

TERMS OF REFERENCE

Consultancy to design inclusive and culturally appropriate information systems pilots for job training institutions

[REGIONAL]

[RG-T4480]

[Promoting an inclusive digital transformation of labor market institutions in the region]

<https://www.iadb.org/en/project/RG-T4480>

1. Background and Justification

- 1.1. The Social Sector (SCL) has a multidisciplinary team convinced that investing in people is the way to improve lives and overcome the challenges of development in Latin America and the Caribbean. Together with the countries of the region, the Social Sector builds public policy solutions to reduce poverty and to improve the education, working conditions, social protection and health services that citizens receive. The work of the Sector aims to promote a more productive region with equal opportunities between men and women and with greater inclusion of the most vulnerable populations.*
- 1.2. The Division of Labor Markets and Social Security (SCL/LMK) promotes more and better employment in Latin America and the Caribbean. The IDB works to achieve regional goals in poverty reduction, equality of opportunities and improvement of labor productivity, by strengthening employment and training services, improving the design and scope of social security and the analysis of labor markets and labor information. To achieve these goals, the IDB is currently focusing on analytical work and projects in the following four areas: Intermediation, Job Training, Workforce Migration, and Social Security.*
- 1.3. In recent years, the digital transformation process has gained strength in different sectors. The public sector has not been an exception of such developments. This boost has allowed the digitalization of different services, including the Public Employment Services (PES) to be able to extend their offer through virtual channels. This advance allows to reduce the impact of face-to-face visits, and to extend the scope of the service. However, in the attempt to improve the service, it is important to consider from the design the different types of users who will use the platforms, thus avoiding the exclusion of diverse populations.*
- 1.4. Among the populations that have been marginalized by this process are Persons with Disabilities (PwD) and Indigenous Persons (IP), since they require additional adaptations to be able to make adequate use of web pages, for example the need of hearing aids for people with visual impairments, translation options into native languages, among others. For this reason, it is expected that, through the design of accessible information systems, this consultancy will contribute to the accessibility of these groups to PES services, improving their options for integration into the labour market, and, therefore, their job prospects.*

2. Objectives

- 2.1. *The objective of the consultancy is to design two pilots of inclusive information systems for PwD and IP that can be implemented in the institutions in charge of job training in the beneficiary countries determined by the IDB.*

3. Scope of Services

- 3.1. *The Consulting Firm (CF) must coordinate with the corresponding institution of the beneficiary countries defined to design the information system, according to the available services and current platform, as well as considering possibilities and limitations in the capacities of the beneficiary institution.*
- 3.2. *The CF must carry out an analysis of the accessibility of the systems currently in action, and the level of use of these, identifying factors that prevent access for the populations of interest.*
- 3.3. *The consulting firm will propose the design of two information systems with specific considerations for PwD and IP, adapted to the context and possibilities of the defined countries and their beneficiary institutions.*

4. Key Activities

- 4.1. **Coordination with the beneficiary institutions** to determine the services to be considered in the design of the system, its scope, and the potential limitations in the adaptability process both related to the capacity of the systems and the institution.
- 4.2. **Literature analysis of best practices in accessibility to information systems** for PwD and IP. The CF should carry out an analysis of good practices in the region, considering the context of the beneficiary countries in which the systems are expected to be applied.
- 4.3. **Design of the information system with considerations for PwD and IP.** The CF will have to submit the design for two information systems for the institutions in charge of providing the PES in the countries of interest.

5. Expected Results and Outputs

- 5.1. **Work plan.** The first product will be a work plan that must at least reflect the times, exclusions, requirements, and inputs by the CF; risk analysis and mitigating factors. The schedule must provide the time required for the approval of the products by the Bank, to continue with the following consulting activities. The CF is also expected to include details of its methodology, governance plan and project management plan.
- 5.2. **Analysis of best practices of accessibility in information systems with considerations for PwD and IP.** It is expected that the CF will carry out an analysis of best practices in accessibility of information systems for PwD and IP, considering the necessary adaptations and cultural considerations. It is expected that the CF will systematize previous experiences in the region and present them as inputs that can later be used in the drafting of technical notes on the subject.

