

TERMS OF REFERENCE

Survey about Issues Determining the Execution of IDB Projects

1. Background and Justification

- 1.1. The Inter-American Development Bank (IDB) is focused on enhancing development effectiveness in the Latin American and Caribbean (LAC) region by fostering institutional capacity and results ownership among borrowers and PEUs. These objectives have materialized in the new IDB Group Institutional Strategy.
- 1.2. In the rapidly evolving landscape of international development, the need for robust evidence and targeted knowledge is more critical than ever. The IDB is committed to systematically reducing knowledge gaps and leveraging high-quality evidence to enhance its operational effectiveness and ensure that interventions are impactful and sustainable. One important knowledge gap that persists, is the role of clients, specifically Project Executing Units (PEUs) in determining the results and impact of development projects. Previous works have examined the factors contributing to the success or failure of IDB projects utilizing project management data (see Álvarez et al., 2021 and Corral et al., 2022).¹ Studies cite critical dimensions, such as disbursements and product cancellations, to explain project effectiveness.
- 1.3. Studying these issues, Acosta, Cambra, Martínez-Carrasco, Cerda, Kang, Villalba and Yepez (2024)² implemented a comprehensive survey of 36 IDB Project Executing Units (PEUs) across the region in 2023, revealing that, while these units extensively use internal performance indicators, there is a predominant focus on monitoring outputs and financial disbursements rather than achieving development outcomes. The lack of PEU involvement in the project design phase often leads to misalignment with the IDB results framework. Additionally, although PEUs recognize the importance of documenting lessons from previous projects, less than half actively use this evidence in their current operations.
- 1.4. This research also found three critical areas for improvement. First, enhancing the efficiency of the IDB's Client Portal to support PEUs throughout the project lifecycle, especially to identify and coordinate responses to execution challenges. Second, aligning incentives to ensure that project objectives are appropriately measured by owning and monitoring the set of outcome indicators. Third, addressing discrepancies between PEU perceptions and IDB reports regarding responsiveness to obstacles, the leverage of lessons learned, and the achievement of key

¹ Álvarez, C., L. Corral, A. Cuesta, J. Martínez, C. Montiel, and C. Yepez. 2021. Project Completion Report Analysis: Factors Behind Project Success and Effectiveness Office of Strategic Planning and Development Effectiveness IDB Technical Note No. IDB-TN-02135. <http://dx.doi.org/10.18235/0003116>

Corral, L., G. Lotti, J. Martínez, and C. Pecha. 2022. Operational Excellence: Understanding Project Financial Cancellations and its Impact on the Delivery of Results Office of Strategic Planning and Development Effectiveness Department. IDB Technical Note No. IDB-TN-02417. Inter-American Development Bank. <http://dx.doi.org/10.18235/0003952>

² Acosta, C., Cambra, G., Martínez-Carrasco, J., Cerda, M., Kang, M., Villalba, H., & Yepez, M.C. 2024. Unveiling the IDB's Project Executing Units: Performance Indicators, Results-Based Management, and Demand for Knowledge. IDB Technical Note No. IDB-TN-02961. <http://dx.doi.org/10.18235/0013040>

performance indicators is crucial. These issues underscore the need for a deeper understanding and commitment to impact-achievement management.

1.5. We are looking for a firm with extensive experience to improve and expand the survey implemented by Acosta et al. (2024) to a sample covering a large share of PEUs implementing IDB projects across all countries and sectors in Latin America and the Caribbean. This survey will allow for the evaluation of some of the capabilities of the IDB's Client Portal, which will be done following a random allocation of them. Therefore, before the survey, the firm will also implement a short screener questionnaire to facilitate the randomization of the program. Both instruments should be implemented following the highest level of rigor to ensure the quality of the evaluation and the results.

2. Objectives

2.1. The main goal of this consulting project is to conduct around 300 surveys to gather comprehensive data from a representative sample of Project Executing Units (PEUs) working with the IDB across all countries and sectors in Latin America and the Caribbean. This survey will feed an important research agenda aiming to understand the role of PEUs in determining project success and impact.

