

BA-T1104-P001

TERMS OF REFERENCE

Consultancy to support the baseline mapping exercise in Barbados

BARBADOS

BA-T1104

<https://www.iadb.org/en/whats-our-impact/BA-T1104>

Support to social policies in Barbados

1. Background and Justification

- 1.1.** The objective of this Technical Cooperation (TC) The overall objective is to support the Government of Barbados in strengthening the effectiveness and efficiency of social policies and sustainability of social security in Barbados. The specific objective is to: (i) design a Survey of Living Conditions to gather and systematize formation related to targeted social and labor programs and (ii) conduct studies necessary to comply with the conditions committed in the BA-L1060 policy program. This TC envisages gathering and generating statistical data for the analysis of targeted social and labor policies.
- 1.2.** The Government of Barbados and the Bank need information on the behavior and characteristics of the population to choose design and implement the most effective targeted social and labor policies. The urgency for such is increasing as the Bank extends, for example, conditional cash programs, beyond Jamaica to other countries in the Caribbean region without the benefit of adequate information. This crucial information can be provided, in part, by household surveys. In addition to reducing poverty, private sector development requires employer surveys to improve the quality and reliability of the analysis of labor market and education issues, like mismatch for labor supply and demand and the effectiveness of training programs.
- 1.3.** To achieve the proposed goal of Component 1, this consultancy is looking for a firm that can conduct a baseline mapping exercise to assess the existing gap in information on targeted social and labor policies in Barbados. The activities included a comprehensive review of the existing targeted social and labor programs in each country and a review of statistical information available.

2. Objectives

- 2.1.** The overall objective of this consulting work is to review and systematize the information on targeted social and labor programs in Barbados and to consolidate and assess the household-level information available.

3. Scope of Services

- 3.1.** The consulting firm will provide a scope of services for each phase including multiple elements

listed below:

- 3.1.1. The consulting firm will participate in the planning of the project and ensure the follow-up of its implementation and of all related activities to achieve the expected results.
- 3.1.2. The consulting firm will ensure that the planned activities are carried out in a timely manner, and in constant compliance with Bank policies and procedures.

4. Key Activities

4.1. Literature review on targeted social and labor policies and programs in Barbados.

- 4.1.1. Policies: review all the policies adopted by the Governments of the Region focused on targeted programs addressing social and labor issues (education, health, safety nets, unemployment).

4.2. Analysis of their coherence, coordination, sustainability, and potential impact.

- 4.2.1. Institutions: identify all the public institutions devoted to the design of targeted social and labor policies and programs and the provision of such services. Perform a brief institutional assessment (human resources, budget, etc.). Identify non-profit institutions that play a significant role in the area of provision of social and labor services.

- 4.2.2. Programs and projects: Analysis of the programs and projects focused on social and labor issues. The dimensions to be considered are:

- 4.2.2.1. Institutional framework;
- 4.2.2.2. Types of intervention;
- 4.2.2.3. Beneficiaries (number and characteristics);
- 4.2.2.4. Resources public, private, and donors (budget and human resources) and funding, including sustainability of funding;
- 4.2.2.5. Geographical distribution at the highest disaggregation possible;
- 4.2.2.6. Evaluation strategy, if any, and expected outcomes.

- 4.2.3. Data gathering and analysis:

- 4.2.3.1. Review of the institutional arrangements existing for collection, systematization, and analysis of household surveys in general and data collected with the specific objective of assessing the effectiveness of targeted social and labor programs and projects. Assess the limitations in the existing system.
- 4.2.3.2. Identify and characterize the existing household surveys (and other surveys that collect relevant information). It includes identifying any methodological shortcomings as well as gaps in the information gathered.
- 4.2.3.3. Review of the planned activities in data collection by the Government and donor community. Meet with government officials and the donor community to elaborate an exhaustive list of data collection activities with the planned timeline and identify potential collaboration.
- 4.2.3.4. Collect those databases that are currently available.

5. Expected Outcome and Deliverables

5.1. This consultation must submit the following products. All these products must be approved to be considered final products.

- Product 1: Work plan with timetable
- Product 2: Document presenting the results of the baseline analysis, highlighting cross-cutting characteristics and areas of improvement. The document should include as annex country-specific reports (in electronic file).
- Product 3: Databases and Power Point Presentation summarizing the main results.

6. Project Schedule and Milestones

| Deliverables | Timeframe |
|--------------------------------------|--|
| Submission and approval of Product 1 | One week after the signature of the contract |
| Submission and approval of Product 2 | Three months after the signature of the contract |
| Submission and approval of Product 3 | Six months after the signature of the contract |

7. Reporting Requirements

7.1. Every report must be submitted to the Bank in an electronic file. The report should include the cover, main document, and all annexes. This file must also be in an electronic format used by the Bank, such as one of the MS Office, JPG and/or TIFF formats. ZIP files (compressed) will not be accepted as final reports due to the regulations of the Bank File Management Section.

8. Acceptance Criteria

8.1. Dulce Baptista, Senior Operations Specialist of the Labor Markets Division of the Bank, and Luis Tejerina, Sector Lead Specialist of the Social Protection and Health Division of the Bank, are authorized to accept the work.

