**TERMS OF REFERENCE**

**Consulting Firm – Developing Urban Life Assessment**

**(Mobility: Walkability, Bikeability and Public Spaces)**

1. Background
   1. In 2011, the Inter-American Development Bank (IADB) launched the Emerging and Sustainable Cities Initiative (ESCI) in order to help Latin American and Caribbean cities provide a high quality of life for its inhabitants. The first phase was the pilot test to develop ESCI’s methodology and its application in five cities. The second phase of the project, currently being implemented, involves the scaling up of the program to a total of 50 cities in the Region. At the moment, the Initiative is supporting a total of 26 cities.
   2. The specific objective of the Emerging and Sustainable Cities Initiative is to support cities of the region -at least one in each country- in the identification of main challenges, prioritization, and initial financing of sectors and actions that will lead them to sustainable development. The challenges for Latin American and Caribbean cities to ensure their sustainability in coming years are grouped into three major dimensions: (i) risk of disaster, environmental sustainability, and climate change; (ii) comprehensive urban development; and (iii) fiscal management, governance, and transparency.
   3. Due to limited financial, technical, and institutional resources available to Latin American and Caribbean cities, the methodological instrument of the Cities Initiative was designed to offer a comprehensive perspective that makes it possible to view problems concurrently, achieve synergies, understand interdependencies and linkages, prioritize problems and make decisions to use the limited resources in a way to produce the greatest effects and impact.
   4. One of the key areas of the Initiative where this comprehensive approach can be applied is in the promotion of more sustainable urban lifestyles. In most Latin American cities the urban environment is largely dominated by vehicular traffic. Conditions for pedestrians and cyclists are often poor and relegated and the public transport system usually presents lack of quality and efficiency. This situation has a significant impact on the citizens’ quality of life, through its negative effects on noise, air quality, public health or productivity, among other impacts.
   5. Policy makers at the municipal level in intermediate cities of the region often lack adequate supporting information and analysis to aid them in the design of policies that promote more sustainable urban environments.
   6. The studies to be undertaken as part of this consultancy aim to provide this information. These studies will help urban planners to design and implement policies and projects necessary to promote quality urban environments and significantly improve the daily life of every citizen.
   7. This consultancy will help to develop a programmatic approach to be applied in all the cities participating in the Initiative. This will support the effort of cities to transform the street use and promote higher walkability and bikeability levels.
   8. This consultancy will perform an assessment in the city of Montego Bay in Jamaica. The city has a tourism vocation that makes this industry one of the main contributors to its GDP. As many other cities in Latin America, Montego Bay presents evident deficits in cycling infrastructure, public transport and quality public space. On the other hand, it currently has progressive local leaders committed to an urban innovation agenda. Furthermore, the city shows an extraordinary potential to become a model of positive transformation for other cities in the region.
2. Objectives
   1. The purpose of the consultancy is to develop an assessment of the overall urban environment in the city of Montego Bay in order to promote more sustainable urban mobility and lifestyles.
   2. The specific objectives are: (i) to collect data and information on factors related to public spaces and sustainable mobility in selected sites in the city of Montego Bay (ii) to analyze the data and draw conclusions and to identify specific policy recommendations and projects on how to create safer and more attractive public spaces, strengthen walkability, increase bike ridership and improve public transport.
3. Characteristics of the Consultancy
   1. **Type of contract:**  International or local firm. The consultant will be hired to carry out all the services required to develop the assessment, from the design, the planning and execution of the field research to the analysis and preparation of reports and designs.
   2. **Duration:** The activities under these terms of reference should be completed within fifteen (15) weeks from the signing of the contract.
   3. **Payments:** Refer to Section on Payment Schedule of this document.

3.4 **Place of work:** The work will be carried out in Montego Bay, Mexico.

