REQUEST FOR EXPRESSIONS OF INTEREST **CONSULTING SERVICES** **BANK-EXECUTED OPERATIONS** ***FULL COMPETITIVE SELECTION PROCESS***

PROJECT NAME: Paving the Pan American Highway for Digital Health
SELECTION PROCESS #: RG-T4546-P001
SELECTION METHOD: Full Competitive
COUNTRY: Regional
SECTOR OR DEPARTMENT: Health
TC NAME: RG-T4546 and RG-T4471
FUNDING – TC #: ATN/OC-20850-RG
LINK TO TC DOCUMENT: IDB | Applied Health Intelligence: Innovation for Implementation and Evaluation of Digital Health in LAC (iadb.org)

The Inter-American Development Bank (the Bank) was established in December of 1959 to help accelerate economic and social development in Latin America and the Caribbean. Today, the Bank is a major catalyst in mobilizing resources for the region (For more information about the Bank, please refer to the Bank's website at www.iadb.org.)

Section 1. Purpose of this Request for Expression of Interest

1.1 The Bank is executing the above-mentioned project. The Bank intends to contract consulting services described in this Request for Expressions of Interest (REOI). The purpose of this REOI is to obtain sufficient information to enable the Bank to evaluate if the eligible consulting firms (CF) have the experience and qualifications relevant to provide the consulting services requested by the Bank.

1.2 As defined in the Corporate *Procurement Policy* (GN-2303-33), participating CF must be from a Bank's Member Country[1] or Territory[2] to be eligible to submit an Expression of Interest (EOI). The Bank will conduct the shortlisting process of the CF that expressed interest. The shortlisted CF will then be invited to continue further in the procurement process.

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[1] **Member Countries:** Argentina, Austria, Bahamas, Barbados, Belgium, Belize, Bolivia, Brazil, Canada, Colombia, Costa Rica, Chile, Croatia, Denmark, Dominican Republic, Ecuador, El Salvador, Finland, France, Germany, Guatemala, Guyana, Haiti, Honduras, Israel, Italy, Jamaica, Japan, Mexico, Netherlands, Nicaragua, Norway, Panama, Paraguay, People's Republic of China, Peru, Portugal, Republic of Korea, Slovenia, Spain, Suriname, Sweden, Switzerland, Trinidad & Tobago, United Kingdom, United States, Uruguay and Venezuela.

[2] **Eligible Territories:** a) Guadeloupe, French Guiana, Martinique, Reunion – as Departments of France; b) U.S. Virgin Islands, Puerto Rico, Guam – as Territories of the USA; c) Aruba – as a constituent country of the Netherlands; and Bonaire, Curacao, Saint Marten, Saba, St Eustatius – as Departments of the Netherlands; d) Hong Kong – as a Special Administrative Region of the People's Republic of China.

1.3 This REOI is not to be construed as either an RFP or an offer to contract and in no way obligates the Bank to contract anyone. The Bank reserves the right to reject any and all participating CF for any or no reason without having to provide an explanation. The Bank does not bind itself in any way to select any participating consulting firm. No debrief will be provided as to why CF have or have not been shortlisted.

Section 2. Instructions to the eligible consulting firms

2.1 Expressions of interest must be delivered using the *Bidder Portal for the Selection and Contracting of Consulting Firms for Bank-Executed Operations* (the Portal) (http://beo-procurement.iadb.org) by: *July 23rd*, 5:00 P.M. (**Washington, D.C., Time**) in PDF format only (Max. 45MB).

2.2 To access the Portal, the CF must generate a registration account, including *all* the data requested by the Portal. In the event that any of the information requested is not included, the consulting firm will not be able to participate in this or any other Bank-executed selection process for operational work. If the consulting firm has been previously registered, please validate that you have *all* the consulting firm's information updated and complete before submitting an EOI.

2.3 Eligible CF may partner in the form of a Consortium/joint venture (JV) to enhance their qualifications. Such Consortium/JV shall appoint one of the CF as the representative responsible for the communications, the registration in the Portal, and the submission of the corresponding documents.

