA	T,P/D,F	St. Vincent & the Grenadines
TAX	Mark Hillaire Connolly	Canada	15 days	TA	T,P/D,F	St. Vincent & the Grenadines
TAX	Maria Mihaly	Canada	16 days	TA	T,P/D,F	St. Vincent & the Grenadines
TAX	Jerome Johnson	USA	7 days	TA	T,P/D,F	St. Vincent & the Grenadines
TAX	Sharon Jane Lovell	USA	46 days	TA	T,P/D,F	St. Vincent & the Grenadines
TAX	John Gillan	Canada	35 days	TA	T,P/D,F	St. Vincent & the Grenadines
TAX	Ronald Thompson	Canada	16 days	TA	T,P/D,F	St. Vincent & the Grenadines

N.C = No Cost T = Travel P/D = Per Diem H = Honorarium F = Fees  
 PFM - Public Finance Management FSS - Financial Supervision Sector  
 STA - Statistics TAX - Taxation; CMD - Capital Markets Development

**CARTAC - UNDP RLA/01/011**  
**Short-Term Experts/Consultants Engaged**  
**May - October 2009**

International Experts/Consultants						
Area	Name	Country/Source	Duration	Purpose	Compensation	Requested By
TAX	David Taitt	Canada	33 days	TA	T,P/D,F	St. Vincent & the Grenadines
TAX	Sharon Jane Lovell	USA	14 days	TA	F	Work At Home - Regional
TAX	Janet A Forest	USA	8 days	TA	F	Work At Home - Regional
TAX	David Taitt	Canada	18 days	TA	F	Work At Home - Regional
TAX	John Gillan	Canada	10 days	TA	F	Work At Home - Regional
TAX	Maria Mihaly	Canada	23 days	TA	F	Work At Home - Regional
FSS	David James Congram	Canada	30 days	TA	T,P/D,F	Anguilla
FSS	David M. Sutherland	United Kingdom	15 days	TA	T,P/D,F	Anguilla
FSS	Michael Hafeman	Canada	9 days	TA	T,P/D,F	Grenada
FSS	Rodney Ross Lester	USA	8 days	TA	T,P/D,F	Grenada
FSS	Rebel A. Cole	USA	4 days	TA	T,P/D,F	Guyana
FSS	Arup Chatterjee	Switzerland	3 days	P	T,P/D	Regional
FSS	Karlis E. Adamsons	Canada	12 days	TA	T,P/D,F	St. Vincent & the Grenadines
FSS	Stuart Charles Levy	USA	22 days	TA	T,P/D,F	The Bahamas
FSS	David James Congram	Canada	28 days	TA	T,P/D, F	Trinidad & Tobago
FSS	John Ernest Fernandes	Canada	25 days	TA	T,P/D, F	Dominica
FSS	Rebel A. Cole	USA	11 days	TA	T,P/D, F	The Bahamas
FSS	Harry Ruthnum	Canada	5 days	TA	T,P/D,F	The Bahamas
