

TERMS OF REFERENCE FOR EXPERTS

Terms of reference for on-site activities and missions

Action code and partner country: *SOCIEUX 2020-24 ARMENIA*

Action title: *Maintenance of the disability assessment formula*

Partner institution: *Ministry of Labour and Social Affairs of the Republic of Armenia (MLSA)*

Activity number and title: *Activity 1* – Including appropriate participation measurement into the functional disability assessment process and formula

Date of implementation of activities:

Activity 1 – Including appropriate participation measurement into the functional disability assessment process and formula: **December 15th, 2020, onwards, to be specified**

Expert positions and responsibilities (by activity):

Activity1 :Expert 1 (*principal*) – Disability benefits

Activity1 :Expert 2 – Disability benefits

Workload:

Activity1 - Expert 1 : 18 days

Activity 1- Expert 2 : 17 days

Call for experts' reference: **20-24/ARM/1**

Version - #: 2 Draft

Final

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SOCIEUX+ is implemented by

Partnership led by:



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1 BACKGROUND INFORMATION

1.1 Country overview

The Republic of Armenia is a landlocked country situated in the South Caucasus and bordering Georgia, Azerbaijan, Turkey and Iran, and covering the area of 29,7 thousand km². The country's population is around 3 millions of people.

The GDP per capita amounts to around 4.500 USD in 2019. Although poverty reduction has been impressive since 1990, a large proportion of Armenians is still vulnerable (around 42,5% living with less than 5.5 dollars per day, while 37% of Armenians are subject to multidimensional poverty), with persisting spatial disparities. The economic and social life of Armenia was impacted significantly by the global financial crisis in 2008, when the Country was struck by three simultaneous shocks: loss of export demand, a collapse of commodity export prices, and a sharp decline in remittances and private capital flows. The key challenge for the Country in the medium term is to strengthen the economy and its resilience to external shocks, and create new opportunities for development. Following robust growth in the past three years, which continued also in the first two months of 2020 (of more than 9 percent year-on-year), growth has turned negative since March (due to the restrictions imposed as the pandemic spread) and registered a 5.7 percent y-o-y contraction for the first half of the year.

Armenia ranks 81st according to the 2018 Human Development Index; its core has been improving since the 90ies, particularly in the first half of 2000s, when Armenia has undertaken comprehensive institutional, economic and social reforms towards implementation of the Millennium Development Goals (MDGs). Out of the total 65 indicators that Armenia had committed to achieve, around a third of them (34%, particularly those relating with health) have been fully accomplished, while almost an half (46%) have not been achieved at all (poverty reduction remains at stake). Prioritization for targeting Sustainable Development Goals by 2030 is ongoing. National consultations seem to indicate that economic growth, human capital development and an improved governance shall be the Country's strategic development priorities for the 15 years to come.

Late September 2020, a military conflict between Armenia and Azerbaijan broke out over the territories of Astrakh (Nagorno-Karabakh) causing serious casualties and civil population displaced. Early November, a peace deal was brokered which included peacekeeping forces deployment in the region.

1.2 Sector situation

Armenia ratified the United Nations Convention on the Rights of Persons with Disabilities (UN CRPD) in 2010 and initiated the reforms in disability assessment as well as eligibility determination policy and practice to shift from the medical approach to human-rights-based approach.

In 2014 the Armenian Government approved the Concept note on introducing the system for comprehensive functional assessment of individuals based on the WHO ICF approach and adopted the WHO ICF as a national standard for recording and sharing information on functional limitations, health and disability of individuals among the social, healthcare and education sectors. Between 2014 and 2017 with support of the donor community (UNPRPD, UNDP, UNICEF, USAID), the Ministry of Labor and Social Affairs (MLSA) developed, piloted and tested the new tools and procedures for disability assessment and eligibility determination. However, the pilot results demonstrated that the proposed protocol was too complicated and did not allow to summarize and extract the level of functional limitation of individuals, to define and plan the relevant funding allocations for provision of services and benefits.

In 2018, the MLSA applied for expert support from EU SOCIEUX+ technical assistance facility to review the assessment tools and methodology and be advised on designing the communication strategy for the reform implementation. This assistance helped the Ministry to revise the assessment tools and eligibility determination algorithm and make essential revisions in the reform plan relative to administrative, scientific and operational issues under the concept of the ICF Disability assessment center, which addresses the multiple needs of assessment for the PwDs and the fair distribution of state's provisions.