2.4 Interested CF may obtain further information during office hours, 09:00 AM to 05:00 PM (**Washington, D.C. Time**), by sending an email to: *[isabeld@iadb.org]*

Inter-American Development Bank
Division: *[Social Protection and Health (SPH)]*
Attn: *[Jennifer A. Nelson, Program Team Leader]*
1300 New York Ave, NW
Washington DC, 20577
Tel: *[+12026232442]*
E-mail: *[jennifern@iadb.org]*
Web site: www.iadb.org

2.5 The Bank hereby invites eligible CF to indicate their interest in providing the services described below in the draft Terms of Reference for the consulting services. Interested CF must provide information establishing that they have the necessary experience and are qualified to perform the services. So that all responses may be properly evaluated, eligible CF must include in their submissions the information requested in the following section, with full and clear explanations.

Section 3. Consulting Services

3.1 The consulting services include:
1) Create a 3-year communications plan for the Pan-American Highway for Digital Health project.
2) Conduct primary and secondary research on key publics.
3) Develop branding and graphic design for the project.
4) Implement the first phase of the communications plan.
5) Create communication products for the project launch in October 2024.
6) Support IDB in positioning the project through various channels.
7) Conduct regular media analyses.

Key deliverables include:
1) Primary and secondary research plan and analysis for each key public.
2) Draft and full-scale communications plan, including branding and launch event strategy.
3) Communication products for the launch event (photos, videos, press strategy).
4) Internal communication tactics for IDB staff.
5) Creation of a subsection or mini-website within the IDB Social Digital website.
6) Support for ad campaigns.

The consulting firm will be responsible for:
1) Conducting secondary research on market trends, competitors, and stakeholders.
2) Organizing focus groups for primary research.
3) Developing a comprehensive communications strategy.
4) Creating branding and graphic design elements.
5) Producing communication materials (videos, infographics, social media content).
6) Supporting the launch event in October 2024.
7) Implementing the first phase of the communications plan.
8) Conducting regular media analyses and supporting with potential backlash.

The overall goal is to effectively launch and promote the Pan-American Highway for Digital Health project, positioning IDB and PAHO as regional leaders in digital health transformation.

3.2 Although there is no standard format for presenting an Expression of Interest, eligible CF must submit an EOI containing the following information:

9) Basic Information—Provide the official name of CF, the contact's name, email address, phone numbers, and office address (es) of the key contact (s) responsible for the EOI.

10) Background—Provide a description of the CF. The CF may include brochures or documents that provide information about its organization, history, mission, structure, and number of staff.

11) Experience related to the requested consulting services—Provide all kinds of evidence the CF considers appropriate to show its experience and expertise in delivering services similar to those described in Annex A, Terms of Reference (e.g., brochures, reports, studies, description of similar assignments, references to cases in which it has provided similar services, experience in similar conditions, availability of appropriate skills among staff, etc.)

3.3 Estimated budget: *$75.000*

Annex A. Draft Terms of Reference

Please note that the attached Terms of Reference may be subject to changes by the Bank. The CF that have been shortlisted will be notified of these changes.

<u>**TERMS OF REFERENCE**</u>

Communication Strategy, Design and Implementation for the Pan-American Highway for Health

Consulting firm

RG-T4546

Paving the Pan American Highway for Digital Health

RG-T4471

<u>*Applied Health Intelligence: Innovation for Implementation and Evaluation of Digital Health in LAC*</u>

1. <u>**Background and Justification**</u>

    1.1. **The COVID-19 pandemic had a significant impact on Latin America and the Caribbean (LAC)** *region, accounting for a high number of cases and deaths compared to its population. According to official data, LAC accounted for 17 percent of reported COVID-19 cases and 29 percent of confirmed deaths, despite having only 8 percent of the world's population (Savedoff et al., 2022). The economic consequences of the pandemic were also substantial. The World Bank estimated a 6.9% decline in regional Gross Domestic Product (GDP) in 2020 (Savedoff et al., 2022).*