3.5 **Qualifications:** The prospective consulting firms will need to demonstrate the ability to design and apply a methodology and approach relevant to the qualitative and quantitative analysis of the public space. They also need to demonstrate solid experience of the team in charge of the study to produce high quality written and visual communication products and a track record of relevant experience on urban space, walkability and bikeability studies. ­­

1. Project Description
   1. **Studies:** The assessment will include the following five types of study:
2. **Public spaces**

- Quantitative: Amount and type of staying activities.

- Qualitative: Distribution, network and proximity of spaces to key streets and destinations, physical conditions and quality, seating opportunities, visual quality of the streetscape, main problems and potentials.

b) **Walkability** – Conditions for pedestrians.

- Quantitative: Walking patterns, amount of pedestrian volumes, activities, pedestrian facilities and types of pedestrians (age and gender).

- Qualitative: Main conflicts with vehicular traffic, sidewalk quality, prevalence of barriers and quality of building frontage.

c) **Bikeability**: Cycling environment, cycling network, amount of cycling flows and main conflicts with vehicular traffic.

d) **Public transport services**: Network, connectivity, multimodal use, interconnection with non-motorized transportation and quality of the experience from door to door i.e. waiting for transport.

e) **Opportunities for pilot projects**

* 1. **Study Areas:** The three study areas where the work will be carried out comprise the following sites:

1. Downtown area (historic center).
2. Commercial areas
   1. **Intervention Areas:** pilot projects will be located within the study areas. The definition of the specific boundaries of the interventions will be based on a variety of factors which shall include special consideration of:

a. Replicability - How well the site represents a problem prevalent in other city districts.

b. Feasibility - How likely a quick-win is possible at that location.

c. Cost Benefit - How the greatest impact can be created through the most efficient and optimized form of intervention.

1. Activities of the consultancy
   1. The consulting firm will undertake the following activities:
2. Preliminary Activities
   1. Prepare maps and initial material.
   2. Analyze the selected study areas in coordination with the local governments of Montego Bay (“the local governments” or “municipalities”).
   3. Situate one consultant full time in Mexico to work in the city throughout the duration of the project in order to ease communication between the consulting firm and the local team and to ensure efficiency of work process and capacity building within the local team.
   4. Perform anoverall assessment of the study areas in their wider context.
3. Survey Methodology and Implementation
   1. Design a research methodology, tailored to the city characteristics, to collect information about public spaces and sustainable mobility in the three selected study areas, including quantitative data of pedestrian and cyclist activity and qualitative data of the experiential qualities of the urban environment. Specifically, the survey should provide information on:
4. Where people walk and stay either as part of their daily activities or for recreational purposes. This can form the basis for future decisions on, which streets and routes to improve, to make them easy and pleasant places to visit, and not just act as traffic conduits.
5. How many people sit, stand or carry out other stationary activities in the city and where they do it.
6. Where and how many people bike in the city and which obstacles if any there is to this activity.
   1. Arrange, in coordination with the local governments, a strategic partnership with one of the local universities to help conducting the field work.
   2. Organize and carry out a capacity building process that involves survey methodology and training in order to help the municipality staff perform surveys themselves and educate their partners in the future. This includes Training process and Quality Control.
   3. Coordinate the application of the survey methodology in the study areas. The local governments will be responsible for recruiting and handling all practical arrangements with the professional and volunteer staff who will conduct the surveys, including setting up dates, time, and payments for surveyors, etc.
   4. Implement a quality control process of results.
7. Strategy development based on quantitative and qualitative analysis
   1. Guide the local governments on how to visually represent the data collected.
   2. Systematize and analyze all primary data.
   3. Synthesize results into general recommendations and design principles for the public realm of Montego Bay.
   4. Perform a comparison with other similar cities, based on systematized data.
   5. Prepare preliminary and final reports as described in 8.1 below.
   6. Use the survey results to submit a short medium and long-term strategy for the three sites.

1. Pilot Projects
   1. Select specific sites within the study areas for the interventions (pilot projects).

The pilot projects will focus on visionary and effective ways to create safer and more attractive public spaces, strengthen walkability, increase bike ridership and improve public transport.

