

TERMS OF REFERENCE

Consultancy for Implementation of a Virtual Community and pool procurement for Water Utilities in the Caribbean

RG-T4645

Support for virtual community: data sharing and pool procurement among water utilities in the Caribbean

1. Background and Justification

- **1.1.** Established in 1959, the Inter-American Development Bank ("IDB" or "Bank") is the main source of financing for economic, social, and institutional development in Latin America and the Caribbean. It provides loans, grants, guarantees, policy advice and technical assistance to the public and private sectors of its borrowing countries.
- **1.2.** The IDB seeks to support a virtual community for Caribbean water utilities to be able to share and access information in real time that will help them with decision making as well as a pilot for pool procurement in the Region through a technology platform. The water and sanitation sector in the Caribbean is fragmented. While many utilities face similar challenges, there are limited tools to foster information sharing, particularly on specific and technical aspects, like specifications, performance, and availability of materials utilized for the provision of water service. Connecting the Caribbean water and sanitation in real time could have significant benefits, such as save money and time when procuring parts and materials, provide each other with expedited mutual aid in the event of a natural disaster or other emergency need for parts, equipment, or materials. The future of the water and sanitation sector is a networked ecosystem where utilities are working together to improve resiliency, save money, and make smarter decisions.
- **1.3.** As highlighted in the One Caribbean framework, the Caribbean is highly exposed to tropical storms and hurricanes, which will increase in frequency and intensity due to climate change, along with higher temperatures, intense and prolonged droughts, severe rainfall, and increased flooding. W&S utilities are not exempt, and, moreover, following any such event, the resiliency and recovery of W&S services are key to the overall recovery of the affected area. It is worth mentioning that the vision of One Caribbean is addressing such challenges under a regional approach. One of the expected results of One Caribbean is "Improved disaster preparedness and greater access to resilient infrastructure across the region."
- 1.4. To facilitate a critical mass of utilities in the platform to enable Pool Procurement, financing is required to extend the use for the 7 utilities in the virtual community piloted under RG-T4032 and to pilot pool procurement following the recommendations from the feasibility study conducted under RG-T4032. Additionally, the extended use of the platform will facilitate synergies with the Caribbean Water Utility Insurance Collective (CWUIC) response program. Pooled procurement fosters a more resilient and efficient water sector by enhancing collaboration, reducing costs by aggregating demand, ensuring a stable supply of essential parts and supplies, and in conjunction with Component 1 Response Program of CWUIC, facilitate mutual aid and support during emergencies, ensuring that critical supplies are available when needed.



- **1.5.** Direct Contracting of H2bid: It is proposed in the TC for IDB to engage in a direct contract with H2bid. In accordance with GN-2303-33 this is a Single Source procurement because it is the only qualified firm for the assignment, as AURSI is proprietary to H2bid and it is a natural continuation of previous work that started under RG-T4032. H2bid is a for-profit enterprise incorporated in the state of Delaware, USA. H2bid provides cloud-based solutions to water and sanitation (wastewater) utilities to help utilities save money, increase efficiency, and/or improve climate resiliency. H2bid's services include (1) a service that connects vendors and water/wastewater utilities to increase competition for public procurement opportunities (H2bid.com), and (2) a service that connects utilities into a virtual community with a network effect to share parts and materials information, while enabling expedited mutual aid in an emergency (h2bidparts.com). H2bid Parts is powered by the AURSI platform, which is provided via a partnership with AURSI. The AURSI platform also facilitates cooperative purchasing among utilities to get group pricing and save money on parts and materials.
- **1.6.** The AURSI platform has been used for these purposes successfully for over 23 years by utilities in America. There are over 120 water, sanitation, and electric utilities using the AURSI platform in America and the list is growing as utilities are recognizing the value of sharing parts and materials information and communicating in real time, being able to quickly locate and request assistance from other utilities for specific parts and materials in an emergency, and the cost savings from cooperative purchasing. The specific advantage to the Bank in hiring H2bid, and not another one, is that there is no other platform that connects utilities together in a virtual community (with a network effect) to share parts and materials information in real time, expedite mutual aid, and facilitate cooperative purchasing as will be done in this assignment. The AURSI platform is oneof-a kind. Another company would have to develop such a platform which would be risky, time consuming, significantly more expensive (likely costing millions of dollars), and with no guarantee that the Bank would get a finished product that worked. Additional benefits will be increased capacity building among the participating utilities, access to a broader network of expert peers (including American utilities that are already on the platform), each utility will be able to store and update their parts and materials in an online database, the ability to engage in efficient digital procurement with their own vendors for parts and materials, access to a wider network of vendors, the ability to share information about surplus materials available to other utilities, and the ability to share specifications (preventing utilities from having to "recreate the wheel" by hiring consultants to write the same specifications), and the ability to discover new materials in use by other utilities and contact current users and make due diligence inquiries prior to purchasing the new items.