3. Scope of Services

3.1. The selected firm will design the survey methodology, review the current survey questions, conduct a pilot testing to ensure clarity and effectiveness of revised questions, implement a screener questionnaire to identify a representative sample of around 300 PEUs, develop a recruitment strategy to engage participants, send out invitations and follow-up reminders to encourage participation, administer the surveys using appropriate channels (online, in-person, or mixed methods) and languages (English and Spanish), monitor the response rate and address any issues that may arise during the survey period, ensure data integrity and accuracy throughout the collection process, provide technical documentation, and the unit-level responses in an organized and well-documented dataset.

4. Key Activities

4.1. The firm will:

- 4.1.1. Provide at least one (1) bi-weekly meeting to discuss the advances in the project.
- 4.1.2. Review the provided survey questions and suggest improvements.
- 4.1.3. Conduct short screening questionnaire to around 85% of PEUs in the IDB Client Portal.
- 4.1.4. Conduct pilot testing to ensure clarity and effectiveness of revised questions.
- 4.1.5. Sampling and recruitment: Identify a representative sample of PEUs from screening questionnaire.
- 4.1.6. Develop a recruitment strategy to engage participants. Send out invitations and follow-up reminders to encourage participation.

- 4.1.7. Data Collection Execution: Administer the surveys using appropriate channels (online, in-person, or mixed methods) and languages (English or Spanish).
- 4.1.8. Monitor the response rate and address any issues that may arise during the survey period.
- 4.1.9. Ensure data integrity and accuracy throughout the collection process.
- 4.1.10. Provide technical documentation regarding the survey and a final memo of the results.
- 4.1.11. Provide a clean PEU-level dataset with the survey responses with its respective dictionary.

5. Expected Outcome and Deliverables

- 5.1. Deliverable 1: Results from the screening questionnaire and randomization strategy.
- 5.2. Deliverable 2: Documents with the reviewed survey questionnaire and results from the pilot testing.
- 5.3. Deliverable 3: Dataset at the project executing level in CSV or Excel format, including an accompanying Readme file (codebook) and a final memo/brief summarizing the results of the project (not a data analysis exercise).

6. Project Schedule and Milestones

6.1. The proposed period of this project is February to June 2025. Work should be implemented in three phases, as described in the table below:

Phase of Project	Description	Anticipated Timeframe
Phase 1. Screening	Results from the screening questionnaire and randomization strategy	February 2025
Phase 2. Pilot	Documents with the reviewed survey questionnaire and results from the pilot testing.	March – April 2025
Phase 3. Survey	Dataset at the project executing level in CSV or Excel format, including an accompanying Readme file and a final memo/brief summarizing the results of the project.	April – June 2025

7. Reporting Requirements

- 7.1. At least one biweekly meeting where teams discuss the advancements of the project.
- 7.2. One brief final memo that summarizes the results of the project, together with a final meeting where the firm presents the report.

8. Acceptance Criteria

- 8.1. The selected firm must have more than five years of verifiable experience in survey design and application in both Spanish and English, quantitative and qualitative research, and extensive experience in the public sector.
- 8.2. The firm should have experts with quantitative and interpersonal skills, experience communicating with high-level officials, and the ability to adapt to working with diverse cultures.

9. Payment Schedule

- 9.1. 25% against the first deliverable
- 9.2. 25% against the second deliverable
- 9.3. 50% against the third deliverable.

10. Supervision

- 10.1. This contract will be supervised by Gina Cambra (gcambra@iadb.org VPC/FMP) and José Martínez (jalejandrom@iadb.org VPS/VPS)

Consultant to support data coordination and analysis on issues determining the execution of IDB projects**Post of Duty: Remote**

The IDB Group is a community of diverse, versatile, and passionate people who come together on a journey to improve lives in Latin America and the Caribbean. Our people find purpose and do what they love in an inclusive, collaborative, agile, and rewarding environment.

About this position

The Inter-American Development Bank (IDB) is focused on enhancing development effectiveness in the Latin American and Caribbean (LAC) region by fostering institutional capacity and results ownership among borrowers and PEUs. These objectives have materialized in the new IDB Group Institutional Strategy.

