

## Terms of Reference

### Regional (RG-T4359) Knowledge Management Consultant

#### 1. BACKGROUND

The Caribbean Public Health Agency (CARPHA), as the lead regional public health agency and an expression of Caribbean Cooperation in Health, is mandated by its Inter-governmental Agreement (IGA) to support its 26 Member States in bolstering national systems and coordinating regional response to public health threats. CARPHA has established programs for pandemic prevention, preparedness and response (PPR) and coordination (Communicable Diseases, Emergency Response, Tourism and Health, Foodborne, Vector-borne, and Field Epidemiology) and serves as the Regional Reference Laboratory. The Agency works closely with regional and international agencies and uses regional mechanisms, surveillance systems, and networks for coordinating its public health response work. CARPHA is competent in all three areas of PPR and has a successful track record of the same, as demonstrated by its regional COVID-19 response. The Agency is uniquely positioned for successfully implementing PPR capacities in the region, and to leverage its coordinating ability to encourage complementarity.

The Pandemic Fund (PF), established in September 2022, is the first multilateral financing mechanism dedicated to providing multiyear grants to help low- and middle-income countries become better prepared for future pandemics. The PF's first Call for Proposals provides additional financing to strengthen PPR capabilities and address critical gaps in low- and middle-income countries through investments and technical support at the national, regional, and global levels. It is expected to support and reinforce capacity building and implementation of pandemic prevention, preparedness and response (PPR) under the IHR (2005) and other legal frameworks, consistent with the One Health approach. The three high-priority areas are:

- Comprehensive disease surveillance and early warning systems (EWS)
- Laboratory systems
- Human resources and public health and community workforce capacity.

In August 2023, the PF Governing Board announced that CARPHA's regional entity proposal, entitled *'Reducing the Public Health Impact of Pandemics in the Caribbean through Strengthened Integrated Early Warning Surveillance, Laboratory Systems and Workforce Development'* was successfully selected for the first round of financing. CARPHA is the Executing Agency and the IDB is the Implementing Entity.

The Goal of this Project is to Reduce the Public Health Impact of Pandemics in the Caribbean through Prevention, Preparedness, and Response. The Objective is to support CARPHA in reducing the public health impact of pandemics in the Caribbean region will serve to build PPR surveillance & EWS, laboratory systems and workforce capacity at CARPHA and at country levels.

The Project comprises the following five components:

- Component 1: Strengthening and Expanding Integrated EWS
- Component 2: Expansion of Laboratory Systems
- Component 3: Workforce Development
- Component 4: Regional Strategic Coordination, Collaboration & Commitment to Pandemic Response
- Component 5: Monitoring, Evaluation, and Project Management

The Consultancy is concerned with *Component 1: Strengthening and Expanding Integrated EWS* and seeks an individual to function as the **Knowledge Management Consultant**.

### **1.1. Justification for the Study**

CARPHA is the sole regional public health agency in the Caribbean and an expression of the Caribbean Cooperation in Health (CCH). Public health surveillance is CARPHA's core mandate (Inter-Governmental Agreement (IGA), Article 5) and the mainstay of the work of CARPHA. The region faces a complex mosaic of diseases and public health conditions and in this regard, CARPHA's public health surveillance work is multifaceted, addressing a wide spectrum of diseases and public health issues in the region.

Integrated public health surveillance is the recommended approach for effective and efficient public health surveillance of multiple diseases and public health issues. This approach is necessary for consolidation and analyses of CARPHA's wide range of surveillance data to improve efficiency and effectiveness and allow for the provision of one cohesive report on overall regional public health surveillance. CARPHA has been pioneering this initiative in the Caribbean.

While there is some level of functional integration, the different surveillance systems in the Agency tend to function in isolation with separate plans and outputs that are not always consolidated and assessed together. To address these challenges, CARPHA must strengthen its surveillance systems through better amalgamation of its technical areas, as well as the formalization of an up-to-date, complete information repository for CARPHA, through the PF.

## **2. OBJECTIVE**

The objective of the **Knowledge Management Consultant** is to collect, compile and organise all existing CARPHA manuals, standard operating procedures, guidelines, promotional materials and other related documents on the various surveillance systems of CARPHA. The Consultant will design an online file classification system that will enable more efficient accessibility and dissemination of relevant information within CARPHA and to CMS as well as allowing for timelier updating of relevant documents.

