

## TERMS OF REFERENCE

Consultancy in diagnoses based on a maturity model to be developed and implemented in the Labor Ministries and Training institutions in LAC.

### **1. Background and Justification**

- 1.1. We work to improve lives in Latin America and the Caribbean. Through financial and technical support for countries working to reduce poverty and inequality, we help improve health and education, and advance infrastructure. Our aim is to achieve development in a sustainable, climate-friendly way. With a history dating back to 1959, today we are the leading source of development financing for Latin America and the Caribbean. We provide loans, grants, and technical assistance; and we conduct extensive research. We maintain a strong commitment to achieving measurable results and the highest standards of increased integrity, transparency, and accountability.
- 1.2. The Social Sector (SCL) is a multidisciplinary team convinced that investing in people is the way to improve lives and overcome the development challenges in Latin America and the Caribbean. Jointly with the countries in the region, the Social Sector formulates public policy solutions to reduce poverty and improve the delivery of education, work, social protection, and health services. The objective is to advance a more productive region, with equal opportunities for men and women, and greater inclusion of the most vulnerable groups.
- 1.3. Labor intermediation Services (LIS) as well as Labor Training Institutions (LTI) and Social Security Institutions (SSI) of the Region, are looking for ways to promote efficiency and effectiveness in their work. One of the alternatives available is the possibility to adopt new technologies available in the market to improve their processes and services. This has created a need for advice in the correct way to implement new technologies as well as in the decision of which technologies fit best their needs. To help the promotion of technologies in the region, the Labor Markets Division (SCL/LMK) will promote the knowledge generation and dissemination regarding opportunities of new technologies and its possible uses by LIS, LTI and SSI, while promoting the sharing of data to further promote effectiveness of services.
- 1.4. To meet this goal, it is necessary to hire Consulting Services, led by a team of specialists with extensive knowledge and vast experience in this kind of projects, and especially in its diagnosis and execution phase.

### **2. Objectives**

- 2.1. The objective of this consultancy is to hire a consulting firm (henceforth “Provider”) to support in the diagnosis of maturity model for the interested Labor Ministries and training institutions in the region in which the Bank is working. The objective is to evaluate digital maturity through video call meetings with LIS, LTI and SSI officials, review of documents and execution and some field visits to evaluate final diagnosis.

### **3. Scope of Services**

- 3.1. The provider is expected to carry out video call meetings, document reviews and some field visits. Having collected the necessary information, the provider is expected to provide a diagnosis document on digital maturity for each LIS, PES and SSI evaluated.

### **4. Key Activities**

- 4.1. **Collect information from LTI, PES and SSI for further diagnosis.** The provider will carry out video call meetings with LIS, LTI, and SSI officials, document reviews, some field visits and other ways to collect necessary information, in order to gather all the necessary information to generate a digital maturity diagnosis for these institutions;
- 4.2. **An analysis of all information and data collected.** The provider will be in charge of an analysis of all the collected data and information in order to elaborate a diagnosis for each institution evaluated. This analysis will focus on the effectiveness and efficiency of information systems and process management, in addition to the use of digital tools;
- 4.3. **Prepare a diagnostic document based on the maturity model.** The provider will be in charge of presenting a diagnostic document based on the aforementioned analysis. The objective of this diagnosis is to evaluate the digital maturity model of the institutions. This will improve the efficiency and effectiveness of these institutions according to their levels

### **5. Expected Outcome and Deliverables**

- 5.1. **Work Plan approved by the IDB team:** The first deliverable will be a work plan laying out the phases of the project and detailing the project schedule.
- 5.2. **Document on the information and data collected:** The second deliverable will be a report showing all the meetings, field visits, documents analyzed, and all other actions carried out to collect information and data.
- 5.3. **Document based on a digital maturity model diagnosis:** The third and final deliverable will be the diagnosis.

### **6. Project Schedule and Milestones**

- 6.1. It is expected that the project will take x months from the date of sign-off (including all legal reviews). Kickoff and program initiation in Week x; report 1 in Week x; and in Week x the Final Report.

### **7. Profile of the consultants – Work Team.**

The technical team will be integrated as a minimum by the following experts:

#### **7.1. Specialist in Data Science:**

- 7.1.1. Title/Academic level: Professional in the fields of computer engineering, technology,

information systems or related.

7.1.2. Professional experience: At least 5 (five) years of performance in IT areas, with at least 3 (three) years of experience leading the implementation of projects related to Data Science.

