

PUBLIC

DOCUMENT OF THE INTER-AMERICAN DEVELOPMENT BANK

REGIONAL

EDUCATION STATISTICS AND INDICATORS FOR LATIN AMERICA AND THE CARIBBEAN

(RG-T2341)

TECHNICAL COOPERATION DOCUMENT

The project team consisting of prepared this document: Emiliana Vegas (SCL/EDU), Team Leader; Elena Arias, Alternate TL (SCL/EDU); Hugo Ñopo (SCL/EDU); María Soledad Bos (SCL/EDU); Analía Jaimovich (SCL/EDU); Katherina Hruskovec (SCL/EDU), Diego Buchara (LEG/SGO), Livia Mueller (SCL/EDU).

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EDUCATION STATISTICS AND INDICATORS FOR LATIN AMERICA
AND THE CARIBBEAN

RG-T2341

CERTIFICATION

I hereby certify that this operation was approved for financing under the Special Program for Employment, Poverty Reduction and Social Development in Support of the Millennium Development Goals (SOF), through a communication dated May 16, 2013 and signed by Carmen Albertos (ORP/GCM). Also, I certify that resources from the Special Program for Employment, Poverty Reduction and Social Development in Support of the Millennium Development Goals (SOF) are available for up to US\$675,000 in order to finance the activities described and budgeted in this document. This certification reserves resource for the referenced project for a period of four (4) calendar months counted from the date of eligibility from the funding source. If the project is not approved by the IDB within that period, the reserve of resources will be cancelled, except in the case a new certification is granted. The commitment and disbursement of these resources shall be made only by the Bank in US dollars. The same currency shall be used to stipulate the remuneration and payments to consultants, except in the case of local consultants working in their own borrowing member country who shall have their remuneration defined and paid in the currency of such country. No resources of the Fund shall be made available to cover amounts greater than the amount certified herein above for the implementation of this operation. Amounts greater than the certified amount may arise from commitments on contracts denominated in a currency other than the Fund currency, resulting in currency exchange rate differences, for which the Fund is not at risk.



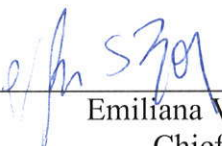
Sonia M. Rivera
Chief
Grants and Co-Financing Management Unit
ORP/GCM

09/10/2013

Date

CA
9/10/2013

APPROVAL

Approved: 

Emiliana Vegas
Chief
Education Division
SCL/EDU

9/10/13

Date

TC Document

I. BASIC INFORMATION FOR TC

▪Country:	▪Regional
▪TC Name:	▪Education Statistics and Indicators for Latin America and the Caribbean
▪TC Number:	▪RG-T2341
▪Associated Loan/Guarantee Name:	▪N/A
▪Associated Loan/Guarantee Number:	▪N/A
▪Team Leader/Members:	▪Emiliana Vegas (SCL/EDU), Team Leader; Elena Arias, Alternate TL (SCL/EDU); Hugo Ñopo (SCL/EDU); María Soledad Bos (SCL/EDU); Analia Jaimovich (SCL/EDU); Katherina Hruskovec (SCL/EDU), Diego Buchara (LEG/SGO), Livia Mueller (SCL/EDU)
▪Date of TC Abstract authorization:	▪16 May 2013
▪Donors providing funding:	▪Social Fund ¹
▪Beneficiary:	▪Bank´s Borrowing Member Countries
▪Type of Operation	▪ Client Support
▪Executing Agency and contact name:	▪The Bank, through SCL/EDU
▪IDB Funding Requested:	▪US\$675,000
▪Local counterpart funding, if any:	▪N/A
▪Disbursement and Execution period:	▪36 months – 30 months
▪Required start date:	▪01 October 2013
▪Types of consultants:	▪Firm and individuals
▪Prepared by Unit:	▪SCL/EDU
▪Unit of Disbursement Responsibility:	▪SCL/EDU
▪TC Included in Country Strategy (y/n):	▪N/A
▪TC included in CPD (y/n):	▪N/A
▪GCI-9 Sector Priority:	▪Raising the quality and equity of education

II. JUSTIFICATION AND OBJECTIVES OF THE TC

2.1 **Justification.** The provision of high-quality information and up-to-date comprehensive data is a fundamental factor for strategic decision-making, resource allocation, and accountability in public policy. In Latin American and Caribbean (LAC) countries, multiple sources of information exist about the education systems. They operate at the national and sub-national levels (e.g. school censuses, household surveys, student learning assessments, even administrative data from the ministries of education), the regional level (LLECE, SERCE), and the international level (TIMSS, PIRLS, PISA). However, a high degree of heterogeneity is observed among countries in their institutional capacity for education evaluation and research. Difficulties also arise from the high diversity in the political and administrative institutions responsible for producing education statistics (ministries vs. evaluation agencies) and their level of autonomy. As a result, the region lags behind advanced and fast-developing economies in Europe, North America, and Asia in education data and research and, more importantly, education outcomes. Even when available, education data in Latin America and the Caribbean are often either not readily

¹ Resources from the Special Program for Employment, Poverty Reduction and Social Development in Support of the Millennium Development Goals

available to policy makers or cannot be fully utilized due to their low quality or irregular application.

- 2.2 Across the region, policy-makers are becoming increasingly aware of the importance of evidence-based data decision making to improve the impact of education reforms and have recently made requests for IDB assistance to: (i) strengthen their systems of data collection and analysis; (ii) support their participation in regional and international surveys of student learning; and (iii) collaborate on the evaluation of important education reforms at the country level. To date, the IDB has responded to these requests on a country-by-country basis, using both technical assistance and lending instruments. As an attempt to partially fill the existing informational gap, the IDB's Education Division has been increasingly involved in the compilation and harmonization of relevant educational data for all the countries in the region. For example, the division has collected and analyzed household survey data from almost all the countries, national and regional student learning data, and other education data produced by national and international agencies in order to compute harmonized education indicators. At present, the household survey data is housed in a server but not readily accessible to policy makers and analysts. The different pieces of analysis performed with such data (working papers, technical notes, etc.) are available online, but the target audience would be more effectively served by having them within one integrated platform.
- 2.3 **Objectives.** The objective of this TC is to improve the collection, analysis, and dissemination of education statistics that lead to high quality evaluations, conduct advanced research to promote the education reforms the region needs, and improve policy making. Furthermore, the activities within this TC will set the foundations for the development of a center in the region to assume this role. The implementation strategy of the TC will be to sequentially develop within the Bank key functions of the center, design the organization of the center, and ensure its sustainability by building a regional consensus about its importance for the region and develop national and international partnerships. These key functions include: the creation of an IDB Education Data Warehouse, an Education Statistics Portal, and the publication of a report about "the state of the education in LAC" containing a summary of key education indicators and advanced research in policy-oriented education topics.² Given the weak institutional capacity of some countries for data collection and monitoring of their national education systems, priority assistance will be given to those that are facing major difficulties in the production of statistics (e.g. by providing a manual with best practices in data collection; by promoting exchanges between these countries and others with stronger education statistics; and by supporting seminars and workshops in the region).
- 2.4 At the global level, there are similar efforts to the Education Data Warehouse and Statistics Portal (UNESCO Institute of Statistics, World Bank EdStats). However, the existing portals contain only a limited number of indicators in education. Furthermore, for those indicators available, an important share of countries in LAC have missing observations providing limited information about the state of the education in the region as a whole. Our initiative will be specifically designed to address a wider set of education

² The focus will be on preschool through secondary education. While the Education Division also works in post-secondary education, the data collected by countries at this level is not consistent across countries.

outcomes, include all Latin American and Caribbean education systems, and ensure their comparability with indicators produced in other regions (Eurostats) and economies (OECD). In addition, the report about “the state of the education in LAC” will fill an important gap given that none of the existing regional reports (such as the *Panorama Educativo de las Americas* done by UNESCO or The Partnership for Educational Revitalization in the Americas [PREAL]³) have the double objective of providing access to the most comprehensive data on education systems and leading research on specific education policy issues (closer to OECD’s *Education at a Glance*). The IDB is best placed to lead such an initiative.

- 2.5 From a strategic perspective, increasing knowledge about the challenges for educational progress across Latin America and the Caribbean would enable the identification of new areas of support through operations and technical cooperation. Importantly, the Center will enhance the volume and relevance of client countries’ demands in the sector. This will strengthen the Bank’s leadership and dialogue capacity, which in turn should increase the Bank’s lending. It will do so by consolidating the various data systems, developing methodologies for diagnosis and interventions, and promoting institutional strengthening activities. In this sense, one immediate goal of the TC is to access more comprehensive and up-to-date information to inform the preparation of the Education Sector Notes that are part of Country Strategies.
- 2.6 Overall, the goal is to establish the leading role of the Bank in addressing the need for comprehensive, up-to-date data and analyses of the region’s education systems. In addition, by providing access to local and international researchers to improved education data from Latin American and Caribbean, the Center, once created, will promote a higher volume of quality research in other institutions on education issues affecting the region’s education systems. Thus, the vision is that this Center will become the primary source of information on education for policymakers and researchers in Latin America and the Caribbean. This will contribute to position the Bank as the main partner for educational reforms and knowledge generation throughout the region. In this sense, this TC is aligned to the Bank’s GCI-9 priority of “Social policy for equity and productivity”, in the strategic area of “raising the quality and equity of education,” and responds to the goal of the Bank’s work in education as presented in the 2013 Sector Framework Document for Education and Early Childhood Development: Promote effective teaching and learning among all children and youth in Latin America and the Caribbean.