    1.2. *The challenges exposed by the pandemic include inadequate data use and access, informal markets for health certificates, low vaccination coverage, and a lack of coordination and interoperability in digital health initiatives. These challenges hinder the exchange of critical health data and limit cross-border healthcare services, exacerbating the situation. The Pan American Health Organization (PAHO) has emphasized the vulnerability in the region caused by the lack of sustainable integrated and interoperable information systems for health. Access to timely and accurate information during public health emergencies is crucial, but it has been a challenge in the region. Previous research on emergencies like Ebola, Cholera, and MERS showed that insufficient data use and lack of access to quality data were common challenges (Park et al., 2020). The lack of coordination and interoperability in digital health initiatives further hindered the exchange of crucial health data and limited cross-border healthcare services in LAC (PAHO, 2021).*

    1.3. ***Interoperability and data exchange among countries in the region are crucial for a coordinated and agile response in times of need*** *(World Health Organization - Global Vaccine Action Plan 2011-2020, 2016). The establishment of regional agreements for health information exchange can optimize resource management, aid public health research, and strengthen disaster response (Bagolle et al., 2022). In the LAC region, there is a pressing need for equitable access to healthcare and inclusive digital health solutions. The Principle of Inclusive Digital Health was approved in 2021, emphasizing appropriate access, digital skills,*

and usability in technological solutions (PAHO, 2021).

1.4. *To address these challenges, **regional agreements and data exchange initiatives have been prioritized**. For example, the Roadmap for the Digital Transformation of the Health Sector in the Region of the Americas aims to adopt and implement interoperable digital health solutions. The [RELACSIS 4.0](#) event and the [2nd Regional LACPASS Connectathon](#) demonstrated successful data exchange among sixteen countries, including digital vaccine certificates and critical clinical information.*

1.5. *Along with these initiatives and agreements, deep collaborations have been established to improve digital health in the LAC region. **Collaboration between the IDB and PAHO** has led to the development of national strategic plans and the identification of investment needs in multiple countries, as well as the implementation of standards-based digital COVID-19 Certificates. In addition, the adoption of digital transformation tools and cross-border data exchange for public health have been promoted. These initiatives are fundamental to achieving inclusive and equitable digital health in the region, overcoming inequality barriers based on income, gender, race and ethnicity. Currently, efforts are being made in the building of a Digital Pan-American Highway for health that can improve public health and empower patients to securely access and share their health data across borders.*

1.6. *IDB and PAHO require a **communication strategy to raise awareness about their digital health efforts in the region as well as to maximize the knowledge about the Pan-American Highway for Digital Health project.** By fostering a robust communication strategy, we aim to raise awareness about the importance and benefits of the Pan-American project and inspire greater participation from additional countries and organizations. Together, we can create a strong network of stakeholders committed to advancing digital health in the Americas, fostering collaboration, and driving positive change in healthcare delivery throughout a transformative journey towards a digitally empowered and inclusive future of healthcare in the Pan-American region.*

2. Objectives

2.1. *Create an overall **communications plan** to launch the Pan-American Highway for Digital Health project to be implemented by IDB with the potential to be replicated by PAHO and other partners, including countries´ governments.*

2.2. *Inform about the Pan-American Highway for Digital Health project to engage **more regional countries and other stakeholders** in this initiative.*

2.3. *Raise awareness about the Pan-American Highway for Digital Health project to **position** IDB and PAHO as regional leaders in digital health transformation.*

2.4. *Raise awareness about the Pan-American Highway for Digital Health project to create new*

*partnerships with prospective **donors** interested in supporting the project in the long-term.*

2.5. *Conduct media analysis periodically to detect specific mentions in the media.*

3. **Scope of Services**

3.1. **Conduct secondary research** *to create a 3 years communications plan about the Pan-American Highway for Digital Health project (the Pan-American project).*

3.2. **Conduct a participatory process** *to develop the communications plan about the Pan-American project. This participatory process should be conducted through secondary and primary research on the key publics mentioned below:*

1) Countries already involved in the project, including government authorities, digital health technicians (IT, social sciences, and health professionals). <u>This could be divided into regions or subregions.</u>
2) Prospective countries that are likely to join the project. <u>This could be divided into regions or subregions.</u>
3) Health organizations already involved in the project.
4) Key digital health organizations not yet involved in the project.