In 2019, the MLSA developed the Reform Program with UNDP and UNICEF support, conducted assessment of premises for establishing 48 ICF Disability assessment centers, defined the list of equipment and composition of assessment commissions, agreed on synchronization of data exchange between social, health and education sectors. The National Commission for coordinating the reform implementation was established by the Prime-Minister's Decree in June 2019. Two draft laws have been developed to provide the legal framework of the reform: "Draft Law on the Rights of People with Disabilities" and "Draft Law on Functional Assessment". The draft laws are to be submitted to the National Assembly. However, a further effort is needed to ensure that these laws are duly implemented once adopted.

1.3 Role of partner institution in the sector

The Ministry of Labour and Social Affairs of the Republic of Armenia (MLSA) is a republican body of executive authority, which elaborates and implements the policies of the Government of the Republic of Armenia in the labour and social security sectors. The Ministry is founded and operates by the decree of the President of the Republic of Armenia. The powers of the Ministry are defined by the Constitution of RA, state laws, decrees and orders of the President of the Republic of Armenia, decisions of the Government of Armenia and international treaties of RA. Ministry's staff are civil servants and their rights are protected under the Law on Civil Servants. Minister and his/her staff (deputy ministers, advisors and assistants) are partisan positions and are assigned by ruling party.

The structure of the Ministry includes line departments and divisions that regulate sector administration in accordance with the Government policies and strategies. Ministry has five separate agencies under its administration for enforcing the Government policy and state funds administration (Social Security Service with 51 regional offices); labour and employment sector (State Employment Agency with 51 regional offices); disability assessment and eligibility definition (State Agency of Medical and Social Assessment with 27 regional offices); the National Institute for Labour and Social Research and "Nork" Foundation for public awareness and information management. In addition, the Ministry directly regulates operation of orphanages, child night care institutions, residential and home type care institutions for elderly and people with disabilities, emergency support and day care centers, as well as monitors activity of numerous CSOs who provide social services to vulnerable population with state funding under partnership agreements. The Ministry's Division on Disability-related issues is responsible for development and supervision of state policy and programs directed to improve social protection and inclusion of people with disabilities. This division is direct beneficiary of this request

2 ACTION DESCRIPTION

2.1 Overall objective

Access to employment and social protection is expanded to poor and vulnerable groups

2.2 Specific objective (s) (purpose)

S1: Adequate tests and criteria for taking into account the sphere of "participation" of PwDs into the specific country context are developed in relation to the disability assessment formula based on ICF codes

2.3 Expected results

R1: An adequate measurement of participation and activities of PwDs is included in the disability assessment formula based on ICF codes

2.4 Final deliverables

D1: A technical brief outlining the modality of inclusion of participation into the existing functional disability assessment formula and overall process.

3 METHODOLOGY

3.1 General methodology (of the action)

This is a one-activity action, that fits into a series of four actions agreed with the Partner Institution that pursue the same overall objective. This action concerns the PwDs participation in the assessment aspect.

The technical assistance methodology will be detailed by the mobilized experts. Notwithstanding this experts' responsibility, the overall methodology shall be centred on the international standards and EU best practice in the field of the disability assessment and PwDs participation in this process. The experts shall take into account the work that has been done so far by the Ministry of Labour and Social Affairs of Armenia as well as its development partners.

The peer-to-peer cooperation between European experts and their counterparts at the MLSA will take place remotely, as the current global health emergency and the related ongoing restrictions to international travel, do not allow an on-site mission of the experts in conditions of safety and certainty. MLSA will be responsible for gathering relevant staff to participate to the distant roundtables facilitated by the experts. SOCIEUX+ may provide to all participants to the distant interaction, a professional platform for hosting and conducting the virtual exchanges (Zoom Pro, Moodle).

It needs to be noted that the action is currently on hold but it may start rapidly once the situation is stable in the country.

3.2 Planned activities (work plan of the action)

The following activities are currently planned for the action:

A1: Including appropriate participation measurement into the functional disability assessment process and formula.

