

TERMS OF REFERENCE*Consulting Firm to Design and Develop Integrated Critical Path and Procurement Tracking Dashboards*

*Regional
RG-T4964*

P001

Website:

1. Background and Justification

- 1.1.** The Education Division of the IDB is implementing a Results-Based Supervision model to improve the effectiveness of education operations across Latin America and the Caribbean. The model seeks to move supervision from a primarily retrospective and compliance-oriented approach toward a more strategic, proactive, and results-based model.
- 1.2.** A central element of this model is the ability to identify the critical implementation paths of active operations and monitor the procurement processes that are essential for delivering critical products. Delays in procurement, implementation milestones, or key outputs can compromise the achievement of development results. However, information on project execution and procurement is often dispersed across different instruments, making it difficult for project teams to identify risks early and prioritize corrective actions.
- 1.3.** This consultancy will design and develop an integrated dashboard solution with two complementary modules: (i) Annual Critical Path Dashboards, which will help teams monitor critical products, milestones, risks, and dependencies; and (ii) a Critical Procurement Tracking Dashboard, which will track procurement processes linked to critical products and flag delays or bottlenecks. The integrated solution will support early-warning mechanisms and improve evidence-based decision-making during implementation.

2. Objectives

- 2.1.** The general objective of this consultancy is to design, develop, pilot, and transfer integrated Critical Path and Procurement Tracking Dashboards for the active education portfolio.

The specific objectives are:

- To define a methodology and data model for identifying and monitoring critical implementation paths.
- To develop Annual Critical Path Dashboards for selected education operations.
- To develop a Critical Procurement Tracking Dashboard linked to critical products and expected results.

- To generate alerts and portfolio-level views that help teams identify bottlenecks, risks, and corrective actions.
- To prepare documentation, training materials, and a sustainability plan for the use and maintenance of the dashboards.

3. Scope of Services

3.1. The consulting firm will be responsible for the design, development, testing, piloting, and transfer of an integrated dashboard solution. The work will include requirements gathering, data model design, dashboard development, user testing, documentation, training, and final handover.

4. Key Activities

4.1. The firm will carry out the following activities:

- Develop a detailed workplan, governance structure, and risk mitigation strategy.
- Review existing planning, supervision, procurement, and monitoring instruments used by the Education Division.
- Identify user needs and functional requirements through consultations with Team Leaders, the Development Effectiveness team, and selected project teams.
- Develop a methodology and data model to link operations, components, products, milestones, procurement processes, risks, responsible parties, dates, and status updates.
- Design and validate prototypes for the Critical Path Dashboard and Procurement Tracking Dashboard.
- Develop the Critical Path Dashboard module, including views by operation, country, component, product, milestone, risk, and status.
- Develop the Procurement Tracking Dashboard module, including views by operation, procurement process, stage, responsible party, planned dates, delays, and alerts.
- Develop portfolio-level views to identify common bottlenecks, delays, and implementation risks across operations.
- Implement early-warning rules and alerts based on delays, upcoming deadlines, missing information, or procurement bottlenecks.
- Pilot the dashboards with selected operations and adjust the tools based on user feedback.
- Prepare user manuals, technical documentation, data dictionary, update protocols, and training materials.
- Deliver training sessions and transfer the final solution to the IDB team.

5. Expected Outcome and Deliverables

5.1. The consulting firm will produce the following deliverables:

1. Inception Report and Workplan, including methodology, governance structure, timeline, risk matrix, and validation process.
2. Diagnostic Report and Functional Requirements, including review of existing instruments, user needs, data availability, and dashboard requirements.
3. Methodology, Data Model, and Prototype Design, including critical path methodology, procurement tracking logic, data dictionary, alert rules, and dashboard mockups.
4. Functional Version of Integrated Dashboards, including both modules with initial data from selected operations.
5. Pilot Report and Adjusted Dashboard Version, including user feedback, testing results, improvements, and pending issues.
6. Final Integrated Dashboard Solution, including validated dashboards, portfolio-level views, alerts, and exportable reports.
7. Documentation, Training, and Sustainability Package, including user manuals, technical documentation, update protocols, training materials, and a sustainability plan for dashboard maintenance, data updates, and future improvements.

6. Project Schedule and Milestones

- 6.1.** The consultancy will have a total duration of 18 months from the date of contract signature. Payments will be made upon satisfactory submission and approval of deliverables by the IDB project leader, according to the schedule below.