Primary and secondary research should be conducted separately for each key public.

3.3. *Create **a 3-years communications plan** about the Pan-American project including measuring its evolution according to a Key Performance Indicator (KPI) strategy. The implementation of the first phase of the plan (up to the end of the contract) will be in charge of the consulting firm.*

3.4. *Create the **branding** and **graphic design** of the **communications plan** about the Pan-American project.*

3.5. *The participatory process mentioned in the item 3.2. should also include a stage of sharing with these publics the general communications strategy and branding proposed by the agency to **incorporate their feedback.***

3.6. **Design and produce the communication products** *(such as videos, website, photos, posts for social networks, marketing materials for the key events) and **digital health campaigns** according to the general plan during the duration of the contract. **Support IDB on its paid ad** strategy*

3.7. *Conduct media analysis periodically, including all regions of the Americas and in at least four languages (Spanish, English, Portuguese, French) and support IDB with backlash.*

4. **Key Activities**

4.1. **Conduct secondary research** *to create a 3-years **communications plan** about the Pan-*

American project.

Secondary research in a communication plan involves the collection and analysis of existing data that has been gathered by other sources. This type of research is crucial for better understanding the context in which the communication strategy will be developed and for making informed decisions.

This secondary research should cover, but not be limited to, the following aspects:

- *Conducting a <u>stakeholders' mapping and network analysis</u>.*
- *Identifying <u>current market (digital health) trends, how the digital health industry is behaving, and what factors are influencing its evolution.</u>*
- *Evaluating <u>immediate competitors</u>, their communication strategies, market positioning, and the performance of their campaigns.*
- *Examining how the <u>IDB-PAHO</u> brand or alliance is perceived in the market, its strengths and weaknesses, and how it compares with competitors.*
- *Investigating <u>social trends and changes</u> that may affect communications, such as <u>cultural norms or behaviors</u> related to information consumption (for example: attention span).*
- *Considering how the political and economic environment might influence communication, including laws and regulations, economic stability, and political climate.*

4.2. *Conduct a participatory process through **secondary and primary research** about specific key publics mentioned in the subsection 3.2.*

<u>Brief secondary research on each key public, should include:</u>

A Key Public Profile:

*-**Demographics and Psychographics***: Gather information on the demographic (age, gender, location, socioeconomic level) and psychographic (interests, values, lifestyles) characteristics of the target audience.*

*-**Media Consumption Habits:** Understand which media the target audience prefers, how they consume information in general and specifically about digital health, and their preferred communication channels and social platforms.*

<u>Primary research in the form of focus groups (one per key public):</u>

The main goal of primary research for a communications plan is to gather specific, firsthand information directly from the target audience or stakeholders. This research is tailored to address the unique needs and objectives of the communication strategy. Here are the primary objectives of conducting primary research in this context:

Understanding the Target Audience:

*-**Preferences and Behaviors:** Gain detailed insights into the preferences, behaviors, and motivations of the target audience. This includes how they consume media, what messages*

resonate with them, their preferred communication channels and platforms, how they prefer to receive information from IDB about digital health, what communication products they prefer, and what content they prefer to see in these products.

*-**Needs and Expectations:** Identify the specific needs, expectations, and pain points of the audience to tailor messages that effectively address these aspects.*

*-**Privacy and data management:** Understand the current perception of key publics around privacy and data management, to create proactive messages around this topic in our communications strategy.*

*****Assessing Brand Perception:*****

*-**Current Perception:** Understand how the target audience currently perceives IDB and PAHO and their work on digital health, including strengths, weaknesses, and areas for improvement.*

*-**Brand Positioning:** Gather insights on how to position IDB and PAHO more effectively in the minds of the target audience.*

*****Identifying Opportunities:*****

*-**Opportunities for Engagement:** Uncover new opportunities for engaging with the audience in meaningful ways.*

*After doing this primary research, a **succinct** analysis should be done, including a **situation analysis** to understand each targeted audience's previous knowledge about the existence of this project. Internally, this should be useful to answer the questions "where are we now?" and "what could get in the way of the success of this communications plan?".*