FSS	Diane Marie Mendoza	USA	23 days	TA	T,P/D, F	St. Vincent & the Grenadines
MAC	Eliahu S. Kreis	USA	15 days	TA	T,P/D,F	Anguilla
MAC	Mahinder Gill	USA	10 days	TA	T,P/D,F	Anguilla
MAC	Kevin O'Connor	USA	11 days	TA	T,P/D,F	Anguilla
MAC	Eliahu S. Kreis	USA	30 days	TA	T,P/D,F	St. Kitts & Nevis
MAC	Eliahu S. Kreis	USA	16 days	TA	T,P/D,F	St. Lucia
MAC	Toma Gudac	USA	11.5 days	TA	T,P/D,F	St. Kitts & Nevis
MAC	Ali Salehizadeh	USA	14 days	TA	T,P/D,F	St. Vincent & the Grenadines
STA	James Thomas	USA	8 days	TA	T,P/D,F	Anguilla
STA	Yusuf Siddiqi	Canada	10 days	TA	T,P/D,F	Antigua & Barbuda
STA	Yusuf Siddiqi	Canada	13 days	TA	T,P/D,F	Barbados
STA	Pablo Mandler	Israel	20 days	TA	T,P/D,F	Belize
STA	Dale A. Smith	USA	17 days	TA	T,P/D,F	Belize
STA	Bent Thage	Denmark	18 days	TA	T,P/D,F	Montserrat & Grenada
STA	Yusuf Siddiqi	Canada	10 days	TA	T,P/D,F	St. Lucia
STA	Michelle Vachris	USA	10 days	TA	T,P/D,F	The Bahamas
STA	Russel William Freeman	New Zealand	19 days	TA	T,P/D,F	Trinidad & Tobago
STA	Yusuf Siddiqi	Canada	6 days	TA	T,P/D,F	ECCB
CMD	Richard Jack Britton	UK	3 days	TA	T,P/D,F	Antigua & Barbuda
CMD	Samuel C. Thompson Jr.	USA	14 days	TA	T,P/D,F	Barbados
CMD	Samuel C. Thompson Jr.	USA	8 days	TA	T,P/D,F	Jamaica
CMD	Tanis MacLaren	Canada	8 days	TA	T,P/D,F	Jamaica
CMD	Rebel A. Cole	USA	25 days	TA	T,P/D,F	Jamaica
CMD	Tanis MacLaren	Canada	6 days	TA	T,P/D,F	St. Kitts & Nevis
CMD	Andrea Corcoran	USA	37.5 days	TA	T,P/D,F	St. Kitts & Nevis
CMD	Brynjulv Vollan	Norway	19 days	TA	T,P/D,F	St. Kitts & Nevis
CMD	Richard Jack Britton	UK	6 days	TA	T,P/D,F	St. Kitts & Nevis
CMD	Richard Jack Britton	UK	3 days	TA	T,P/D,F	St. Kitts & Nevis
CMD	Richard Jack Britton	UK	19 days	TA	T,P/D,F	The Bahamas
CMD	Samuel C. Thompson Jr.	USA	3 days	TA	T,P/D,F	Trinidad & Tobago
CMD	Tanis MacLaren	Canada	36 days	TA	F	Work At Home - Regional
CMD	Richard Jack Britton	UK	10 days	TA	F	Work At Home - Regional
OTHER	Martin Habicht	Canada	36 days	TA	T,P/D,F	CARTAC
OTHER	CARTAC Review Team	Oxford Policy Mgmt	86 days	TA	T,P/D,F	OTM