Deliverables	Timeline
Inception Report and Workplan	Month 1
Diagnostic Report and Functional Requirements	Month 5
Methodology, Data Model, and Prototype Design	Month 7
Functional Version of Integrated Dashboards	Month 10
Pilot Report and Adjusted Dashboard Version	Month 12
Final Integrated Dashboard Solution	Month 15
Documentation, Training, and Sustainability Package	Month 18

7. Reporting Requirements

- 7.1.** All deliverables must be submitted in English, in editable format. The consultant may also be asked to prepare summary materials in Spanish, depending on the needs of the Education Division.

8. Acceptance Criteria

- 8.1.** The products will be approved by Harold Villalba (HAROLDVI@IADB.ORG). Deliverables will be accepted when complying with the criteria established in sections 5, 6 and 7. Deliverables should demonstrate methodological rigor, clear documentation of assumptions and data limitations, consistency across countries, and practical relevance for policymakers.

9. Consultant Requirements

9.1. The consulting firm should demonstrate:

- At least 5 years of experience designing dashboards, monitoring systems, data visualization tools, or digital management platforms.
- Experience with business intelligence, data analytics, project monitoring, procurement tracking, or portfolio management tools.
- Experience working with public sector, multilateral development organizations, or international development projects will be considered an advantage.
- Capacity to translate operational and procurement information into user-friendly dashboards and early-warning mechanisms.
- Strong technical capacity in data modeling, dashboard development, user experience, documentation, and training.
- The firm must be legally established in one of the Bank's 48 member countries.

9.2. The proposed team should include, at minimum:

- Project Manager.
- Results-Based Management or Monitoring Specialist.
- Procurement or Project Execution Specialist.
- Data Architect / Data Modeler.
- BI / Dashboard Developer.
- UX/UI Specialist.
- Training and Documentation Specialist.

10. Other Requirements

- 10.1.** The solution should be modular, scalable, and designed for sustainability. It should include user roles, data quality controls, update protocols, and documentation sufficient for future maintenance and scaling.

11. Supervision and Reporting

- 11.1.** The consultancy firm will report to Harold Villalba (HAROLDVI@IADB.ORG). As Project Manager, meetings will be held with him, and he will provide comments on reports, approve reports and documents, and give comments or instructions for changes. It shall be the Firm's responsibility to ensure that such meetings are conducted and that reports and deliverables are submitted to the Bank according to the agreed schedule.

12. Schedule of Payments

- 12.1.** 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.

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

Payment Schedule	
<i>Deliverable</i>	%
1. Inception Report and Workplan	10%
2. Diagnostic Report and Functional Requirements	15%
3. Methodology, Data Model, and Prototype Design	15%
4. Functional Version of Integrated Dashboards	25%
5. Pilot Report and Adjusted Dashboard Version	15%
6. Final Integrated Dashboard Solution	10%
7. Documentation, Training, and Sustainability Package	10%
TOTAL	100%

TERMS OF REFERENCE*Consulting Firm to Design and Deliver a Capacity Building Program for Team Leaders and Project Execution Units*

*Regional
RG-T4964*

P002

Website:

1. Background and Justification

- 1.1. The Education Division of the IDB is developing a Results-Based Supervision model to strengthen the execution and effectiveness of its active education portfolio across Latin America and the Caribbean. The model includes analytical reviews of Theories of Change, Critical Path and Procurement Tracking Dashboards, standardized execution planning templates, supervision guidelines, and strategic aide-mémoire templates.
- 1.2. For these tools to be effectively adopted, Team Leaders and Project Execution Units need practical training and coaching on how to use them during project implementation. The effectiveness of the RBS model will depend not only on the quality of the tools, but also on whether operational teams can incorporate them into planning, supervision, risk management, procurement monitoring, and decision-making routines.
- 1.3. This consultancy will design and deliver a Capacity Building Program for Team Leaders and Project Execution Units to support adoption of the RBS model and strengthen results-based execution and supervision practices.

2. Objectives

- 2.1. The general objective of this consultancy is to design and deliver a capacity-building program that enables Team Leaders and Project Execution Units to use the RBS model, tools, dashboards, and guidelines in practice.

The specific objectives are:

- To design a practical training program on results-based supervision and execution management.
- To build capacity among Team Leaders and Project Execution Units to use the standardized PEP/POA/PA templates, dashboards, guidelines, and aide-mémoire templates.
- To strengthen the ability of teams to identify critical products, monitor risks, track procurement

bottlenecks, and prioritize corrective actions.

