Selection process #

TERMS OF REFERENCE

Consultant to support development of standardized theories of change and causal chain frameworks

Washington, DC – USA or remote

RG-T4967

Driving Impact of Fiscal Sector Projects through Strategic Development Effectiveness

1. Background and Justification

1.1. The Fiscal Management Division (IFD/FMM) of the Inter-American Development Bank (IDB) is part of the Institutions for Development Sector. This team is responsible for supporting improvements in fiscal policy and management throughout the region, at both national and subnational levels.

1.2. Latin American and Caribbean countries face the challenge of maximizing the impact of their fiscal policies in a context of limited fiscal space and growing social demands. Historically, the fiscal sector has registered lower development effectiveness ratings due to weaknesses in the analytical, conceptual, and methodological foundations that support the design, monitoring, and evaluation of fiscal interventions. A major challenge is the need to adapt the logic of fiscal interventions to an evaluation framework focused on the population as the ultimate beneficiary, since fiscal projects typically target institutions directly. This introduces additional complexity in the causal chains and transmission mechanisms. Within this context, this Technical Cooperation aims to generate knowledge to foster the effectiveness of fiscal interventions and adapt to evolving corporate standards, such as the IDB's Impact Framework (2024–2030).

2. Objectives

2.1. The position will support the strengthening of operational capacities by developing standardized theories of change and causal chain frameworks for fiscal sector interventions.

2.2. We are seeking a professional to strengthen the technical foundations and methodological quality of fiscal interventions. The work will focus on addressing the specific complexities of fiscal operations, ensuring consistency in the measurement, reporting, and tracking of results from the design stage.

3. Scope of Services

3.1. The consultant will support Component 1 of the operation, aimed at strengthening the analytical and design foundations of fiscal sector interventions. 3.2. The work will involve:

- Reviewing recent quality-at-entry evaluations to identify common limitations in the formulation of theories of change and results frameworks in fiscal operations.
- Developing standardized theories of change and causal chain frameworks that adequately link institutional reforms and incentive-based interventions with ultimate citizen well-being.
- Ensuring alignment with the guidelines established in the IDB Impact Framework and PR-200 policies. 3.3. All work will be conducted in coordination with the Fiscal Management Division

(IFD/FMM) to ensure methodological rigor, policy relevance, and alignment with institutional priorities.

3.4. Education: Master's degree in Economics, Public Policy, or related fields. 3.5. Experience: At least 4 years of experience in public policy, project evaluation, or development effectiveness. Experience in the fiscal sector is preferred.

3.6. Languages: Proficiency in English and in one of the other official languages of the Bank (Spanish, French, or Portuguese) is required.

3.7. Technical Skills: Solid knowledge of logical frameworks, theory of change development, and project design methodologies.

3.8. Desired Competencies:

- Willingness to engage in continuous learning
- Openness to collaboration and knowledge sharing
- Orientation toward client needs
- Ability to communicate clearly and build consensus
- Interest in innovation and exploring new approaches

4. Key Activities

4.1. Activity: Conduct a diagnostic review of existing FMM fiscal projects to identify current gaps in logical chains, transmission mechanisms, and attribution of development results.

4.2. Activity: Develop standardized theories of change and causal chain frameworks tailored to the specific nature of fiscal sector interventions (e.g., institutional capability building, tax compliance initiatives, expenditure efficiency).

4.3. Activity: Support FMM specialists in defining expected contributions to results from the design stage to ensure traceability throughout the project cycle. 4.4. Activity: Hold regular meetings with the FMM team to discuss methodologies, validate findings, and present progress on the frameworks being developed.

5. Expected Outcome and Deliverables

5.1. Activity 1: Diagnostic review of current logical frameworks. Deliverable: Diagnostic report summarizing the identified limitations in theories of change and results frameworks within recent fiscal sector operations.

5.2. Activity 2: Development of causal chains. Deliverable: Technical document presenting standardized theories of change and causal chain frameworks adapted for different types of fiscal interventions.

5.3. Activity 3: Application to project design. Deliverable: Policy or methodological note with practical guidelines for FMM teams on how to incorporate these standardized frameworks into new operation designs.

