

## TERMS OF REFERENCE

### **Consultancy to support the IDB-UWI Fiscal Research Center (FRC) – Component I**

**Country:** Jamaica

**Project Number:** JA-T1231

**TC Public Link:** TBD

**TC Title:** IDB UWI Fiscal Research Center Collaboration

**[Three expected work streams: (i) research; (ii) course development and teaching; & (iii) capacity building.**

**Standard language is included below for each stream.]**

#### **Post of Duty:** Consultant

The IDB Group is a community of diverse, versatile, and passionate people who come together on a journey to improve lives in Latin America and the Caribbean. Our people find purpose and do what they love in an inclusive, collaborative, agile, and rewarding environment.

#### **About this position:**

The objective of this Technical Cooperation (TC) is to support the Government of Jamaica and the broader Caribbean region to develop and launch a first-of-its-kind Fiscal Research Center (FRC) at The University of the West Indies (UWI). This TC will finance three types of activities: (i) a partnership between the IDB's Vice Presidency for Countries, the Caribbean Country Department and relevant IDBG Divisions to design, produce and disseminate policy-oriented research jointly with UWI researchers (including relevant data), possibly including collaboration with other experts from around the world; (ii) development of curricula for students and practitioners in economic and public finance policy and practice; and (iii) development and delivery of focused courses and related outputs that will help to build capacity for public servants from across the region.

The Caribbean Country Department (CCB) seeks a consultant to support this initiative via: [(i) the design and production of high-quality research / (ii) editing and/or typesetting, graphic design work, and production of specific publications / (iii) development and delivery of courses in related areas / (iv) targeted technical assistance, in collaboration with experts from UWI, the IDB, and other affiliated researchers.]

Specifically, the consultant will contribute to the: [(i) design, production, and dissemination of high-quality research projects and publications, in collaboration with other experts; / (ii) editing and/or typesetting, graphic design work, and production of specific publications / (iii) the design and delivery of courses for students and/or practitioners to be delivered via the FRC (either in person or virtually, depending on needs and circumstances) / (iv) design and delivery of focused technical assistance and capacity building activities, on topics and areas identified by the FRC and its steering committee. ]

### **What you'll do:**

- **First responsibility.** Leverage experience in related areas to help: [(i) identify, design, and produce high-quality, demand-driven research on economic and fiscal management topics / (ii) editing and/or typesetting, graphic design work, and production of specific publications / (iii) develop curricula for courses in related areas, as well as contributing to the delivery of said courses / (iv) capacity building in related areas, as set forth by the FRC's Steering Committee and TC Team Leader, based on guidance from stakeholders.]
- **Second responsibility.** Contribute to the public dissemination of, and engagement regarding said research, courses, or capacity building (and related products), including via contributions to press releases, blogs, podcasts, social media inputs and postings, as well as participation in seminars or other public or media facing events.
- **Fourth responsibility.** Perform tasks per request of the Team Leader.

### **Deliverables and Payments Timeline:**

- **Product 1:** [TBD depending on product]

The payments will be processed according to the following:

- 10% upon delivery and approval of Product 1. (TBC)
- 30% upon delivery and approval of Product 2. (TBC)
- 40% upon delivery and approval of Product 3. (TBC)
- 20% upon delivery and approval of Product 4. (TBC)

### **What you'll need:** [depending on output]

- **Education:** Master's degree in economics, Public Finance, Public Policy, or related areas with a relevant experience in conducting fiscal policy and management reform in developing countries.
- **Experience:** At least 10 years of combined experience in economic analysis, public finance, or fiscal policy and management.
- **Languages:** Fluency in English.

Or

- **Experience:** At least 10 years of combined experience in editing, typesetting, graphic design, and document production.
- **Languages:** Fluency in English.

### **Core and Technical Competencies:** [depending on output]

- Fiscal policy.
- Economic management.

- Climate Change policy.
- Project management.
- Ability to work in a team given the high interaction with officials in the country expected for the job.

Or

- Editing and typesetting of technical documents.
- Graphic design for publications.
- Publishing.
- Project management.

### **Requirements:**

- **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 the second degree of affinity, including spouse) working for the IDB Group.

