



**GOVERNMENT OF BERMUDA**  
**MINISTRY OF FINANCE**

**PATI Information Statement**

**Name of Public Authority:** Fiscal Planning & Control Unit (Budget Office)

**Introduction:**

- The general purpose of the Public Access to Information Act 2010;

Under section 2 of the Public Access to Information Act 2012, the purpose of the Act is to-

- (a) give the public the right to obtain access to information held by public authorities to the greatest extent possible, subject to exceptions that are in the public interest or for the protection of the rights of others;
- (b) increase transparency, and eliminate unnecessary secrecy, with regard to information held by public authorities;
- (c) increase the accountability of public authorities;
- (d) inform the public about the activities of public authorities, including the manner in which they make decisions; and
- (e) have more information placed in the public domain as a matter of routine.

- The reason that the public authority has an information statement;

Under Section 5 of the Public Access to Information Act 2010, every public authority<sup>1</sup> in Bermuda must produce an information statement.

- The purposes and aims of the information scheme, and what the public authority hopes to achieve through the information statement;

This statement aims to make it easy to access key information about the Ministry of Finance's activities.

- Summary of what is in the information statement;

Who we are and what we do

What we spend and how we spend it

What our priorities are and how we are doing

<sup>1</sup> Section 1 of the Act defines a public authority to mean an entity listed in column 1 of the Schedule; Sub-clause 12 of Column 1 of Schedule 1 defines a public authority to include every department of the Government.

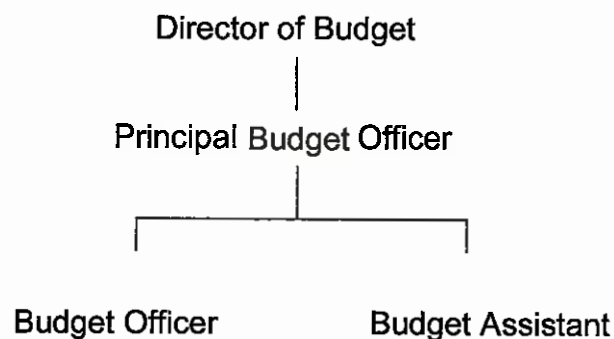
How we make our decisions

Our policies and procedures

Lists and registers – none at this time

The information provided includes: Organisational structure of the Unit; governing legislation; functions and powers; services and programmes; information held - grouped into decision making; administrative or other record; further information (includes financial); contact details for the information officer and locations of the information statement.

### Section A: Structure, Organization and Legislation [s5(1)a]



### Legislation

*Insert governing Legislation:*

#### Governance Framework

- The Employment Act 2000
- Good Governance Act 2011
- The Human Rights Act 1981
- The Interpretation Act 1951
- The Public Service Commission Regulations 2001
- The Public Service (Delegation of Powers) Regulations 2001
- The Public Treasury (Administration and Payments) Act 1969

The primary legislative framework for the unit is as follows:

Appropriation Act

Supplementary Appropriation Act

The Public Treasury (Administration and Payments) Act 1969

Government Fees Act 1965 and the Government Fees Amendment Regulations

Copies of the foregoing Acts and Regulations may be viewed at the following website:

<http://www.bermudalaws.bm/default.aspx>

**Section B: 1) Functions, powers, duties of the Authority [s5(1)b]**

The Fiscal Planning & Control Unit or more commonly known as the Budget Office, is primarily responsible for the management, collection and collation of the Consolidated Fund budget data for both Capital and Current Account Expenditure. This includes:

- Preparation and formulation of the annual budget estimates, utilizing the Medium –Term Expenditure methodologies
- Production and distribution of all Budget Publications utilizing external publication services, Gov't web-site and DCI
- Review and development of the annual Capital Expenditure Plan to support the Government's capital programme priorities
- Monitor and report to the Financial Secretary and the Minister of Finance on the overall Government's financial performance for both expenditures and revenues utilizing the Gov't financial system
- Provide advice to Cabinet and all Government departments/quangos on all budgetary related matters both preparation and control

**Section B: 2) Obligations under PATI Act [s5(1)b]**

*Same for all public authorities*

To provide an **information statement** for the public and promulgate it [s5],

- To provide **other information** to the public so that the public needs only to have minimum resort to the use of the Act to obtain information [s6]. This includes:
  - General information, e.g. activities of the Authority
  - Log of all information requests and their outcome
  - Quarterly expenditure (upon request) [s6(5)]
  - Contracts valued at \$50,000 or more.
- To **respond to information requests** in a timely manner [s12-16]
- To **track information requests**, and provide this data to the Information Commissioner
- To respond to requests from the Information Commissioner [s9]
- To **amend personal information** held by the Authority that it is wrong or misleading following a written request by the person to whom the information relates [s19]