N.C = No Cost T = Travel P/D = Per Diem H = Honorarium F = Fees  
PFM - Public Finance Management FSS - Financial Supervision Sector  
STA - Statistics TAX - Taxation; CMD - Capital Markets Development

**CARTAC - UNDP RLA/01/011**  
**Short-Term Experts/Consultants Engaged**  
**May - October 2009**

Regional Experts/Consultants						
Area	Name	Country/Source	Duration	Purpose	Compensation	Requested By
TAX	Haseena Ali	Trinidad & Tobago	5 days	TA	T,P/D,F	Regional
TAX	Desmond R. Wyllis	Dominica	16 days	TA	T,P/D,F	Belize
TAX	Pauline Peters	Grenada	8 days	TA	T,P/D,F	Belize
TAX	Peter Terence Leonard	St. Lucia	16 days	TA	T,P/D,F	Dominica
TAX	Grenville John	St. Vincent & the Grenadines	23 days	TA	T,P/D,F	Dominica & Grenada
TAX	Belinda Charles	Dominica	16 days	TA	T,P/D,F	Grenada
TAX	Kelvin Woodman	Dominica	8 days	TA	T,P/D,F	Grenada
TAX	Norris Anthony Miller	Jamaica	14 days	TA	T,P/D,F	Grenada
TAX	Annette Weekes	Barbados	8 days	TA	T,P/D,F	Grenada
TAX	Desiree Zachariah	Antigua	14 days	TA	T,P/D,F	Grenada
TAX	Sabina Walcott-Denny	Barbados	1 day	TA	H	Regional
TAX	Bevon Sinclair	Jamaica	1 day	TA	H	Regional
TAX	Nayak Ramdahin	Trinidad & Tobago	1 day	TA	H	Regional
TAX	Kelvin Pompey	St. Vincent & the Grenadines	1 day	TA	H	Regional
TAX	Desmond R. Wyllis	Dominica	16 days	TA	T,P/D,F	St. Kitts & Nevis
TAX	Grenville John	St. Vincent & the Grenadines	7 days	TA	T,P/D,F	St. Kitts & Nevis
TAX	Adria Sonson	St. Lucia	7 days	TA	T,P/D,F	St. Vincent & the Grenadines
MFM	Derek Gibbs	Barbados	10 days	TA	F	Barbados
MFM	Ryan Skeete	Cayman Islands	13 days	TA	T,P/D,H	Belize
MFM	Derek Osborne	Bahamas	1 day	TA	T,P/D,H	Regional
MFM	Richard Nunez	Barbados	1 day	TA	T,P/D,H	Regional
MFM	Anthony Manders	Bermuda	1 day	TA	T,P/D,H	Regional
MFM	Elvin Bailey	Nevis	1 day	TA	T,P/D,H	Regional
MFM	Marius St. Rose	St. Lucia	1 day	TA	T,P/D,H	Regional
MFM	Garth Nicholls	St. Kitts & Nevis	1 day	TA	T,P/D,H	Regional
MFM	Ralph Henry	Trinidad & Tobago	1 day	TA	T,P/D,H	Regional
MFM	Arthur Charles Herbert	Barbados	1 day	TA	T,P/D,H	Regional
MFM	Lisa Wade	Barbados	1 day	TA	T,P/D,H	Regional
MFM	Faith Innerarity	Jamaica	1 day	TA	T,P/D,H	Regional
FSS	Desiree Cherebin	Barbados	4 days	TA	T,P/D,H	Anguilla
FSS	Desiree Cherebin	Barbados	5 days	TA	T,P/D, F	Antigua & Barbuda
FSS	Desiree Cherebin	Barbados	12 days	TA	T,P/D,H	Bahamas
FSS	David Wong	Jamaica	1 day	TA	T,P/D,H	Guyana
FSS	Kirk Tyrell	Jamaica	1 day	TA	T,P/D,H	Guyana
FSS	Peter Quinn	Jamaica	1 day	TA	T,P/D,H	Guyana
FSS	Angela Beckford	Jamaica	1 day	TA	T,P/D	Regional
FSS	Nicolette Jenez	Jamaica	1 day	TA	T/P/D	Regional
FSS	Desiree Cherebin	Barbados	12 days	TA	F	Work At Home - Regional
PFM	Annis Horne	St. Vincent & the Grenadines	5 days	TA	T,P/D,F	Anguilla
PFM	Margaret Sivers	Barbados	5 days	TA	T,P/D,F	Grenada
PFM	Ambrose Louis-Obike	Grenada	8 days	TA	T,P/D,F	St. Kitts & Nevis
PFM	Ambrose Louis-Obike	Grenada	8 days	TA	T,P/D,F	St. Vincent & the Grenadines
STA	Edwin St. Catherine	St. Lucia	42 days	TA	H	Antigua & Barbuda St. Lucia
STA	Edwin St. Catherine	St. Lucia	8 days	TA	T,P/D,F	Belize
STA	Peter Pariag	Trinidad & Tobago	13 days	TA	T,P/D,F	Dominica Grenada
STA	Edwin St. Catherine	St. Lucia	31 days	TA	H	St. Vincent & the Grenadines