## 7.2. **Specialist in Digital Transformation:**

7.2.1. Title/Academic level: Professional in the fields of social or human sciences. Preferably, with a postgraduate degree.

7.2.2. Professional experience: At least 5 (five) of experience in digital transformation, automation of processes and technologies, or related implementations

## 7.3. **Specialist in advanced software development:**

7.3.1. Title/Academic level: Professional in the fields of computer engineering, technology, information systems or related.

7.3.2. Professional experience: At least 8 (eight) years of performance in IT areas, with at least 5 (five) years of experience leading the implementation of projects that applied advanced software development.

## 8. **Reporting Requirements**

8.1. Reports shall be developed in PDF in either English or Spanish.

## 9. **Acceptance Criteria**

9.1. All consultancy deliverables received will be revised by the IDB team, which will provide comments in written or verbal form. The deliverables will be approved once the comments of the IDB team are incorporated to the satisfaction of the IDB consultancy supervisor.

## 10. **Supervision and Reporting**

10.1. The Provider will report to Manuel Urquidi, Labor Markets Lead in Operations. The deliverables shall be sent to [manuelu@iadb.org](mailto:manuelu@iadb.org) , copying [enzoh@iadb.org](mailto:enzoh@iadb.org)

## 11. **Schedule of Payments**

11.1. The Provider will be remunerated according to the following schedule:

- 1) Approval of work plan: 20%
- 2) Approval of Document on information and data collected: 30%.
- 3) Approval of Document on diagnosis: 50%.

11.2. Each of the payments will be made against the delivery of an official invoice. This invoice should describe the services and should be made out to the "Inter-American Development Bank, Washington, D.C.", and should also include the contract number, payment number, and value.

11.3. The IDB Official Exchange Rate indicated in the RFP will be applied for necessary conversions of local currency payments.

## **Consultancy in analysis and recommendations to improve information systems**

**Background of this search:** to improve efficiency and effectiveness in institutions in charge of training, job placement and social security. LMK is looking for an expert in digital solutions and information systems in public and private institutions.

**The team's mission:** The Social Sector (SCL) is a multidisciplinary team convinced that investing in people is the way to improve lives and overcome the development challenges in Latin America and the Caribbean. Jointly with the countries in the region, the Social Sector formulates public policy solutions to reduce poverty and improve the delivery of education, work, social protection, and health services. The objective is to advance a more productive region, with equal opportunities for men and women, and greater inclusion of the most vulnerable groups.

**What you'll do:** The consultant will be in charge of preparing an extensive list of existing digital tools alternatives in the market, for each Labor Intermediation Systems (LIS), Labor Training Institutions (LTI) and Social Security Institutions for their information systems to become intersectoral, predictive and interoperable

- Identify all existing digital tools in the market for mentioned institutions. Describe in detail of the digital solutions available in the technology market for Labor Market for information systems.
- Analyze each digital tool according to the level of maturity of each institution. Indicate which digital tool corresponds to continue advancing towards an intersectoral, predictive and interoperable organization
- A technical document on the digital tools available for SIL, LTI and SSI and with all the recommendations according to their information systems level of digital maturity.

### **Deliverables and Payments timeline:**

Consultant will deliver the following products:

- **Product 1:** Work plan and schedule.
- **Product 2:** First report on digital tools available.
- **Product 3:** Second report is a Technical document.

### **Payment schedule:**

No	Detail	% of payment	Term
1	Work plan and schedule, Product 1	10	Upon signing the contract
2	First report Product 2	20	To the presentation and approval of the first report
3	Second report Product 3	20	To the presentation and approval of the second report

### **What you'll need:**

#### **Citizenship:**

- You are a citizen of one of our 48-member countries.

**Consanguinity:** You have no family members (up to fourth degree of consanguinity and second degree of affinity, including spouse) working at the IDB Group.

**Education:** University degree in areas of computer engineering, technology, information systems or related branches. Preferably postgraduate level.

**Experience:** Extensive in the knowledge and analysis of digital tools and operational management processes and efficiency in public and private institutions.

**Languages:** Spanish and English.

**Core and Technical Competencies:** Ability to analyze and experience in the implementation of technological projects

### **Opportunity Summary:**

- Type of contract and modality: Products and External Services Consultant (PEC), lump sum.
- Length of contract: 6 months
- Starting date:
- Location: External consultancy
- Responsible person: Sectoral specialist of Labor Markets, Manuel Urquidi (manuelu@iadb.org)
- Requirements: You must be a citizen of one of the [IDB's 48 member countries](#) and have no family members currently working at the IDB Group.