The **Knowledge Management Consultant** will interact with relevant CARPHA departments (Communicable Diseases and Emergency Response, Laboratory, Tourism and Health, Vector-borne, Climate & Health, Foodborne, Environmental Health, Field Epidemiology & Public Health Workforce Development) in accordance with the Projects Operations Manual, including aligning to CARPHA's communication protocols with the Project's Technical Coordinator and other relevant persons in the PF Project.

## **3. SCOPE OF SERVICES /TASKS**

- Retrieve all existing CARPHA manuals, standard operating procedures, guidelines, promotional materials and other related documents on the various surveillance systems of CARPHA.
- Develop an inventory of the various manuals, standard operating procedures, guidelines, promotional materials and other related documents on the various surveillance systems of CARPHA.
- Design and set up an online file classification system/repository on CARPHA's intranet across CARPHA surveillance systems and departments.

- Oversees the proper identification, naming, formatting and handling of documents, including their transfer, storage and retrieval within the online portal.
- Develop Standard Operating Procedures for the maintenance and updating of the online file classification system/ repository.
- Implements knowledge management strategies and processes to ensure efficient knowledge sharing, retrieval, and utilisation across key members in the Project Execution Unit and CARPHA.
- Work with CARPHA team to build a library containing hard copies of all manuals, standard operating procedures, guidelines, promotional materials and other related documents inclusive of version history.
- Works with Project Director to ensure the pandemic funds activities are implemented in alignment with what is required by the relevant department leads.
- Interact with CARPHA departments and CARPHA Member States, international experts and other stakeholders in accordance with the Projects Operations Manual, including aligning to CARPHA’s communication protocols with MS and other stakeholders.
- Other duties that may be implied in the contract or assigned by CARPHA.

**4. CONSULTANT’S REPORTING OBLIGATION**

No.	Deliverable/ Reports	Contents of Report	Timeline
1.	Inception Report	Maximum 10 pages to be produced one (1) week after the start of implementation. In the report the Consultant shall describe initial findings, progress in collecting data, any difficulties encountered or expected in addition to the work programme. More specifically, the Report will include a detailed workplan with the timelines for the specific project activities and the methodology for the activities.	One (1) week
2.	Monthly Report	Maximum 10 pages (main text excluding annexes) to be produced at the end of each month of the Consultancy (excluding the final month). This report will consist of a detailed summary of progress with implementation of the specific work, set out in Section 3, including challenges encountered and action taken/proposed to address challenges.	After 1 month
3	Monthly Report	Maximum 10 pages (main text excluding annexes) to be produced at the end of each month of the Consultancy (excluding the final month). This report will consist of a detailed summary of progress with implementation of the specific work, set out in Section 3, including challenges encountered and action taken/proposed to address challenges.	Last day of 2nd month
4	Monthly Report	Maximum 10 pages (main text excluding annexes) to be produced at the end of each month of the Consultancy (excluding the final month). This report will consist of a detailed summary of progress with implementation of the specific work, set out in Section 3, including challenges	Last day of 3rd month

No.	Deliverable/ Reports	Contents of Report	Timeline
		encountered and action taken/proposed to address challenges.	
5	Monthly Report	Maximum 10 pages (main text excluding annexes) to be produced at the end of each month of the Consultancy (excluding the final month). This report will consist of a detailed summary of progress with implementation of the specific work, set out in Section 3, including challenges encountered and action taken/proposed to address challenges.	Last day of 4 <sup>th</sup> month
6	Monthly Report	Maximum 10 pages (main text excluding annexes) to be produced at the end of each month of the Consultancy (excluding the final month). This report will consist of a detailed summary of progress with implementation of the specific work, set out in Section 3, including challenges encountered and action taken/proposed to address challenges.	Last day 5 <sup>th</sup> month
4	Final Report	Maximum 20 pages (main text, excluding annexes) shall be submitted at the end of the final month of the Consultancy. The submission must be a comprehensive report comprising the work conducted in respect of Section 3.	Last day of 6 <sup>th</sup> month

## 5. QUALIFICATIONS AND EXPERIENCE

### Academic Qualification

- Bachelor’s degree or equivalent in Management Studies, Records Management, Library Science, Information Management, Knowledge Management, Computer Sciences, Health Informatics, or related field.
- Studies in Public health or a related field would be an asset.