2. Objectives

2.1 The objective of this consultancy is to build resilience for water utilities in the Caribbean by allowing for the participating utilities to remain connected into the virtual community while the platform is expanded to other Caribbean utilities and to enable and pilot pool procurement with the participating utilities. This is to be accomplished forming a virtual community of water utilities in the Caribbean connected to the platform by H2bid, powered by the AURSI, which is an innovative virtual parts community for public utilities.

3. Scope of Services

3.1. The pilot will be developed according to the following steps: a) Information gathering – participating utilities will provide materials standards information to H2bid, who will upload all necessary information. b) Training workshop – a training workshop will be prepared by H2bid to explain in detail to the participating utilities the use of the platform for pool



procurement. c) setting of coordination for pool procurement pilot in consultation with utilities. d) Pilot implementation – the H2bid platform for will be used to pilot pool procurement to demonstrate the benefits for the pool procurement using the platform. The outcome is the ability of Caribbean water utilities to share their excess stock for emergencies, exchange information about standards of goods and materials purchased, exchange experiences with the use of specific goods and overcoming challenges in its use and for at least 4 out of the 7 utilities to be capable of conducting pool procurement on the virtual platform.

4. Key Activities

4.1. Task 1: Information gathering and upload in the AURSI database:

- Confirm administrators from each water utility, and coordinate with each to collect materials standards information.
- Assess the available information at each utility regarding their approved materials to determine what can be provided and what steps need to be done to enter the data into the AURSI platform (e.g., can the data be sent and entered electronically, does it need to be converted from hard copies and entered manually by the AURSI team, or if there is no data, then how to begin the creation of a digital materials manual for the utility).
- Review the proposed data to be entered with each utility. After approval of completeness and the format of the data, enter the data into the AURSI database.

4.2. Task 2: Training workshops:

- Conduct virtual training sessions for administrators on the use of the AURSI platform covering all features, including cooperative procurement.
- Identify regular users, create regular user accounts for each utility, and provide virtual training sessions for regular users.
- Develop infographics showing how the platform works as an interactive guide for the user and tutorial video showing the operation of the platform.

4.3. Task 3: setting of coordination for pool procurement:

• Prepare, configure, coordinate and secure the H2bid platform for the pilot.

4.4. Task 4: Pilot implementation:

• Pilot pool procurement of the H2bid platform for goods that are used/agreed by at least 4 out of 7 utilities providing the necessary support to the water utilities.

4.5. Task 5: Pool Procurement:

• Support the establishment of pool procurement among the water utilities.

5. Expected Outcome and Deliverables

5.1. Deliverables expected as follows:

- **Deliverable 1:** Water utilities of the Caribbean are connected in a virtual community via the H2bid/ AURSI platform with their respective data on the platform
- **Deliverable 2:** Administrators and selected persons of water utilities of the Caribbean are trained on the use of the H2bid/AURSI platform for pool procurement.
- **Deliverable 3:** Prepare and coordinate pool procurement.



• Deliverable 4: Pool procurement pilot.

6. Project Schedule and Milestones

- **6.1.** Milestones and payment schedule:
- 25% upon acceptance of Work Plan for the assignment within 15 days of signing the contract.
- 25% upon IDB approval of a Draft Report detailing Deliverables 1 and 2.
- 25% upon completion of preparation for coordination of pool procurement
- 25% acceptance of Final Report detailing the implementation of the pilot and record of support.