III. DESCRIPTION OF ACTIVITIES, COMPONENTS AND BUDGET

- 3.1 This proposal has two main components: (i) Education Data Warehouse and Statistics Portal; and (ii) Foundations for the Center for Education Statistics, Evaluation and Research for Latin America and the Caribbean. Component 1 would be introduced first in order to provide the foundations for the development of the center.

³ PREAL is a regional initiative that focuses on promoting an informed debate on education issues in the region. Although it synthesizes and disseminates research and produces education report cards, its main goal is to generate awareness and support for education reform. Moreover, it has a special focus on Central American countries.

- 3.2 **Component 1. Education Data Warehouse and Statistics Portal (US\$ 515,000)**
- 3.3 **Subcomponent 1.1. Education Data Warehouse.** The objective of this subcomponent is to standardize and manage more efficiently the large amount of education information on the region's education systems (indicators, statistics and methodologies, etc.), produced by national, local, and state government, and regional and international agencies (UNESCO Institute for Statistics (UIS), World Bank, UNESCO-OREALC, PREAL; etc.). The main output will be the creation of a data warehouse containing education statistics, databases, assessment tools, and quantitative information useful to policy makers and researchers in the region. The databases that will feed the warehouse are: school census and administrative records in education (particularly important given that currently none of the existing data portals in education contains this information), household surveys, educational indicators published by the UIS and World Bank, school and academic achievement tests (National Assessments, PISA, TIMSS, SERCE, etc.), and any database created within the Bank, either through our operations or our analytical work (homogenized household surveys).
- 3.4 The following activities will be financed: (i) the collection and cataloging of existing information; and (ii) the set-up of the Education Data Warehouse housing all the databases.
- 3.5 **Subcomponent 1.2. Education Statistics Portal "EDUDATA-LAC: Education Statistics and Indicators for Latin America and the Caribbean."** The objective of this subcomponent is to establish a platform that provides access to harmonized indicators, databases, and information from the different sources outlined in the subcomponent 1.1. It will also serve as a tool to generate statistical tables and graphs based on individual needs. Using the Education Data Warehouse from subcomponent 1, the main output will be the creation of a statistical portal dedicated to the production and monitoring of education indicators and statistics exclusively for the LAC region. The indicators will be aligned with the Dimensions of Success that the Bank has outlined in its Sector Framework Document for Education and Early Childhood Development and will allow the tracking of its progress. The indicators will be disaggregated by gender whenever the data allows it. The data collection from the countries will also require the provision of technical assistance and promotion of institutional strengthening for data collection in countries where it is weak.
- 3.6 The following activities will be financed: (i) the definition of a set of education indicators; (ii) the provision of technical assistance to help countries facing difficulties in collecting education data (including the production and dissemination of a best practices manual in data collection); and (iii) the design and development of the portal.
- 3.7 **Subcomponent 1.3. Report: "State of Education in Latin America and the Caribbean."** The objective of this subcomponent is to produce and disseminate a report that presents an in-depth analysis of the key education indicators generated by subcomponent 1.2. The report is designed to inform policy makers about the state of education in the region and the progress made by their individual countries (a format inspired by the OECD "Education at a Glance Report" and the Global Education Digest [GED]). In addition to providing a comparative analysis on indicators on a variety of education outcomes, the report will include a detailed analysis of a particular topic related to the Dimensions of Success for Education outlined in the Sector Framework Document for Education and Early Childhood Development (e.g. teacher quality or early childhood

development) based on the results of the ongoing research produced by the Education Division.

- 3.8 The following activities will be financed: (i) the production of background papers for the report; (ii) the elaboration of the report; and (iii) the design, editing, printing, and dissemination of the report.
- 3.9 **Component 2. Foundations for the Center for Education Statistics, Evaluation and Research for Latin America and the Caribbean (US\$ 160,000).** The objective of this component is to set the basis for the creation of an education policy research center physically established in the region and equipped with highly technical staff and communication resources. The Center would have four main functions: (i) serve as a reference for all information and statistics on education systems in the region (the portal from component 1 would be transferred to the Center); (ii) develop its own research on critical issues relevant for decision-making processes on education policy in the region; (iii) support the participation of countries in regional and international learning assessments; and (iv) strengthen the technical and institutional capacity of LAC countries to measure learning and collect education statistics. The activities of component 1 will work towards building consensus and raising awareness for the importance of data collection and analysis and promote the Center as a permanent house for data and analysis useful for research and policy making among all countries in the region.
- 3.10 The following activities will be financed by this component: (i) the design and planning of the organization of the Center: this includes defining a system of governance, a legal and financial structure, main functions, financial plan, a profile in terms of human resources and areas of research, and a strategy for the development of its corporate image; (ii) the development of an outreach strategy to promote interest for the creation of the Center and the generation of a national and international network of partnerships with institutions of excellence in education; and (iii) the definition of country/institutions hosting the Center's launch, which requires a regional call for proposals with suggested location and configuration of the center and the identification of education experts, who will evaluate and rank the proposals.

Table III-1: Indicative results matrix

Result	Units	Planned Units	Completion Date	Data Source
Component 1: Education Data Warehouse and Statistics Portal				
Education Data Warehouse operational	Number	1	December 2014	EDU's intranet
Statistical portal operational	Number	1	June 2015	IDB Web page
Statistical report published	Number	1	November 2015	Publications
Indicators are used for country sector notes and design of operations	Number of times	6	December 2015	References in Bank's documents
Indicators produced are used to inform policy documents in countries	Number of times	6	December 2015	References in policy documents
Component 2: Foundations for the Center for Education Statistics, Evaluation and Research for Latin America and the Caribbean				
International agencies or institutions of excellence in Education are part of the support network for the Centre	Number	5	January 2016	
Country proposals for hosting the center received	Number	3	January 2016	Call for proposals

3.11 The amount of funding needed to achieve the expected results is indicated below. The total costs of US\$675,000 will be financed through the Social Fund. Resources will be provided on a non-reimbursable basis. The activities of this TC are eligible within the Social Fund (GN-2426-3) as they include the development of data collection instruments, data gathering activities data digitalization and cleaning, data analysis, and dissemination of results in the education sector. Furthermore, the activities will allow access to comprehensive and up-to-date information for the preparation of Country Strategies (see paragraph 2.5)

TABLE III-2: INDICATIVE BUDGET IN \$US

Description	UNIT/ COST	IDB	Counterpart	TOTAL
Component 1. Education Data Ware house and Statistics Portal	515,000	515,000	-	515,000
Subcomponent 1.1. Education Data Warehouse	180,000	180,000	-	180,000
- Activity 1. Identify and catalog existing statistical information	50,000	50,000	-	50,000
- Activity 2. Set up of Education Data Warehouse	130,000	130,000	-	130,000
Subcomponent 1.2. Education Statistics Portal	235,000	235,000	-	235,000
- Activity 1. Identify indicators and define contents	30,000	30,000	-	30,000
- Activity 2. Provide technical assistance for countries for data production	60,000	60,000	-	60,000
- Activity 3. Design and development of the Portal	145,000	145,000	-	145,000
Subcomponent 1.3. Report	100,000	100,000	-	100,000
- Activity 1. Production of background papers for the report	25,000	25,000	-	25,000
- Activity 2. Elaboration of the report	50,000	50,000	-	50,000
- Activity 3. Dissemination and distribution	25,000	25,000	-	25,000
Component 2. Latin American Center for Education Statistics, Evaluation and Research	160,000	160,000	-	160,000
- Activity 1. Design and planning of the Centre	50,000	50,000	-	50,000
- Activity 2. Outreach strategy	50,000	50,000	-	50,000
- Activity 3. Definition of country/institutions hosting the center	60,000	60,000	-	60,000
TOTAL	<u>675,000</u>	<u>675,000</u>	-	<u>675,000</u>

IV. EXECUTING AGENCY AND EXECUTION STRUCTURE

4.1 **Executing Agency.** Because of its regional focus, the Bank's comparative advantage and expertise given its role in education operations, research, and technical assistance throughout the region, the regional nature of the operation, and the lack of an entity (regional or national) in the region with sound institutional and operational capabilities to carry out the activities proposed in this TC, the program will be executed by the Bank, through its Education Division (SCL/EDU). This TC originates by and responds to client needs to strengthen their capacity to make evidence-based policy decisions as has been manifested and communicated to the Bank in the ongoing dialogue between borrowing member countries and the Bank, who have expressed the need for comparable and up-to-

date education statistics and quality research to inform policy making in education in the region. The Bank is in a unique position to lead these activities given the experience it has in producing educational data for the countries in the region. These include, among others, the homogenization of household surveys between countries, the collection of school census and administrative records to build education indicators unique to LAC, the surveys conducted within the framework of the publications of the division (e.g. *Disconnected* or *Education for Transformation*) or the databases related to important impact evaluations (e.g. OLPC in Peru or Ecuador evaluating teachers in Ecuador).