4.3. *Develop a 3-years **communications plan** about the Pan-American project. The consulting firm will be in charge of the implementation of the first phase of the plan (up to the end of the contract).*

*The **communications plan** should:*

A. ***Follow** corporate guidelines and specifications from IDB and always include IDB and PAHO logos.*

B. ***Make informed decisions and strategies** based on the insights concluded by the primary and secondary research of this plan.*

C. ***Support the regular annual communications plan promoted by the IDB Digital Health team by:***

- *Creating **infographics (editables)** about the project to be sent to current and prospective countries involved in the project through direct emails, to showcase the benefits of Pan-American project and its evolution thus far. This should be*

done taking into consideration the insights provided by the primary and secondary research.

- **Creating videos** *about the project of 1 minute long each (content to be determined with IDB) to be published on IDB's social media (LinkedIn, Instagram, Twitter, Facebook). This should be done taking into consideration the insights provided by the primary and secondary research.*

- *Creating videos about solutions that the Pan-American project offers (example, interoperability).*

- **Improving the current regional newsletter or creating multiple versions of it divided by key publics or regions,** *taking into consideration the insights provided by the primary and secondary research.*

- **Creating an e-mail marketing** *strategy divided into key publics with specific content according to the insights provided by the primary and secondary research.*

D. *Create the **communications strategy** to prepare, execute, and disseminate the October 2024 launch event.*

   Including:

   a. *Drafting **messages** according to the conducted research.*

   b. *Proposing creative communication **tactics to maximize IDB and PAHO''s messages through direct (on-site) communication with the participants.***

   c. ***Covering the launch** through photo coverage for each day of the event.*

   d. *Developing **videos** in **three languages (English, Spanish, and Portuguese, including scripts and subtitles).***

      At least:

      -One general video of the event of 1 minute long, including a script in the three languages.

      -One video of testimonies of no more than 3 minutes long, including a script and subtitles in the three languages.

      Note: The two videos mentioned above should be adapted to two (2) Instagram reels in the three languages.

   e. *(After the event) Proposing and implementing communication tactics to maximize the diffusion of this event and the project endeavor through direct e-mails addressed at the key publics.*

> f. *Press strategy after the event to maximize the diffusion of this event and the project endeavor to the general public.*

> E. *Include the creation of a KPI strategy to measure the evolution of the communications strategy.*

4.4. *The participatory process mentioned in the item 3.2. should also include a stage of sharing with these publics the branding and general communications strategy proposed to **incorporate their feedback, which could be done through four focus groups (one per key public).***

<u>Testing and Refining Messages:</u>

Feedback and Iteration: *Collect feedback on initial ideas or prototypes and refine the communication approach based on this input.*

Message Effectiveness: *Evaluate the effectiveness of proposed messages and communication strategies to ensure they are clear, compelling, and resonate with the audience.*

4.5. *The **3-years communications plan** about the Pan-American project should include creating its **branding** and **graphic design templates (turning-in editable pieces)**:*

4.5.i. Visual identity for the initiative (look and feel)/graphic design with IDB and PAHO logos, includes:

- *Color palette.*

- *Typography.*

- *Logo.*

- *Templates for Word Doc and PPTX.*

- *Invitation templates for emails.*

- *Banner for <u>IDB eventus page</u> (1600*600px).*

- *Background design for event screens.*

- *Roll-up banners design.*

- *Social media templates (Instagram, Facebook, Twitter, LinkedIn) pieces design.*

*4.5.ii. **Project name definition in three languages (Spanish, Portuguese, English) + Key messages** development in agreement with IDB and PAHO teams.*

*4.5.ii. Craft **metaphors** around the Pan-American Highway for Digital Health project (examples: the Connectathon as the way to create the lanes of the Highway; cars as health*

data; airbags as cybersecurity; governance as traffic rules; the Highway as the way to guarantee continuity of healthcare, etc.)