**CARTAC - UNDP RLA/01/011**  
**Short-Term Experts/Consultants Engaged**  
**May - October 2009**

Regional Experts/Consultants						
Area	Name	Country/Source	Duration	Purpose	Compensation	Requested By
STA	Annette M. McKenzie	Jamaica		TA	T,P/D,F	St. Kitts & Nevis
STA	Hazel Corbin	Antigua & Barbuda	4 days	TA	T,P/D,F	Regional
STA	Edwin St. Catherine	St. Lucia	11 days	TA	T,P/D,H	St. Kitts & Nevis
STA	Maureen Blokland	Curacao	10 days	TA	T,P/D,F	Suriname
STA	Edwin St. Catherine	St. Lucia	7 days	TA	F	Work At Home - Regional
Other	Annette Weeks	Barbados	7 days	TA	T,P/D,F	CARTAC

N.C = No Cost; T = Travel; P/D = Per Diem; H = Honorarium; F = Fees;  
 TA - Technical Assistance; CMD - Capital Markets; PFM - Public Finance  
 Management; MFM-MacroFiscal Management; FSS - Financial Supervision Sector;  
 STA - Statistics, TAX - Taxation; Oth

**CARTAC - UNDP RLA/01/011**  
**Training Activities and Seminars**  
**May - October 2009**

Appendix 3

Area	Course	Beneficiary	Dates	Location	Participants	Number
PFM	Strategic Budgeting	St. Kitts & Nevis	May 1	St. Kitts & Nevis	Permanent Secretaries and Senior PFM Officials	12
PFM	Internal Audit Workshop	Jamaica	May 4-8	Jamaica	Internal Auditors	25
PFM	Public Financial Management (IDB Sponsored)	Barbados	June 15-19	Barbados	PFM Officials	25
PFM	Strategic Budgeting	The Bahamas	June 25-26	The Bahamas	Permanent Secretaries and Department Heads	70
PFM	Strategic Budgeting	Anguilla	July 2	Anguilla	Ministers	3
PFM	Strategic Budgeting	Anguilla	July 3	Anguilla	Permanent Secretaries and Senior PFM Officials	35
PFM	CAPFA Meeting (IDB Sponsored)	Regional	July 6	Barbados	Accountant General, Financial Secretary & Directors	8
PFM	Public Financial Management	Grenada	July 13-17	Grenada	Audit Department & Accountant General's Office	30
PFM	Strategic Budgeting	Barbados	July 30	Barbados	Ministers	16
PFM	Public Financial Management	St. Vincent & the Grenadines	August 24-28	St. Vincent & the Grenadines	Ministry of Finance	30
PFM	Strategic Budgeting	Grenada	September 1	Grenada	Ministers, Permanent Secretaries & Senior Budget Officials	100
PFM	CAPFA Meeting (IDB Sponsored)	Regional	September 3-4	St. Lucia	Accountant General, Financial Secretary & Directors	6
PFM	Strategic Budgeting	St. Vincent & the Grenadines	September 7	St. Vincent & the Grenadines	Permanent Secretaries and Senior PFM Officials	65
PFM	FMIS/Smartstream Users Conference (IDB Sponsored)	Regional	September 14-17	Belize	Accountants, Administrators Analysts, Consultants	48
PFM	Public Financial Management (IDB Sponsored)	St. Kitts & Nevis	September 21-25	St. Kitts & Nevis	PFM Officials	42