- To support adoption of a shared results-based supervision culture across the education portfolio.

3. Scope of Services

3.1. The consulting firm will design, deliver, and document a capacity-building program, including training materials, workshops, practical exercises, coaching sessions, and recommendations for institutionalizing the program.

4. Key Activities

4.1. The firm will carry out the following activities:

- Review the RBS model, dashboards, templates, guidelines, and supervision tools developed under the TC.
- Conduct a rapid capacity needs assessment among selected Team Leaders and Project Execution Units.
- Design a capacity-building curriculum, including modules, learning objectives, practical exercises, and delivery modalities.
- Prepare training materials, facilitator guides, participant handouts, case studies, and practical exercises.
- Deliver training workshops for Team Leaders and Project Execution Units.
- Provide technical coaching sessions to support application of the tools in selected operations.
- Collect participant feedback and adjust materials as needed.
- Prepare a final report with lessons learned, recommendations, and materials for future replication.

5. Expected Outcome and Deliverables

5.1. The consulting firm will produce the following deliverables:

- **Capacity Needs Assessment and Training Design**, including target audience, curriculum, learning objectives, delivery plan, and workplan.
- **Training Materials and Practical Toolkit**, including slides, handouts, exercises, case studies, facilitator guides, and participant materials.
- **Delivery of Training Workshops and Coaching Sessions**, including evidence of participation and feedback.
- **Final Capacity Building Report and Replication Package**, including lessons learned, recommendations, revised materials, and guidance for future delivery.

1. Project Schedule and Milestones

1.1. The consultancy will have a total duration of 12 months from the date of contract signature. Payments will be made upon satisfactory submission and approval of deliverables by the IDB

project leader, according to the schedule below.

Deliverables	Timeline
Capacity Needs Assessment and Training Design	Month 2
Training Materials and Practical Toolkit	Month 4
Delivery of Training Workshops and Coaching Sessions	Months 5
Final Capacity Building Report and Replication Package	Month 6

2. Reporting Requirements

2.1. All deliverables must be submitted in English, in editable format. The consultant may also be asked to prepare summary materials in Spanish, depending on the needs of the Education Division.

3. Acceptance Criteria

3.1. The products will be approved by Harold Villalba (HAROLDVI@IADB.ORG). Deliverables will be accepted when complying with the criteria established in sections 5, 6 and 7. Deliverables should demonstrate methodological rigor, clear documentation of assumptions and data limitations, consistency across countries, and practical relevance for policymakers.

4. Consultant Requirements

4.1. The consulting firm should demonstrate:

- Experience designing and delivering capacity-building programs for public sector, multilateral, or development project teams.
- Experience in results-based management, project execution, supervision, monitoring and evaluation, or operational planning.
- Strong capacity to translate technical tools into practical training materials and exercises.
- Experience with adult learning methodologies, facilitation, coaching, and virtual or hybrid training delivery.
- Familiarity with education operations or multilateral development bank processes will be considered an advantage.
- The firm must be legally established in one of the Bank's 48 member countries.

5. Other Requirements

5.1. NA

6. Supervision and Reporting

- 6.1.** The consultancy firm will report to Harold Villalba (HAROLDVI@IADB.ORG). As Project Manager, meetings will be held with him, and he will provide comments on reports, approve reports and documents, and give comments or instructions for changes. It shall be the Firm's responsibility to ensure that such meetings are conducted and that reports and deliverables are submitted to the Bank according to the agreed schedule.

7. Schedule of Payments

- 7.1.** 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.
- 7.2.** The IDB Official Exchange Rate indicated in the RFP will be applied for necessary conversions of local currency payments.

Payment Schedule	
<i>Deliverable</i>	%
1. Capacity Needs Assessment and Training Design	25%
2. Training Materials and Practical Toolkit	25%
3. Delivery of Training Workshops and Coaching Sessions	35%
4. Final Capacity Building Report and Replication Package	15%
TOTAL	100%

HRD Terms of Reference

Results Based Supervision and Theory of Change Consultant – SCL/EDU

Washington DC, USA

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.

[The Social Sector \(SCL\)](#) is a multidisciplinary team convinced that investing in people is the way to improve lives and overcome the development challenges in Latin America and the Caribbean. Jointly with the countries in the region, the Social Sector formulates public policy solutions to reduce poverty and improve the delivery of education, work, social protection, and health services. The objective is to advance a more productive region, with equal opportunities for men and women, and greater inclusion of the most vulnerable groups.