### General Professional Experience:

- At least three years’ professional experience with exposure to one or more of the following: Office Management, Research, Knowledge Management, Communications and/or Consulting.
- Experience in collecting, storing and manipulating data/information from different sources and bringing them together in an e-filing Systems.
- Experience in Document Management procedures, systems and standards.
- Ability to work under pressure and meet tight deadlines

### Specific Professional Experience & Skills:

- Keen analytical and organisational skills
- Strong oral and written communication skills in English
- Knowledge of government, public health, and international development agencies
- Demonstrated experience in being part of a team developing and/or maintaining databases.
- Ability to communicate effectively with diverse stakeholders.

- Strong competency in Microsoft Office, SharePoint, Intranet Systems and a general proficiency with related technology systems

#### **6. MANDATORY COMPLIANCE:**

- **Eligibility:** as per *Policies for the Selection and Contracting of Consultants Financed by IDB-GN-2350-15 May 2019*: Section I. Clause 1.13 Eligibility. Information on Eligible Countries is at Annex 3.
- **No Conflict of Interest:** as per *Policies for the Selection and Contracting of Consultants Financed by IDB-GN- 2350-15 May 2019*: Section I Clause 1.11 Conflict of Interest
- **Not Sanctioned by the Bank:** IDB's Group List of sanctioned firms and individuals – <https://www.iadb.org/en/topics/transparency/integrity-at-the-idb-group/sanctioned-firms-and-individuals%2C1293.html>

#### **7. CHARACTERISTICS OF THE CONSULTANCY**

- Type of Consultancy: Individual
- Duration: 6 months
- Place of Work: Caribbean Public Health Agency (CARPHA) HQ, Port of Spain, Trinidad and Tobago (in-person)
- Working Language: English

#### **8. CLIENT'S INPUT AND COUNTERPART PERSONNEL**

The Client shall ensure that all consultants are supported and equipped. In particular, the Client must ensure that there is sufficient administrative, secretarial and interpreting provision to enable experts to concentrate on their primary responsibilities. The Client will provide office accommodation, internet connectivity for use during this consultancy and all currently available data, information, documentation and reports to inform assessment, consultations and recommendations. It must also transfer funds as necessary to support their work under the contract and to ensure that its consultants are paid regularly and in a timely fashion.

The Consultant shall be required to provide his/her personal computer.

#### **9. REPORTING REQUIREMENTS AND TIME SCHEDULE FOR DELIVERABLES**

All payments will be made upon submission and acceptance of monthly invoices and timesheets by the Project Director (CARPHA Technical Lead) or designate.

#### **10. COORDINATION**

The **Knowledge Management Consultant** will report to the Technical Coordinator who will in turn report to the Project Director (CARPHA Technical Lead)/designate. The Project Director will be responsible for the coordination of activities under the contract, for accepting and approving reports on behalf of CARPHA, receiving and approving invoices for payment, and preparing performance evaluation reports.

The **Knowledge Management Consultant** is expected to collaborate, liaise or meet as required with specialist team members in the PEU, CARPHA's personnel, assigned subject matter experts, executives and stakeholders, and representatives of the IDB, as needed.

**Annex 1: Evaluation Criteria**

<b>Selection Component</b>	<b>Evaluation Criteria</b>	<b>Max Points</b>
<b>1. Academic Qualifications</b>	Bachelor’s degree or equivalent in Management Studies, Records Management, Library Science, Information Management, Knowledge Management, Computer Sciences, Health Informatics, or related field.  Studies in Public health or a related field would be an asset.	15
<b>2. Required Experience</b>	At least three years’ professional experience with exposure to one or more of the following: Office Management, Research, Knowledge Management, Communications and/or Consulting.	10
	Experience in collecting, storing and manipulating data/information from different sources and bringing them together in an e-filing Systems.	10
	Experience in Document Management procedures, systems and standards.	10
<b>3. Expert Knowledge and Skills</b>	Keen analytical and organisational skills	10
	Strong oral and written communication skills in English	10
	Knowledge of government, public health, and international development agencies	10
	Demonstrated experience in being part of a team developing and/or maintaining databases.	10
	Ability to communicate effectively with diverse stakeholders.	5
	Strong competency in Microsoft Office, SharePoint, Intranet Systems and a general proficiency with related technology systems	10
<b>Total Points</b>		<b>100</b>

