

## **REQUEST FOR EXPRESSIONS OF INTEREST** **CONSULTING SERVICES**

**Selection # as assigned by e-Tool:** RG-T2995-P001

**Selection Method:** Full Competitive Selection

**Country:** Regional

**Sector:** IFD/ICS

**Funding – TC #:** ATN/OC-16308-RG

**Project #:** RG-T2995

**TC name:** Simplifying Lives (SL): The impact of the management of information technologies and citizens relationship on the quality of public service delivery and on citizen satisfaction

**Link to TC document:** <https://www.iadb.org/en/project/RG-T2995>

**Description of Services:** Simplifying Lives Project: Methodology review and second regional measurement of quality and satisfaction with transactional public services delivered to citizens.

The Inter-American Development Bank (IDB) is executing the above-mentioned operation. For this operation, the IDB intends to contract consulting services described in this Request for Expressions of Interest.

Expressions of interest must be delivered using the IDB Portal for Bank Executed Operations ( <http://beo-procurement.iadb.org/home>) by: **January 31st, 2018** at 5:00 P.M. (Washington D.C. Time).

The consulting services (“the Services”) include: the review and adjustment of the methodology (questionnaires, instruments, data processing and analysis); measurements and interviews to be performed directly or through local partner firms. IDB will select the countries (up to 7) and services (up to 7) to be evaluated. A final report will be produced containing a description of methodology adjustments, key results, conclusions and recommendations, and survey metadata. This report should be similar to [the report prepared for the 2015 edition](#). An executive summary for each service manager and a policy brief for each country will also be produced. The final product of the consultancy should be delivered, at the latest, in the first quarter of 2019.

Eligible consulting firms will be selected in accordance with the procedures set out in the Inter-American Development Bank: [Policy for the Selection and Contracting of Consulting firms for Bank-executed Operational Work](#) - GN-2765-1. All eligible consulting firms, as defined in the Policy may express an interest. If the Consulting Firm is presented in a Consortium, it will designate one of them as a representative, and the latter will be responsible for the communications, the registration in the portal and for submitting the corresponding documents.

The IDB now invites eligible consulting firms to indicate their interest in providing the services described below in the [draft summary](#) of the intended Terms of Reference for the assignment. Interested consulting firms must provide information establishing that they are qualified to perform the Services (brochures, description of similar assignments, experience in similar conditions, availability of appropriate skills among staff, etc.). Eligible consulting firms may associate in a form of a Joint Venture or a sub-consultancy

agreement to enhance their qualifications. Such association or Joint Venture shall appoint one of the firms as the representative.

Interested eligible consulting firms may obtain further information during office hours, 09:00 AM to 05:00 PM, (Washington D.C. Time) by sending an email to: [apareja@iadb.org](mailto:apareja@iadb.org)

Inter-American Development Bank

Division: IFD/ICS

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## **Summary of Draft of Terms of Reference**

### **Simplifying lives project: methodology review and second regional measurement**

#### **Background**

The mission of Government is to provide services for citizens and organizations with quality, efficiency, effectiveness and transparency. Notwithstanding this fundamental role in government and unlike the private sector, quality of service delivery and citizen satisfaction have been mostly absent from the performance measurements of bureaucratic institutions. Thus, so far, measurement of results and organization success cannot be said to have been much citizen-centered.

Having this in mind, in 2015 the Innovations for Citizen Services (ICS) Division at the Inter-American Development Bank (IDB) designed the Simplifying Lives methodology to measure the quality and satisfaction with public services delivery. The aim of the initiative is to generate evidence for informed decision making regarding quality of transactional services, simplification and incorporation of digital solutions in LAC. The methodology was applied for the first time that year on six transactional services and six countries. [The methodology and results were published in 2016.](#)

#### **Objectives**

The objective of this consultancy is to review the SL's methodology and to apply it a second time to seven countries and seven services. Some of the countries have already been evaluated in 2015, others will be assessed for the first time. On the other hand, most of the services will be the same as 2015 and there will be new services to evaluate.

#### **Scope of Services**

Given the limited allocated budget for this project, the final quantity of countries and services to be assessed will depend on the amount of the proposals. The final number could be more or could be less than seven, either for services or countries.