**Our culture:** Our people are committed and passionate about improving lives in Latin-America and the Caribbean, and they get to do what they love in a diverse, collaborative and stimulating work environment. We are the first Latin American and Caribbean development institution to be awarded the EDGE certification, recognizing our strong commitment to gender equality. As an employee you can be part of internal resource groups that connect our diverse community around common interests.

Because we are committed to providing equal opportunities in employment, we embrace diversity based on gender, age, education, national origin, ethnic origin, race, disability, sexual orientation, and religion. We encourage women, Afro-descendants and persons of indigenous origins to apply.

**About us:** At the IDB, we're committed to improving lives. Since 1959, we've been a leading source of long-term financing for economic, social, and institutional development in Latin America and the Caribbean. We do more than lending though. We partner with our 48-member countries to provide Latin America and the Caribbean with cutting-edge research about relevant development issues, policy advice to inform their decisions, and technical assistance to improve on the planning and execution of projects. For this, we need people who not only have the right skills, but also are passionate about improving lives.

**Our team in Human Resources carefully reviews all applications.**

## **Consultancy in analysis of best practices of how to include usability by PwD in information services**

**Background of this search:** to improve efficiency and effectiveness in institutions in charge of training, job placement and social security. LMK is looking for a social scientist with experience in technology adoptions in public and private institutions, and in the use of digital platforms by vulnerable groups.

**The team’s mission:** The Social Sector (SCL) is a multidisciplinary team convinced that investing in people is the way to improve lives and overcome the development challenges in Latin America and the Caribbean. Jointly with the countries in the region, the Social Sector formulates public policy solutions to reduce poverty and improve the delivery of education, work, social protection, and health services. The objective is to advance a more productive region, with equal opportunities for men and women, and greater inclusion of the most vulnerable groups.

**What you’ll do:** The consultant will be in charge of preparing knowledge documents based on best practices of how to include usability by PwD in information services.

- Identify successful experiences for best practices on how to include usability by PwD in information services
- Analyze successful experiences for best practices on how to include usability by PwD in information services.
- A proposal on possible policies to promote the use of platforms for the training of women in nontraditional sectors.

### **Deliverables and Payments timeline:**

Consultant will deliver the following products:

- **Product 1:** Work plan and schedule.
- **Product 2:** First report on identification of experiences for best practices.
- **Product 3:** Second report on an analysis of experiences for best practices.
- **Product 4:** Third report on possible policies.

### **Payment schedule:**

No	Detail	% of payment	Term
1	Work plan and schedule, Product 1	10	Upon signing the contract
2	First report Product 2	30	To the presentation and approval of the first report
3	Second report Product 3	30	To the presentation and approval of the second report
4	Third report Product 4	30	To the presentation and approval of the third report

### **What you’ll need:**

#### **Citizenship:**

- You are a citizen of one of our 48-member countries.

**Consanguinity:** You have no family members (up to fourth degree of consanguinity and second degree of affinity, including spouse) working at the IDB Group.

**Education:** University degree in areas of social sciences. Preferably postgraduate level.

**Experience:** Relevant on conceptualization of experiences in technology adoptions in public and private institutions. Experience with vulnerable groups and digital solutions.

**Languages:** Spanish and English.

**Core and Technical Competencies:** Qualitative analysis capabilities and knowledge of technological tools.

### **Opportunity Summary:**

- Type of contract and modality: Products and External Services Consultant (PEC), lump sum.
- Length of contract: 6 months
- Starting date:
- Location: External consultancy
- Responsible person: Sectoral specialist of Labor Markets, Manuel Urquidi (manuelu@iadb.org)
- Requirements: You must be a citizen of one of the [IDB's 48 member countries](#) and have no family members currently working at the IDB Group.

**Our culture:** Our people are committed and passionate about improving lives in Latin-America and the Caribbean, and they get to do what they love in a diverse, collaborative and stimulating work environment. We are the first Latin American and Caribbean development institution to be awarded the EDGE certification, recognizing our strong commitment to gender equality. As an employee you can be part of internal resource groups that connect our diverse community around common interests. Because we are committed to providing equal opportunities in employment, we embrace diversity based on gender, age, education, national origin, ethnic origin, race, disability, sexual orientation, and religion. We encourage women, Afro-descendants and persons of indigenous origins to apply.