5.3. Analysis of scope and limitations in the information systems of labor market institutions of the defined countries. *The CF must coordinate with the beneficiary institutions to determine the scope of the information systems designed, according to the services offered, the limitations they present, and the current and potential scope of these. This report is expected to delimit and guide the design of information systems.*

5.4. Design of two information systems pilots with considerations for PwD and IP and Final Report of the consultancy. *The CF will prepare a written proposal that describes the methodology and steps to be followed for the design of the information systems, according to the inputs obtained in the analyses carried out within the framework of the consultancy. This product will include the delivery of the Final Report of the consultancy, which must contain information on the key actors contacted during the consultancy process, lessons learned and final recommendations.*

6. Project Timeline & Milestones

6.1. *The consultancy is expected to last sixteen months (490 calendar days) from the signing of the contract (The schedule should include the process of all Bank reviews).*

<u>Product</u>	<u>Delivery time (days from the signing of the contract)</u>
1) <i>Work plan</i>	<i>At 30 days</i>
2) <i>Analysis of best practices of accessibility in information systems with considerations of PwD and IP</i>	<i>At 4 months</i>
3) <i>Analysis of the scope and limitations of information systems in labor market institutions in the defined countries</i>	<i>At 8 months</i>
4) <i>Proposal for the design of an information systems pilot with considerations for PwD and IP and final report of the consultancy</i>	<i>At 16 months</i>

7. Reporting Requirements

7.1. *All the reports described in point 5 of these Terms of Reference must contain a detail of the main activities carried out, accompanied by a list with contact details of the key actors with whom meetings were held to carry out these actions. The report must be written in Spanish.*

7.2. *All reports must be submitted to the Bank in an electronic file. The documents must have a cover page in the main document, and all annexes. Files in Zip format will not be accepted as final reports due to the regulations of the Archives Management Section.*

8. Acceptance criteria

8.1. *Product 1 will be approved upon compliance with the requested specifications, detailed in the activities to be carried out in the expected times.*

- 8.2. Output 2 will be approved once the results of the best practice analysis are submitted.*
- 8.3. Output 3 will be approved once the report with the results of the analysis of limitations and scope of labor market institutions is presented.*
- 8.4. Output 4 will be approved upon submission of the proposed design of the information systems pilots and the Final Report of the consultancy.*
- 8.5. Each of the products will be submitted for consideration and approval by the Sectoral Specialist of the IDB's Labor Markets and Social Security Division, accompanied by the final report of the consultancy.*

9. Other Requirements

- 9.1. The CF must be incorporated in one of the Bank's 48 member countries.*
- 9.2. The FC will propose a team of experts according to the survey of the needs it carries out and it is desirable that the members of this team have at least three years of proven experience in similar experiences and that at least the professional profiles mentioned in the following point are included in the team:*
 - 9.2.1. Project Coordinator Professional in the social sciences with at least 10 years of experience in the field, with specific experience in job training, digitization of services or accessibility projects for PwD or IP.*
 - 9.2.2. UX designer or programmer with experience in designing accessible and/or culturally appropriate platforms.*

10. Monitoring and Reporting

- 10.1. The CF will send the products and reports to the Bank's Labor Markets Division. The Sectoral Specialist of the IDB's Labor Markets Division is responsible for approving the reports, products, and working documents resulting from this consultancy. It shall be the responsibility of the FC to ensure that such meetings are held, and reports are submitted to the Bank.*
- 10.2. The supervision of the consultancy will be in charge of Manuel Urquidi, LMK/SCL Sector Specialist; email: manuelu@iadb, who will approve the reports detailed in these Terms of Reference. Specify who the consulting firm will be reporting to, meetings, frequency, who will comment on reports, approve reports, documents, work, and make comments or instructions for changes. It shall be the responsibility of the Firm to ensure that such meetings are held, and reports are submitted to the Bank.*

11. Payment Schedule

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

described in this document.