* 1. Use collected data to create an action plan and develop a sketch design for the three pilot projects to solve the problems the city is facing.
  2. Use collected data to create an action plan and develop a sketch design for the three pilot projects to solve the problems the city is facing. The local governments will be responsible of implementing the pilot projects based on detailed construction designs to be produced by local professionals.
  3. Outline a process for measuring success, testing outcomes, and refining the design which the local governments can utilize in the actual implementation of the design.

1. Effective Communication to Decision Makers
   1. Develop, in conjunction with the municipalities, specific methods for outreach and consultation
   2. Organize and carry out a capacity building process that involves Effective Communication to Decision Makers. This will encompass effectively facilitating a change of mindset.
   3. Present the final summary report in a local workshop.
2. Products
   1. **Deliverables**. The consultant must produce the following high quality documents and studies:
3. A First Report, containing a detailed work plan and timeframe for carrying out the assessment and pilot projects design.
4. A Preliminary Progress Report containing a description of field work team, performed actions and early findings.
5. A Final Summary Report containing the methodology applied, strategic recommendations and design principles for short- medium- long-term interventions for site. The report should be concise, easily communicated and will illustrate key findings and conclusions based on observations and collected data that clearly communicates the key challenges to work with. The report should also contain best practice examples for inspiration and motivation.
   1. **Drafts and review.** The consulting firm will submit a draft deliverable and the local governments will have one round of review and comment prior to submission of the final deliverable.
6. Coordination And Supervision
   1. Supervision and coordination of the consultancy will be the responsibility of Gabriel Nagy (IFD/FMM) and a Local Specialist in Jamaica.
7. Payment Schedule
   1. 30% upon Signature of the contract and agreement on the scope of work and deliverables.
   2. 40% upon Consultant submitting the preliminary progress report.
   3. 30% upon approval of the final summary report and all deliverables.
8. Confidentiality

**9.1 The** Consulting firm accepts to not disclose any information concerning the Bank and the activities of ESCI and Montego Bay.