5.4. Activity 4: Coordination and reporting. Deliverable: Short progress updates submitted periodically (e.g., biweekly or monthly) over email or at meetings, as agreed with the supervisor.

6. Project Schedule and Milestones

6.1. The consultancy will span twelve (12) months from the contract start date. The following table outlines the expected timeline and key deliverables. Specific deadlines and review periods will be confirmed with the FMM team at the start of the contract.

Month	Milestone / Output	Format
Month 1	Kickoff meeting with the FMM team; agreement on detailed workplan and framework scope.	Meeting summary
Month 3	Submission of diagnostic report reviewing recent quality-at-entry evaluations and current gaps.	Draft report
Months 4-7	Development of standardized theories of change and causal chain frameworks.	Internal notes
Month 8	Submission of the technical document with the definitive theories of change frameworks.	Final report
Month 10	Submission of methodological guidelines/note for integrating frameworks into new project designs.	Methodological note
Ongoing	Periodic coordination meetings to discuss progress and validate models.	Meeting notes
Month 12	Submission of final completion report summarizing key findings and deliverables.	Final report

7. Acceptance Criteria

7.1. The deliverables will be reviewed and approved by the designated supervisor within the Fiscal Management Division (IFD/FMM). Acceptance will be based on the quality, completeness, and timeliness of each product, as well as its alignment with the objectives and scope outlined in this TOR. Deliverables will be considered acceptable when they:

- Are submitted in the agreed format (e.g., Word);
- Address the tasks and content described in the workplan and this TOR;
- Demonstrate analytical rigor, relevance, and clarity appropriate to the intended audience; and
- Incorporate comments and feedback provided by the supervisor or technical team, where applicable.

8. Other Requirements

8.1. Citizenship: You are a citizen of one of our 48 member countries.

8.2. Kinship: You do not have any family members (up to the fourth degree of consanguinity and second degree of affinity, including your spouse) working at the IDB, IDB Invest, or IDB Lab.

9. Supervision and Reporting

9.1. Supervising Officer: Anastasiya Yarygina Udovenko, Team Leader (IFD/FMM).

10. Schedule of Payments

Deliverable	%
1. Submission of diagnostic report reviewing current gaps in theories of change and results frameworks	20%

2. Submission of the technical document presenting standardized theories of change and causal chain frameworks	40%
3. Submission of practical methodological guidelines for project design	25%
4. Submission of final completion report summarizing all activities, findings, and recommendations	15%
TOTAL	100%

TERMS OF REFERENCE

Consultant to support interventions' quasi-experimental evaluations.

Washington, DC – USA or remote

RG-T4967

Driving Impact of Fiscal Sector Projects through Strategic Development Effectiveness

1. Background and Justification

1.1. The Fiscal Management Division (IFD/FMM) of the Inter-American Development Bank (IDB) is part of the Institutions for Development Sector. This team is responsible for supporting improvements in fiscal policy and management throughout the region, at both national and subnational levels.

1.2. Latin American and Caribbean countries face the challenge of maximizing the impact of their fiscal policies in a context of limited fiscal space and growing social demands. Historically, the fiscal sector has registered lower development effectiveness ratings due to weaknesses in the analytical, conceptual, and methodological foundations that support the design, monitoring, and evaluation of fiscal interventions. A major challenge is the need to adapt the logic of fiscal interventions to an evaluation framework focused on the population as the ultimate beneficiary, since fiscal projects typically target institutions directly. Within this context, this Technical Cooperation aims to generate knowledge to foster the effectiveness of fiscal interventions and adapt to evolving corporate standards, such as the IDB's Impact Framework (2024–2030).

2. Objectives

2.1. The position will support the strengthening of operational capacities by carrying out interventions' quasi-experimental evaluations to generate rigorous evidence on the effectiveness of fiscal sector projects.

2.2. We are seeking a professional to strengthen the technical foundations and methodological quality of fiscal interventions. The work will focus on addressing the specific complexities of fiscal operations by measuring and demonstrating development results through robust empirical evaluation methodologies.