**About us:** At the IDB, we're committed to improving lives. Since 1959, we've been a leading source of long-term financing for economic, social, and institutional development in Latin America and the Caribbean. We do more than lending though. We partner with our 48-member countries to provide Latin America and the Caribbean with cutting-edge research about relevant development issues, policy advice to inform their decisions, and technical assistance to improve on the planning and execution of projects. For this, we need people who not only have the right skills, but also are passionate about improving lives.

**Our team in Human Resources carefully reviews all applications.**



## **Consultancy in one technical note on best practices in the design and implementation of digital solutions**

**Background of this search:** to improve efficiency and effectiveness in institutions in charge of training, job placement and social security. LMK is looking for a social scientist with experiences in technology adoptions in public and private institutions.

**The team's mission:** The Social Sector (SCL) is a multidisciplinary team convinced that investing in people is the way to improve lives and overcome the development challenges in Latin America and the Caribbean. Jointly with the countries in the region, the Social Sector formulates public policy solutions to reduce poverty and improve the delivery of education, work, social protection, and health services. The objective is to advance a more productive region, with equal opportunities for men and women, and greater inclusion of the most vulnerable groups.

**What you'll do:** The consultant will be in charge of preparing one technical note based in an analysis of best practices of learned lessons in the design and implementation of digital solutions.

- Identify experiences in the design and implementation of information systems.
- Analyze all the experiences gathered during the design and implementation phase, in order to establish challenges, failures, successes and processes to be recommended.
- One technical note focused on the design phase and on the information systems implementation phase, summarizing best practices for these phases. These documents are expected to establish steps to be followed according to different levels of digital maturity of each institution.

### **Deliverables and Payments timeline:**

Consultant will deliver the following products:

- **Product 1:** Work plan and schedule.
- **Product 2:** First report on identification and analysis of experiences.
- **Product 3:** Second report on one technical note.

### **Payment schedule:**

No	Detail	% of payment	Term
1	Work plan and schedule, Product 1	10	Upon signing the contract
2	First report Product 2	35	To the presentation and approval of the first report
3	Second report Product 3	55	To the presentation and approval of the second report

### **What you'll need:**

**Citizenship:**

- You are a citizen of one of our 48-member countries.

**Consanguinity:** You have no family members (up to fourth degree of consanguinity and second degree of affinity, including spouse) working at the IDB Group.

**Education:** University degree in areas of social sciences. Preferably postgraduate level.

**Experience:** Relevant on conceptualization of experiences in technology adoptions in public and private institutions.

**Languages:** Spanish and English.

**Core and Technical Competencies:** Capacity of qualitative analysis and interaction with teams and change management.

**Opportunity Summary:**

- Type of contract and modality: Products and External Services Consultant (PEC), lump sum.
- Length of contract: 6 months
- Starting date:
- Location: External consultancy
- Responsible person: Sectoral specialist of Labor Markets, Manuel Urquidi (manuelu@iadb.org)
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**Our team in Human Resources carefully reviews all applications.**

## **TERMS OF REFERENCE**

Consultancy in advisory services to support the implementation of technologies in at least 4 countries of LAC

### **1 Background and Justification**

- 1.1 We work to improve lives in Latin America and the Caribbean. Through financial and technical support for countries working to reduce poverty and inequality, we help improve health and education, and advance infrastructure. Our aim is to achieve development in a sustainable, climate-friendly way. With a history dating back to 1959, today we are the leading source of development financing for Latin America and the Caribbean. We provide loans, grants, and technical assistance; and we conduct extensive research. We maintain a strong commitment to achieving measurable results and the highest standards of increased integrity, transparency, and accountability.
- 1.2 The Social Sector (SCL) is a multidisciplinary team convinced that investing in people is the way to improve lives and overcome the development challenges in Latin America and the Caribbean. Jointly with the countries in the region, the Social Sector formulates public policy solutions to reduce poverty and improve the delivery of education, work, social protection, and health services. The objective is to advance a more productive region, with equal opportunities for men and women, and greater inclusion of the most vulnerable groups.
- 1.3 Labor intermediation Services (LIS) as well as Labor Training Institutions (LTI) and Social Security Institutions (SSI) of the Region, are looking for ways to promote efficiency and effectiveness in their work. One of the alternatives available is the possibility to adopt new technologies available in the market to improve their processes and services. This has created a need for advice in the correct way to implement new technologies as well as in the decision of which technologies fit best their needs. To help the promotion of technologies in the region, the Labor Markets Division (SCL/LMK) will promote the knowledge generation and dissemination regarding opportunities of new technologies and its possible uses by LIS, LTI and SSI, while promoting the sharing of data to further promote effectiveness of services.
- 1.4 To meet this goal, it is necessary to hire Consulting Services, led by a team of specialists with extensive knowledge and vast experience in this kind of projects, and especially in its implementation phase.