For this consultancy it will be understood that service delivery refers only to the transactions between citizens and the public administration (or private companies when public services happen to be outsourced), which involve the exchange of information and possibly also payments, that can be implemented as a business process, and that are also known as "transactional services". The term may not necessarily cover the set of problems associated with the material

delivery of services (e.g. teacher's skills, medical care quality, tap water quality etc.) while it will do cover the transactions imposed on citizens in order to be able to receive the necessary services for everyday life. The exchange of information is usually performed through different channels: personal interaction, telephone conversation, paper mail, e-mail, paper forms, documents, Web forms, Web pages and chat. Another important observation to formulate is that only services delivered directly to people fall within the scope of this project. In other words, services for organizations (i.e. businesses) are out of its scope (There are important differences in this respect: unlike businesses, citizens do not normally have an agent on whom to delegate those proceedings; factors influencing quality are different; again, unlike companies, the provision of services to citizens is usually massive; and citizens make greater use of multi-channel delivery.)

### **Key Activities**

The firm will pursue the support of participating government officers and will be responsible for convening them to the activities where they should take part. IDB will provide coordination support.

### **Methodology review**

Review and adjustment of the methodology (questionnaires, instruments, data processing). The IDB will provide all the methodological tools used in the first measurement and its lessons learned. The modifications to be submitted must be validated by the IDB. The new version will have to keep comparability with the one used in 2015.

### **Measurement**

The firm is responsible of performing the research, measurements and interviews, directly or through local partner firms. IDB will select the countries (up to 7) and services (up to 7) to be evaluated.

The set of services to be considered will be picked most probably from the following categories: identity document and passport; civil registry (issuing of original birth and marriage certificates and issuing of copies); driver's license and vehicle registration; social security (including the establishment of eligibility for a pension and pension payments) and labor benefits application; public utilities services application, contracting and payments; education services (e.g. matriculation into public schools, issuance of copies of students' school records).

There will be two types of countries and services:

**Type 1:** countries/services that were evaluated in 2015

**Type 2:** countries/services that will be evaluated for the first time

The measurement effort for each case will be different. For type 1, the internal view data gathering can be carried out through web forms and telemeetings and not necessarily through in-person interviews. The idea for this case is to focus only on changes that had taken place in the last three years (since 2015.) For type 2, data for the internal view must be gathered through in-person interviews. These meeting will take place in the capital city of each participating country. The rest of the activities can be performed remotely.

### **Report**

A final report will be produced with a structure similar to that of the 2015 measurement. It will contain a description of methodology adjustments, key results (both for the internal and external views and the relation between them), conclusions and recommendations, and survey metadata. It will include an assessment of the relations between data gathered in 2015 and 2018. An executive summary for each service manager and a policy brief for each country will also be produced.

The final product of the consultancy should be delivered, at the latest, in the first quarter of 2019.

### **Expected Outcome and Deliverables**

The following are the specific products expected from this consultancy:

Diagnostic Tool: A document containing the review of the measurement model with proposed changes accepted by IDB. Changes could be on data gathering techniques, data robustness, data analysis, index composition etc.

Data collection web tool: web questionnaires both for the internal and external view. It can be based on SurveyMonkey, JotForm or similar. It must be mobile friendly. The data must be exportable to excel, and must be stored in an IDB database.

Datasets: all data gathered.

Graphic design of invitations to potential respondents (one for each service). The invitations and all external communication of the project must have the prior validation of the IDB.

Weekly progress report on data collection. The report should include: number of invitations sent, number of landings on the search page, number of responses initiated, rejected, complete and valid. Information must be submitted by country, service, and defined demographic groups.

### **Reporting Requirements**

The consulting firm will have to deliver the following reports:

- Implementation plan of the project containing proposal of adjustments to the methodology.
- Internal vision data, including questionnaires and database with the data collected.
- External vision data, containing: (1) sampling and pre-test plan; (2) database with the data and metadata of all valid answers obtained; and (3) statistical analysis, including importance of attributes. The IDB will have access to the data during the entire collection process.
- Executive summary for each service in each country
- Policy brief for each country
- Final report based on the 2015 report as above described and adapted to this edition.

Final report must be presented in Spanish. Communications with citizens and government officials must be performed in each country's official language (Spanish or English.) Service executive summaries and policy brief must also be in the local language.

### **Firm Qualifications**

For the development of the theoretical model the firm may gather a team comprising the following specialties: (i) an expert on public management and, especially, on management of public services delivered to citizens; (ii) an expert on customer satisfaction measurements and, especially, on citizen satisfaction measurements; (iii) a business process analyst; (iv); and (v) a senior editor for the reports. The firm must show experience on measurement of customer satisfaction or on measurements of public management performance related with service delivery.