- 4.2 **Execution period.** The TC will disburse in 36 months and execute in 30 months from the approval date.
- 4.3 **Non-objection letters.** Non-objection letters will be sought from countries for the execution of activities that might take place in a specific country. These activities will be limited to workshops for technical assistance and marketing campaign (subcomponent 1.2 and component 2).
- 4.4 **Procurement.** Standard Bank procedures will be followed.

V. MAJOR ISSUES

- 5.1 The risks related to this TC are low and limited to the uneven quality of the education data collected by the countries in the region. Some countries in the region do not regularly collect comprehensive educational information, particularly on learning outcomes, in some others the data collection is of poor quality with a lot of missing information from students. Furthermore, countries collect data in many different formats, making comparison across countries a challenge. These problems will probably be encountered in the early activities of the TC and will be mitigated with the planned technical assistance activities. A manual with best practices in data collection will be produced to guide countries in this process.

VI. EXCEPTIONS TO BANK POLICY

- 6.1 None.

VII. ENVIRONMENTAL AND SOCIAL STRATEGY

- 7.1 The TC is not anticipated to have direct environmental or social impacts and has been classified as “C” according to the Safeguard Classification Tool. No environmental impact is foreseen as the initiative is limited to consultancies and the production of a portal and a report. No Bank resources will be used to finance investments in infrastructure or large scale equipment. This TC will mitigate any risks of exclusion by promoting gender equality in data collection and reporting.

Required Annexes:

- Annex I: [Terms of Reference](#)
- Annex II: [Procurement Plan](#)

TERMS OF REFERENCE

COUNTRY: Regional

PROJECT NAME: Education Statistics and Indicators for Latin America and the Caribbean

PROJECT NUMBER: RG-T2341

CONSULTANCY NAME: Identify and catalogue existing education statistics and identify indicators for statistics portal

I. BACKGROUND

- 1.1 The provision of high-quality information and up-to-date comprehensive data is a fundamental factor for strategic decision-making, resource allocation, and accountability in public policy. In Latin American and Caribbean (LAC) countries, multiple sources of information exist about the education systems. They operate at the national and sub-national levels (e.g. school censuses, household surveys, student learning assessments, even administrative data from the ministries of education), the regional level (LLECE, SERCE), and the international level (TIMSS, PIRLS, PISA). However, a high degree of heterogeneity is observed among countries in their institutional capacity for education evaluation and research. Difficulties also arise from the high diversity in the political and administrative institutions that produce education statistics in terms of responsible entity (ministries vs. evaluation agencies) and the level of autonomy. As a result, the region as a whole lags behind advanced and fast-developing economies in Europe, North America, and Asia in education data and research. Even when available, education data in Latin America and the Caribbean are often either not readily available to policy makers or cannot be fully utilized due to their low quality or irregular application.
- 1.2 As an attempt to partially fill the existing informational gap, the IDB's Education Division has been increasingly involved in the compilation and harmonization of relevant educational data for all the countries in the region. For example, the division has collected and analyzed household survey data from almost all the countries, national and regional student learning data, and other education data produced by national and international agencies in order to compute harmonized education indicators. At present, the data produced are housed in a server but not readily accessible to policy makers and analysts. The different pieces of analysis performed with such data (working papers, technical notes, etc.) are available online, but the target audience would be more effectively served by having them within one integrated platform, as well as having direct access to the data to carry out their own analyses.
- 1.3 Under this Technical Cooperation, the Education Division of the IDB will develop an Education Data Warehouse that hosts education statistics from across

the region, as well as an education web portal that will make that information available to the public.

II. CONSULTANCY OBJECTIVES

- 2.1 The objective of this consultancy is to support the development of an Education Data Warehouse. The Education Data Warehouse will standardize and manage more efficiently the large amount of statistical information in the region's education systems, produced by national, local, and state governments, regional and international agencies (UNESCO Institute for Statistics (UIS), World Bank, UNESCO-OREALC, PREAL; etc.), and the Bank itself. Thus, the Education Data Warehouse will compile databases from school censuses and administrative records in education, household surveys, educational indicators published by the UIS and World Bank, school and academic achievement tests (national assessments, PISA, TIMSS, SERCE, etc.), and databases created within the Bank (for example, homogenized household surveys).

III. MAIN ACTIVITIES

- 3.1 **Identification of contents and structure of the Education Data Warehouse.** This activity will be carried out in two phases.
- 3.2 During Phase I, the consultant will:
 - a. Identify and catalogue existing education statistics hosted at the Inter-American Development Bank, including homogenized household surveys, data from program evaluations, as well as other research data produced by the Education Division of the IDB.
 - b. Analyze the structure and contents of the existing information and make a proposal regarding its homogenization.
- 3.3 During Phase II, based on the analysis of the characteristics of the existing information during Phase I, the consultant will:
 - a. Catalogue additional sources of education statistics (besides the IDB) that could potentially be included in the Education Data Warehouse. Such catalogue will include information produced by national and local governments (school censuses and other administrative data in education), international education assessments (for example, data from PISA, TIMMS, PIRLS, SERCE, etc.), and international organizations (UNESCO Institute for Statistics (UIS), World Bank, UNESCO-OREALC, etc.). The consultant will describe the content and structure of the databases identified (underlying logical structure, variable list, variable definitions, units, time series, periodicity, etc.), as well as the accessibility and permissions for the use of the information (including both potential legal limitations regarding the use of data and the logistics regarding physical accessibility of the data).
 - b. Identify additional education indicators that should be included in the Education Data Warehouse, taking into account the five dimensions of

success of education systems as defined in the Sector Framework Document for Education and Early Childhood Development. The indicators will be disaggregated by gender whenever the data allows it

- c. Identify sources of education statistics (besides the IDB) from where the additional indicators will be drawn, based on the catalogue developed in item a.
 - d. Develop guidelines for the homogenization of data across databases. These guidelines will be based on a description of the available information (structure of the database, variable list, variable definitions, units, time series, periodicity, etc.), and of the ways in which the information will be made available to users.
 - e. Identify a set of indicators to be published in the web portal, provide definitions for each indicator, and determine a methodology for their estimation.
 - f. Collect all available datasets on education in digital format.
- 3.4 **Collaborate in the development of the Education Data Warehouse.** The consultant will work closely with the individual consultants or firm in charge of developing the infrastructure for the creation of the Education Data Warehouse. Special attention will be paid to controlling the accuracy of the homogenization performed across databases for the creation of the data warehouse.
- 3.5 **Collaborate in the development of the education portal.** The consultant will work closely with the individual consultants or firm in charge of designing and developing the web portal for external access to the data hosted in the Education Data Warehouse. Special attention will be paid to the identification of possible user queries and the design of a proposal of possible outputs to be provided by the web portal (such as maps, charts, tables, etc.).

IV. DELIVERABLES

- 4.1 The consultant will deliver the following products:
- a. A catalogue of sources of statistical information, which will include a description of the databases (structure of the database, variables/indicators, time series, etc.) as well as a description of methods of data homogenization across databases.
 - b. A list of indicators to be published in the web portal, including definitions for each indicator, the methodology for their estimation, and models for possible outputs to be provided by the web portal as response to user queries (such as maps, charts, tables, etc.).
 - c. Identification of gaps in the existing information to cover the five dimensions of success of education systems as described in the Sector Framework Document for Education and Early Childhood Development, and description of additional indicators to be collected in the future.

- d. A list of all the databases collected during the duration of this consultancy in digital format.

V. SCHEDULE OF PAYMENT

- 5.1 The consultancy will be paid as follows:
 - a. 30% upon signature of the contract.
 - b. 30% upon submission and approval of products in items a and d.
 - c. 40% upon submission and approval of products in items b and c.

VI. COORDINATION

- 6.1 Team Leader or Coordinator: Emiliana Vegas (SCL/EDU) and Elena Arias (SCL/EDU).
- 6.2 Department/Division: SCL/EDU.

VII. CHARACTERISTICS OF THE CONSULTANCY

- 7.1 **Type of Consultancy:** Individual consultant.
- 7.2 **Contract Duration:** 18 months.
- 7.3 **Place of work:** External Consultancy.

VIII. QUALIFICATIONS

- 8.1 **Education:** The candidate should have a PhD or equivalent degree in Education, Political Science, Economics, or Public Administration. Strong research background and strong analytical abilities, as demonstrated by academic and other personal achievements, preferred. Knowledge of educational testing will be a plus.
- 8.2 **Language:** The consultant must have excellent command of both Spanish and English.
- 8.3 **Experience:** The consultant should be an education indicators expert with at least 15 years of relevant experience in the field of education policy. Previous experience in administrating education statistics and database systems at the government level will be a plus.

