

TERMS OF REFERENCE FOR CONSULTANTS

A. Objective/Purpose of the Assignments

1. The 2007 work program of the Operations Evaluation Department (OED), as approved by the Development Effectiveness Committee, includes a special evaluation study (SES) to assess the “Achievements of the Long-Term Strategic Framework (LTSF).” The LTSF provides an agenda for poverty reduction and growth-financing activities of the Asian Development Bank (ADB) over the next 15 years (2001–2015). The LTSF envisages 3 medium-term strategy (MTS), each for 5-year period, to implement it. The MTS is the bridge between the LTSF and the activities that ADB will undertake in its developing member countries (DMCs) over the subsequent periods. The MTS-I, covering the period 2001–2005, defined operational priorities within the context of the strategic agenda that directly address the medium-term challenges for the region. The MTS-I also identified the organizational changes and requirements necessary for implementing the operational priorities and operating principles with greater efficiency. The MTS is designed to ultimately enhance the development impact of ADB assistance. On 18 October 2006, at his address to the Management and heads of departments and offices on his reelection, ADB President announced that there would be a review of the LTSF in 2007. This was in response to the changing environment and market places and emerging challenges, opportunities, and risks.

2. The objective of the SES would be to assess independently the achievements of the LTSF with focus on ADB’s activities and operations implemented during the MTS-I with a view to track progress, assess achievements, identify lessons, and make recommendations for ensuring better development effectiveness in the future. The scope of the SES would entail assessing the relevance in the context of development challenges and opportunities prevalent then and now, effectiveness in achieving the underlying objectives of the LTSF; efficiency in implementing the LTSF, and likely sustainability of the key operations and activities, policies, strategies, and initiatives.

3. The SES would be undertaken in three main phases: (i) inception to take stock of the relevant literature, ADB documents, ongoing/planned studies, and to develop full-fledged approach paper, methodology design, and work program; (ii) diagnostic will review and assess the achievements of the MTS-I and recent initiative in relation to the LTSF, following the survey and analytical methods developed in phase I; and (iii) formulation of options and recommendations for addressing the findings. The work would be carried out in close consultation with the Strategy and Policy Department, at the same time maintaining total independence in the SES work.

B. International: Senior Strategy Adviser

4. A Senior Strategy Adviser (SSA) will assist OED in carrying out the above study. The SSA will be recruited for a total of 60 person days and will report to Director, OED2. The assignment will be rendered on an intermittent basis.

5. The SSA would be an accomplished expert in development economics/public policy and corporate strategy formulation and management with a long track record in the operations and management of MDB. Specifically, he/she would have the following: (i) knowledge/experience of organizational, management, operations, and change issues of MDBs like ADB and the World Bank; (ii) knowledge/experience of analyzing development policy issues and MDB strategies; (iii) familiarity with ADB’s guidelines for operations evaluation; (iv) ability to communicate

effectively; (v) representation from ADB member countries; and (vii) at least a postgraduate degree in economics, or business with reference to international development management.

6. **Key Tasks.** The SSA will undertake:

- (i) review of literature on development trends, challenges, opportunities, and threats in the Asia and Pacific region, and strategies and operations of MDBs;
- (ii) review of relevant ADB documents, ongoing, and planned strategic and thematic studies;
- (iii) undertake an in-depth review of the interim report prepared by the LTSF team and identify areas for improvements, and for analysis of strategic options;
- (iv) carry out consultations with key ADB officials and Board of Directors members;
- (v) based on the foregoing items, identify issues and areas of focus for developing strategic options;
- (vi) undertake consolidation of earlier reports and prepare a final report detailing methodology and key findings of the LTSF study, and ensuing strategic options and recommendations for ADB;
- (vii) conduct informal and formal seminars/discussions of the approach, findings, and recommendations of the SES;
- (viii) incorporate comments of ADB staff on the draft final report; and
- (ix) any other relevant tasks asked by the OED/ADB.

7. **Outputs/Reporting Requirements.** Review of other MDB strategies for medium to long term to achieve development goals (e.g., MDGs, sustainable socioeconomic development); review of interim report; formulation of strategic options and recommendations; preparation of a consolidated final report of the LTSF study; and assist in/contribute to informal and formal seminars/discussions of the findings and recommendations. The SSA will report to Director, OED2.

C. International – Peer Reviewers

8. There will be two external peer reviewers who will review the draft reports prepared by the LTSF team and provide independent and constructive comments and suggestions to enhance the content and presentation of the LTSF study reports. The peer reviewers will be accomplished development practitioners, and/or former senior executives of MDBs. Each will be assigned for a week's input, and will be home based, to undertake peer review.

D. Domestic Consultant: Evaluation Expert/s

9. **Scope of Work.** The evaluation will require the services of domestic consultants (Evaluation Expert/s) at ADB Headquarters for a total of 6 person months.

10. Under the guidance of the Director, OED2 and the international consultants (Management and Strategy Development Specialist, and SSA), the domestic consultant (DC) in ADB Headquarters will conduct various desk reviews and analyses as required to implement the planned study methodology/approach. The domestic consultant will also prepare a series of reports, tables, and presentations (in Word, Excel, PowerPoint, etc.) to present the findings of different literature/document reviews, data collection/surveys, and data analyses during the evaluation.

11. The consultancy will initially support phase I of the SES. During phase I, the DC will assist the IC by providing supporting data and technical analyses to prepare an inception report

and contribute to the preparation of an evaluation approach paper for the SES. After approval of the approach paper by the Director General, OED, the DC will then support the technical requirements of the IC, who will take the lead in undertaking phases II and III in the context of the identified work program, methodology of key activities, and intended outputs of the SES.

12. The intermittent assignment will be carried out at ADB Headquarters from 4 December 2006 to 28 February 2007 for a period of 60 person-days or 2 person-months equivalent. The selected consultant is expected to exhibit the following knowledge and skills: (i) familiarity with ADB databases and document formats; (ii) good oral and written communication; (iii) good knowledge of analyzing and assessing key evaluation criteria; (iv) familiarity with ADB documentation and publications; (v) good experience in understanding the issues relating to ADB operations; and (vi) good knowledge of development issues in Asia and Pacific region.

13. **Detailed Tasks.** In addition to data collection and collation, the DC will be responsible for preparing reports on specific topics through independent research and analysis as determined by the IC. The DC will also (i) assist in document reviews and semi-structured interviews and their analysis; (ii) assist in the design and administration of a questionnaire-based survey and data analysis; and (iii) perform other related tasks as required by the IC and Task Manager or Director, OED2. Further detailed tasks to be done by the DC during phases II and III of the SES will be specified in the inception report of the IC and/or as requested by Director, OED2.

14. **Output/Reporting Requirements.** With minimal guidance from the evaluation team leader, the DC will prepare reports (in Word, Excel, etc.), which present the findings on selected topics from different literature/document reviews, data collection/surveys, and data analyses. The consultant will report to Director, OED2 or OED staff designated by him.