PFM	Public Financial Management (IDB Sponsored)	Anguilla	October 12-16	Anguilla	PFM Officials	30
PFM	Introductory Internal Audit Workshop	Jamaica	October 26-30	Jamaica	Internal Auditors	27
					<b>Sub-total</b>	<b>572</b>
MFM	MTFF Review and Allocations	St. Vincent & the Grenadines	May 24-June 5	St. Vincent & the Grenadines	Economic Policy Unit & Budget Director	4
MFM	Public Pension Issues & Reforms	Regional	June 24-26	St. Kitts & Nevis	Permanent Secretaries, Budget Officers & Managers	34
MFM	Macro-Fiscal Management Tools & Activities	Anguilla	July 1-3	Anguilla	Permanent Secretary & Budget Director	3
MFM	Revenue Modeling & Forecasting & MTFF	Grenada	July 6-10	Grenada	Central Bank, Statistics, Budget & Revenue Admin	15
MFM	Revenue Modeling & Forecasting	British Virgin Islands	August 31-Sept 4	British Virgin Islands	Revenue Admin, Finance & Development Planning	10
MFM	Revenue Modeling & Forecasting	Belize	September 7-16	Belize	Budget, Revenue Admin, Central Bank & Statistics	18
MFM	Revenue Modeling & Forecasting & MTFF	Barbados	September 21-30	Barbados	Budget, Economists, Revenue Admin & Central Bank	11
MFM	MTFT & Debt Sustainability Analysis	Belize	October 5-9	Belize	Budget, Revenue Admin, Central Bank, Statistics	21
MFM	LAC Debt Management	Regional	October 19-20	Washington	Accountant Generals & Directors of Debt Offices	9
MFM	Enhancing SOE Oversight & Governance	St. Vincent & the Grenadines	October 26-30	St. Vincent & the Grenadines	Oversight Team, Finance & SFO's State-Owned Ent	31
					<b>Sub-total</b>	<b>156</b>
TAX	Basic Accounting	St. Vincent & the Grenadines	May 1-8	St. Vincent & the Grenadines	Customs and Inland Revenue Officers	27
TAX	Corporate Strategic Business Plan	St. Kitts & Nevis	May 6-8	St. Kitts & Nevis	Customs Officers	23
TAX	Risk Management Workshop	Dominica	May 27-June 3	Dominica	Customs Officers	15
TAX	Customs Meetings	Grenada & Dominica	June 1-5	Dominica	Senior Legal Counsel, Senior Customs Officers	7
TAX	Basic VAT Training	Grenada	June 2-5	Grenada	Customs, VAT & Inland Revenue Departments	50
TAX	Basic VAT Training	Grenada	June 15-19	Grenada	Customs, VAT & Inland Revenue Departments	50
TAX	Train the Trainers Workshop	St. Lucia	June 15-19	St. Lucia	VAT Project Team Staff	16
TAX	Corporate Strategic Business Plan	St. Lucia	June 17-19	St. Lucia	Customs & Inland Revenue Management Teams	20
TAX	Train the Trainers Workshop	St. Kitts & Nevis	June 22-26	St. Kitts & Nevis	VAT Project Team Staff	15
TAX	Risk Assessment Training	Grenada	June 29-July 10	Grenada	VAT Auditors	18