7. <u>Reporting Requirements</u>

- 7.1. Products must be presented in English. All reports will be presented as follows: (i) relevant electronic files in MS Word, Excel, or other application acceptable to the IDB (they must include all annexes and appendices); (ii) an electronic PDF file for each full report. These reports and electronic files must be submitted within the time frames mentioned above.
- **7.2.** The consulting firm must provide verified work copies of all executable files, templates, databases, and other files created during the consultation.

8. Acceptance Criteria

8.1. The reports must be approved by the IDB Water and Sanitation Division team.

9. Other Requirements

- **9.1.** It is expected that the assignment will be led by an appropriately qualified consultant (individual or company) with:
 - Previous background in installing the AURSI database and supporting the client for its use.
 - A minimum of five (5) years post qualification related experience.
 - Possess at least a Degree (Bachelor's or Master's) in Social Sciences, Computer Science, Business Management, or equivalent qualification from a recognized tertiary institution.

Other supporting staff include but are not limited to:

- Information Technology specialist
- Cyber-security specialist
- Procurement specialist with experience with water utilities

10. Supervision and Reporting

10.1. The supervision of the works and deliverables will be carried out by the WSA specialist Gilroy Lewis, (<u>gilroyl@iadb.org</u>).

11. Schedule of Payments

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



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

Payment Schedule			
Deliverable	%		
1. Upon acceptance of Work Plan for the assignment within 15 days of signing the contract	25%		
2. Upon IDB approval of a Draft Report detailing Deliverables 1 and 2			
3. Upon completion of preparation for coordination of pool procurement			
4. Upon acceptance of Final Report			
TOTAL	100%		



TERMS OF REFERENCE

Consultancy for Final Project Evaluation

RG-T4645 Support for virtual community: data sharing and pool procurement among water utilities in the Caribbean

1. Background and Justification

- **1.1.** Established in 1959, the Inter-American Development Bank ("IDB" or "Bank") is the main source of financing for economic, social, and institutional development in Latin America and the Caribbean. It provides loans, grants, guarantees, policy advice and technical assistance to the public and private sectors of its borrowing countries.
- **1.2.** The IDB seeks to support a virtual community for Caribbean water utilities to be able to share and access information in real time that will help them with decision making as well as a pilot for pool procurement in the Region through a technology platform. The water and sanitation sector in the Caribbean is fragmented. While many utilities face similar challenges, there are limited tools to foster information sharing, particularly on specific and technical aspects, like specifications, performance, and availability of materials utilized for the provision of water service. Connecting the Caribbean water and sanitation utilities into a virtual community where they can share parts and materials information in real time could have significant benefits, such as save money and time when procuring parts and materials, provide each other with expedited mutual aid in the event of a natural disaster or other emergency need for parts, equipment, or materials. The future of the water and sanitation sector is a networked ecosystem where utilities are working together to improve resiliency, save money, and make smarter decisions.
- 1.3. As highlighted in the One Caribbean framework, the Caribbean is highly exposed to tropical storms and hurricanes, which will increase in frequency and intensity due to climate change, along with higher temperatures, intense and prolonged droughts, severe rainfall, and increased flooding. W&S utilities are not exempt, and, moreover, following any such event, the resiliency and recovery of W&S services are key to the overall recovery of the affected area. It is worth mentioning that the vision of One Caribbean is addressing such challenges under a regional approach. One of the expected results of One Caribbean is "Improved disaster preparedness and greater access to resilient infrastructure across the region."
- 1.4. To facilitate a critical mass of utilities in the platform to enable Pool Procurement, financing is required to extend the use for the 7 utilities in the virtual community piloted under RG-T4032 and to pilot pool procurement following the recommendations from the feasibility study conducted under RG-T4032. Additionally, the extended use of the platform will facilitate synergies with the Caribbean Water Utility Insurance Collective (CWUIC) response program. Pooled procurement fosters a more resilient and efficient water sector by enhancing collaboration, reducing costs by aggregating demand, ensuring a stable supply of essential parts and supplies, and in conjunction with Component 1 Response Program of CWUIC, facilitate mutual aid and support during emergencies, ensuring that critical supplies are available when needed.