Previous works have examined the factors contributing to the success or failure of IDB projects utilizing project management data (see Álvarez et al., 2021 and Corral et al., 2022). Studies cite critical dimensions, such as disbursements and product cancellations, to explain project effectiveness. However, there is still an important knowledge gap in examining the role of clients, specifically the PEUs, to understand the factors behind the results.

Studying these issues, Acosta, Cambra, Martinez-Carrasco, Cerda, Kang, Villalba and Yopez (2024) implemented a comprehensive survey of 36 IDB Project Executing Units (PEUs) across the region in 2023, revealing that, while these units extensively use internal performance indicators, there is a predominant focus on monitoring outputs and financial disbursements rather than achieving development outcomes. The lack of PEU involvement in the project design phase often leads to misalignment with the IDB results framework. Additionally, although PEUs recognize the importance of documenting lessons from previous projects, less than half actively use this evidence in their current operations.

This research also found three critical areas for improvement. First, enhancing the efficiency of the IDB's Client Portal to support PEUs throughout the project lifecycle, especially to identify and coordinate responses to execution challenges. Second, aligning incentives to ensure that project objectives are appropriately measured by owning and monitoring the set of outcome indicators. Third, addressing discrepancies between PEU perceptions and IDB reports regarding responsiveness to obstacles, the leverage of lessons learned, and the achievement of key performance indicators is crucial. These issues underscore the need for a deeper understanding and commitment to impact-achievement management.

We are looking for a proactive, data-centric and evidence-based research consultant. In this position, the consultant's main tasks will be to review existing evidence on measuring organizational practices and institutional arrangements in international organizations, clean and analyze a large data file obtained from a survey using state-of-the-art econometric and statistical methods and Natural Language Processing (NLP) and assist in the writing of the final report.

The consultant will work in a team with members from multiple bank units in a project led by a Senior Specialist of the Operations Financial Management and Procurement Services Office.

What you'll do:

1. Review cutting-edge literature on measuring organizational practices and institutional arrangements in public investment executing units, as well as efficiency indexes for planning and procurement processes.
2. Clean a large data file obtained from surveying a large sample of PEUs.
3. Analyze the data using statistical, econometrical, and machine learning techniques to solve the main research question.
4. Written documentation of the data analysis and codes.
5. Write a report of the main findings.

Deliverables and Payments Timeline:

Payments will be made upon the consultant's submission of invoices linked to delivery and acceptance by the Project Team Leader or Alternate Team Leader of the above-mentioned activities. Invoices will account for the number of days worked on a given product, activities performed, and outputs delivered.

<u>Deliverable #</u>	<u>Percentage</u>	<u>Planned Date to Submit</u>
1 – Literature review	14.2%	End of the first month
2 – Clean dataset	14.3%	End of the second month
3 – Presentation of results	14.3%	End of the third month
4 – First report of results	14.3%	End of the fourth month
5 – Codes used for cleaning and analyzing the data	14.3%	End of the fifth month
6 – Data Documentation and dictionary	14.3%	End of the sixth month
7 – Final report of results	14.3%	End of the seventh month

What you'll need

- **Education:** Bachelor's or master's degree in economics, public policy, or other fields relevant to the responsibilities of the role.
- **Experience:** At least 2 years of relevant and progressive experience conducting studies, reviewing literature, data management and data analysis.
- **Languages:** Proficiency in English and one of the other Bank official languages (Spanish, French or Portuguese) is required.

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.

Type of contract and duration:

- **Type of contract:** Products and External Services Consultant (PEC), Lump Sum
- **Length of contract:** 7 months
- **Work Location:** Remote

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

About IDB Lab

Is the innovation laboratory of the IDB Group. We mobilize financing, knowledge, and connections to drive innovation for inclusion in Latin America and the Caribbean. We believe innovation is a powerful tool that can transform our region, providing today unprecedented opportunities to populations that are vulnerable due to economic, social, or environmental factors. IDB Lab has a commitment to gender quality and diversity as part of its development mandate. The Strategy and Impact unit supports IDB Lab in the development of strategy, connections and knowledge, and impact measurement and reporting.