4.6. *Creation of **internal communications tactics** to effectively communicate this effort —briefly and attractively— to IDB's employees and leaders, so they can understand the scope and impact of this project.*

4.7. *Create **infographics (editables)** about the project or other creative materials to be sent to prospective **donors** through direct emails to awareness about the Pan-American project and create new partnerships with them.*

4.8. **Creation of a subsection or mini website within the [IDB Social Digital website](#)** *to showcase the Pan-American project, highlighting its initiatives and impact (products mentioned before could be highlighted on the website).*

4.9. *Support IDB in positioning the Pan-American project through paid ads with the creation of -at least- three **copies and** three **graphic design** pieces in three languages –Spanish, Portuguese, English for each social media platform and Google. The preferred social media platforms should be determined by region and according to the research conducted by this plan.*

4.10. *Conduct regular media analyses to:*

- *Monitor the evolution of the Pan-American project.*
- *Detect mentions related to digital health, IDB + PAHO+ digital health, IDB + digital health, PAHO + digital health.*
- *Detect sensitive topics (example: data privacy) related to digital health and the IDB and PAHO work.*
- *Support IDB with backlash.*

5. Expected Outcome and Deliverables

Products

5.1. **Primary and secondary research plan per key public**

5.2. **Primary and secondary research analysis per key public + media analysis.**

5.3. **Draft communications plan** *for IDB-PAHO review, including proposed **branding and the specific communication strategy for launch event in October 2024 + media analysis.***

5.4. **Full-scale communications plan + media analysis.**

5.5. **Communication products (photos, videos, press strategy) resulting of the launch event coverage in October 2024.**

5.6. **Creation of internal communications tactics** *to effectively communicate this effort briefly and attractively to IDB's staff + media analysis*

5.7. Creation of a subsection or mini website within the [IDB Social Digital website](#).

*5.8. Support for **ad campaigns.***

Results

*5.9 **Full-scale communications plan implemented (with proper branding) in the first phase** by launching the Pan-American Highway for Digital Health project.*

6. **Project Schedule and Milestones**

Deliverable	*Detail*	*Estimated date*
Product 1	*Primary and secondary research **plan** per key public.*	*One week after the contract is signed.*
Product 2	*Overall primary and secondary research **analysis + media analysis***	*One month after the contract is signed.*
Product 3	***Draft communications plan, including the strategy for the launch event + media analysis***	*Two months after the contract is signed.*
Product 4	***Full-scale communications and branding plan + media analysis***	*Three months after the contract is signed.*
Product 5	***Communication products resulting of the launch event coverage in October 2024.***	*Late October 2024*
Product 6	*Creation of **internal communications tactics + media analysis***	*October - December 2024*
Product 7	*Mock-up of the subsection or mini website*	*October - December 2024*
Product 8	*Final delivery of the subsection or mini website*	*November 2024*
Product 9	*Support for **ad campaigns.***	*December 2024*
Product 10	*Final report including KPIs strategy*	*December 2024*

7. Reporting Requirements

7.1. *All reports should be prepared in English, Spanish and Portuguese and shared in electronic format. If reports are to be published on the Bank's website, they should follow the standard IDB format.*

8. Acceptance Criteria

8.1. *All products must be approved by IDB, which must be made via official note or email by the person designated as a technical counterparty.*

9. Supervision and Reporting

9.1. *The consulting firm will report to Jennifer Nelson at the IDB and provide monthly updates or when required, via email or meetings to the IDB on project status. It is the responsibility of the Firm to ensure that such meetings are held, and reports submitted to the Bank.*

10. Schedule of Payments

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

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

11.

Deliverable	Payment schedule	%
Product 1	Primary and secondary research **plan** per key public.	10
Product 2	Overall primary and secondary research **analysis + media analysis**	10
Product 3	**Draft communications plan, including the strategy for the launch event + media analysis**	10
Product 4	**Full-scale communications and branding plan + media analyses**	10

Product 5	**Communication products resulting of the launch event coverage in October 2024.**	10
Product 6	Creation of **internal communications tactics + media analysis**	10
Product 7	Mock-up of the subsection or mini website	10
Product 8	Final delivery of the subsection or mini website	10
Product 9	Support for **ad campaigns.**	10
Product 10	Final report including KPIs strategy	10