TERMS OF REFERENCE

COUNTRY: Regional

PROJECT NAME: Education Statistics and Indicators for Latin America and the Caribbean

PROJECT NUMBER: RG-T2341

CONSULTANCY NAME: Development of Education Data Warehouse

I. BACKGROUND

- 1.1 The provision of high-quality information and up-to-date comprehensive data is a fundamental factor for strategic decision-making, resource allocation, and accountability in public policy. In Latin American and Caribbean (LAC) countries, multiple sources of information exist about the education systems. They operate at the national and sub-national levels (e.g. school censuses, household surveys, student learning assessments, even administrative data from the Ministries of Education), the regional level (LLECE, SERCE), and the international level (TIMSS, PIRLS, PISA). However, a high degree of heterogeneity is observed among countries in their institutional capacity for education evaluation and research. Difficulties also arise from the high diversity in the political and administrative institutions that produce education statistics in terms of responsible entity (ministries vs. evaluation agencies) and the level of autonomy. As a result, the region as a whole lags behind advanced and fast-developing economies in Europe, North America, and Asia in education data and research. Even when available, education data in Latin America and the Caribbean are often either not readily available to policy makers or cannot be fully utilized due to their low quality or irregular application.
- 1.2 As an attempt to partially fill the existing informational gap, the IDB's Education Division has been increasingly involved in the compilation and harmonization of relevant educational data for all the countries in the region. For example, the division has collected and analyzed household survey data from almost all the countries, national and regional student learning data, and other education data produced by national and international agencies in order to compute harmonized education indicators. At present, the data produced are housed in a server but not readily accessible to policy makers and analysts. The different pieces of analysis performed with such data (working papers, technical notes, etc.) are available online, but the target audience would be more effectively served by having them within an integrated platform, as well as having direct access to the data to carry out their own analyses.
- 1.3 Under this Technical Cooperation, the Education Division of the IDB will develop an Education Data Warehouse that hosts education statistics from across the region, as well as an education web portal that will make that information available to the public.

II. CONSULTANCY OBJECTIVES

- 2.1 The objective of this consultancy is to develop an Education Data Warehouse. The Education Data Warehouse will standardize and manage more efficiently the large amount of statistical information in the region's education systems, produced by national, local, and state governments, regional and international agencies (UNESCO Institute for Statistics (UIS), World Bank, UNESCO-OREALC, PREAL; etc.), and the Bank itself. Thus, the Education Data Warehouse will compile databases from school censuses and administrative records in education, household surveys, educational indicators published by the UIS and World Bank, school and academic achievement tests (national assessments, PISA, TIMSS, SERCE, etc.), and databases created within the Bank (for example, homogenized household surveys).

III. MAIN ACTIVITIES

- 3.1 **Development of the Education Data Warehouse.** In close collaboration with the Education Statistics Expert consultant and the IDB Education Division staff, the firm will:
- a. Develop an ETL system to compile and homogenize the various data sets in the region.
 - b. Develop metadata management guidelines in compliance with international standards and practices.
 - c. Ensure that data quality and governance processes are in place.
 - d. Set up a server to host the information for the Education Data Warehouse and provide access to appropriate personnel.
 - e. Determine data integration technology and processes that are needed to prepare the data for access through the web portal.
 - f. Define data usage guidelines for the web portal.
 - g. Establish mechanisms and protocols to update the information on a regular basis.
- 3.2 **Collaborate in the development of the education portal.** The firm will work closely with the consultant or firm in charge of designing and developing the web portal for external access to the data hosted in the Education Data Warehouse. Special attention will be paid to mechanisms to access the contents of the Education Data Warehouse through the web portal, the identification of possible user queries, and outputs to be provided by the web portal (such as maps, charts, tables, etc.), so as to provide the adequate semantic structure and physical infrastructure to the Education Data Warehouse.

IV. DELIVERABLES

- 4.1 There are three deliverables to this consultancy:
- a. Deliverable I will consist of an Education Data Warehouse housed in external servers comprising the information already available within the IDB (homogenized household surveys, data from impact evaluations, and other research data produced by the Education Division of the IDB), as well as information available from other sources such as UNESCO, World Bank, OECD, etc.
 - b. Deliverable II will consist of the same Education Data Warehouse with additional information, to be determined in agreement with the Statistics Expert and the IDB Education Division staff, from administrative databases and from national examinations collected directly from government databases.
 - c. Deliverable III will consist of detailed documentation of the architecture supporting the warehouse, with specific reference to the set of rules to maintain and expand the Education Data Warehouse as new information becomes available, as well as to ensure its future migratability to other servers.

V. SCHEDULE OF PAYMENT

- 5.1 The consultancy will be paid as follows:
- a. 30% upon signature of the contract.
 - b. 30% upon submission of Deliverable I.
 - c. 40% upon submission of Deliverables II and III.

VI. COORDINATION

- 6.1 Team Leader or Coordinator: Emiliana Vegas (SCL/EDU) and Elena Arias (SCL/EDU).
- 6.2 Department/Division: SCL/EDU.

VII. CHARACTERISTICS OF THE CONSULTANCY

- 7.1 **Type of Consultancy:** International consulting firm.
- 7.2 **Contract Duration:** 12 months.
- 7.3 **Place of work:** Location of consultancy firm.

VIII. REQUIREMENTS

- 8.1 Leading and innovative technological firm with expertise in database integration and development. At least 10 years of demonstrated field experience and industry

recognition. Previous experience working with Latin American countries in the specific areas described herein is desired.

- 1.1 The firm will submit documentation that it can meet the technical and skills requirements for this project, including full-time developers' CVs and samples of previous work.

TERMS OF REFERENCE

COUNTRY: Regional

PROJECT NAME: Education Statistics and Indicators for Latin America and the Caribbean

PROJECT NUMBER: RG-T2341

NAME OF THE CONSULTANCY: Best practices in data collection

I. BACKGROUND

- 1.1 The provision of high-quality information and up-to-date comprehensive data is a fundamental factor for strategic decision-making, resource allocation, and accountability in public policy. In Latin American and Caribbean (LAC) countries, multiple sources of information exist about the education systems. They operate at the national and sub-national levels (e.g. school censuses, household surveys, student learning assessments, even administrative data from the ministries of education), the regional level (LLECE, SERCE), and the international level (TIMSS, PIRLS, PISA). However, a high degree of heterogeneity is observed among countries in their institutional capacity for education evaluation and research. Difficulties also arise from the high diversity in the political and administrative institutions that produce education statistics in terms of responsible entity (ministries vs. evaluation agencies) and the level of autonomy. As a result, the region as a whole lags behind advanced and fast-developing economies in Europe, North America, and Asia in education data and research. Even when available, education data in Latin America and the Caribbean are often either not readily available to policy makers or cannot be fully utilized due to their low quality or irregular application.
- 1.2 As an attempt to partially fill the existing informational gap, the IDB's Education Division has been increasingly involved in the compilation and harmonization of relevant educational data for all the countries in the region. For example, the division has collected and analyzed household survey data from almost all the countries, national and regional student learning data, and other education data produced by national and international agencies in order to compute harmonized education indicators. At present, the data produced are housed in a server but not readily accessible to policy makers and analysts. The different pieces of analysis performed with such data (working papers, technical notes, etc.) are available online, but the target audience would be more effectively served by having them within an integrated platform, as well as having direct access to the data to carry out their own analyses.
- 1.3 Under this Technical Cooperation, the Education Division of the IDB will develop an Education Data Warehouse that hosts education statistics from across the region, as well as an education web portal that will make that information available to the public. The Education Data Warehouse will standardize and manage more efficiently the large amount of statistical information in the region's education systems, produced by national, local, and state governments, regional

and international agencies (UNESCO Institute for Statistics (UIS), World Bank, UNESCO-OREALC, PREAL; etc.), and the Bank itself. Thus, the Education Data Warehouse will compile databases from school censuses and administrative records in education, household surveys, educational indicators published by the UIS and World Bank, school and academic achievement tests (national assessments, PISA, TIMSS, SERCE, etc.), and databases created within the Bank (for example, homogenized household surveys).

II. CONSULTANCY OBJECTIVES

- 2.1 The objective of this consultancy is to provide support to countries in the Latin America and Caribbean region for the improvement of their education statistics systems through the development and dissemination of a best practices manual in data collection and management.

III. MAIN ACTIVITIES

- 3.1 Taking into account the information produced under subcomponent 1.1 of this Technical Cooperation, the consultant will develop a best practices manual in data collection and management that could be used to provide training and support to countries for the improvement of their education statistics systems. Such manual should discuss: (i) mechanisms for data collection, main challenges, and case studies of high performing education management information systems; (ii) best practices in data entry, integration, management, and transfer, with particular reference to the use of specific database management systems (DBMS); and (iii) a suggested list of indicators on which to collect data and guidelines for their estimation, with particular reference to indicators that have been homogenized across the region during the execution of the activities in subcomponent 1.1.
- 3.2 Using the manual, the consultant will design and lead a series of workshops to provide training to officials of the statistics departments of a number of countries to be determined (deemed most needed of this type of support in agreement with the IDB Education staff).