The present terms of reference cover the services expected for activities of the above work plan:

- Activity1.

3.3 Inclusion of cross-cutting issues

SOCIEUX+ recognises the importance to include cross-cutting issues in social protection, labour and employment policies and systems. The following cross-cutting issues are duly taken into account:

- Gender equality;
- Good governance;
- Human rights (including rights of children, people living with disabilities, vulnerable groups and minorities); and,
- Social and economic inclusion of vulnerable groups.

4 ACTIVITIES DESCRIPTION

4.1 Tasks

The principal expert will lead the remote mission. He/she will be responsible for the delivery of all deliverables of the activity. He/she will be responsible for the preparation, coordination, implementation and reporting of the overall activity towards SOCIEUX+.

Tasks:

Minimum tasks expected from the experts shall include:

- Ahead of the (distant) mission, to get substantial knowledge of the local context; review relevant background documents provided by SOCIEUX+ and the Partner.
- Preliminary contacts with the Partner in view of the preparation of the mission's methodology and agenda, to be transmitted ahead of mission to the SOCIEUX+ team for approval;
- Taking part to the pre-departure briefing with SOCIEUX+ team (around 1 week before the mission);
- During the mission, to conduct consultations with the Partner's executives and staffs, as well as any other external actor that can support the positive deployment of the mission.
- To make themselves available for a remote meeting with the EU Delegation office in Armenia.
- To present to the partner the preliminary outcomes of the mission in order to take into account the Partner's remarks in view of the finalization of the final deliverables;
- At the end of the mission, timely submission to SOCIEUX+ of the final deliverables (10 working days after the mission), and availability to go through an eventual round of comments and adjustments in interaction with SOCIEUX+ and the Partner;
- To channel to SOCIEUX+ Communication officer any material that can be useful to inform the public about the activity (pictures, interviews, brief notes or articles).
- To employ the different templates and evaluation forms provided by the SOCIEUX+ Team.

4.2 Deliverables

4.2.1 *Pre-mission deliverables (to be transmitted to SOCIEUX+ FMT at least three working days ahead of the activity)*

- A methodological note (max. 3 pages), detailing the working approach, tools and methods to employed, a risks analysis
- A preliminary agenda (max. 2 pages), detailing the distant meetings and working sessions to be held

4.2.2 *Final deliverables (to be transmitted to SOCIEUX+ FMT no later than ten days after the activity's completion):*

- Action Report (AcR). To be filled according to template.
- D1:A technical brief outlining the modality of inclusion of participation into the existing functional disability assessment formula and overall process.
- Experts' Mission Report (ExMR) and on-line evaluation survey (EXF). To be filled according to templates.

5 REPORTING AND SUBMISSION OF DELIVERABLES

5.1 Formats

All deliverables and products of the activity (notes, reports, presentations, etc) shall comply with the formats and templates provided by the SOCIEUX+ Team.

All deliverables are to be submitted in electronic in electronic editable versions [Microsoft Word 97-2003 [doc], PowerPoint 97-2003 [ppt] and Excel 97-2003 [xls]; or in equivalent OpenDocument

format). Non-editable electronic document such as in Portable Document Format (PDF) shall not be accepted.

Templates for electronic presentations during the activity/mission are provided by the SOCIEUX+ Team. These templates are in Microsoft PowerPoint format and comply with the SOCIEUX+ Corporate Image standards. These templates are to be used as a sole format by all members of the expert mission team. They are to be used for all presentations by the experts during and for the activity/mission. The use by the experts of their own, or their organisation(s), templates or formats are not allowed unless otherwise instructed in written [by email] to the experts by the SOCIEUX+ Team.

All versions of deliverables or other products used or produced during activity/mission by the experts shall include the following disclaimer:

"Disclaimer:

The responsibility of this publication sole lies with its authors. The European Union, the European Commission, the implementation partners of SOCIEUX+ and the SOCIEUX+ Staff are not responsible for any use that may be made of the information contained therein."

Please refer to the expert information package for further guidance on communication and templates.

All deliverables are to be provided in English.

5.2 Submission and approval

All deliverables versions (drafts, final or other) shall be submitted directly and only to SOCIEUX+ Team, unless otherwise instructed in written [by email] to the experts by the SOCIEUX+ Team.