**TERMS OF REFERENCE**

**Consulting Firm – Implementing a Monitoring System in Montego Bay, Jamaica**

1. Background
   1. In 2010 the Inter-American Development Bank (IDB) created the Emerging and Sustainable Cities Initiative (ESCI) to support Latin American cities to achieve the objectives of: provide basic services, ensure adequate levels of quality of life, promote employment opportunities, and protect the environment. The ESCI focuses on medium-sized cities that are best positioned for effective planning and adapt to future challenges. Montego Bay was selected by ESCI with the objective of applying the methodology of the initiative that focuses on three critical areas: Environmental Sustainability and Climate Change, Urban Sustainability, and Fiscal Sustainability and Government.
   2. The methodology is an analysis of the identification of the sustainability challenges of the city in each of the three areas through a rapid assessment (quantitative and qualitative) which allows for a diagnosis, identifying critical problems, and prioritizes areas or sectors that require more attention. From this diagnosis the methodology seeks to define: (i) strategies and action plans that can become useful tools for decision making and prepare the city for a sustainable future; and (ii) a citizen monitoring system of sustainability in cities seeking to track the progress on the commitments and targets set in the action plan.
   3. As part of the citizen monitoring the IDB seeks to establish a formal relationship with the local government to strengthen their ability to report relevant information to the public. With funding and technical assistance from the IDB, the city will improve their information systems and dissemination, its ability to report on the whole Municipality, its financial sustainability strategy, its ability to raise relevant issues that enable citizen participation in local decisions and help the authorities respond more directly to the concerns of its people.
2. Objectives of the Consultancy
   1. Strengthen the citizen monitoring system through public perception surveys covering all subjects covered by ESCI and covering the entire urban area of the city.
   2. Support the exchange of experiences with other successful citizen monitoring organizations in the region as the network of cities ‘Como Vamos en Colombia’ in a way that experiences can be exchanged and financial mechanisms strengthen for funding such initiatives through relationships with potential sponsors.
   3. Build: (i) detailed indicators that cover all the areas that ESCI is working on; (ii) databases that collect in an organized way the collected information through the indicators; and (iii) an interface on the internet that allows access to these indicators and the aggregated information of the same.
   4. Generate knowledge, periodicals and a network of printed media, television, radio, and social networks.
3. Work Plan
   1. To achieve each of the objectives of the consultancy four areas of action are expected, each linked to a target. The activities are listed below:
4. A. Strengthen the citizen monitoring system
   1. The monitoring is done through annual surveys of public perception that allows inquiring how the city population feels about problems related to the environment, risk prevention, urban sustainability, security, transportation, local management, and especially, the authorities’ attitude in the solution to these problems and improving the quality of life. The citizens monitoring should be structured so it covers representatively the entire urban area of the city. It must:
      1. Establish formal agreements with all municipalities to access necessary information from each one and cover all the urban area of the city and all the areas of ESCI.
      2. Design a sampling system to collect survey information from all municipalities and are representative of each one.
      3. Establish a system for collecting information through surveys so that the information collected has all the necessary credibility and technical support.
5. B. Support the exchange of experiences
   1. Generate an information exchange between Montego Bay, Jamaica and other monitoring experiences in ESCI cities such as Trujillo, Santa Ana, Montevideo, Port Spain, and others.
   2. Search formal support and the commitment of business sectors and the civil society to give sustainability to their work.
6. C. Build indicators, databases and interface
   1. The consultant will take the following actions:
      1. Define appropriate indicators to cover all areas included by the ESCI’s methodology. This work will be done taking into account the work done by other networks of cities and the IDB. Each indicator should be described in detail in terms of the exact definition, the methodology to be applied and the rationale for its use.
      2. Create a database that collects information from the indicators and technical specifications and centralize data generated by public and private institutions related to the selected indicators in the Action Plan.
      3. Strengthening the network of institutions that generate information, will look for consensus and validation of the indicators by the authorities, also, will recognize the evolution of the indicators and will make comparisons with international standards.
      4. Create an interface that allows citizens and institutions to access all the information generated and collected easily and effectively.
7. D. Generate knowledge and periodicals
   1. The aim is to generate knowledge through forums for dialogue, debate, and work of citizens; such is the case of the thematic panels, forums, mobilization, campaigns, etc., and trying to involve and collect proposals from a greater number of actors and civil society specialists in building alternatives to the problems of the city, and promoting institutional spaces of dialogue, consensus and agreement with the political authority.
8. Term and Place of Service
   1. The consultancy will be held in Montego Bay, Jamaica, for a period of up to 24 months from the day following the date of signing the contract.
9. Coordination and Monitoring
   1. The coordination and monitoring of the Consultancy will be in charge of the ESCI team in Washington, D.C. under the supervision of Gabriel Nagy, Fiscal and Municipal Development Specialist IFD/FMM and the IDB office in Jamaica.
10. Confidentiality

**6.1 The** Consulting firm accepts to not disclose any information concerning the Bank and the activities of ESCI and Montego Bay.

**TERMS OF REFERENCE**

**Individual Local Consultant – Coordination Activities for teh aplication of ESCI’s execution and monitoring phases in Montego Bay, Jamaica.**