IV. DELIVERABLES

- 4.1 The consultant will deliver the following products:
 - a. Deliverable 1: manual on best practices in data collection and data management.
 - b. Deliverable 2: curriculum, activities, and materials (i.e. sample databases) for the training workshops and execution of training workshops.

V. SCHEDULE OF PAYMENT

- 5.1 The consultancy will be paid as follows:
 - a. 30% upon signature of the contract.

- b. 30% upon submission and approval of Deliverable 1.
- c. 40% upon submission and approval of Deliverable 2.

VI. COORDINATION

- 6.1 Team Leader or Coordinator: Emiliana Vegas (SCL/EDU) and Elena Arias (SCL/EDU).
- 6.2 Department/Division: SCL/EDU.

VII. CHARACTERISTICS OF THE CONSULTANCY

- 7.1 **Type of Consultancy:** Individual consultant.
- 7.2 **Contract Duration:** 30 non-consecutive days.
- 7.3 **Place of work:** External Consultancy.

VIII. QUALIFICATIONS

- 8.1 **Education:** The candidate should have a PhD or equivalent degree in Education, Political Science, Economics, or Public Administration. Strong research background and strong analytical abilities as demonstrated by academic and other personal achievements preferred. Knowledge of educational testing will be a plus.
- 8.2 **Language:** The consultant must have excellent command of both Spanish and English.
- 8.3 **Experience:** The consultant should be an education indicators expert with at least 15 years of relevant experience in the field of education.

TERMS OF REFERENCE

COUNTRY: Regional

PROJECT NAME: Education Statistics and Indicators for Latin America and the Caribbean

PROJECT NUMBER: RG-T2341

NAME OF THE CONSULTANCY: Design and development of the web portal

I. BACKGROUND

- 1.1 The provision of high-quality information and up-to-date comprehensive data is a fundamental factor for strategic decision-making, resource allocation, and accountability in public policy. In Latin American and Caribbean (LAC) countries, multiple sources of information exist about the education systems. They operate at the national and sub-national levels (e.g. school censuses, household surveys, student learning assessments, even administrative data from the Ministries of Education), the regional level (LLECE, SERCE), and the international level (TIMSS, PIRLS, PISA). However, a high degree of heterogeneity is observed among countries in their institutional capacity for education evaluation and research. Difficulties also arise from the high diversity in the political and administrative institutions that produce education statistics in terms of responsible entity (ministries vs. evaluation agencies) and the level of autonomy. As a result, the region as a whole lags behind advanced and fast-developing economies in Europe, North America, and Asia in education data and research and, more importantly, education outcomes. Even when available, education data in Latin America and the Caribbean are often either not readily available to policy makers, or cannot be fully utilized due to their low quality or irregular application.
- 1.2 This consultancy will establish a platform that provides access to harmonized indicators, databases, and information from the different sources outlined in subcomponent 1. It will also serve as a tool to generate statistical tables and graphs based on individual needs. Using the statistical record Education Data Warehouse from subcomponent 1 of this TC, the main output will be the creation of the first statistical portal dedicated to the production and monitoring of education indicators and statistics exclusively for the LAC region.

II. CONSULTANCY OBJECTIVES

- 2.1 The main objectives of the consultancy include:
 - a. Map the metadata of the Education Data Warehouse in a web platform as required by the project's team.
 - b. Develop and design a user-friendly platform that provides access to harmonized indicators, databases and information from the different sources outlined in subcomponent 1.1 of this TC and make them available for broader audiences.

- 2.2 The firm will work closely with the consultant or firm in charge of developing the Education Data Warehouse. It will pay special attention to mechanisms to access the contents of the Education Data Warehouse through the web portal, the identification of possible user queries, and outputs to be provided by the web portal (such as maps, charts, tables, etc.), so as to provide the adequate semantic structure and physical infrastructure to the Education Data Warehouse.

III. MAIN ACTIVITIES

- 3.1 Meet regularly and maintain a close communication with the project's team, in particular with the data analyst.
- 3.2 Develop a proposal for the design and main functionalities of the web portal based on data usage guidelines. The design should be visually appealing and user-friendly.
- 3.3 Ensure that data quality and governance processes of the Education Data Warehouse continue to be in place in the portal.
- 3.4 Establish the linkage between the server that hosts the information for the Education Data Warehouse and the portal.
- 3.5 Ensure that the data integration technology and processes developed by the data analyst are adequately connected to the web portal.
- 3.6 Create a content management system that allows for frequent updates of the information posted in the portal.
- 3.7 Conduct tests to ensure that the portal and the web platform are functioning properly.

IV. DELIVERABLES

- 4.1 The main product of this consultancy will be the set-up of the web statistical portal available to the public.

V. SCHEDULE OF PAYMENT

- 5.1 The consultancy will be paid as follows:
- a. 30% upon the delivery of the work plan and proposal for the web portal, including its main functionalities and design.
 - b. 20% upon the completion of the first phase of the project, according to the timeframe established in the work plan.
 - c. 20% upon the completion of the second phase of the project, according to the timeline established in the work plan.
 - d. 30% after the training of the IDB's team in how to update and maintain the web portal takes place.

VI. COORDINATION

- 6.1 Team Leader: Emiliana Vegas.
- 6.2 Department/Division: SCL/EDU.

VII. CHARACTERISTICS OF THE CONSULTANCY

- 7.1 **Type of Consultancy:** Firm.
- 7.2 **Contract Duration:** 6 months.
- 7.3 **Place of work:** External consultancy.

VIII. QUALIFICATIONS

- 8.1 The firm should have at least 5 years of experience developing and designing content management systems and web portals.

TERMS OF REFERENCE

COUNTRY: Regional

PROJECT NAME: Education Statistics and Indicators for Latin America and the Caribbean

PROJECT NUMBER: RG-T2341

CONSULTANCY NAME: Background papers for report

I. BACKGROUND

- 1.1 The provision of high-quality information and up-to-date comprehensive data is a fundamental factor for strategic decision-making, resource allocation, and accountability in public policy. In Latin American and Caribbean (LAC) countries, multiple sources of information exist about education systems. These sources operate at the national and sub-national levels (e.g. school censuses, household surveys, student learning assessments, even administrative data from the ministries of education) and at the regional level (LLECE, SERCE) and the international level (TIMSS, PIRLS, PISA). However, a high degree of heterogeneity is observed among countries and within countries in their institutional capacity for education evaluation and research. As a result, the region lags behind advanced and fast-developing economies in Europe, North America, and Asia in education data and research and, more importantly, education outcomes. Even when it exists, education data in Latin America and the Caribbean are often either not readily available to policy makers or cannot be fully utilized due to their low quality or irregular application.
- 1.2 As part of this TC, this consultancy will be part of a comprehensive effort by the Bank to produce and disseminate a report that presents an in-depth analysis of the key education indicators. This report will be designed to inform policy makers on the state of education in the region and the progress made by their individual countries (a format inspired by the OECD *Education at a Glance Report* and the *Global Education Digest* (GED)). In addition to providing a comparative analysis on indicators on a variety of education outcomes, the report will include a detailed analysis of a particular topic related to the Dimensions of Success for Education outlined in the Sector Framework Document for Education and Early Childhood Development (e.g. teacher quality or ECD) based on the results of the ongoing research produced by the Education Division.

II. CONSULTANCY OBJECTIVES

- 2.1 The main objective of this consultancy is to produce in-depth background papers that can serve as the basis for the production of the first thematic report by the Education Division.

III. MAIN ACTIVITIES

- 3.1 Communicate regularly with the project's team in the Education Division to jointly define the scope of the analysis that the background paper will provide.

- 3.2 Conduct a literature review of recent research on the education policy issue that will be addressed by the report.
- 3.3 Use the data produced by the Education Data Warehouse and published by the statistics portal as part of subcomponents 1 and 2 of this TC respectively in the analysis.
- 3.4 Draft an annotated outline of the paper to be approved by the project's team.
- 3.5 Create user-friendly graphs and info graphics to present the paper's findings to both technical and non-technical audiences.
- 3.6 Present the paper's findings to the IDB specialists.
- 3.7 Participate as a speaker in conferences, workshops, and related events to present the paper's findings across Latin America and the Caribbean.
- 3.8 Participate in the discussion of the content of the articles that will be included in the final report.

IV. DELIVERABLES

- 4.1 The main product of this consultancy will be the background paper on the education policy issue that will be defined by the project's team and used as the fundamental basis for the statistical report that will be produced by IDB's Education Division.

V. SCHEDULE OF PAYMENT

- 5.1 The consultancy will be paid as follows:
 - a. 20% upon signing the contract.
 - b. 30% upon delivery of the annotated outline.
 - c. 50% upon submission of the final version of the background paper and its approval by the project's team.