3. Scope of Services

3.1. The consultant will support Component 1 of the operation, aimed at strengthening the analytical and design foundations of fiscal sector interventions.

3.2. The work will involve:

- Developing a standardized methodology for the evaluation of specific evaluation criteria, with a focus on economic analysis.
- Designing and conducting quasi-experimental evaluations of selected fiscal sector interventions.
- Ensuring alignment with the guidelines established in the IDB Impact Framework and PR-200 policies, contributing to the generation of knowledge and evidence-based decision-making.

3.3. All work will be conducted in coordination with the Fiscal Management Division (IFD/FMM) to ensure methodological rigor, policy relevance, and alignment with institutional priorities.

3.4. Education: Master's degree in Economics, Public Policy, Statistics, or related fields.

3.5. Experience: At least 4 years of experience in public policy, econometric analysis, and the design and implementation of quasi-experimental evaluations. Experience in the fiscal sector is preferred.

3.6. Languages: Proficiency in English and in one of the other official languages of the Bank (Spanish, French, or Portuguese) is required.

3.7. Technical Skills: Solid knowledge of econometric modeling and statistical analysis. Proficiency in statistical programming languages such as Stata, R, or Python is required.

3.8. Desired Competencies:

- Willingness to engage in continuous learning
- Openness to collaboration and knowledge sharing
- Orientation toward client needs
- Ability to communicate clearly and build consensus
- Interest in innovation and exploring new approaches

4. Key Activities:

4.1. Activity: Identify and prioritize specific fiscal policy interventions implemented by FMM that are suitable for quasi-experimental evaluation, based on policy relevance and data availability.

4.2. Activity: Develop the methodological design for the quasi-experimental evaluations, defining the identification strategy, required data sources, and econometric techniques.

4.3. Activity: Conduct the empirical analysis, processing administrative data and applying quasi-experimental methods to isolate the causal impact of the selected fiscal interventions.

4.4. Activity: Hold regular coordination meetings with the FMM team to discuss data access, validate methodologies, present preliminary results, and formulate policy recommendations based on the findings.

5. Expected Outcome and Deliverables

5.1. Activity 1: Identification and Methodological Design. Deliverable: Evaluation design note outlining the proposed identification strategy, data requirements, and methodology for the selected quasi-experimental evaluations.

5.2. Activity 2: Data Analysis and Preliminary Findings. Deliverable: Technical report presenting the preliminary results of the quasi-experimental evaluations, including data descriptive statistics and initial econometric outputs.

5.3. Activity 3: Final Evaluation Report. Deliverable: Comprehensive final evaluation report detailing the methodology, robust empirical results, and actionable policy implications for future fiscal sector operations.

5.4. Activity 4: Coordination and reporting. Deliverable: Short progress updates submitted periodically (e.g., biweekly or monthly) over email or at meetings, as agreed with the supervisor.

6. Project Schedule and Milestones:

6.1. The consultancy will span twelve (12) months from the contract start date. The following table outlines the expected timeline and key deliverables. Specific deadlines and review periods will be confirmed with the FMM team at the start of the contract.

Month	Milestone / Output	Format
Month 1	Kickoff meeting with the FMM team; agreement on detailed workplan, intervention selection, and data needs.	Meeting summary
Month 3	Submission of the evaluation design note outlining the quasi-experimental methodology.	Methodological note
Months 4-7	Data collection, processing, and empirical analysis.	Internal notes
Month 8	Submission of the technical report with preliminary quasi-experimental results.	Draft report
Month 11	Submission of the definitive comprehensive final evaluation report.	Final report
Ongoing	Periodic coordination meetings to discuss progress, models, and empirical strategies.	Meeting notes
Month 12	Submission of final completion report summarizing key findings and deliverables.	Final report

7. Acceptance Criteria

7.1. The deliverables will be reviewed and approved by the designated supervisor within the Fiscal Management Division (IFD/FMM). Acceptance will be based on the quality, completeness, and timeliness of each product, as well as its alignment with the objectives and scope outlined in this TOR. Deliverables will be considered acceptable when they:

- Are submitted in the agreed format (e.g., Word, LaTeX);
- Address the tasks and content described in the workplan and this TOR;
- Demonstrate analytical rigor, relevance, and clarity appropriate to the intended audience; and
- Incorporate comments and feedback provided by the supervisor or technical team, where applicable.