5.2.1 Pre-mission deliverables

- Pre-mission deliverables shall be submitted no later than 3 working days before the start of activity.
- Pre-mission deliverables will be shared and reviewed by the SOCIEUX+ and the Partner Institution. Feedback on the deliverables should be provided to the Principal Expert at latest 2 days before the start of activity or departure of the mission of the experts, whichever is the earliest. Comments and recommendation of this feedback shall be taken into account for the implementation of the activity/mission by the experts. Only the mission agenda shall be resubmitted with revision if requested by the SOCIEUX+ Team.

5.2.2 Final deliverables

- The first draft versions of the final deliverables are to be submitted no later than 10 working days upon completion of the activity or return of the experts.
- Feedback to the first draft version of the report should be provided 10 working days after its submission.
- Inclusion of the feedback on drafts versions is expected 5 working days upon reception of the comments by the principal expert. (In general, no more than one round of feedback and revision is required, unless the quality of the deliverables is considered unsatisfactory by the SOCIEUX+ Team or/and the Partner Institution.)
- Final versions of the deliverables should be approved or rejected no later than 10 working days upon their submission to the SOCIEUX+ Team.
- Final payments and reimbursement of travel costs to experts can only be authorised upon approval of the final version of the deliverables by SOCIEUX+.

6 REQUIRED EXPERTISE

6.1 Expertise profile

Principal expert (Expert 1):

Area(s) of expertise: Disability benefits

Specific skill(s) of expertise: Qualitative methods

Requirements (essential/required):

- *Education: university level (Masters or PhD relating to the subject are considered a plus)*
- *At least 15 years of professional experience within EU public administrations or, international organisations, academia, social partners, civil society organizations, international thematic organizations*
- *Specific experience and skills in designing, managing and/or evaluating the provision of disability benefits;*
- *Specific experience in disability assessment and/or managing disability assessment formulas;*
- *Previous experience in the evaluation of the efficiency of disability-related services of a non-medical or a functional nature;*
- *Fluent in English, written and oral;*
- *Acute sense of diplomacy and institutional relations.*

Additional assets (advantageous in selection):

- *A previous experience in delivering short-term technical assistance in international cooperation;*
- *A previous professional experience in Armenia and/or Eastern Europe*

Expert 2:

Area(s) of expertise: Disability benefits

Specific skill(s) of expertise: Service delivery

Requirements (essential/required):

- *Education: university level (Masters or PhD relating to the subject are considered a plus)*
- *At least 15 years of professional experience within EU public administrations or, international organisations, academia, social partners, civil society organizations, international thematic organizations*
- *Specific experience and skills in designing and running monitoring and evaluation systems regarding the provision of disability-related policies, benefits and services;*
- *Previous experience in assessing participation levels of people with disabilities;*
- *Fluent in English, written and oral;*
- *Acute sense of diplomacy and institutional relations.*

Additional assets (advantageous in selection):

- *A previous experience in delivering short-term technical assistance in international cooperation;*
- *A previous professional experience in Armenia and/or Eastern Europe*

6.2 Estimated workload

	Preparation	On-site work (distance)	Reporting & deliverables	Total Working days
Principal expert (#1)	3	12	3	18
Expert (#2)	2	12	3	17
Total	5	24	6	35

7 APPLICATIONS

7.1 Call for experts

All calls for experts for SOCIEUX+ activities are published online on the SOCIEUX+ website. Interested experts should submit their application on the SOCIEUX+ on-line expert database: <https://pmt.socieux.eu> (currently only available in English). The application process is:

1. If they have not already, experts create their SOCIEUX+ account by clicking on "Create an account" using an email address.
2. Login details for their account will be sent to experts by email, experts should create and submit their profile for review by¹:
 - a. Providing contact details
 - b. Providing information on the competences, skills and working history of the expert. Experts are required to provide only limited information through fields marked with an asterisk. However, *experts are encouraged to complete in most detail de sections on skills and competences as the SOCIEUX+ Team also regularly reviews profiles in the roster to identify and contact potential experts for future missions.*
 - c. Uploading of a curriculum vitae, preferably in Europass format².
3. Once their profile is approved by the SOCIEUX+ Team, they can apply to any available calls for experts accessible under the tab "Call for experts" and click on "Apply."