VI. COORDINATION

- 6.1 Team Leader or Coordinator: Emiliana Vegas (SCL/EDU) and Elena Arias (SCL/EDU).
- 6.2 Department/Division: SCL/EDU.

VII. CHARACTERISTICS OF THE CONSULTANCY

- 7.1 **Type of Consultancy:** Individual consultant.
- 7.2 **Contract Duration:** 6 months.
- 7.3 **Place of work:** External Consultancy.

VIII. QUALIFICATIONS

- 8.1 **Education:** The consultant should be a renowned expert in the field of education policy and he or she should be a specialist in the report's topic. PhD in economics, education policy or related field preferred.
- 8.2 **Language:** Spanish and English. Conversational Portuguese and French are a plus.
- 8.3 **Experience:** More than 5 years of experience working in a renowned university, think tank, or similar institution and constantly produce analytical work. Relevant publications related to the topic of both the background paper and the report. Outstanding communication skills and ability to reach broad and non-technical audiences.

TERMS OF REFERENCE

COUNTRY: Regional

PROJECT NAME: Education Statistics and Indicators for Latin America and the Caribbean

PROJECT NUMBER: RG-T2341

NAME OF THE CONSULTANCY: Production of education education report/
Research assistance

I. BACKGROUND

- 1.1 The provision of high-quality information and up-to-date comprehensive data is a fundamental factor for strategic decision-making, resource allocation, and accountability in public policy. In Latin American and Caribbean (LAC) countries, multiple sources of information exist about education systems. These sources operate at the national and sub-national levels (e.g. school censuses, household surveys, student learning assessments, even administrative data from the ministries of education) and at the regional level (LLECE, SERCE) and the international level (TIMSS, PIRLS, PISA). However, a high degree of heterogeneity is observed among countries and within countries in their institutional capacity for education evaluation and research. As a result, the region lags behind advanced and fast-developing economies in Europe, North America, and Asia in education data and research and, more importantly, education outcomes. Even when it exists, education data in Latin America and the Caribbean are often either not readily available to policy makers, or cannot be fully utilized due to their low quality or irregular application.
- 1.2 As part of this TC, this consultancy will be part of a comprehensive effort by the Bank to produce and disseminate a report that presents an in-depth analysis of the key education indicators. This report will be designed to inform policy makers on the state of education in the region and the progress made by their individual countries (a format inspired by the OECD *Education at a Glance Report* and the *Global Education Digest* (GED)). In addition to providing a comparative analysis on indicators on a variety of education outcomes, the report will include a detailed analysis of a particular topic related to the Dimensions of Success for Education outlined in the Sector Framework Document for Education and Early Childhood Development (e.g. teacher quality or ECD) based on the results of the ongoing research produced by the Education Division.

II. CONSULTANCY OBJECTIVES

- 2.1 The main objective of this consultancy is to provide research and data analysis support to the development of an education report that presents an in-depth analysis of key education indicators in the Latin America and Caribbean region.

III. MAIN ACTIVITIES

- 3.1 Conduct literature reviews on topics to be assigned.
- 3.2 Manage databases and conduct statistical analyses as requested by the team in charge of the coordination of the report.
- 3.3 Draft sections of the report based on the data analyses performed.
- 3.4 Develop user-friendly graphs, charts, and other visual aids to be included in the report in close collaboration with the graphic designer.
- 3.5 Participate in the discussion of the content of the articles that will be included in the final report.

IV. DELIVERABLES

- 4.1 The consultant will deliver the following products:
 - a. Literature review on relevant education topics.
 - b. Do-files for data analysis.
 - c. Data analysis outputs.
 - d. Draft of sections of the report.

V. SCHEDULE OF PAYMENT

- 5.1 The consultancy will be paid as follows:
 - a. 30% upon signature of contract.
 - b. 30% upon submission of literature review, do-files and data analysis outputs.
 - c. 40% upon submission of draft sections of the report.

VI. COORDINATION

- 6.1 Team Leader or Coordinator: Emiliana Vegas (SCL/EDU) and Elena Arias (SCL/EDU).
- 6.2 Department/Division: SCL/EDU.

VII. CHARACTERISTICS OF THE CONSULTANCY

- 7.1 **Type of Consultancy:** Individual consultant.
- 7.2 **Contract Duration:** 8 months.
- 7.3 **Place of work:** External Consultancy.

VIII. QUALIFICATIONS

- 8.1 **Education:** The candidate should have a Master's degree in Education, Economics, Statistics, or related field and experience in data analysis using statistical software such as STATA. Strong research background preferred.
- 8.2 **Language:** The consultant must have excellent command of both Spanish and English.
- 8.3 **Experience:** The consultant should be a data analyst with at least 3 years of relevant experience in the field of education and have strong analytical abilities as demonstrated by academic and other personal achievements. Experience managing large databases is required. Knowledge of educational testing concepts will be a plus.

TERMS OF REFERENCE

COUNTRY: Regional

PROJECT NAME: Education Statistics and Indicators for Latin America and the Caribbean

PROJECT NUMBER: RG-T2341

NAME OF THE CONSULTANCY: Design of the education report

I. BACKGROUND

- 1.1 The provision of high-quality information and up-to-date comprehensive data is a fundamental factor for strategic decision-making, resource allocation, and accountability in public policy. In Latin American and Caribbean (LAC) countries, multiple sources of information exist about education systems. These sources operate at the national and sub-national levels (e.g. school censuses, household surveys, student learning assessments, even administrative data from the ministries of education) and at the regional level (LLECE, SERCE) and the international level (TIMSS, PIRLS, PISA). However, a high degree of heterogeneity is observed among countries and within countries in their institutional capacity for education evaluation and research. As a result, the region lags behind advanced and fast-developing economies in Europe, North America, and Asia in education data and research and, more importantly, education outcomes. Even when it exists, education data in Latin America and the Caribbean are often either not readily available to policy makers or cannot be fully utilized due to their low quality or irregular application.
- 1.2 As part of this TC, this consultancy will be part of a comprehensive effort by the Bank to produce and disseminate a report that presents an in-depth analysis of the key education indicators. This report will be designed to inform the policy makers on the state of education in the region and the progress made by their individual countries (a format inspired by the OECD *Education at a Glance Report* and the *Global Education Digest* (GED)). In addition to providing a comparative analysis on indicators on a variety of education outcomes, the report will include a detailed analysis of a particular topic related to the Dimensions of Success for Education outlined in the Sector Framework Document for Education and Early Childhood Development (e.g. teacher quality or ECD) based on the results of the ongoing research produced by the Education Division.
- 1.3 This TC will finance the production of the first report, with the idea that it becomes periodical once the Center takes the responsibilities outlined in this component. For that reason, this consultancy includes both the design of the first report and also a general template that can serve as a guide for future editions.

II. CONSULTANCY OBJECTIVES

- 2.1 The main objective of this consultancy will be to design the layout of the report, according to the graphic identity of the IDB's education division, and the contents.

III. MAIN ACTIVITIES

- 3.1 Review similar international reports to help capture the main idea of a statistical report and create an original product for the IDB.
- 3.2 Present a proposal for the report's design and incorporate feedback and comments.
- 3.3 Use the content provided by the team in charge of the coordination of the report and define the report's lay out as part of an appealing format, including colors, images, and info graphics, among other graphical resources.
- 3.4 Meet on a regular basis with the team in charge of the coordination of the report. Constant communication with the project's team is key to this consultancy's execution. The sections of the report will be designed progressively and feedback should be requested along the process. Each section will be finalized after the project's team final approval.

IV. DELIVERABLES

- 4.1 The consultant will deliver the following products:
 - a. Design proposal for the 2014-2015 Education Report.
 - b. Final design for the 2014-2015 Education report.
 - c. Template for the design of the report to be used in the future editions.

V. SCHEDULE OF PAYMENT

- 5.1 The consultancy will be paid as follows:
 - a. 20% upon the delivery of the design proposal.
 - b. 60% upon the delivery of the final and approved design of the report.
 - c. 20% after delivering the template for future reports' designs.

VI. COORDINATION

- 6.1 Team Leader or Coordinator: Emiliana Vegas.
- 6.2 Department/Division: SCL/EDU.

VII. CHARACTERISTICS OF THE CONSULTANCY

- 7.1 **Type of Consultancy:** International Individual Consultancy.
- 7.2 **Contract Duration:** 6 months.
- 7.3 **Place of work:** External consultancy.

VIII. QUALIFICATIONS

- 8.1 Professional in graphic design and publishing with 3-5 years of experience.
- 8.2 Experience designing technical magazines and reports is a plus.

