

TERMS OF REFERENCE FOR EXPERTS

Terms of reference for on-site activities and missions

Action code and partner country: *SOCIEUX 2022-10 ARMENIA*

Action title: *Developing procedure of selection and certification of the disability assessors and SOP of Disability Assessment Centres*

Partner institution: *Ministry of Labour and Social Affairs*

Activity number and title (if applicable): *Activity 3 Develop a workflow tool that would visually explain the administrative and scientific procedures needed for DACs to carry out their services*

Date of implementation of activity/ies:

Preparation 21 November – 3 December / Implementation 4-17 December / Reporting by 10 January 2023

Expert positions and responsibilities (by activity):

Activity #3: Expert #2 – *Organisational management & administration / Disability benefits*

Workload:

Activity #3 - Expert #2: 16__days

Call for experts' reference: **22-10/ARM/3**

Version - #: __

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Final

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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 has ratified the United Nations Convention on the Rights of Persons with Disabilities (UN-CRPD) in 2010 and has initiated the reforms on disability assessment and eligibility determination in view to shift from a medical approach to one based on functional assessment. This process was done in compliance with.

In 2014 the Government has approved the Concept note on introducing the system for comprehensive functional assessment of individuals based on the World Health Organization (WHO) guidance on International Classification of Functioning, Disability and Health (ICF) as a national standard for recording functional limitations.

Between 2014 and 2017, with the support of international development partners (UNPRPD, UNDP, UNICEF, USAID), the MLSA has developed, piloted and tested new tools and procedures for disability assessment and eligibility determination.

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.

In 2020, the MLSA requested SOCIEUX+ expert support in view to develop individual capacities in the field of functional disability assessment. MLSA's goal was to constitute, among the assessors currently on duty, a team of 40 trainers who would be in a position to organize and display training and preparation activities for other assessors and for newly hired assessors of function disabilities.

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.

2 ACTION DESCRIPTION

As per work-plan.

2.1 Overall objective

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

2.2 Specific objective (s) (purpose)

S1: To develop and implement a methodology ensuring more transparent selection and certification of assessors.

S2: To improve the workflow of staff working at the Disability assessment centres (DAC)

2.3 Expected results

R1: A Manual is developed to adapt and integrate the existing training material and other technical deliverables developed in the previous activities on the use of tests and assistive technologies.

R2: Staff at the DAC is trained to use the available test results for the correct attribution of disability qualifiers, according to international standards adapted to Armenia

R3: Staff dispose of an updated workflow tool outlining the work organisation and standard operation procedures at the DAC.

2.4 Final deliverables

D1: Pedagogical materials developed for the on-the-job training of trainers, including observations on how the assessment is carried out and recommendations on how to handle test results

D2: Updated TOT Manual for assessors on the use of tests and assistive technologies, containing elements of adult pedagogy, including modules, exercises and tests for candidate selection

D3: Workflow tool detailing the workflow actions of the administrative and scientific procedures needed for DACs to carry out their services, and especially the work the case manager (social worker)

3 METHODOLOGY

3.1 General methodology (of the action)

This new action follows on from previous technical cooperation implemented under SOCIEUX+, notably action 2017-38, 2020-23 and 2020-21. Through this action, the Ministry of Labour and Social Affairs is seeking technical assistance to support the completion, development of tools and piloting to ensure the operationalisation of its reform process in the 48 newly established IFC Disability Assessment Centres across the country.

The planned training (activity 1) and manual (activity 2) aims to reinforce the capacity of the assessors at the Disability Assessment Centres and will contribute towards empowering trainer assessors to perform capacity-building activities for future assessors. This last activity (activity 3) aims to systematise the organisation and operationalisation of the various scientific and non-scientific services offered at the DACs.

To ensure mutual understanding during implementation, translation and interpretation from Armenian to English and vice versa would be provided throughout the activities.

3.2 Planned activities (work plan of the action)

The following activities are currently planned for the action:

- Activity 1 – *Conduct a training of trainers for assessors to use the test results and better assign the correct IFC qualifier based on the available tests, and on the approved ICF disability assessment formula*
- Activity 2 – *Title Develop a TOT manual on the use of tests and assistive technologies, based on the existing materials (DW)*
- **Activity 3 – *Develop a workflow tool that would visually explain the administrative and scientific procedures needed for DACs to carry out their services***

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

- **Activity #3.**

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

➤ Methodology

This third activity aims to systematise the organisation and operationalisation of the various scientific and non-scientific services offered at the DACs.