8. Other Requirements

8.1. Citizenship: You are a citizen of one of our 48 member countries.

8.2. Kinship: You do not have any family members (up to the fourth degree of consanguinity and second degree of affinity, including your spouse) working at the IDB, IDB Invest, or IDB Lab.

9. Supervision and Reporting

9.1. Supervising Officer: Anastasiya Yarygina Udovenko, Team Leader (IFD/FMM).

10. Schedule of Payments

Deliverable	%
1. Submission of the evaluation design note with proposed identification strategies	20%
2. Submission of the technical report presenting preliminary quasi-experimental results	30%
3. Submission of the comprehensive final evaluation report with methodology, results, and policy implications	35%
4. Submission of final completion report summarizing all activities, findings, and recommendations	15%
TOTAL	100%

TERMS OF REFERENCE

CONSULTANCY TO DESIGN A SIMPLIFIED DIAGNOSTIC TOOL BASED ON INTERNATIONAL FRAMEWORKS

Regional
RG-T4967
Driving Impact of Fiscal Sector Projects through Strategic Development Effectiveness

2. Background and Justification

The Fiscal Management Division (IFD/FMM) of the Inter-American Development Bank (IDB) is part of the Institutions for Development Sector. This team is responsible for supporting improvements in fiscal policy and management throughout the region, at both national and subnational levels. Latin American and Caribbean countries face the challenge of maximizing the impact of their fiscal policies in a context of limited fiscal space and growing social demands. Unlike other sectors, the fiscal sector often lacks standardized and sustained data collection systems to measure institutional capacity. Existing evaluations (e.g., PEFA, TADAT, MAPS) are sporadic and conducted on demand, and many specific metrics of institutional capacity remain restricted or non-public. This data gap restricts the quality of operation design, limits project evaluability, and affects the Bank's ability to measure and demonstrate the effectiveness and impact of fiscal interventions. Within this context, this Technical Cooperation aims to generate knowledge and tools to foster the effectiveness of fiscal interventions and adapt to evolving corporate standards. This assignment is needed to produce a robust methodological tool that strengthens the use of evidence and supports the design and implementation of fiscal modernization projects.

3. Objectives

The objective of this service is to support the strengthening of the evaluability of fiscal sector interventions by designing a simplified diagnostic and monitoring tool for institutional capacity metrics. The consulting firm will develop a simplified diagnostic tool based on existing international frameworks and best practices (such as PEFA, TADAT, MAPS, and MD-GEFIS). This tool will inform the definition of SMART indicators during project design, facilitate the monitoring of progress, and enable the measurement of objective achievement at project closure.

4. Scope of Services

The consulting firm shall provide specialized technical services to support Component 2 of the operation, aimed at strengthening the evaluability of fiscal sector interventions. The work will involve:

- Reviewing existing international assessment frameworks (PEFA, TADAT, MAPS, MD-GEFIS) to identify key performance indicators applicable to IDB fiscal operations.
- Developing a conceptual framework for a simplified diagnostic tool tailored to the specific needs of the fiscal sector.
- Designing the tool to inform the creation of SMART indicators and support continuous monitoring throughout the project lifecycle.

5. Key Activities

- **Activity 1:** Prepare an inception report with a work plan, methodological approach, and data needs for the review of existing frameworks.
- **Activity 2:** Conduct a comprehensive review of existing international capacity assessment frameworks (PEFA, TADAT, MAPS, MD-GEFIS) to identify best practices and extract relevant metrics for FMM operations.
- **Activity 3:** Develop the conceptual framework for a simplified diagnostic tool that can be easily adopted by FMM specialists to assess institutional capacity.

- **Activity 4:** Design the diagnostic tool, including user guidelines and methodological notes on how to leverage the tool to define SMART indicators during the project design phase.
- **Activity 5:** Organize validation sessions and regular coordination meetings with the FMM team to present the conceptual framework, gather feedback, and refine the diagnostic tool.