### **2 Objectives**

- 2.1 The objective of this consultancy is to hire a consulting firm (henceforth “Provider”) to provide expert advisor in the implementation of technologies for the interested Labor Ministries, training and job placement Institutions in the region in which the Bank is working. As part of this services the firm will analyze existing technological alternatives in the market for institutions in charge of training and job placement according to their level of maturity of digital adoption and propose

which are the best fit for institutions and to generate advice through socialization trips, review of documents for hiring, advice in fields related to implementation of technologies.

### **3 Scope of Services**

3.1 The provider is expected to carry out socialization trips to support the management and implementation of technologies in four countries of the Region. In addition, the provider is expected to provide advice to decision-making teams on technology matters.

### **4 Key Activities**

4.1 **Presence of experts to support in the implementation of information systems.** The provider will carry out up to 4 socialization trips, project management support, conflict management, advice on change management and presentations in four countries where the Bank is implementing technologies;

4.2 **Support through technical advice the implementation of technologies in training and job placement institutions.** The provider will be in charge of advising policy makers with up to 200 hours of review of documents, analysis on potential technology providers; analysis on the preparation, design and revision of terms of reference; analysis on terms of contracts with technological suppliers; budget analysis to carry out the technological execution by the suppliers and interactions with various stakeholders that require answers based on analysis, advice and meetings.

### **5 Expected Outcome and Deliverables**

5.1 **Work Plan approved by the IDB team:** The first deliverable will be a work plan laying out the phases of the project and detailing the project schedule.

5.2 **Document based on an implementation plan.** The second deliverable will be an implementation plan to improve and execute, in four countries of the Region, technologies in training and job placement institutions.

5.3 **Document based on support for projects implementation:** The third deliverable will be a description and a systematic analysis of the support provided in the 4 countries based on technological advices.

### **6 Project Schedule and Milestones**

6.1 It is expected that the project will take x months from the date of sign-off (including all legal reviews). Kickoff and program initiation in Week x; report 1 in Week x; and in Week x the Final Report.

### **7 Profile of the consultants – Work Team.**

The technical team will be integrated as a minimum by the following experts:

### **7.1 Specialist in Data Science:**

7.1.1 Title/Academic level: Professional in the fields of computer engineering, technology, information systems or related.

7.1.2 Professional experience: At least 5 (five) years of performance in IT areas, with at least 3 (three) years of experience leading the implementation of projects related to Data Science.

### **7.2 Specialist in Digital Transformation:**

7.2.1 Title/Academic level: Professional in the fields of social or human sciences. Preferably, with a postgraduate degree.

7.2.2 Professional experience: At least 5 (five) of experience in digital transformation, automation of processes and technologies, or related implementations

### **7.3 Specialist in advanced software development:**

7.3.1 Title/Academic level: Professional in the fields of computer engineering, technology, information systems or related.

7.3.2 Professional experience: At least 8 (eight) years of performance in IT areas, with at least 5 (five) years of experience leading the implementation of projects that applied advanced software development.

## **8 Reporting Requirements**

8.1 Reports shall be developed in PDF in either English or Spanish.

## **9 Acceptance Criteria**

9.1 All consultancy deliverables received will be revised by the IDB team, which will provide comments in written or verbal form. The deliverables will be approved once the comments of the IDB team are incorporated to the satisfaction of the IDB consultancy supervisor.

## **10 Supervision and Reporting**

10.1 The Provider will report to Manuel Urquidi, Labor Markets Lead in Operations. The deliverables shall be sent to [manuelu@iadb.org](mailto:manuelu@iadb.org) , copying [enzoh@iadb.org](mailto:enzoh@iadb.org)

## **11 Schedule of Payments**

11.1 The Provider will be remunerated according to the following schedule:

- 1) Approval of work plan: 20%.
- 2) Approval of the Implementation Plan: 40%
- 3) Approval of Document on support for projects implementation: 40%.

- 11.2 Each of the payments will be made against the delivery of an official invoice. This invoice should describe the services and should be made out to the “Inter-American Development Bank, Washington, D.C.”, and should also include the contract number, payment number, and value.
- 11.3 The IDB Official Exchange Rate indicated in the RFP will be applied for necessary conversions of local currency payments.