1. Background
   1. The cities of Latin America and the Caribbean (LAC) face daunting challenges in decades to come. Despite being the engines of growth in their respective economies and ongoing improvements in the provision of basic services, cities in the region are still characterized by unacceptably high proportions of their population living in poverty, limited institutional capacity, and an enduring scarcity of resources to improve the quality of life of their citizens. The additional burdens of adapting to the challenges of climate change renders even more urgent the need to promote improved governance.
   2. Over 75% of LAC’s population lives in urban conglomerates, a population of approximately 460 million people. LAC is the second most urbanized region on the planet; it has 4 of the 20 cities in the world with over 10 million inhabitants and 55 of the world’s 414 cities with more than one million inhabitants. Although large cities are more important in LAC than in developing countries in other regions, these big cities are no longer those with the highest rates of growth and the region’s urban population increasingly consists of residents of intermediate-size rather than large cities (Lora, 2010).
   3. Urban areas have been, and will continue to be, the focal points of economic activity; 55% of the Gross Domestic Product (GDP) in the region has been generated by activities in the cities. This number is expected to reach 80% in the next 25 years. At the same time, there is a concentration of poverty in urban areas. According to ECLAC (2009), 180 million people in LAC live in conditions of poverty in 2008 (33% of the region’s total population) and about 66% of those in poverty lived in LAC cities (118 million people). In addition, it is estimated that 130 million people (32% of the urban population) live in informal settlements (UN-Habitat, 2006).
   4. Addressing these challenges requires a comprehensive and integrated development vision to satisfy current needs without jeopardizing the well-being of future generations. A sustainable city is one that offers a high quality of life for its inhabitants while generating lower environmental impacts, promotes sustainable urban development, is fiscally solvent, and practices good governance.
   5. The Emerging and Sustainable Cities Initiative employs a multidisciplinary approach to addressing the challenges facing the urban areas of LAC, integrating environmental sustainability, comprehensive urban development, fiscal sustainability and good governance.

The Initiative will include all of the countries in the region and will be open to any municipality, state or provincial governments or groups of municipalities. However, the initial priority will be to focus on medium size cities, the 70 emerging local economies of the region, where the impact of the actions has the potential to be greater and more immediate. The Initiative is aimed at mobilizing and coordinating the technical capacity of all the areas of the Bank in supporting the cities in closing the gaps identified and prioritized in the process.

1. Consultancy Objectives
   1. The main objective of the consultancy is to provide support to the Coordinator of Emerging and Sustainable Cities Initiative (ESCI), as well as to the specialists involved in the application of the methodology in Montego Bay, Jamaica.
2. Main Activities
   1. The consultant should perform the following activities:
      1. Support the Coordination Team in activities related to improving interaction of the Bank with Montego Bay authorities.
      2. Compile and process the necessary information to manage ESCI’s Coordinating Team. Establish contact with sector specialists and the local and national authorities in Jamaica that are involved in ESCI’s operations in Montego Bay.
      3. Support in the analysis of information related to Montego Bay. The consultant should participate in the design and production of anali tical studies and projects
      4. Facilitate the process of designing agendas related to Bank’s missions to Montego Bay.
      5. Facilitate the overall process of implementing ESCI’s methodology in Montego Bay.
   2. Characteristics of the consultancy:
      1. Consultancy Category & Modality: International Individual Consultancy, Monthly
      2. Contract Duration: TBD
      3. Place of Work: Jamaica and/or Washington, DC.
      4. Qualifications. Bachelor´s degree in international development, regional studies with a focus on Latin America or the Caribbean, or similar related major with an interdisciplinary approach. Minimum two year experience in integrated urban development projects. Experience working in urban topics in Jamaica is desirable.
3. Supervision and Coordination
   1. Team Leader or Coordinator: Gabriel Nagy, Urban Specialists (IFD/FMM) and Ellis Juan, General Coordinator of ESCI (VPS/VPS).
4. Confidentiality
   1. Consultants accept to not disclose any information concerning the Bank and the activities of ESCI in Montego Bay.