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

Payment Plan	
<i>Deliverables</i>	%
1. <i>Work plan</i>	10%
2. <i>Analysis of best practices of accessibility in information systems with considerations for PwD and IP</i>	25%
3. <i>Analysis of the scope and limitations of information systems in labor market institutions in the defined countries</i>	25%
4. <i>Design of two pilots and Final Report</i>	40%
TOTAL	100%

TERMS OF REFERENCE

Consultancy to design a pilot to monitoring system for labor insertion with diversity and gender perspectives

[REGIONAL]

[RG-T4480]

[Promoting an inclusive digital transformation of labor market institutions in the region]

<https://www.iadb.org/en/project/RG-T4480>

1. Background and Justification

- 1.1. *The Social Sector (SCL) has a multidisciplinary team convinced that investing in people is the way to improve lives and overcome the challenges of development in Latin America and the Caribbean. Together with the countries of the region, the Social Sector builds public policy solutions to reduce poverty and to improve the education, working conditions, social protection and health services that citizens receive. The work of the Sector aims to promote a more productive region with equal opportunities between men and women and with greater inclusion of the most vulnerable populations.*
- 1.2. *The Division of Labor Markets and Social Security (SCL/LMK) promotes more and better employment in Latin America and the Caribbean. The IDB works to achieve regional goals in poverty reduction, equality of opportunities and improvement of labor productivity, by strengthening employment and training services, improving the design and scope of social security and the analysis of labor markets and labor information. To achieve these goals, the IDB is currently focusing on analytical work and projects in the following four areas: Intermediation, Job Training, Workforce Migration, and Social Security.*
- 1.3. *In recent years, the digital transformation process has gained strength in different sectors. The public sector has not been an exception of such developments. This boost has allowed the digitalization of different services, including the Public Employment Services (PES) to be able to extend their offer through virtual channels. This advance allows to reduce the impact of face-to-face visits, and to extend the scope of the service. However, in the attempt to improve the service, it is important to consider from the design the different types of users who will use the platforms, thus avoiding the exclusion of diverse populations.*
- 1.4. *In this sense, this consultancy aims to design a pilot for a labor insertion monitoring system, which allows monitoring the beneficiaries of the labor insertion service offered by the PES of a country to be defined by the IDB, considering diversity and gender perspectives. It is expected that with this monitoring system it will be possible to disaggregate labor insertion data to identify the impacts on Persons with Disabilities (PwD), Indigenous Persons (IP) and by gender.*

2. Objectives

- 2.1. *The objective of the consultancy is to design a pilot labor insertion monitoring system based on*

the use of administrative data, which allows monitoring the effectiveness of labor market policies implemented by the labor market institution of the defined country, considering gender and diversity perspectives.

3. Scope of Services

3.1. The Consulting Firm (CF) must coordinate with the corresponding institution of the beneficiary country defined for the design of the monitoring system, according to the current platform, and the possibilities and limitations in the capacities of the beneficiary institution.

3.2. Design of a labor insertion monitoring system with specific gender and diversity considerations, adapted to the context and possibilities of the defined country and its intermediary institution.

4. Key Activities

*4.1. **Coordination with the beneficiary institution** to determine the scope of the monitoring system, and its interaction with the labor insertion service, according to the capacities of the beneficiary country.*

*4.2. **Literature analysis of best practices in labor insertion monitoring systems** considering gender and diversity issues. The CF should carry out an analysis of good practices in the region, considering the context of the beneficiary country in which the system is expected to be applied.*

*4.3. **Design of the labor insertion monitoring system with gender and diversity considerations.** The FC must present the design for a monitoring system for the intermediary institution in charge of providing the labor insertion service in the country of interest.*

5. Expected Results and Outputs

*5.1. **Work plan.** The first product will be a work plan that must at least reflect the times, exclusions, requirements, and inputs by the CF; risk analysis and mitigating factors. The schedule must provide for the time required for the approval of the products by the Bank, to continue with the following consulting activities. The CF is also expected to include details of its methodology, governance plan and project management plan.*

*5.2. **Analysis of best practices in the implementation of labor insertion monitoring systems.** It is expected that the consulting firm will be able to carry out an analysis of best practices in the implementation of a labor insertion monitoring system considering gender and diversity issues.*

*5.3. **Analysis of the scope and limitations of the institution that will implement the monitoring system.** The CF must coordinate with the beneficiary institution to determine the scope of the monitoring system designed, according to its limitations, and the current and potential scope of the institution. It is expected that this report will define and guide the design of the monitoring system.*

*5.4. **Design of the pilot of monitoring systems with gender and diversity considerations and Final report of the consultancy.** The CF will prepare a written proposal describing the methodology and*

steps to be followed for the design of the monitoring system, based on the inputs obtained in the analyses carried out within the framework of the consultancy. This product will include the delivery of the Final Report of the consultancy, which must contain information on the key actors contacted during the consultancy process, lessons learned and final recommendations.