6. Expected Outcome and Deliverables

The expected outcome is a set of high-quality analytical and methodological products that strengthen the evaluability of fiscal projects and support the definition of SMART indicators.

Deliverable	Description	Estimated Timing
1. Inception Report and Methodological Framework	Detailed methodology, timeline, priority frameworks to be reviewed, and proposed structure of the diagnostic tool.	Within 15 calendar days after contract signature
2. Applied Study and Diagnostic Report	Diagnostic report synthesizing the key elements of PEFA, TADAT, MAPS, and MD-GEFIS that are adaptable to a simplified monitoring tool.	Within 90 calendar days after contract signature
3. Performance, Effectiveness and Impact Assessment Report	Technical document presenting the conceptual framework and the fully designed simplified diagnostic tool for institutional capacity metrics.	Within 240 calendar days after contract signature
4. Methodological Notes and Dissemination Materials	Methodological note and user guide for FMM teams on how to apply the tool to define SMART indicators, including a final completion report.	Within 360 calendar days after contract signature

7. Project Schedule and Milestones

The estimated duration of the assignment is up to 12 months from contract signature. The final schedule will be agreed with the IDB team during the inception phase.

8. Reporting Requirements

The consulting firm shall submit all deliverables in English, unless otherwise requested by the Bank. The final deliverables shall be submitted electronically in editable formats, accompanied by any databases, methodological annexes, presentations, or supporting files produced during the assignment.

9. Acceptance Criteria

Deliverables will be considered acceptable when they: (i) respond fully to the scope and activities described in these Terms of Reference; (ii) present clear, consistent and evidence-based analysis; (iii) incorporate comments and guidance provided by the IDB technical team; (iv) are submitted in editable format and, when applicable, in presentation-ready format; and (v) comply with IDB quality, formatting and knowledge product standards.

10. Consulting Firm and Team Requirements

The consulting firm is expected to have proven 5 years of experience in applied research, institutional capacity assessment, public financial management, and the preparation of methodological notes related to public sector modernization. The firm should demonstrate solid knowledge of results-based management, logical frameworks, and international diagnostic frameworks (such as PEFA, TADAT, MAPS, etc.). The proposed team should be multidisciplinary and include professionals with complementary expertise in public finance, public policy evaluation, and the design of monitoring tools. The key experts should preferably include:

- **Team Leader / Senior Fiscal Management Specialist:** Professional with a Master's degree and extensive experience in fiscal management, institutional capacity assessment, and coordination of technical studies. The team leader should be responsible for the overall technical quality of the consultancy and interaction with stakeholders.
- **Evaluation and Results-Based Management Specialist:** Professional with experience in performance evaluations, including the design of SMART indicators, evaluation methodologies, and analytical frameworks for assessing public sector programs.
- **Technical Writer / Knowledge Management Specialist:** Professional with experience in drafting methodological user guides, policy briefs, and other knowledge products, ensuring clarity and alignment with institutional standards.

All team members should have strong analytical capacity, excellent writing skills in English, and the ability to work with institutional counterparts.

11. Supervision and Reporting

To Supervising Officer: Anastasiya Yarygina Udovenko, Team Leader (IFD/FMM). The consulting firm will be reporting to her for meetings, frequency, who will give comments to any reports, approve reports, documents, work, and give comments or any instructions for changes. It shall be the Firm's responsibility for ensuring that such meetings are conducted, and such reports are submitted to the Bank.

12. Schedule of Payments

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.

Payment Schedule	
Deliverable	**%**
1. *Inception Report and Methodological Framework*	10%
2. *Applied Study and Diagnostic Report*	25%
3. *Performance, Effectiveness and Impact Assessment Report*	40%
4. Methodological Notes and Dissemination Materials	25%
TOTAL	100%

TERMS OF REFERENCE

Consultant for pilot application and elaboration of quasi-experimental evaluation reports.