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Area	Course	Beneficiary	Dates	Location	Participants	Number
TAX	Customs Post Clearance Audit Workshop	St. Vincent & the Grenadines	July 27-August 7	St. Vincent & the Grenadines	Customs Officers	20
TAX	SIGTAS Training	Grenada	August 24-28	Grenada	VAT Officers	35
TAX	Corporate Strategic Business Plan	Barbados	September 15-17	Barbados	Customs Management Team	19
TAX	Excise Tax Training	Grenada	September 23-24	Grenada	VAT Auditors	18
TAX	Basic Audit Workshop	St. Lucia	Sept 21-Oct 9	St. Lucia	Customs & Inland Revenue Officers	24
TAX	Customs Meetings	Barbados, Belize, St. Kitts & St. Vincent	October 5-9	St. Kitts & Nevis	Legal Counsels, Senior Customs Officers	17
TAX	CARICOM Tax Treaty Workshop (IDB Sponsored)	Regional	October 12-15	Barbados	Commissioners, Comptrollers & Managers	40
					<b>Sub-total</b>	<b>414</b>
FSS	OECS Accounting Auditing ROSC Dissemination	Regional	May 8	St. Kitts & Nevis	Directors, Commissioners and Examiners	7
FSS	CAIR/CARTAC Workshop & Conference	Regional	June 15-19	Grenada	Regulators, Examiners, Analyst and Directors	54
FSS	CGBS IT Workshop	Regional	June 23-25	Guyana	Examiners, Supervisors and Analyst	28
FSS	Single Regulatory Units Meeting	Regional	June 29	Anguilla	Directors, Regulators and Commissioners	13
FSS	Caribbean Private Pension Supervision Workshop	Regional	October 8-9	Jamaica	Examiners, Supervisors and Analyst, Regulators	76
					<b>Sub-total</b>	<b>178</b>
MAC	Macroeconomic Statistics for Economists	Anguilla, Dominica, St. Lucia & St. Kitts	October 5-9	Anguilla	Economists	24
					<b>Sub-total</b>	<b>24</b>
STA	Consumer Price Indices Workshop	Regional	June 15-26	St. Lucia	Statisticians	32
STA	Data Processing Merchandise Trade Workshop	Dominica	July 20-31	Trinidad & Tobago	Senior Statistical Officer	1
STA	Data Processing Merchandise Trade Workshop	St. Vincent & the Grenadines	July 27-31	Trinidad & Tobago	Senior Statistical Officer	1
STA	CPI Seminar on Producer Price Indices	Jamaica	August 17-21	Washington	Statistician	1
STA	CARTAC/ECCB National Accounts Rebasing Meeting	Regional	October 1-2	St. Kitts & Nevis	Statisticians	17
STA	CPI Price Index Processor System	Regional	October 5-9	St. Kitts & Nevis	Statisticians	12
STA	CARTAC/IMF Monetary & Financial Statistics	Regional	October 19-30	Trinidad & Tobago	Accountants, Analysts, Economists and Statisticians	25
					<b>Sub-total</b>	<b>89</b>
CMD	SEC Spring Institute & Internship Programme	St. Kitts & Nevis	May 1-6	USA	Examiner	1
CMD	Leadership in Financial Management	Jamaica	June 21-26	Canada	Deputy Director and Senior Securities Analyst	2
CMD	Takeovers & Mergers Regional Protocol	Regional	July 23	Barbados	Directors	15
CMD	Regulators Advisory Group Meeting	Regional	July 24	Barbados	Directors	15
CMD	Corporate Securities & Related Aspects of Mergers	Regional	September 23-25	USA	Directors and Legal Officers	12
CMD	Banking & Securities & Crisis Simulation Programme	Jamaica	October 13-16	Canada	Manager	1
CMD	Takeovers & Mergers Regional Protocol	Regional	October 20-21	Trinidad & Tobago	Consultants, Directors, Legal Council & Supervisors	15
CMD	Regulators Advisory Group Meeting	Regional	October 22-23	Trinidad & Tobago	Directors	20
CMD	IOSC Training Programme	Jamaica	October 27-30	Spain	Analyst and Director	2
					<b>Sub-total</b>	<b>83</b>
					<b>Grand Total</b>	<b>1360</b>