6. Project Timeline & Milestones

6.1. The consultancy is expected to last twelve months (360 calendar days) from the signing of the contract (The schedule should include the process of all Bank reviews).

<u>Product</u>	<u>Delivery time (days from the signing of the contract)</u>
1) <i>Work plan</i>	<i>At 30 days</i>
2) <i>Analysis of best practices of accessibility in information systems with considerations of PwD and IP</i>	<i>At 4 months</i>
3) <i>Analysis of the scope and limitations of information systems in labor market institutions in the defined countries</i>	<i>At 6 months</i>
4) <i>Proposal for the design of an information systems pilot with considerations for PwD and IP and final report of the consultancy</i>	<i>At 12 months</i>

7. Reporting Requirements

7.1. All the reports described in point 5 of these Terms of Reference must contain a detail of the main activities carried out, accompanied by a list with contact details of the key actors with whom meetings were held to carry out these actions. The report must be written in Spanish.

7.2. All reports must be submitted to the Bank in an electronic file. The documents must have a cover page in the main document, and all annexes. Files in Zip format will not be accepted as final reports due to the regulations of the Archives Management Section.

8. Acceptance criteria

8.1. Product 1 will be approved upon compliance with the requested specifications, detailed in the activities to be carried out (point 5) in the expected times.

8.2. Output 2 will be approved once the results of the best practice analysis are submitted.

8.3. Output 3 will be approved once the report with the results of the analysis of limitations and scope of the beneficiary institution is presented.

8.4. Output 4 will be approved upon submission of the monitoring system pilot design proposal and the Final Report of the consultancy.

8.5. Each of the products will be submitted for consideration and approval by the Sectoral Specialist of the IDB's Labor Markets and Social Security Division, accompanied by the final report of the

consultancy.

9. Other Requirements

9.1. The CF must be incorporated in one of the Bank's 48 member countries.

9.2. The FC will propose a team of experts according to the survey of the needs it carries out and it is desirable that the members of this team have at least three years of proven experience in similar experiences and that at least the professional profiles mentioned in the following point are included in the team:

9.2.1. Project Coordinator Professional in the social sciences with at least 10 years of experience in the field, with specific experience in labor insertion, digitization of services, monitoring of labor insertion or implementation of digital systems with gender and diversity considerations.

9.2.2. Programmer with experience in designing platforms for monitoring administrative data.

9.2.3. Data analyst with experience in analysis with administrative data.

10. Monitoring and Reporting

10.1. The CF will send the products and reports to the Bank's Labor Markets Division. The Sectoral Specialist of the IDB's Labor Markets Division is responsible for approving the reports, products, and working documents as a result of this consultancy. It shall be the responsibility of the FC to ensure that such meetings are held and reports are submitted to the Bank.

10.2. The supervision of the consultancy will be in charge of Manuel Urquidi, LMK/SCL Sector Specialist; email: manuelu@iadb.org who will approve the reports detailed in these Terms of Reference. Specify who the consulting firm will be reporting to, meetings, frequency, who will comment on reports, approve reports, documents, work, and make comments or instructions for changes. It shall be the responsibility of the Firm to ensure that such meetings are held, and reports are submitted to the Bank.

11. Payment Schedule

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

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

Payment Plan	
<i>Deliverables</i>	%
1. <i>Work plan</i>	10%
2. <i>Literature analysis of best practices in labor insertion monitoring systems</i>	25%
3. <i>Analysis of the scope and limitations of the institution that will implement the monitoring system</i>	25%
4. <i>Pilot Design and Final Report</i>	40%
TOTAL	100%