Washington, DC – USA or remote

RG-T4967

Driving Impact of Fiscal Sector Projects through Strategic Development Effectiveness

1. Background and Justification

1.1. The Fiscal Management Division (IFD/FMM) of the Inter-American Development Bank (IDB) is part of the Institutions for Development Sector. This team is responsible for supporting improvements in fiscal policy and management throughout the region, at both national and subnational levels.

1.2. Latin American and Caribbean countries face the challenge of maximizing the impact of their fiscal policies in a context of limited fiscal space and growing social demands. Unlike other sectors, the fiscal sector often lacks standardized and sustained data collection systems to measure institutional capacity. This restricts the Bank's ability to measure and demonstrate the effectiveness and impact of fiscal interventions. Within this context, Component 2 of this Technical Cooperation aims to strengthen the evaluability of fiscal sector interventions by designing diagnostic tools and promoting their pilot application and evaluation.

2. Objectives

2.1. The position will support the strengthening of the evaluability of fiscal sector interventions through the pilot application of evaluation methodologies and the elaboration of quasi-experimental evaluation reports.

2.2. We are seeking a professional to implement pilot tests of simplified diagnostic tools and rigorous evaluation frameworks in selected fiscal projects, generating evidence-based reports that demonstrate the impact and results of these interventions.

3. Scope of Services

3.1The consultant will support Component 2 of the operation, aimed at strengthening the evaluability of fiscal sector interventions.

3.2. The work will involve:

- Conducting pilot applications of newly developed diagnostic tools and evaluation frameworks on selected fiscal interventions.
- Collecting, processing, and analyzing data generated during the pilot applications.
- Elaborating comprehensive quasi-experimental evaluation reports based on the results of the pilot applications.

3.3. All work will be conducted in coordination with the Fiscal Management Division (IFD/FMM) to ensure methodological rigor, policy relevance, and alignment with institutional priorities.

3.4. Education: Master's degree in Economics, Public Policy, Statistics, or related fields.

3.5. Experience: At least 4 years of experience in project evaluation, impact measurement, and quasi-experimental econometric analysis. Experience in public financial management or the fiscal sector is highly desirable.

3.6. Languages: Proficiency in English and in one of the other official languages of the Bank (Spanish, French, or Portuguese) is required.

3.7. Technical Skills: Solid knowledge of econometric modeling, statistical analysis, and evaluation methodologies. Proficiency in statistical programming languages such as Stata, R, or Python is required.

3.8. Desired Competencies:

- Willingness to engage in continuous learning
- Openness to collaboration and knowledge sharing
- Orientation toward client needs
- Ability to communicate clearly and build consensus
- Interest in innovation and exploring new approaches

4. Key Activities

4.1. Activity: Formulate a detailed action plan for the pilot application of evaluation frameworks in coordination with the FMM team and selected executing agencies.

4.2. Activity: Execute the pilot application of the diagnostic tools and quasi-experimental evaluation models on the selected fiscal projects, overseeing data collection and quality assurance.

4.3. Activity: Conduct robust econometric and statistical analysis using the data gathered from the pilot implementations to assess results and isolate causal impacts.

4.4. Activity: Draft comprehensive evaluation reports detailing the methodology, pilot implementation challenges, analytical findings, and lessons learned for future fiscal operations.

5. Expected Outcome and Deliverables

5.1. Activity 1: Pilot application planning. Deliverable: Methodological note and workplan detailing the selected operations and the strategy for the pilot application.

5.2. Activity 2 & 3: Pilot execution and data analysis. Deliverable: Intermediate technical report presenting the data collected during the pilot application and preliminary econometric analysis.

5.3. Activity 4: Elaboration of evaluation reports. Deliverable: Final quasi-experimental evaluation reports based on the pilot applications, including findings, limitations, and recommendations for scaling the tools.

5.4. Activity 5: Coordination and reporting. Deliverable: Short progress updates submitted periodically (e.g., biweekly or monthly) over email or at meetings, as agreed with the supervisor.

6. Project Schedule and Milestones

6.1. The consultancy will span ten (10) months from the contract start date. The following table outlines the expected timeline and key deliverables. Specific deadlines and review periods will be confirmed with the FMM team at the start of the contract.