**TERMS OF REFERENCE**

**Individual International Consultancy – Deepening of Multisector Activities for the execution and monitoring phases in Montego Bay, Jamaica**

1. background
   1. The cities of Latin America and the Caribbean (LAC) face daunting challenges in decades to come. Despite being the engines of growth in their respective economies and ongoing improvements in the provision of basic services, cities in the region are still characterized by unacceptably high proportions of their population living in poverty, limited institutional capacity, and an enduring scarcity of resources to improve the quality of life of their citizens. The additional burdens of adapting to the challenges of climate change renders even more urgent the need to promote improved governance.
   2. Over 75% of LAC’s population lives in urban conglomerates, a population of approximately 460 million people. LAC is the second most urbanized region on the planet; it has 4 of the 20 cities in the world with over 10 million inhabitants and 55 of the world’s 414 cities with more than one million inhabitants. Although large cities are more important in LAC than in developing countries in other regions, these big cities are no longer those with the highest rates of growth and the region’s urban population increasingly consists of residents of intermediate-size rather than large cities (Lora, 2010).
   3. Urban areas have been, and will continue to be, the focal points of economic activity; 55% of the Gross Domestic Product (GDP) in the region has been generated by activities in the cities. This number is expected to reach 80% in the next 25 years. At the same time, there is a concentration of poverty in urban areas. According to ECLAC (2009), 180 million people in LAC live in conditions of poverty in 2008 (33% of the region’s total population) and about 66% of those in poverty lived in LAC cities (118 million people). In addition, it is estimated that 130 million people (32% of the urban population) live in informal settlements (UN-Habitat, 2006).
   4. Addressing these challenges requires a comprehensive and integrated development vision to satisfy current needs without jeopardizing the well-being of future generations. A sustainable city is one that offers a high quality of life for its inhabitants while generating lower environmental impacts, promotes sustainable urban development, is fiscally solvent, and practices good governance.
   5. The Emerging and Sustainable Cities Initiative employs a multidisciplinary approach to addressing the challenges facing the urban areas of LAC, integrating environmental sustainability, comprehensive urban development, fiscal sustainability and good governance.
   6. The Initiative will include all of the countries in the region and will be open to any municipality, state or provincial governments or groups of municipalities. However, the initial priority will be to focus on medium size cities, the 70 emerging local economies of the region, where the impact of the actions has the potential to be greater and more immediate. The Initiative is aimed at mobilizing and coordinating the technical capacity of all the areas of the Bank in supporting the cities in closing the gaps identified and prioritized in the process.
2. Consultancy Objectives
   1. The Consultant will provide support to ESCI’s Coordinator and sector specialists taht are involved in deepening the activities of the Initiative in Montego Bay, Jamaica.
3. Main Activities
   1. The consultant will perform the following activities:
      1. Support the review, analyzing and improvement of ESCI’s technical studies and knowledge products..
      2. Support the sector specialists on topics related to deepening of ESCI’s studies in Montego Bay.
      3. Compile and process the necessary information to manage the deepening of ESCI’s studies. To that goal, the Consultant should keep in constant contact with the Bank’s specialists as well as with Jamaican local and national authorities that are involved in athe application of ESCI’s methodology.
      4. Support the process of compiling information, and particpate in the elaboration of studies related to specific urban sustainability topics.
      5. Collaborate in the organization of meetings and missions related to deepening ESCI’s studies in Montego Bay.
      6. Collaborate in all othe rmatters pertaining to deepening the methodological process of ESCI in the city.
4. Characteristics of the Consultancy
   1. Consultancy Category & Modality: International Individual Consultancy, Monthly
   2. Contract Duration:
   3. Place of Work: Jamaica and/or Washington, DC.
   4. Qualifications. Bachelor´s degree in international development, regional studies with a focus on Latin America or the Caribbean, or similar related major with an interdisciplinary approach. Minimum two year experience in integrated urban studies and processes related to ESCI’s mehtodological process.
5. Supervision and Coordination
   1. Team Leader or Coordinator: Gabriel Nagy, Urban Specialists (IFD/FMM) and Ellis Juan, General Coordinator of ESCI (VPS/VPS).
6. Confidentiality
   1. Consultants accept to not disclose any information concerning the Bank and the activities of ESCI and Montego Bay.