### **Type of contract and duration:**

- **Type of contract and modality:** Product and External Services Contractual (PEC). Lump Sum Contract.
- **Length of contract:** [TBD depending on specific output]
- **Start date:** [TBD]
- **Location:** remote.
- **Responsible person:** The consultancy will be coordinated by Henry Mooney ([hmooney@iadb.org](mailto:hmooney@iadb.org)), Economics Advisor, with support from Lesley Cassar ([lesleyc@iadb.org](mailto:lesleyc@iadb.org)), Senior Operations Specialist, Caribbean Country Department (CCB/CCB).

## TERMS OF REFERENCE

### Consultancy to support the IDB-UWI Fiscal Research Center (FRC) – Component I

#### Publication Editing, Graphics and Production

**Country:** Jamaica

**Project Number:** JA-T1231

**TC Public Link:** TBD

**TC Title:** IDB UWI Fiscal Research Center Collaboration

#### **Post of Duty:** Consultant

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#### **About this position:**

The objective of this Technical Cooperation (TC) is to support the Government of Jamaica and the broader Caribbean region to develop and launch a first-of-its-kind Fiscal Research Center (FRC) at The University of the West Indies (UWI). This TC will finance three types of activities: (i) a partnership between the IDB's Vice Presidency for Countries, the Caribbean Country Department and relevant IDBG Divisions to design, produce and disseminate policy-oriented research jointly with UWI researchers (including relevant data), possibly including collaboration with other experts from around the world; (ii) development of curricula for students and practitioners in economic and public finance policy and practice; and (iii) development and delivery of focused courses and related outputs that will help to build capacity for public servants from across the region.

The Caribbean Country Department (CCB) seeks a consultant to support this initiative by supporting the final preparation of research and related items for publication. Specifically, the consultant will contribute to the editing and/or typesetting, graphic design work, and production of specific publications.

#### **What you'll do:**

- **First responsibility.** Leverage experience in related areas to contribute to the editing and/or typesetting, graphic design work, and production of specific publications.
- **Second responsibility.** Contribute to the development and production of graphics and other material for use in advertising and dissemination of related products, including for use in press releases, blogs, podcasts, social media inputs and postings, and alike.
- **Fourth responsibility.** Perform tasks per request of the Team Leader.

### **Deliverables and Payments Timeline:**

- **Product 1:** [TBD depending on product]

### **The payments will be processed according to the following:**

- 10% upon delivery and approval of Product 1. (TBC)
- 30% upon delivery and approval of Product 2. (TBC)
- 40% upon delivery and approval of Product 3. (TBC)
- 20% upon delivery and approval of Product 4. (TBC)

### **What you'll need: [depending on output]**

- **Experience:** At least 4 years of combined experience in editing / typesetting / graphic design, / document production.
- **Languages:** Fluency in English

### **Core and Technical Competencies: [depending on output]**

- Editing and typesetting of technical documents.
- Graphic design for publications.
- Publishing.
- Project management.

### **Requirements:**

- **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 the second degree of affinity, including spouse) working for the IDB Group.

### **Type of contract and duration:**

- **Type of contract and modality:** Product and External Services Contractual (PEC). Lump Sum Contract.
- **Length of contract:** [TBD depending on specific output]
- **Start date:** [TBD]
- **Location:** remote
- **Responsible person:** The consultancy will be coordinated by Henry Mooney ([hmooney@iadb.org](mailto:hmooney@iadb.org)), Economics Advisor, with support from Lesley Cassar ([lesleyc@iadb.org](mailto:lesleyc@iadb.org)), Senior Operations Specialist, Caribbean Country Department (CCB/CCB).