- To conduct an **internal review** if formally requested [part 5]
- To give evidence for **review by the Information Commissioner** [part 6, 47(4)], or for **judicial review** [s49], if required
- To provide an **annual written report** to the Information Commissioner of the status of information requests [s58 (3)].
- **To do anything else as required** under the PATI Act and subsequent Regulations [s59, 60], including:
  - **Fees** for Requests for information
  - Management and maintenance of **records**
  - **Procedures** for administering the Act
- To **train staff and make arrangements** so as to facilitate compliance with the Act [s61]
- To **designate one of its officers** to be the person to whom requests are directed [s62]

**Section C: Services and Programmes [s5(1)c]**

**Services:**

- Services: See Section B above and also:
  - Budget management assistance/guidance
  - Budget Preparation and control training
  - Financial Performance reporting distribution
  - Electronic Departmental Budget Folders management
- Costs: All costs related to the delivery of services set out in Section B above, are set out in the Annual Approved Estimates of Revenue and Expenditure, under Head 10, Cost Center 20020.

Cost of services: \$495K

**Programmes:**

Open-Budget reporting  
 Full implementation of Medium-Term budgeting  
 Mid-Year Performance reporting  
 Monthly Expenditure Performance Certification

**Section D: Records and documents held [s5(1)d]**

Budget Office Control files  
 Electronic/Manual Departmental Files  
 Capital Expenditure Plan  
 Budget Preparation Files

**Section E: Administration (all public access) manuals [s5(1)e]**

**Budget Office Staff Procedural manuals**

- Training Manuals
  - (a) Budget Monitoring & Control
  - (b) Budget Preparation
  - (c) EnterpriseOne (E1)

**Administrative Guidelines**

- Various HR policies and guidance issued by the Department of Human Resources.

**Data Protection Guidelines**

- Computer Security Instructions published by ITO August 1997 [draft?]
- Information Sharing and Data Protection Policy Statement issued by ITO dated 28 January, 1998
- Electronic Records Management System: Government Records Center issued by the Government Archivist.

**Financial Guidelines**

- Financial Instructions issued by the Ministry of Finance.
- Budget Preparation Manual issued by the Ministry of Finance.
- Budget Controls issued by the Ministry of Finance.

**Health and Safety**

- Health and Safety Policy issued by the Cabinet Office.

**Policy Development Guidelines**

- The Legislative Process Guidance Note issued by the Cabinet Office.
- The Preparation of Cabinet Memoranda Guidance Note issued by the Cabinet Office.
- Making Policy Happen in Bermuda Guidance Note issued by the Cabinet Office.

**Other Guidance notes**

- Election Guidance Notes issued by the Cabinet Office.

**Section F: Decision-making documents [s5(1)f]**

- (a) Monthly Performance Reports – indicates both expenditure and revenue positions of all Ministries/Departments
- (b) Ministry of Finance Business Plan
- (c) Ministry of Finance Legislative Agenda
- (d) Capital Expenditure Plan – 6 year expenditure profile of all Government capital projects which exceed \$100,000
- (e) Throne Speech
- \*(e) Pre-Budget Report – outlines the Government’s initial and proposed budget development strategy
- (f) Medium Term Expenditure Framework – 3 year cash limit projections of expenditure and revenue for all ministries
- \*(g) Budget Statement
- \*(h) Approved Estimates of Revenue & Expenditure
- (i) Mid-Year Review – Governments Financial Performance
- \*(j) Consolidated Fund Financial Statements
- (k) Audit Reports
- (k) All Public Sector Collective Bargaining Agreements

\* Currently available on Ministry of Finance web-site

**Section G: The Information officer [s5(1)g]**

*Insert name and contact information:*

Denise Saunders  
 Ministry of Finance  
 Government Administration Building  
 30 Parliament Street  
 Hamilton HM 12  
 Bermuda  
 Tel: 297 7502  
 Email: [dsaunders@gov.bm](mailto:dsaunders@gov.bm)

**Section H: Any Other Information [s5(1)h]**

*Insert any other information that **you think** might be useful for the public to know, so as to decrease requests for information:*

*Not applicable*

**Section I: Any Other Information To be Provided? [s5(1)i]**

*Not applicable*

**Section J: Information Statement: Copies and Updates [s5(2,3,4,5)]**

Every public authority shall update its information statement at least once a year, and make it available for inspection by the public at reasonable times by [s5(1-5), PATI Act]:


**Date Information Statement was updated:** 29<sup>th</sup> June, 2018

**Locations of Information Statement:**

*Confirm copies of Information Statement are available at the following sites:*

|   |   |
|---|---|
| Your principal office: 2nd Floor Government Administration Building   | Y |
| The Bermuda National Library;   | Y |
| The Bermuda Archives;   | Y |
| Available electronically,   | Y |
| Website for public authority (will be posted on website).   | Y |
| Have you published a notice in the Gazette indicating the places where the information statement is available for the public? | Y |
| With the Information Commissioner.  | Y |

**Sign and Date:**

 30/6/2018