Month	Milestone / Output	Format
Month 1	Kickoff meeting with the FMM team; agreement on detailed workplan and selection of pilot operations.	Meeting summary
Month 2	Submission of the methodological note and workplan for the pilot applications.	Methodological note
Months 3-5	Execution of the pilot application and data collection.	Internal notes
Month 6	Submission of the intermediate technical report with preliminary data analysis.	Draft report
Months 7-8	Advanced econometric analysis and drafting of the evaluation reports.	Draft evaluation reports
Month 9	Submission of the final quasi-experimental evaluation reports.	Final evaluation reports
Ongoing	Periodic coordination meetings to discuss progress and validate empirical strategies.	Meeting notes
Month 10	Submission of final completion report summarizing key findings and deliverables.	Final report

7. Acceptance Criteria

7.1. The deliverables will be reviewed and approved by the designated supervisor within the Fiscal Management Division (IFD/FMM). Acceptance will be based on the quality, completeness, and timeliness of each product, as well as its alignment with the objectives and scope outlined in this TOR. Deliverables will be considered acceptable when they:

- Are submitted in the agreed format (e.g., Word, LaTeX);
- Address the tasks and content described in the workplan and this TOR;
- Demonstrate analytical rigor, relevance, and clarity appropriate to the intended audience; and
- Incorporate comments and feedback provided by the supervisor or technical team, where applicable.

8. Other Requirements

8.1. Citizenship: You are a citizen of one of our 48 member countries.

8.2. Kinship: You do not have any family members (up to the fourth degree of consanguinity and second degree of affinity, including your spouse) working at the IDB, IDB Invest, or IDB Lab.

9. Supervision and Reporting

9.1. Supervising Officer: Anastasiya Yarygina Udovenko, Team Leader (IFD/FMM).

10. Schedule of Payments

Deliverable	%
1. Submission of the methodological note and workplan for the pilot applications	20%
2. Submission of the intermediate technical report presenting preliminary data analysis from the pilot	30%
3. Submission of the final quasi-experimental evaluation reports	35%
4. Submission of final completion report summarizing all activities, findings, and recommendations	15%
TOTAL	100%

TERMS OF REFERENCE

Consultant for preparation and dissemination of knowledge products (technical notes)

Washington, DC – USA or remote

RG-T4967

Driving Impact of Fiscal Sector Projects through Strategic Development Effectiveness

1. Background and Justification

1.1. The Fiscal Management Division (IFD/FMM) of the Inter-American Development Bank (IDB) is part of the Institutions for Development Sector. This team is responsible for supporting improvements in fiscal policy and management throughout the region, at both national and subnational levels.

1.2. Latin American and Caribbean countries face the challenge of maximizing the impact of their fiscal policies in a context of limited fiscal space and growing social demands. Historically, the fiscal sector has registered lower development effectiveness ratings. Furthermore, efforts to systematize and disseminate lessons learned and findings from the execution and evaluation of fiscal sector interventions are still limited. This limits the institutionalization of good practices and the empowerment of operational teams. Within this context, Component 3 of this Technical Cooperation aims to promote knowledge dissemination and learning related to the effectiveness of fiscal sector interventions.

2. Objectives

2.1. The position will support the preparation and dissemination of knowledge products, including technical notes and studies on lessons learned and best practices, to foster the effectiveness of fiscal interventions.

2.2. We are seeking a professional to translate analytical findings, evaluation results, and diagnostic tools developed under this Technical Cooperation into accessible and strategic knowledge products that can be disseminated among country counterparts and IDB teams.

3. Scope of Services

3.1. The consultant will support Component 3 of the operation, aimed at knowledge dissemination and learning.

3.2. The work will involve:

- Reviewing analytical outputs, diagnostic tools, and evaluation reports generated by the fiscal sector.
- Preparing and disseminating knowledge products, including technical notes and publications on lessons learned and best practices.

- Developing presentation materials to support workshops and knowledge exchange events with country counterparts and Bank teams.

3.3. All work will be conducted in coordination with the Fiscal Management Division (IFD/FMM) to ensure methodological rigor, policy relevance, and alignment with institutional priorities.