## TERMS OF REFERENCE

### Consultancy to support the IDB-UWI Fiscal Research Center (FRC), Component II

**Country:** Jamaica

**Project Number:** JA-T1231

**TC Public Link:** TBD

**TC Title:** IDB UWI Fiscal Research Center Collaboration

#### 1. Background and Justification

- 1.1. Since gaining independence beginning in the 1960s, Caribbean countries have been among the world's most vulnerable and prone to economic and financial crises. IDB-led<sup>1</sup> and other research has shown that a key contributing factor to the region's economic vulnerabilities has been persistently high levels of public debt, which have contributed to underinvestment in public and social infrastructure, high borrowing costs, the crowding out of private investment, high and unpredictable taxes, and both economic and exchange rate volatility. Against this backdrop, few issues are more important for the region's future than ensuring that policymakers are in a position to design and execute prudent and well-informed policies for fiscal and economic management. This will require the development of demand-driven, policy-oriented research and diagnostics to help the region's authorities optimize fiscal policies and institutions; the design and delivery of training for existing and incoming public servants in cutting-edge tools and methodologies for policy formulation and execution; and focused training and capacity building, where appropriate.
- 1.2. The IDB has long been the region's main development partner, and through this TC, the IDB will partner with the Caribbean region's main university system and the Government of Jamaica to identify economic and fiscal policy and institutional issues with the potential to drive faster and more inclusive growth across the region. This client-focused, demand-driven initiative aims to support governments in the formulation, management and execution of economic policies—including public outlays for traditional, social, natural and digital infrastructure and services—to improve economic stability and performance, as well as fiscal and debt sustainability. These objectives are crucial to setting the stage for faster, sustainable and more inclusive growth.

#### 2. Objectives

- 2.1. The objective of this Technical Cooperation (TC) is to support the Government of Jamaica to develop and launch a first-of-its-kind Fiscal Research Center (FRC) within The University of the West Indies (UWI).

#### 3. Scope of Services

- 3.1. The consulting firm shall collaborate with staff and affiliates of the FRC and the IDB in the design, production and dissemination of high-quality research projects and publications.

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<sup>1</sup> For example, see Mooney et. al., 2021 (<http://dx.doi.org/10.18235/0003053>).

The consulting firm is also expected to collaborate with staff and affiliates of the FRC and the IDB to design and deliver courses in related areas to students, practitioners and government officials, as well as to design and deliver focused technical assistance and capacity building activities, on topics and areas identified by the FRC.

#### 4. Main Activities

4.1. The consulting firm will carry out the activities described hereunder and any other activities necessary to accomplish the stated objectives of the consultancy. Main tasks/activities are described below.

(a) In collaboration with IDB and UWI-FRC staff, leverage the IFSD's strong academic and practical experience in related areas to help: (i) establish and operationalize the UWI-FRC; (ii) identify, design, and produce high-quality, demand-driven research on economic and fiscal management topics; (iii) design courses in related areas, as well as contributing to the delivery of said courses; and, (iv) contribute to capacity building in related areas, as set forth by the FRC and TC Team Leader, based on guidance from stakeholders.

(b) Contribute to the public dissemination of, and engagement regarding said research, courses, or capacity building (and related products), including via contributions to press releases, blogs, podcasts, social media inputs and postings, as well as participation in seminars or other public or media facing events.

(c) Perform tasks per request of the Team Leader.

#### 5. Expected Outcome and Deliverables

5.1. The consulting firm will be required to submit/deliver the following based on the decisions taken after consultation with the IDB and UWI/FRC Teams, including as set out by the FRC Steering Committee. The following shall be delivered:

- **Product 1:** Contributions to the design and delivery of a strategic five-year plan for the FRC, including a research and training output plan, building on IFSD's experience developing and managing a similar agency within a university.
- **Product 2:** Contributions to research projects, jointly with the UWI-FRC team, as defined by the FRC Steering Committee. It is expected that there will be several outputs per calendar year.
- **Product 3:** Contributions to the design and delivery of courses on economic and fiscal management topics, to be developed and delivered jointly with the UWI-FRC team, as defined by the FRC Steering Committee. It is expected that there will be several such courses delivered in each calendar year.

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

6.1. The schedule will be defined by the firm in agreement with the IDB project team.

## **7. Reporting Requirements**

7.1. Each deliverable must be submitted to the Bank in an electronic file (in Word and PDF) for review and dissemination to UWI FRC stakeholders, as applicable. Reports should include the cover, main document and all annexes. Zip files will not be accepted as final reports, due to Records Management Section regulations.

7.2. Deliverables that involve teaching or in person modalities will be supervised by the IDB TC team members.

## **8. Acceptance Criteria**

8.1. The reports submitted by the consultant firm shall be accepted by the IDB and must comply with the reporting on the progress and outcomes of the activities of the consultancy.

## **9. Supervision and Reporting**

9.1. The consulting firm shall report to Henry Mooney (hmooney@iadb.org), Economics Senior Advisor, Caribbean Country Department (CCB/CCB).

## **10. Schedule of Payments**

10.1. Payments will be processed as follows:

- \$12,000 upon delivery and approval of Product 1.
- \$4,000 per completed research output (paper, book chapter, etc.) with IFSD contributions.
- \$15,000 per course designed and delivered by IFSD (including in collaboration with UWI FRC and other contributors).