TERMS OF REFERENCE

COUNTRY: Regional

PROJECT NAME: Education Statistics and Indicators for Latin America and the Caribbean

PROJECT NUMBER: RG-T2341

NAME OF THE CONSULTANCY: Design and planning of the Centre

I. BACKGROUND

- 1.1 The provision of high-quality information and up-to-date comprehensive data is a fundamental factor for strategic decision-making, resource allocation, and accountability in public policy. In Latin American and Caribbean (LAC) countries, multiple sources of information exist about the education systems. They operate at the national and sub-national levels (e.g. school censuses, household surveys, student learning assessments, even administrative data from the ministries of education), the regional level (LLECE, SERCE), and the international level (TIMSS, PIRLS, PISA). However, a high degree of heterogeneity is observed among countries in their institutional capacity for education evaluation and research. Difficulties also arise from the high diversity in the political and administrative institutions that produce education statistics in terms of responsible entity (ministries vs. evaluation agencies) and the level of autonomy. As a result, the region as a whole lags behind advanced and fast-developing economies in Europe, North America, and Asia in education data and research. Even when available, education data in Latin America and the Caribbean are often either not readily available to policy makers or cannot be fully utilized due to their low quality or irregular application.
- 1.2 As an attempt to partially fill the existing informational gap, the IDB's Education Division has been increasingly involved in the compilation and harmonization of relevant educational data for all the countries in the region. For example, the division has collected and analyzed household survey data from almost all the countries, national and regional student learning data, and other education data produced by national and international agencies in order to compute harmonized education indicators. At present, the data produced are housed in a server but not readily accessible to policy makers and analysts. The different pieces of analysis performed with such data (working papers, technical notes, etc.) are available online, but the target audience would be more effectively served by having them within an integrated platform, as well as having direct access to the data to carry out their own analyses.
- 1.3 The Education Division of the IDB will develop an Education Data Warehouse that hosts education statistics from across the region, as well as an education web portal that will make that information available to the public. The Education Data Warehouse and portal will serve as the foundations for the development of a regional center that will collect, analyze, and disseminate the region's education

- statistics, as well as lead high quality evaluations and advanced research to promote the education reforms the region needs.
- 1.4 Under this Technical Cooperation, the Bank will set the minimum standards and main characteristics of the Center to inform a call for proposals from countries and organizations in the region with suggested location and configuration of the Center.

II. CONSULTANCY OBJECTIVES

- 2.1 The objective of this consultancy is to develop a proposal for the organizational structure and financial plan of the Center that will serve as the basis for a call for proposals to host the Center from countries and organizations in the LAC region.

III. MAIN ACTIVITIES

- 3.1 The consultant will:
- a. Identify and analyze similar initiatives in the LAC region and elsewhere to determine best practices and main challenges in the development of this type of institution.
 - b. Elaborate a proposal for the configuration of the Center. Such proposal should include the following elements:
 - main functions;
 - system of governance;
 - legal structure;
 - financial plan;
 - human resources profile;
 - areas of research;
 - strategy to ensure continuity in the compilation of statistics over time, incorporating recommendations developed by the consultancy “Identify and catalogue existing education statistics and identify indicators for statistics portal;”
 - strategy for the development of the Center’s corporate image;
 - partnerships the Center should develop with other institutions.
- 3.2 The proposal should explicitly discuss main advantages and disadvantages of alternative configurations.

IV. DELIVERABLES

- 4.1 The consultant will deliver the following products:
- a. Mid-term report with planned structure of the final report.

- b. Final report with a detailed proposal for the configuration of the Center.

V. SCHEDULE OF PAYMENT

- 5.1 The consultancy will be paid as follows:
 - a. 30% upon signature of the contract.
 - b. 30% upon submission and approval of the mid-term report.
 - c. 40% upon submission and approval of the final report.

VI. COORDINATION

- 6.1 Team Leader or Coordinator: Emiliana Vegas (SCL/EDU) and Elena Arias (SCL/EDU).
- 6.2 Department/Division: SCL/EDU.

VII. CHARACTERISTICS OF THE CONSULTANCY

- 7.1 **Type of Consultancy:** Individual consultant.
- 7.2 **Contract Duration:** 30 days.
- 7.3 **Place of work:** External Consultancy.

VIII. QUALIFICATIONS

- 8.1 **Education:** The candidate should have a PhD in Organizational Analysis, Sociology, Education, Economics, Political Science, or Public Administration, or equivalent degree. Strong research background preferred. Experience heading or participating in the board of research and multi-stakeholder organizations strongly preferred. Knowledge of the education research and policy making field is required.
- 8.2 **Language:** The consultant must have excellent command of both Spanish and English, and have strong analytical abilities as demonstrated by academic and other personal achievements.
- 8.3 **Experience:** The consultant should be an organizational analysis expert with at least 15 years of relevant experience.

TERMS OF REFERENCE

COUNTRY: Regional

PROJECT NAME: Education Statistics and Indicators for Latin America and the Caribbean

PROJECT NUMBER: RG-T2341

NAME OF THE CONSULTANCY: Outreach strategy for the Center

I. BACKGROUND

- 1.1 The provision of high-quality information and up-to-date comprehensive data is a fundamental factor for strategic decision-making, resource allocation, and accountability in public policy. In Latin American and Caribbean (LAC) countries, multiple sources of information exist about the education systems. They operate at the national and sub-national levels (e.g. school censuses, household surveys, student learning assessments, even administrative data from the ministries of education), the regional level (LLECE, SERCE), and the international level (TIMSS, PIRLS, PISA). However, a high degree of heterogeneity is observed among countries in their institutional capacity for education evaluation and research. Difficulties also arise from the high diversity in the political and administrative institutions that produce education statistics in terms of responsible entity (ministries vs. evaluation agencies) and the level of autonomy. As a result, as a whole the region lags behind advanced and fast-developing economies in Europe, North America, and Asia in education data and research and, more importantly, education outcomes. Even when available, education data in Latin America and the Caribbean are often either not readily available to policy makers or cannot be fully utilized due to their low quality or irregular application.
- 1.2 This consultancy is part of the last component of this TC that aims at setting the basis and ensuring governments' buy-in for the creation of an education policy research center physically established in the region and equipped with highly technical staff and communication resources.

II. CONSULTANCY OBJECTIVES

- 2.1 The main objective of this consultancy is to develop an outreach strategy to create interest among Latin American and Caribbean countries and motivate their support for establishing a regional center to collect, systematize, and disseminate education statistics. This consultancy will achieve this goal by creating awareness among national and subnational authorities for the importance of collecting and using reliable education data to promote education quality.

III. MAIN ACTIVITIES

- 3.1 The activities of this consultancy include:

- a. Develop an outreach strategy and activity plan to create interest among Latin American and Caribbean countries and motivate their support for establishing a regional center for education statistics.
- b. Design and disseminate institutional materials for the Center.
- c. Organize conferences, events, and meetings to present the goals and the activities of the Center for Education Statistics (the specific location of these events will also be proposed in the work plan) to government authorities and other relevant actors.
- d. Handle media relations and arrange interviews with the press to raise awareness among the general public about the usefulness of data collection and harmonization.
- e. Use key messages aligned with the organization structure and objectives of the Center as established by the consultancy “Design and planning of the Center.”

IV. DELIVERABLES

- 4.1 The consultant will deliver the following products:
 - a. Outreach strategy and activity plan: the work plan will include activities and deadlines.
 - b. Development and dissemination of corporate materials such as brochures, Power Point presentations, and any other advertising material considered in the work plan.
 - c. Organization of several events, conferences, and meetings to reach government authorities and other relevant actors (the location of these events will be defined along the process).

V. SCHEDULE OF PAYMENT

- 5.1 The consultancy will be paid as follows:
 - a. 30% after delivering the outreach strategy and activity plan.
 - b. 70% after its adequate execution. The second payment will only be granted after verifying the quality of the materials developed by the consulting firm.

VI. COORDINATION

- 6.1 Team Leader or Coordinator: Emiliana Vegas / Elena Arias.
- 6.2 Department/Division: SCL / EDU.

VII. CHARACTERISTICS OF THE CONSULTANCY

- 7.1 **Type of Consultancy:** Firm.
- 7.2 **Contract Duration:** 6 months.

7.3 **Place of work:** External consultancy.

VIII. QUALIFICATION

8.1 The desirable qualifications of the firm include:

- a. 10+ years of experience developing outreach strategies and carrying out public relations activities.
- b. 5+ years of experience providing services and products to Latin American and Caribbean national and/or subnational governments.
- c. Experience working in countries across the region is a plus.

TERMS OF REFERENCE

COUNTRY: Regional

PROJECT NAME: Education Statistics and Indicators for Latin America and the Caribbean

PROJECT NUMBER: RG-T2341

NAME OF THE CONSULTANCY: Design and execution of call for proposals for Center location and leadership composition

I. BACKGROUND

- 1.1 The provision of high-quality information and up-to-date comprehensive data is a fundamental factor for strategic decision-making, resource allocation, and accountability in public policy. In Latin American and Caribbean (LAC) countries, multiple sources of information exist about the education systems. They operate at the national and sub-national levels (e.g. school censuses, household surveys, student learning assessments, even administrative data from the ministries of education), the regional level (LLECE, SERCE), and the international level (TIMSS, PIRLS, PISA). However, a high degree of heterogeneity is observed among countries in their institutional capacity for education evaluation and research. Difficulties also arise from the high diversity in the political and administrative institutions that produce education statistics in terms of responsible entity (ministries vs. evaluation agencies) and the level of autonomy. As a result, as a whole the region lags behind advanced and fast-developing economies in Europe, North America, and Asia in education data and research and, more importantly, education outcomes. Even when available, education data in Latin America and the Caribbean are often either not readily available to policy makers or cannot be fully utilized due to their low quality or irregular application.
- 1.2 This consultancy is part of the last component of this TC that aims at setting the basis and ensuring governments' buy-in for the creation of an education policy research center physically established in the region and equipped with highly technical staff and communication resources.

