

## **REQUEST FOR PROPOSALS (RFP)**

### **Implementation of the Information Technology Agenda**

The North American Development Bank (NADBank) is an international financial institution established and capitalized in equal parts by the U.S. and Mexican governments to provide financing for environmental infrastructure projects in the U.S.-Mexico border region. In its Strategic Plan for 2024- 2028, NADBank has outlined an ambitious set of strategic priorities to enhance its portfolio and operational impact significantly. These priorities are designed to expand NADBank's scope of influence, innovate in key sectors, and improve internal processes.

NADBank is seeking proposals from qualified consultants to provide the services required for the **Implementation of the Information Technology Agenda**.

#### **SCOPE OF WORK - IMPLEMENTATION OF THE IT AGENDA**

NADBank has identified several initiatives that will be implemented in 2025 and require the help of an external consultant.

##### **1. Optimization of three internal processes**

###### *○ Current situation*

- The Bank delivers loans and grants to local developers and communities on the border. A typical project cycle includes the following stages: identifying, developing, and structuring. The Bank aims to approve 10 to 15 projects per year. Once approved, the projects are built and monitored to meet the desired environmental impacts.
- In addition to the project processes, there are administration processes in finance, human resources, risk management, institutional communications, and project stakeholders.
- The Bank has documented more than 70 processes that need to be revisited. The processes must be constantly updated to ensure alignment with customers and internal needs.

###### *○ Deliverable*

- **Process Selection and Review:** Identify three high-impact internal processes across project or administrative functions.
- **Optimization and Mapping:** Redesign the selected processes for efficiency, simplicity, and alignment with customer and organizational needs. Deliver updated workflows using BPMN or a similar standard.
- **Implementation Manuals:** Produce user-friendly manuals to support implementation within a business process management platform.
- **Scalable Methodology:** Develop and document a repeatable methodology for process optimization that NADBank teams can apply independently.

## 2. Data Governance

- *Current situation*
  - The Bank has an operating data lake. The plan to populate it with data from many internal departments requires clear rules and governance
- *Deliverable*
  - Policy and Standards Definition: Create data governance policies, tools, and standards for adoption across departments.
  - Implementation Roadmap: Develop a phased plan to roll out governance practices, with change milestones and integration checkpoints.
  - Compliance and Regulatory Context: Assess and articulate how the framework meets NADBank's regulatory and compliance obligations.
  - Roles and Responsibilities: Define clear roles for data stewardship, ownership, access control, and accountability across the Bank.
  - Quality and Access Controls: Design systematic controls and cultural practices for maintaining data quality, security, and accessibility.
  - Impact Assessment: Analyze and outline the organizational impact of the proposed governance structure.

## 3. Develop a formal change management role/function/capability

- *Current situation*
  - The Bank requires a cultural alignment for effective change and digital innovation
- *Deliverable*
  - Framework Development: Create a structured change management framework tailored to NADBank's needs and culture.
  - Cultural Alignment: Design mechanisms to foster organizational buy-in and promote digital innovation.
  - Communication and Adoption Tools: Provide toolkits to support effective internal communication, user engagement, and sustained adoption.

**PERFORMANCE PERIOD:** The consultant is expected to propose an execution schedule, in phases if needed, based on this document's proposed methodology and requirements.

**INSTRUCTIONS:** If you are interested in undertaking this assignment, you are invited to submit a proposal in accordance with the outline given in the **“Supplementary Information for Consultants”** for the services required under the **Terms of Reference “Scope of Work”**.

- Bidding documents are available upon request to Jairo Lopez by email: [jalopez@nadb.org](mailto:jalopez@nadb.org)

### CALENDAR OF EVENTS:

Issuance of RFP	May 8, 2025
Deadline for Questions	May 16, 2025, 5:00 PM
Deadline for Answers	May 20, 2025, 5:00 PM
Proposal Due Date	May 23, 2025, 5:00 pm

Please note that your proposal must be prepared in accordance with the instructions given in the **“Supplementary Information for Consultants”**.

- **Questions** of technical or contractual nature **concerning this request** for proposals must be submitted by e-mail no later than **May 16th, 2025**. Telephone inquiries will not be accepted. NADBank will provide written **responses via email** no later than **May 20th, 2025**.
- Your proposal will be considered on its merits in accordance with the evaluation criteria outlined in the Supplementary Information and, if selected, could eventually form the basis for negotiations and, ultimately, a contract between your firm and the NADBank. It is anticipated that **contract negotiations** with the selected firm and the assignment would commence around **May 30, 2025**.
- The development of the **“Implementation of the Information Technology Agenda”**, will be a joint effort between the consultant and key NADBank personnel. NADBank will assign an internal project manager and core team to work in close coordination with the consultant. The assignment is expected to start no later than **June 16, 2025**, and should, subject to budget approval by NADBank.

You are asked to hold your proposal valid for sixty (60) days from the date of submission, during which time you will maintain without changing the personnel proposed for the assignment and your proposed price. NADBank will make its best effort to select a consultant within this period.

NADBank is not bound to select any of the consultants that submit proposals. Furthermore, as quality is an important selection criterion, the NADBank does not bind itself in any way to select the firm offering the lowest price.

After selection, the consultant submitting the first-ranked proposal will be invited to negotiate financial and other terms of the contract without delay. Should the negotiations prove unsatisfactory, the consultant submitting the next-ranked proposal will be invited for negotiations (and so on, if necessary, until an agreement is concluded). As soon as the contract is signed with the selected consulting firm, other participating firms will be notified.

Proposals must be sent via e-mail to [jalopez@nadb.org](mailto:jalopez@nadb.org) no later than 5:00 pm central time, **May 23, 2025**.

**For more information, contact, Mauricio Mora at [mmora@nadb.org](mailto:mmora@nadb.org)**

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For queries concerning the North American Development Bank, send a message by email to [mail@nadb.org](mailto:mail@nadb.org), or contact Jesse Hereford at +1 (210) 231-8000.