9. Supervision and Reporting

9.1. The consulting firm will be reporting to Dulce Baptista and Luis Tejerina, according to the different milestones or when one of the parties deems it necessary, who will give comments to any reports, approve reports, documents, and work, and give comments or any instructions for changes. It shall be the consulting firm’s responsibility to ensure that such reports are submitted to the Bank. The frequency of communication will depend on the need for comments and approvals agreed upon at the beginning of the consultancy. It will be the responsibility of the Firm to ensure that such meetings take place and reports are submitted to the Bank.

10. Schedule of Payments

10.1. Payment terms will be based on project milestones or deliverables. The Bank does not expect to make advance payments under consulting contracts unless a significant amount of travel is required. The Bank wishes to receive the most competitive cost proposal for the services described herein.

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

| No | Detail | % |
|-------|--------------------|------|
| 1 | First Deliverable | 10 |
| 2 | Second Deliverable | 50 |
| 3 | Third Deliverable | 40 |
| TOTAL | | 100% |

BA-T1104-P002

TERMS OF REFERENCE

Consultancy to support the Design of the Survey of Living Conditions in Barbados

BARBADOS

BA-T1104

<https://www.iadb.org/en/whats-our-impact/BA-T1104>

Support to social policies in Barbados

1. Background and Justification

- 1.1.** The objective of this Technical Cooperation (TC) The overall objective is to support the Government of Barbados in strengthening the effectiveness and efficiency of social policies and sustainability of social security in Barbados. The specific objective is to: (i) design a Survey of Living Conditions to gather and systematize formation related to targeted social and labor programs and (ii) conduct studies necessary to comply with the conditions committed in the BA-L1060 policy program. This TC envisages gathering and generating statistical data for the analysis of targeted social and labor policies.
- 1.2.** The Government of Barbados and the Bank need information on the behavior and characteristics of the population to choose design and implement the most effective targeted social and labor policies. The urgency for such is increasing as the Bank extends, for example, conditional cash programs, beyond Jamaica to other countries in the Caribbean region without the benefit of adequate information. This crucial information can be provided, in part, by household surveys. In addition to reducing poverty, private sector development requires employer surveys to improve the quality and reliability of the analysis of labor market and education issues, like mismatch for labor supply and demand and the effectiveness of training programs.
- 1.3.** The objective of Component 2 is to relax the constraint of lack of data for policy and program design and evaluation by gathering and systematizing information related to targeted social and labor programs. To achieve the proposed goal of Component 2, this consultancy is looking for a firm that can support the Design of the Survey of Living Conditions in Barbados helping the team with instrument design, sampling design, and pre-testing of the survey instrument.

2. Objectives

- 2.1.** The overall objective of this consulting work is to support the design of the appropriate instruments and the design of the sampling framework for the household surveys to be conducted under this TC. Also, the consultant will provide inputs to the quality control process for the field work.

3. Scope of Services

- 3.1. The consulting firm will provide a scope of services for each phase including multiple elements listed below.
 - 3.1.1. The consulting firm will participate in the planning of the project and ensure the follow-up of its implementation and all related activities to achieve the expected results.
 - 3.1.2. The consulting firm will ensure that the planned activities are carried out in a timely manner, and in constant compliance with Bank policies and procedures.

4. Key Activities

- 4.1. Review and comment on the results obtained from the Baseline Mapping Exercise financed by this TC.
- 4.2. Based on the information collected in Component 1, elaborate a report on the information required to be collected to fulfill the objective of the TC of providing information for evidence-based social policymaking.
- 4.3. Elaborate on the household and individual level questionnaires to be conducted in the surveys.
- 4.4. Elaborate the implementation manual for data collection.
- 4.5. Elaborate a report on the sampling framework for the household surveys. Selection of the Enumeration Districts where the surveys will be conducted.
- 4.6. Elaborate a technical report on the weights to be used in the survey. Estimate the weights once the surveys are completed.
- 4.7. Elaborate a technical report on the consistency controls among the questions that will be used in the data processing stage. Provide support to the team in charge of the data entry stage.
- 4.8. Verify the adequacy of the data entry method.
- 4.9. Meet regularly with the firm(s) contracted to undertake the surveys to discuss technical and implementation issues.
- 4.10. Participate in the regular meetings with Team Members.

5. Expected Outcome and Deliverables

- 5.1. This consultation must submit the following products. All these products must be approved to be considered final products.
 - Product 1: Work plan with timetable
 - Product 2: Document presenting comments and recommendations to report on Component 1.
 - Product 3: Draft design of the appropriate instruments, draft design of the sampling framework for the household surveys, inputs to the survey quality assurance for the fieldwork, and draft design of the training of supervisors and enumerators.
 - Product 4: Final report with complete design, summarizing comments and recommendations.

6. Project Schedule and Milestones

| Deliverables | Timeframe |
|--------------------------------------|--|
| Submission and approval of Product 1 | One week after the signature of the contract |
| Submission and approval of Product 2 | Three months after the signature of the contract |
| Submission and approval of Product 3 | Five months after the signature of the contract |
| Submission and approval of Product 4 | Seven months after the signature of the contract |

7. Reporting Requirements

7.1. Every report must be submitted to the Bank in an electronic file. The report should include the cover, main document, and all annexes. This file must also be in an electronic format used by the Bank, such as one of the MS Office, JPG and/or TIFF formats. ZIP files (compressed) will not be accepted as final reports due to the regulations of the Bank File Management Section.

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|-------|--------------------|------|
| 1 | First Deliverable | 10 |
| 2 | Second Deliverable | 30 |
| 3 | Third Deliverable | 30 |
| 4 | Fourth Deliverable | 30 |
| TOTAL | | 100% |