The IDB Group helps Latin American and Caribbean countries promote skills development and lifelong learning as a strategy to ensure that citizens can contribute productively to society, improve their well-being, and be good citizens. To this end, it works with the countries of the region in [five lines of action](#):

- i. ensure that people have equitable access to relevant, high-quality learning opportunities throughout their lives.
- ii. strengthen quality and relevance assurance mechanisms.
- iii. consolidate and develop better financing and co-financing mechanisms to improve the efficiency, effectiveness, and coverage of skills development opportunities.
- iv. take advantage of the use of technology to increase equity and access to skills development opportunities and improve the efficiency of skills development systems; and
- v. actively promote the generation and use of evidence to inform decisions about skills development.

About this position (business unit, reports to, job summary)

We are looking for a dynamic, analytical, and detail-oriented Results-Based Supervision and Theory of Change Consultant. As a consultant, you will support the Education Division in implementing a Results-Based Supervision model across the active education portfolio in Latin America and the Caribbean.

You will work with the Education Division, part of the Social Sector Department. This team is responsible for formulating public policy solutions to improve learning, equity, and the delivery of education services across the region.

The consultant will contribute to strengthening the results orientation of education portfolio supervision by reviewing the Theories of Change of selected active operations, assessing the vertical logic between activities, outputs, outcomes, and impact indicators, and identifying critical products and implementation pathways. This work will inform the development of critical path and procurement tracking dashboards and support more strategic, evidence-based supervision.

What you'll do:

- Contribute to the IDB Education Division's school feeding agenda through analytical work, knowledge products, and operational support.
- Review project documents, results matrices, execution plans, procurement plans, PMRs, and other relevant materials for selected active education operations.
- Develop and apply a standardized analytical framework to assess the Theory of Change and vertical logic of selected operations.
- Identify gaps, risks, or inconsistencies in the links between activities, outputs, outcomes, and expected development results.
- Identify critical products, milestones, procurement processes, and implementation pathways that are essential for achieving development results.
- Prepare analytical review reports of Theories of Change for selected operations.
- Prepare a synthesis note identifying common bottlenecks, critical product typologies, and recommendations for strengthening results-based supervision.
- Participate in technical exchanges with Team Leaders, the Development Effectiveness team, and other relevant stakeholders.
- Support the Education Division in translating ToC analysis into practical supervision recommendations and early-warning mechanisms.

Deliverables and Payments Timeline

Deliverables and Payments Timeline

<u>Deliverable #</u>	<u>Deliverable</u>	<u>Percentage</u>	<u>Planned Date to Submit</u>
<u>1</u>	Inception note and analytical review framework	15%	Month 1
<u>2</u>	First batch of Theory of Change analytical review reports	25%	Month 4
<u>3</u>	Second batch of Theory of Change analytical review reports	25%	Month 8
<u>4</u>	Final synthesis report with cross-cutting findings and recommendations	25%	Month 11
<u>5</u>	Presentation of findings to the IDB team	10%	Month 12
	Total	100%	

What you'll need

- **Education:** Master degree (or equivalent advanced degree) in economics, education, public health, nutrition, global health, or other fields relevant to the responsibilities of the role.
- **Experience:** At least 5 years of progressive experience in results-based management, development effectiveness, monitoring and evaluation, project design, portfolio supervision, or education operations. The consultant should have demonstrated experience reviewing theories of change, results matrices, logical frameworks, vertical logic, or development project design. Experience with multilateral development bank operations or public sector education projects will be considered an advantage. Strong analytical, writing, synthesis, and communication skills are required.

- **Languages:** Proficiency in Spanish and English, spoken and written, is required. Additional knowledge of French and Portuguese is preferable.

Key skills:

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

Requirements:

- **Citizenship:** You are a citizen of one of our 48-member countries.
- **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.
- **COVID-19 considerations:** the health and safety of our employees are our number one priority. As a condition of employment, IDB/IDB Invest requires all new hires to be fully vaccinated against COVID-19.

Type of contract and duration:

- **Type of contract:** Products and External Services Consultant (PEC), Lump Sum
- **Length of contract:** 12 months

What we offer

The IDB group provides benefits that respond to the different needs and moments of an employee's life. These benefits include:

- A competitive compensation package
- A flexible way of working. You will be evaluated by deliverable.