**CARTAC - UNDP RLA/01/011**  
**Professional Attachments/Internships**  
**May - October 2009**

<b>Area</b>	<b>Name</b>	<b>Country</b>	<b>Place of Attachment</b>	<b>Duration</b>
TAX	Ernice Boland	Dominica	St. Lucia	2 days
TAX	Barbara Eloi	Dominica	St. Lucia	2 days
TAX	Andy Joseph	Dominica	St. Lucia	2 days
TAX	Wilford Joseph	Dominica	St. Lucia	2 days
TAX	Lawrence Moses	Dominica	St. Lucia	2 days
TAX	Timothy Thomas	Dominica	St. Lucia	2 days
TAX	Ernice Boland	Dominica	St. Vincent & the Grenadines	3 days
TAX	Barbara Eloi	Dominica	St. Vincent & the Grenadines	3 days
TAX	Andy Joseph	Dominica	St. Vincent & the Grenadines	3 days
TAX	Wilford Joseph	Dominica	St. Vincent & the Grenadines	3 days
TAX	Lawrence Moses	Dominica	St. Vincent & the Grenadines	3 days
TAX	Timothy Thomas	Dominica	St. Vincent & the Grenadines	3 days
			<b>Sub-total</b>	<b>30 days</b>
MAC	Tiffany Grosvenor	Barbados	Barbados	92 days
MAC	Derek Leith	Barbados	Jamaica	61 days
MAC	Sherannel Thompson	St. Vincent & the Grenadines	Nevis	7 days
MAC	Kazon Simmons	St. Vincent & the Grenadines	Nevis	7 days
MAC	Sherannel Thompson	St. Vincent & the Grenadines	St. Kitts & Nevis	92 days
MAC	Kazon Simmons	St. Vincent & the Grenadines	St. Kitts & Nevis	92 days
MAC	Shanon Sebastian	Belize	Trinidad & Tobago	60 days
MAC	Jenee Stephens	Jamaica	Trinidad & Tobago	92 days
MAC	Andrina Brackin	St. Vincent & the Grenadines	Trinidad & Tobago	92 days
			<b>Sub-total</b>	<b>595 days</b>
CMD	Kadesha Musgrove-Hanna	The Bahamas	Trinidad & Tobago	4 days
CMD	Charles J. McKenzie	The Bahamas	Trinidad & Tobago	4 days
CMD	Charmaine Donovan	St. Kitts & Nevis	Jamaica	10 days
CMD	Alousia Faisal	St. Kitts & Nevis	Jamaica	10 days
			<b>Sub-total</b>	<b>28 days</b>
			<b>Total</b>	<b>653 days</b>

TAX - Taxation  
MAC - Macroeconomics  
CMD - Capital Markets

**CARTAC - UNDP RLA/01/011**  
**Programme Expenditures and Projections 2008-2010**

		Phase III PD Budget	Phase III Revised Total	2008 Actual Expenditures	2009 Projections	2010 Projections
	Project Staff and Regional Travel	10,501,429	10,567,591	3,040,380	3,993,840	3,533,371
	<i>Short term Experts</i>					
11.06	Budget & Expenditure Expert(s)	970,200	1,375,736	693,916	393,070	288,750
11.08	Tax Administration & Policy Expert(s)	4,770,150	5,461,551	1,807,551	1,921,500	1,732,500
11.10	Customs Expert(s)		1,814,078	428,078	808,500	577,500
11.11	Financial Sector Supervision Expert(s)	1,295,910	1,926,883	540,883	808,500	577,500
11.14	Debt Management Expert(s)	291,060	173,250	-	115,500	57,750
11.16	Financial Programming Expert(s)	970,200	970,121	334,871	288,750	346,500
11.18	MacroFiscal Experts	429,660	551,720		262,970	288,750
11.21	Economic Statistics expert(s)	970,200	1,250,908	442,408	346,500	462,000
11.22	Capital Markets Expert(s)		737,178	101,928	346,500	288,750
11.25	CCF Govt of Grenada VAT		159,067	15,471	143,595	-
15.01	Evaluation	213,675	552,429	36,879	446,250	69,300
019	PROJECT PERSONNEL	20,412,484	25,540,511	7,442,364	9,875,475	8,222,671
039	TRAINING	2,321,550	6,532,635	2,085,885	2,425,500	2,021,250
049	EQUIPMENT	57,750	165,190	61,240	63,525	40,425
059	MISCELLANEOUS/OPERATIONS	115,500	490,247	143,747	173,250	173,250
<b>099</b>	<b>BUDGET TOTAL</b>	<b>22,907,284</b>	<b>32,728,583</b>	<b>9,733,237</b>	<b>12,537,750</b>	<b>10,457,596</b>
	<b>Total Confirmed Cash Contributions</b>		<b>32,592,087</b>			

*Note: The above figures include all overhead charges.*