II. CONSULTANCY OBJECTIVES

- 2.1 The main objective of this consultancy is to design the basis for a regional competition that will allow countries/organizations to compete to become the Center's host.

III. MAIN ACTIVITIES

- 3.1 The activities of this consultancy include:
 - a. Review similar competitions in the region.

- b. Design key components of the competition, including the template proposals that countries will have to submit and the basis and rules for participation in the competition.
- c. Carry out the competition and reception of proposals.
- d. Coordinate panel of experts that will review proposals as established by the consultancy “Evaluation panel for submitted proposals.”
- e. Align the basis of the competition and the call for proposal criteria with the configuration of the Center developed in the consultancy “Design and planning of the Center.”

IV. DELIVERABLES

- 4.1 The consultant will deliver the following products:
 - a. Report detailing basis for competition and instruments to use in call for proposal.
 - b. Lead the execution of the proposal.

V. SCHEDULE OF PAYMENT

- 5.1 The consultancy will be paid as follows:
 - a. 30% at signing of contract.
 - b. 30% at submission of report.
 - c. 40% at completion of competition.

VI. COORDINATION

- 6.1 Team Leader or Coordinator: Emiliana Vegas / Elena Arias.
- 6.2 Department/Division: SCL / EDU.

VII. CHARACTERISTICS OF THE CONSULTANCY

- 7.1 **Type of Consultancy:** Individual.
- 7.2 **Contract Duration:** 6 months.
- 7.3 **Place of work:** External consultancy.

VIII. QUALIFICATION

- 8.1 The desirable qualifications of the consultant include:
 - a. Experience developing similar competitions in the region.
 - b. Experience in education projects.
 - c. Experience working in countries across the region is a plus.

TERMS OF REFERENCE

COUNTRY: Regional

PROJECT NAME: Education Statistics and Indicators for Latin America and the Caribbean

PROJECT NUMBER: RG-T2341

NAME OF THE CONSULTANCY: Evaluation panel for submitted proposals

I. BACKGROUND

- 1.1 The provision of high-quality information and up-to-date comprehensive data is a fundamental factor for strategic decision-making, resource allocation, and accountability in public policy. In Latin American and Caribbean (LAC) countries, multiple sources of information exist about the education systems. They operate at the national and sub-national levels (e.g. school censuses, household surveys, student learning assessments, even administrative data from the ministries of education), the regional level (LLECE, SERCE), and the international level (TIMSS, PIRLS, PISA). However, a high degree of heterogeneity is observed among countries in their institutional capacity for education evaluation and research. Difficulties also arise from the high diversity in the political and administrative institutions that produce education statistics in terms of responsible entity (ministries vs. evaluation agencies) and the level of autonomy. As a result, as a whole the region lags behind advanced and fast-developing economies in Europe, North America, and Asia in education data and research and, more importantly, education outcomes. Even when available, education data in Latin America and the Caribbean are often either not readily available to policy makers or cannot be fully utilized due to their low quality or irregular application.
- 1.2 This consultancy is part of the last component of this TC that aims at setting the basis and ensuring governments' buy-in for the creation of an education policy research center physically established in the region and equipped with highly technical staff and communication resources.

II. CONSULTANCY OBJECTIVES

- 2.1 The main objective of this consultancy is to participate as an expert in a panel that will review proposals submitted by countries to become the Center's host.

III. MAIN ACTIVITIES

- 3.1 The activities of this consultancy include:
 - a. Participate in defining the basis of the competition in collaboration with the consultancy "Design and execution of call for proposal for Center location and leadership composition."

- b. Review and rate submitted proposals.
- c. Prioritization of proposals according to their score.
- d. Selection of winners.

IV. DELIVERABLES

- 4.1 Report with rate of proposals detailing reasons behind score.

V. SCHEDULE OF PAYMENT

- 5.1 The consultancy will be paid as follows:
 - a. 30% at signing of contract.
 - b. 30% at submission of report.
 - c. 40% at completion of competition.

VI. COORDINATION

- 6.1 Team Leader or Coordinator: Emiliana Vegas / Elena Arias.
- 6.2 Department/Division: SCL / EDU.

VII. CHARACTERISTICS OF THE CONSULTANCY

- 7.1 **Type of Consultancy:** Individual (3 individual consultants).
- 7.2 **Contract Duration:** 5 days.
- 7.3 **Place of work:** External consultancy.

VIII. QUALIFICATION

- 8.1 **Education:** The candidate should have a PhD or equivalent degree in Education, Political Science, Economics, or Public Administration, and have strong analytical abilities as demonstrated by academic and other personal achievements.
- 8.2 **Language:** The consultant must have excellent command of both Spanish and English.
- 8.3 **Experience:** The consultant should be an education expert with at least 15 years of relevant experience in the field of education.

Inter-American Development Bank -VPC/PDP

PROCUREMENT PLAN FOR NON-REIMBURSABLE TECHNICAL COOPERATIONS										
Country: Regional						Executing agency: SCL/EDU			Public or private sector: public	
Project number: RG-T2341						Title of Project: Education Statistics and Indicators for Latin America and the Caribbean				
Period covered by the plan: 30 months										
Threshold for ex post review of procurements: n/a				Goods and services (in US\$):			Consulting services(in US\$):			
Item No.	Ref. AWP	Description (1)	Estimated contract cost (US\$)	Procurement Method (2)	Review of procurement (ex-ante or ex-post) (3)	Source of financing and percentage		Estimated date of the procurement notice or start of the contract	Technical review by the PTL (4)	Comments
						IDB/MIF %	Local/other %			
1		Component 1. Education and Statistics Portal and Report								
		Non consulting services								
		Editing of report	10,000	PC	Ex-post	100	0	Mar-15		
		Printing, distribution and dissemination of report	25,000	PC	Ex-post	100	0	Mar-15		
		Consulting services								
		Development of data warehouse	130,000	QCBS	ex-post	100	0	Jan-14		
		Design and development of the Portal	145,000	QCBS	ex-post	100	0	Jun-14		
		Individual consultants								
		Identify and catalogue existing education statistics and identify indicators for statistics portal	80,000	IICQ	ex-post	100	0	Oct-13		
		Best practices in data collection and dissemination in countries	60,000	IICQ	ex-post	100	0	Jan-14		
		Production of background papers for the report	25,000	IICQ	ex-post	100	0	Jun-14		
		Production of report	30,000	IICQ	ex-post	100	0	Jun-14		
		Design of report	10,000	IICQ	ex-post	100	0	Feb-15		
2		Component 2 Latin American Center for Education Statistics, Evaluation and Research								
		Individual consultants								
		Design and planning of the Centre	50,000	IICQ	ex-post	100	0	Jun-15		
		Outreach strategy	50,000	IICQ	ex-post	100	0	Sep-15		
		Design and execution of call for proposals to define site of center	40,000	IICQ	ex-post	100	0	Sep-15		
		Evaluation panel	20,000	IICQ	ex-post	100	0	Mar-16		
Total			675,000	Prepared by: Maria Soledad Bos			Date: July 31, 2013			
<p>(1) Grouping together of similar procurement is recommended, such as computer hardware, publications, travel, etc. If there are a number of similar individual contracts to be executed at different times, they can be grouped together under a single heading, with an explanation in the comments column indicating the average individual amount and the period during which the contract would be executed. For example: an export promotion project that includes travel to participate in fairs would have an item called "airfare for fairs", an estimated total value of US\$5,000, and an explanation in the Comments column: "This is for approximately four different airfares to participate in fairs in the region in years X and X1".</p>										
<p>(2) Goods and works: CB: Competitive bidding; PC: Price comparison; DC: Direct contracting.</p>										
<p>(2) Consulting firms: CQS: Selection Based on the Consultants' Qualifications; QCBS: Quality and cost-based selection; LCS: Least Cost Selection; FBS: Selection under a Fixed Budget; SSS: Single Source Selection; QBS: Quality Based selection.</p>										
<p>(2) Individual consultants: IICQ: International Individual Consultant Selection Based on Qualifications; SSS: Single Source Selection.</p>										
<p>(3) Ex ante/ex post review: In general, depending on the institutional capacity and level of risk associated with the procurement, ex post review is the standard modality. Ex ante review can be specified for critical or complex process.</p>										
<p>(4) Technical review: The PTL will use this column to define those procurement he/she considers "critical" or "complex" that require ex ante review of the terms of reference, technical specifications, reports, outputs, or other items.</p>										