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 diversity@iadb.org 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.

Follow us:

<https://www.linkedin.com/company/inter-american-development-bank/>

<https://www.facebook.com/IADB.org>

https://twitter.com/the_IDB

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The IDB Group helps Latin American and Caribbean countries promote skills development and lifelong learning as a strategy to ensure that citizens can contribute productively to society, improve their well-being, and be good citizens. To this end, it works with the countries of the region in [five lines of action](#):

- ii. ensure that people have equitable access to relevant, high-quality learning opportunities throughout their lives.
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- iv. consolidate and develop better financing and co-financing mechanisms to improve the efficiency, effectiveness, and coverage of skills development opportunities.
- v. take advantage of the use of technology to increase equity and access to skills development opportunities and improve the efficiency of skills development systems; and
- vi. actively promote the generation and use of evidence to inform decisions about skills development.

About this position (business unit, reports to, job summary)

We are looking for a dynamic, analytical, and detail-oriented Results-Based Execution Management Tools and Guidelines Consultant. As a consultant, you will support the Education Division in developing standardized tools and practical guidance to strengthen results-based execution management across the active education portfolio.

You will work with the Education Division, part of the Social Sector Department. This team is responsible for formulating public policy solutions to improve learning, equity, and the delivery of education services across Latin America and the Caribbean.

The consultant will develop an integrated package of tools and guidelines to help Team Leaders and Project Execution Units connect annual planning, procurement processes, project activities, critical products, supervision reporting, and expected results. This package will include standardized PEP/POA/PA templates, Results-Based Supervision Guidelines for Team Leaders, and Strategic Aide-Mémoire Templates

What you'll do:

- Review existing execution planning, procurement planning, supervision, and reporting instruments used across selected education operations.

- Identify gaps and opportunities to better align PEP, POA, PA, aide-mémoire, and supervision tools with each operation's vertical logic and expected results.
- Develop standardized PEP/POA/PA templates structured around components, products, activities, procurement processes, timelines, responsibilities, risks, and expected results.
- Prepare Results-Based Supervision Guidelines for Team Leaders, including practical guidance on how to use theories of change, identify critical products, interpret dashboard information, monitor risks, and prioritize corrective actions.
- Develop Strategic Aide-Mémoire Templates to help teams document execution priorities, bottlenecks, agreed actions, responsible parties, deadlines, and follow-up measures in a results-oriented manner.
- Ensure consistency between the templates, guidelines, dashboards, and other tools developed under the Results-Based Supervision model.
- Validate draft tools with Team Leaders, the Development Effectiveness team, and selected Project Execution Units.
- Incorporate feedback and prepare final editable versions of the toolkit.
- Prepare a short implementation note explaining how the tools should be used together during project execution and supervision.

Deliverables and Payments Timeline

Deliverables and Payments Timeline

<u>Deliverable #</u>	<u>Deliverable</u>	<u>Percentage</u>	<u>Planned Date to Submit</u>
<u>1</u>	Inception note and review of existing instruments	15%	Month 1
<u>2</u>	Draft standardized PEP/POA/PA templates	20%	Month 3
<u>3</u>	Draft Results-Based Supervision Guidelines for Team Leaders	20%	Month 5
<u>4</u>	Draft Strategic Aide-Mémoire Templates	20%	Month 7
<u>5</u>	Validated final toolkit and implementation note	25%	Month 12
	Total	100%	

What you'll need

- **Education:** Master degree (or equivalent advanced degree) in economics, education, public health, nutrition, global health, or other fields relevant to the responsibilities of the role.
- **Experience:** At least 5 years of progressive experience in results-based management, development effectiveness, project execution, operational planning, portfolio supervision, or monitoring and evaluation. Demonstrated experience developing operational guidelines, planning templates, supervision tools, toolkits, or practical implementation guidance is required. Familiarity with execution planning instruments, procurement planning, portfolio monitoring, or multilateral development bank operations will be considered an advantage. Strong writing, analytical, facilitation, and synthesis skills are required, as well as the ability to translate complex operational processes into practical, user-friendly tools.
- **Languages:** Proficiency in Spanish and English, spoken and written, is required. Additional knowledge of French and Portuguese is preferable.

Key skills:

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

Requirements:

- **Citizenship:** You are a citizen of one of our 48-member countries.
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Type of contract and duration:

- **Type of contract:** Products and External Services Consultant (PEC), Lump Sum
- **Length of contract:** 12 months

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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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