If more information is needed, please contact SOCIEUX+ by email at experts@socieux.eu with the reference number of the application.

Collaborative or interested institutions wishing to make expertise available for a specific call for application may directly contact the team of SOCIEUX+ at experts@socieux.eu.

7.2 Selection of experts

In principle, SOCIEUX+ mobilises experts from the public administrations and mandated bodies of EU member states, and practitioners working for social partners, including:

- Practitioners, civil servants and employees from publicly mandated bodies;
- Collaborators and employees of social partner institutions, such as trade unions and employer associations; and,
- Academic and research institutions.

Active public experts from collaborative institutions are given priority in the selection. Private consultants may also apply. Their application will be considered in case an appropriate public expert cannot be identified.

Only short-listed applicants may be contacted. The selection process may include interviews by phone or other communication means.

¹SOCIEUX+ expert database and other management tools comply with the General Data Protection Regulation (GDPR) -Regulation (EU) 2016/679.

²Europass templates for CVs are available here:

<http://europass.cedefop.europa.eu/en/documents/curriculum-vitae/templates-instructions>

Interested candidates may download the **Guide for Experts and Collaborative Institutions** with detailed information on contracting with SOCIEUX+ at www.socieux.eu

7.3 Contracting of public experts

Public experts can be in active duty or retired. Retired employees from international specialised agencies or cooperation agencies can also be mobilised, without regard to their former employer's collaborating with SOCIEUX+ on a specific action. Retired experts are considered as public experts for all purposes, benefits, and financial compensation provided by SOCIEUX+.

Short-listed candidates may be required to provide the contact of employer or proof of their ability to be directly contracted under their status as civil servant or public employee.

7.4 Financial compensations

Contract officials or active-duty or retired employees are entitled to standard fixed allowances of 350 euros per working day worked. The fees of private consultants are negotiated according to their number of years of relevant expertise and the standard scale of SOCIEUX+.

Retired experts are assimilated to public employees for all intents and purposes, benefits and financial compensation provided by SOCIEUX+.

National regulations on remuneration and compensation of public employees and civil servants applies and may limit the payment of allowances by SOCIEUX+. The responsibility for compliance and verification lies with individual experts and their institutions of origin. The payment of income or other taxes is the sole responsibility of the mobilised experts and/or their organisations.

7.5 Travel costs

All travel expenses for the mobilised experts (public, private or international institutions) are covered by SOCIEUX in accordance with the **Guide for Experts and Collaborative institutions** with detailed information on contracting with SOCIEUX+ (version as on date of signature of the contract).

8 COMMUNICATION & VISIBILITY

SOCIEUX + can use its communication channels, such as the web, newsletter and other media, to share information about the implementation and results of the activities. For this, contributions of the experts mobilised are expected. The experts may be requested to provide such contributions in the field of communication as photographs, provide short texts, and interviews.

Short briefings, before and after the mission, with the Communication Officer of SOCIEUX+. This briefings will provide the opportunity to identify communication opportunities and strategies.

For specific activities, visibility products, such as brochures, USB sticks, notebooks and pens, can be made available to experts for on-site distribution.

9 CODE OF CONDUCT

The experts mobilised by SOCIEUX+ will provide technical assistance from the preparatory stages of each activity to the delivery of products. The SOCIEUX+ Team will assist experts to fulfil their assignments by supporting and advising on the preparation of background materials before meetings. The SOCIEUX+ team will collect feedback from partner institutions and relevant stakeholders to ensure that mission reports and recommendations are delivered to national authorities, the EU Delegations in the partner countries and EuropeAid.

The experts mobilised are not representing SOCIEUX+ or the EU. Technical opinions and recommendations expressed are their own. They shall not express negative opinions on the implementation of actions supported by SOCIEUX+ to third-parties. Nevertheless, they shall be aware of SOCIEUX+'s objectives and functioning, and promote its services at the best of their knowledge, whenever possible and feasible.

The experts shall perform their duties in the Partner Country in a way that is fully compliant with and respectful of the local institutions, policies and cultural behaviours. They shall particularly adopt a culturally-sensitive behaviour in their way to deal with the local counterparts.

10 OTHER CONSIDERATIONS

11 ANNEXES

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