1.5. Given the nature of this operation being one that is testing a pilot initiative, its success and future viability (or failure and reasons for such outcome) should be assessed.

2. Objectives

2.1 The objective of this consultancy is to conduct an evaluation of RG-T4645 *Support for virtual community: data sharing and pool procurement among water utilities in the Caribbean* detailing all the activities completed and results achieved.

3. Scope of Services

3.1. The final evaluation will assess the execution of the TC, review of all the activities that were carried out, the efficiency and effectiveness with which they were, and an objective evaluation of the results vis-à-vis the main objective of the TC.

4. Key Activities

4.1. Task 1: Review the execution of the H2bid assignment:

- Review the activities undertaken by H2bid to connect the participating countries into the virtual community using the AURSI platform, including H2bid's assessment of information supplied by the utilities regarding approved materials, their formatting and data entry, identification of regular users and creation of regular user accounts for each utility, support given to each utility and their participation in the platform, and training of the water utilities on the use of the AURSI platform.
- Interview H2bid regarding their views of the execution of the H2bid/ IDB contract
- Interview the beneficiary utilities regarding their views of the execution of the H2bid assignment
- Assess the functionality and usefulness of the H2bid/AURSI platform to the beneficiaries

4.2. Task 2: Review of pool procurement pilot:

Review the Pool Procurement pilot

5. Expected Outcome and Deliverables

- **5.1.** Deliverables expected as follows:
- **Deliverable 1:** Draft Evaluation Report
- Deliverable 2: Final Evaluation Report

6. Project Schedule and Milestones

- **6.1.** Milestones and payment schedule:
- 25% upon acceptance of Work Plan for the assignment within 15 days of signing the contract.
- 50% upon acceptance of Draft Evaluation Report.



25% acceptance of Final Evaluation Report

7. Reporting Requirements

- **7.1.** Products must be presented in English. All reports will be presented as follows: (i) relevant electronic files in MS Word, Excel, or other application acceptable to the IDB (they must include all annexes and appendices); (ii) an electronic PDF file for each full report. These reports and electronic files must be submitted within the time frames mentioned above.
- **7.2.** The consulting firm must provide verified work copies of all executable files, templates, databases, and other files created during the consultation.

8. Acceptance Criteria

8.1. The reports must be approved by the IDB Water and Sanitation Division team.

9. Other Requirements

9.1. Not required

10. Supervision and Reporting

10.1. The supervision of the works and deliverables will be carried out by the WSA specialist Gilroy Lewis, (gilroyl@iadb.org).

11. Schedule of Payments

- **11.1.** Payment terms will be based on project milestones or deliverables. The Bank does not expect to make advance payments under consulting contracts unless a significant amount of travel is required. The Bank wishes to receive the most competitive cost proposal for the services described herein.
- **11.2.** The IDB Official Exchange Rate indicated in the RFP will be applied for necessary conversions of local currency payments.

Payment Schedule			
Deliverable	%		
1. Upon acceptance of Work Plan for the assignment within 15 days of signing the contract	25%		
2. Upon acceptance of Draft Evaluation Report	50%		
3. Upon acceptance of Final Evaluation Report			
TOTAL	100%		



Qualifications

- Education: Academic Degree / Level & Years of Professional Work Experience: Master's Degree or equivalent qualification in business management; engineering; water resources management, natural sciences; or other relevant field.
- Experience: Minimum ten years of experience in the water and sanitation sector. Demonstrated experience in conducting project evaluations. Possession of an ethic for working in a methodical and well-organized fashion. Prior experience in the Caribbean and working with projects and programs financed by the Inter-American Development Bank would be an asset.

Areas of Expertise: Project management and / or water and sanitation sector.

Skills: Familiarity with business management issues related to the water and sanitation sector.



TERMS OF REFERENCE

Consultancy for the developing enhanced policies to create enabling environment for pool procurement for participating utilities

RG-T4645 Support for virtual community: data sharing and pool procurement among water utilities in the Caribbean

1. Background and Justification

- **1.1.** Established in 1959, the Inter-American Development Bank ("IDB" or "Bank") is the main source of financing for economic, social, and institutional development in Latin America and the Caribbean. It provides loans, grants, guarantees, policy advice and technical assistance to the public and private sectors of its borrowing countries.
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mutual aid and support during emergencies, ensuring that critical supplies are available when needed.