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https://twitter.com/IDB_Lab

About IDB Invest

IDB Invest, a member of the IDB Group, is a multilateral development bank committed to promoting the economic development of its member countries in Latin America and the Caribbean through the private sector. IDB Invest finances sustainable companies and projects to achieve financial results and maximize economic, social, and environmental development in the region. With a portfolio of \$14.1 billion in asset management and 325 clients in 25 countries, IDB Invest provides innovative financial solutions and advisory services that meet the needs of its clients in a variety of industries.

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<https://www.facebook.com/IDBInvest>

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TERMS OF REFERENCE

Editing and Translation Services for Research Study

1. Background and Justification

1.1. The Knowledge and Learning Division (KIC/KLD) at the Inter-American Development Bank (IDB) is seeking professional editing and translation services for a document titled "Enhancing Impact through the Client Portal: Evaluation of the Digital Semiannual Report on Client Ownership and Quality of Operational Knowledge."

2. Objectives

2.1. The objective of this project is to provide high-quality editing and translation services for the document. This document will be published either as a technical note or as a working paper and will contribute to the Inter-American Development Bank's efforts in promoting development effectiveness.

3. Scope of Services

3.1. The selected firm will provide editing and translation services for the document. Both services should maintain the integrity and meaning of the original content while ensuring coherence, clarity, and adherence to the IDB's language guidelines. By delivering a professionally edited document in both Spanish and English, this project aims to facilitate knowledge dissemination and enhance the impact of the study bank-wide.

4. Key Activities

4.1. The firm will perform a thorough editing process to ensure the quality, consistency, and readability of the document. The editing process will involve proofreading for grammar, punctuation, syntax, and style to ensure the highest standard of language usage. Any necessary improvements, modifications, or corrections will be made to enhance the overall quality and coherence of the final version.

4.2. The firm will translate the document to Spanish, maintaining the quality, integrity, and meaning of the original document. Any necessary improvements, modifications, or corrections will be made to enhance the overall quality and coherence of the final version.

5. Expected Outcome and Deliverables

5.1. Deliverable 1: edited and proofread version of the document, ensuring grammar, punctuation, and syntax accuracy, as well as, any necessary annotations or comments highlighting potential issues or ambiguities in the original document that require clarification.

5.2. Deliverable 2: translated, edited, and proofread version of the document in Spanish, ensuring grammar, punctuation, and syntax accuracy, as well as any necessary annotations or comments highlighting potential issues or ambiguities in the original document that require clarification.

6. Project Schedule and Milestones

6.1. The proposed period of this project is January to March 2026, implemented in two phases:

Phase of Project	Anticipated Timeframe
Phase 1. Edition	January – February 2026
Phase 2. Translation	February – March 2026

7. Reporting Requirements

7.1. The IDB will provide a fixed budget for the edition and translation of the document. The selected firm will be responsible for managing all expenses associated with the process, including any required tools or resources.

8. Acceptance Criteria

8.1. Experience: The firm should have a proven track record in providing professional editing and translation services, preferably with experience in editing technical or specialized content related to economics, development, or similar fields. References or samples of previous work can be requested to assess the quality of their editions. Familiarity with the Bank's style and voice in the relevant language is a must.

8.2. Subject Matter Expertise: It is desirable for the firm to have editors with knowledge or experience in the document's subject matter, such as economics, development, or related fields. This ensures a better understanding of the terminology and concepts involved in the document.

8.3. Adherence to Deadlines: The firm should demonstrate a solid commitment to meeting deadlines and delivering the product within the agreed-upon timeframe. Request information about their workflow, project management, and ability to handle multiple projects simultaneously.

9. Payment Schedule

9.1. 50% against the first deliverable

9.2. 50% against the second deliverable

10. Supervision

10.1. This contract will be supervised by Gina Cambra (gcambra@iadb.org VPC/FMP) and José Martínez (jalejandrom@iadb.org VPS/VPS)