**Annex 2: Curriculum Vitae format**

Name of Consulting Service:	
Name of Individual Consultant:	<i>[Insert full name]</i>
Date of Birth:	<i>[ day/month/year]</i>
<sup>1</sup> Nationality	

**Education:** *[List college/university or other specialized education, giving names of educational institutions, dates attended, degree(s)/diploma(s) obtained]*

---



---

**Experience Relevant to the Assignment:** *[Experience related to the services and tasks to be performed; professional skills according to the assignment requirements, and knowledge of administrative systems and government organization within the country of the Employer, Region or similar. List previous positions relevant to the Assignment in reverse order, provide dates, name of contracting organization, titles of positions held, types of activities performed that best illustrate capability to handle the services/tasks and location of the assignment. Provide contact information of previous Employers who can be contacted for references. past position that is not relevant to the assignment does not need to be included.]*

<b>Period</b>	<b>Contracting Organization/type of services provided/ Title/Position; Contact Information for References</b>	<b>Country</b>	<b>Summary of Key Activities Performed relevant to the Assignment</b>
<i>[e.g., May 2015-present]</i>	<i>[e.g., Ministry of ....., advisor/consultant to...  For references: Tel...../e-mail.....; Mr. Bbbbbb, Deputy Minister]</i>		

---

<sup>1</sup> See Annex 3 of the Terms of Reference Outline for list of member countries of the Bank

**Membership in Professional Associations and Publications:**

**Language Skills (indicate only languages in which you can work):**

**Consultant contact information:** *[e-mail....., Telephone No.....]*

**Certification:**

I, the undersigned, certify that to the best of my knowledge and belief, this CV correctly describes myself, my qualifications, experience, skills and knowledge and I am available to undertake the assignment in case of an award. I understand that any misstatement or misrepresentation described herein may lead to my disqualification or dismissal by the Employer, and/or sanctions by the Bank.

---

Name of Consultant

Signature

Date *[day/month/year]*

(i) This CV correctly describes my qualifications, experience, skills and knowledge

(ii) I am employed by the Executing or the Implementing Agency

(iii) I was part of the team who wrote the Terms of Reference for this consulting services assignment

(iv) I am currently debarred by a multilateral development bank (If yes, identify who)

Yes	No
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>

I confirm that I will be available to carry out the assignment for which my CV is submitted in accordance with the scope of services and Consultant’s reporting obligations set out in the Terms of Reference.



### **Annex 3: Eligible Countries**

This section lists the Bank’s member countries, as well as the criteria to determine the nationality of consultants.

“Eligible countries are: Argentina, Austria, Bahamas, Barbados, Belgium, Belize, Bolivia, Brazil, Canada, Colombia, Costa Rica, Chile, Croatia, Denmark, Dominican Republic, Ecuador, El Salvador, Finland, France, Germany, Guatemala, Guyana, Haiti, Honduras, Israel, Italy, Jamaica, Japan, Mexico, Netherlands, Nicaragua, Norway, Panama, Paraguay, People’s Republic of China, Peru, Portugal, Republic of Korea, Slovenia, Spain, Suriname, Sweden, Switzerland, Trinidad & Tobago, United Kingdom, and United States, Uruguay and Venezuela.

Eligible Territories are:

- a) Guadeloupe, French Guiana, Martinique, Reunion – as Departments of France
- b) U.S. Virgin Islands, Puerto Rico, Guam – as Territories of the USA
- c) Aruba – as a constituent country of the Kingdom of the Netherlands; and Bonaire, Curacao, Saint Marten, Saba, St Eustatius – as Departments of the Kingdom of the Netherlands
- d) Hong Kong – as a Special Administrative Region of the People’s Republic of China”.

#### **Nationality and origin of Goods and Services Criteria**

The policy provisions make it necessary to establish criteria to determine a) the nationality of the firms and individuals eligible to bid or participate in a bank-financed contract and b) the country of origin of goods and services. For these determinations, the following criteria shall be used:

##### **Nationality:**

**An individual** is considered to be a national of a member country of the Bank if he or she meets either of the following requirements:

- i. is a citizen of a member country; or
- ii has established his/her domicile in a member country as a “bona fide” resident and is legally entitled.