1.5. Given the nature of this operation, it is important to build capacity for enhanced policies and create the enabling environment for the envisioned pool procurement modality.

2. Objectives

2.1 The objective of this consultancy is to support the development of enhanced policies to create enabling environment for pool procurement for participating utilities.

3. Scope of Services

3.1. The scope of the consultancy is to assess policies and enabling environment for pool procurement and to propose recommendations of improvements for the participating utilities.

4. Key Activities

4.1. Task 1: Assess the existing policies as well as the enabling environment relevant for pool procurement of participating utilities:

- Review existing documentations regarding procurement policies of participating utilities.
- Interview procurement professionals of participating utilities
- Assess barriers and weaknesses that participating utilities possess related to the implementation
 of a pool procurement modality. In executing this task, the consultant is also expected to refer to
 policies and enabling environment of utilities that have been utilizing a similar pool procurement
 modality (most likely, in other sectors in the Caribbean region, or outside of the Caribbean region).

4.2. Task 2: Develop recommendations regarding policies as well as the enabling environment relevant for pool procurement:

• Develop a report containing recommendations to allow the participating utilities to implement the pool procurement modality. Recommendations may include those at the group level, in addition to recommendations at the individual-utility level.

5. Expected Outcome and Deliverables

- **5.1.** Deliverables expected as follows:
- **Deliverable 1**: Task 1 Report
- **Deliverable 2:** Draft final Report
- Deliverable 3: Final report

6. Project Schedule and Milestones

6.1. Milestones and payment schedule:



- 25% upon acceptance of Work Plan for the assignment within 15 days of signing the contract.
- 25% upon acceptance of Task 1 Report
- 25% upon acceptance of Draft Final Report
- 25% upon acceptance of Final Report

7. Reporting Requirements

- **7.1.** Products must be presented in English. All reports will be presented as follows: (i) relevant electronic files in MS Word, Excel, or other application acceptable to the IDB (they must include all annexes and appendices); (ii) an electronic PDF file for each full report. These reports and electronic files must be submitted within the time frames mentioned above.
- **7.2.** The consulting firm must provide verified work copies of all executable files, templates, databases, and other files created during the consultation.

8. Acceptance Criteria

8.1. The reports must be approved by the IDB Water and Sanitation Division team.

9. Other Requirements

9.1. Not required

10. Supervision and Reporting

10.1. The supervision of the works and deliverables will be carried out by the WSA specialist Gilroy Lewis, (gilroyl@iadb.org).

11. <u>Schedule of Payments</u>

- **11.1.** Payment terms will be based on project milestones or deliverables. The Bank does not expect to make advance payments under consulting contracts unless a significant amount of travel is required. The Bank wishes to receive the most competitive cost proposal for the services described herein.
- **11.2.** The IDB Official Exchange Rate indicated in the RFP will be applied for necessary conversions of local currency payments.

Payment Schedule		
Deliverable	%	
1. Upon acceptance of Work Plan for the assignment within 15 days of signing the contract	25%	
2. Upon acceptance of Task 1 Report	25%	
3. Upon acceptance of Draft Final Report	25%	
4. Upon acceptance of Final Report	25%	



TOTAL		100%
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Qualifications

- Education: Academic Degree / Level & Years of Professional Work Experience: Master's Degree or equivalent qualification in business management; engineering; water resources management, natural sciences; or other relevant field.
- Experience: Minimum ten years of experience in the water and sanitation sector. Demonstrated experience in conducting project evaluations. Possession of an ethic for working in a methodical and well-organized fashion. Prior experience in the Caribbean and working with projects and programs financed by the Inter-American Development Bank would be an asset.
- Areas of Expertise: procurement management and / or water and sanitation sector.
- Skills: Familiarity with business management issues related to the water and sanitation sector.

Consultancy for the Development of a Proposal for a Workshop or Awareness Course about gender perspective and water and sanitation projects

Post of Duty: Remote

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.