3.4. Education: Master's degree in Public Policy, Economics, Communications, or related fields.

3.5. Experience: At least 4 years of experience in public policy analysis, knowledge management, or the preparation of technical publications and policy notes. Experience in the fiscal sector is preferred.

3.6. Languages: Proficiency in English and in one of the other official languages of the Bank (Spanish, French, or Portuguese) is required.

3.7. Technical Skills: Excellent writing and synthesis skills, with the ability to translate complex economic and fiscal concepts into clear, actionable knowledge products.

3.8. Desired Competencies:

- Willingness to engage in continuous learning
- Openness to collaboration and knowledge sharing
- Orientation toward client needs
- Ability to communicate clearly and build consensus
- Interest in innovation and exploring new approaches

4. Key Activities

4.1. Activity: Review evaluation reports, diagnostic tools, and methodological frameworks developed by FMM to extract key lessons learned and best practices regarding fiscal project effectiveness.

4.2. Activity: Draft and edit technical notes, policy briefs, and other knowledge products summarizing these findings for a broader audience.

4.3. Activity: Design and prepare presentation materials, summaries, and visual aids to be used in workshops and knowledge exchange events financed by the operation.

4.4. Activity: Hold regular coordination meetings with the FMM team to validate the content, tone, and strategic focus of the knowledge products being developed.

5. Expected Outcome and Deliverables

5.1. Activity 1 & 2: Drafting of technical notes. Deliverable: Draft versions of technical notes and knowledge products synthesizing lessons learned and best practices in fiscal sector effectiveness.

5.2. Activity 2 & 3: Final products and dissemination materials. Deliverable: Final, formatted technical notes ready for publication, along with presentation materials and slide decks to support knowledge exchange workshops.

5.3. Activity 4: Coordination and reporting. Deliverable: Short progress updates submitted periodically (e.g., biweekly or monthly) over email or at meetings, as agreed with the supervisor.

6. Project Schedule and Milestones

6.1. The consultancy will span seven (7) months from the contract start date. The following table outlines the expected timeline and key deliverables. Specific deadlines and review periods will be confirmed with the FMM team at the start of the contract.

Month	Milestone / Output	Format
Month 1	Kickoff meeting with the FMM team; agreement on detailed workplan, topics for the technical notes, and target audiences.	Meeting summary
Month 2	Submission of detailed outlines and preliminary structure for the technical notes.	Outlines
Month 4	Submission of the first drafts of the technical notes and knowledge products.	Draft reports
Month 6	Submission of the final technical notes and preparation of presentation materials for workshops.	Final notes and materials
Ongoing	Periodic coordination meetings to discuss progress and validate messaging.	Meeting notes
Month 7	Submission of final completion report summarizing key dissemination activities and deliverables.	Final report

7. Acceptance Criteria

7.1. The deliverables will be reviewed and approved by the designated supervisor within the Fiscal Management Division (IFD/FMM). Acceptance will be based on the quality, completeness, and timeliness of each product, as well as its alignment with the objectives and scope outlined in this TOR. Deliverables will be considered acceptable when they:

- Are submitted in the agreed format (e.g., Word, PowerPoint);
- Address the tasks and content described in the workplan and this TOR;
- Demonstrate analytical rigor, relevance, and clarity appropriate to the intended audience; and

- Incorporate comments and feedback provided by the supervisor or technical team, where applicable.

8. Other Requirements

8.1. Citizenship: You are a citizen of one of our 48 member countries.

8.2. Kinship: You do not have any family members (up to the fourth degree of consanguinity and second degree of affinity, including your spouse) working at the IDB, IDB Invest, or IDB Lab.

9. Supervision and Reporting

9.1. Supervising Officer: Anastasiya Yarygina Udovenko, Team Leader (IFD/FMM).

10. Schedule of Payments

Deliverable	%
1. Submission of detailed outlines and structure for the technical notes	20%
2. Submission of the first drafts of the technical notes and knowledge products	30%
3. Submission of the final technical notes and presentation materials for dissemination events	35%
4. Submission of final completion report summarizing all activities	15%
TOTAL	100%