Gender equality is one of the fundamental pillars of development for LAC and is a prerequisite for achieving sustainable interventions across all economic sectors. The IDB plays a crucial role in supporting and proposing projects, programs, and policies in LAC countries. To do this effectively, it must gain a better understanding of the deficiencies that directly affect women and men in the region and know how to support the inclusion of a gender perspective in the sector.

About this position

We are looking for a gender expert as a consultant to develop a proposal for a Workshop or Awareness Course about gender perspective concepts and the inclusion of diversity, and why it is important to incorporate these concepts into the project cycle.

What you'll do:

You will design and implement a virtual Awareness Workshop or Course aimed at professionals working in the water and sanitation sector in Barbados, the Bahamas, Guyana, Jamaica, Suriname, Trinidad & Tobago, and Belize. The general objective of the course is to raise awareness about the relationship between gender and water, the gender inequalities commonly observed in the WASH sector, the importance of incorporating gender considerations when designing WASH solutions, and mainstreaming gender equality and inclusion in organizations and institutions.

It should be noted that some of the participants receiving the training may have technical profiles and/or backgrounds in STEM careers. The course should include the following topics:

- What is the gender approach?
- Why gender matters
- Equality, equity, and inclusion
- Equal participation of women and men in work and decision-making spaces
- Inclusion of people with disabilities and universal accessibility
- The importance of considering gender equality and inclusion in the design of water and sanitation projects
- Gender mainstreaming
- Methodologies for gender mainstreaming

HRD Terms of Reference

- The importance of community participation with a gender approach in the project cycle as a means to ensure the sustainability of projects.
- Methodologies for community participation with a gender approach
- Any other relevant topics deemed necessary to include

Deliverables and Payments Timeline:

Click or tap here to enter text.

Deliverable #	Percentage	Planned Date to Submit
Work Plan	15	10 days
Draft proposal for the course Syllabus	40	30 days
Implementation of the activity	25	45 days
Final implementation report	20	60 days

What you'll need

- Education: Master's degree in Gender Studies, Inclusion, or Women's Studies.
- **Experience:** At least 5 years of progressive experience in preparing and delivering courses, workshops, or other academic activities focused on gender and inclusion, as well as gender mainstreaming in organizations and institutions.
- Languages: Proficiency in English.

<u>Key skills</u>:

- Learn continuously.
- Collaborate and share knowledge.
- Focus on clients.
- Communicate and influence.
- Innovate and try new things.

Requirements:

• **Citizenship:** choose one of the following:

<u>IDB:</u> You are a citizen of one of our 48-member countries eligible to obtain a valid residency or legal permit to work in any of the 48-member countries without the need for sponsorship by the IDB.

HRD Terms of Reference

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

Type of contract and duration:

- Type of contract: Products and External Services Consultant (PEC), Lump Sum.
- Length of contract: 4 months.
- Work Location: Remote.

Our culture

At the IDB Group we work so everyone brings their best and authentic selves to work, willing to try new approaches without fear, and where they are accountable and rewarded for their actions.

Diversity, Equity, Inclusion and Belonging (DEIB) are at the center of our organization. We celebrate all dimensions of diversity and encourage women, LGBTQ+ people, persons with disabilities, Afro-descendants, and Indigenous people to apply.

We will ensure that individuals with disabilities are provided reasonable accommodation to participate in the job interview process. If you are a qualified candidate with a disability, please e-mail us at <u>diversity@iadb.org</u> to request reasonable accommodation to complete this application.

Our Human Resources Team reviews carefully every application.

About the IDB Group

The IDB Group, composed of the Inter-American Development Bank (IDB), IDB Invest, and the IDB Lab offers flexible financing solutions to its member countries to finance economic and social development through lending and grants to public and private entities in Latin America and the Caribbean.

About IDB

We work to improve lives in Latin America and the Caribbean. Through financial and technical support for countries working to reduce poverty and inequality, we help improve health and education and advance infrastructure. Our aim is to achieve development in a sustainable, climate-friendly way. With a history dating back to 1959, today we are the leading source of development financing for Latin America and the Caribbean. We provide loans, grants, and technical assistance; and we conduct extensive research. We maintain a strong commitment to achieving measurable results and the highest standards of integrity, transparency, and accountability.

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