Based on on-the-job training and visits to a designated facility, the experts will develop a workflow tool that would visually explain the administrative and scientific procedures needed for DACs to carry out their services. The experts will get a thorough understanding of the HR management, processes already in place, organisational capacities and actual functioning of the pilot facility. The experts and partners shall then work at the workflow tool during focus groups aimed at establishing the best and most feasible way to expedite and standardise processes, ensure efficient delivery of services, based on the observations in the field and expertise.

The final deliverable would be a separate tool, which will describe in detail the workflow actions of the whole process and especially the work of the case manager (social worker) with the administrative and the scientific staff for the organization and completion of the needed documentation at all assessment stages (preparatory, assessment, post assessment).

➤ Responsibilities:

Experts' team:

The principal expert will lead the mission on site. He/she is responsible for the production of all deliverables of the activity (see section 4.2). He/she will also be responsible for the preparation, coordination, implementation and reporting and/or coordination of the overall activity.

The experts shall co-develop a proposal for methodology and agenda together with the Partner institution, to be discussed and validated ahead of the mission. The experts shall travel onsite for a mission of 10 working days. The experts may conduct training of trainers on the co-developed methodology and agenda.

Partner Institution:

The partner institution shall work in collaboration with experts supporting the preparation and implementation of the activity.

The partner institution shall facilitate the organisation of the activity with regards to the following aspects:

- nominating one or more internal resource-persons to support the experts in the material and technical organisation
- contributing to the technical organisation of the activity, including sharing relevant background documents, contacts and technical inputs with the experts

- convening participants to the trainings and ensuring their participation, including of external stakeholders
 - the material organisation on site (including covering the costs for premises, coffee breaks and logistics).
- **Minimum tasks expected from the experts shall include:**

Preparation:

- Get substantial knowledge of the local context; review relevant policy and institutional framework documents.
- Co-develop the mission’s methodology and agenda (intermediate deliverables), in collaboration with the Partner Institution.
- Agree with the Partner on logistical arrangements for the implementation of on-site activities.
- Transmit the intermediate deliverables to the SOCIEUX+ team for approval.
- Take part to the pre-mission briefing with SOCIEUX+ team (around 1 week before the start of the action).
- Contact the EU Delegation to organise a briefing and/or debriefing upon arrival (SOCIEUX+ will introduce the experts to the focal point within the EU Delegation).

Implementation:

- During the mission, conduct the activity with the Partner’s key staff and other stakeholders as per methodology and agenda. The partner institution shall facilitate and arrange the trainings.
- Present the preliminary outcomes of the mission to the partner in order to discuss and take into account comments on the contents of the deliverables before their finalisation.
- Participate in the briefing/debriefing with the EU Delegation.
- At the end of the exchanges, ask the interviewed actors to complete the participants’ feedback questionnaire (link provided by SOCIEUX+).
- Share with SOCIEUX+ Communication officer any materials that can be useful to inform the public about the activity (pictures, interviews, brief notes or articles), in respect of SOCIEUX+ visibility policy

Reporting:

- Timely submit to SOCIEUX+ the final deliverables. Use the templates and evaluation forms provided by SOCIEUX+.

Go through a round of comments and adjustments in interaction with SOCIEUX+ and the Partner.

4.2 Deliverables

4.2.1 Pre-mission deliverables

- P1: A methodological note, detailing the working approach, tools and methods to employ, a risks analysis, etc. The Methodological Note shall not exceed 3 pages (excluding cover page and annexes).
- P2: A activity/mission agenda, detailing the meetings and working sessions to be held, persons to meet, etc. The Activity/mission Agenda shall not exceed 2 pages.

4.2.2 Final deliverables

- ExMR: An individual Expert Mission Report (ExMR) in SOCIEUX+ format (template provided). This report is a confidential product intended solely for and use by SOCIEUX+. The expert team may also submit a single-joint ExMR report if they prefer to do so (see instructions on the template).

- ExF: An individual completed Expert Feedback Form (ExF) completed online (see instructions and link on the ExMR template).
- AcR: A collective Activity Report (AcR) in SOCIEUX+ format (template provided). This AcR is to be produced jointly by the mission team. It is intended for the Partner Institution, and will be shared, most probably, with key stakeholders of the action. The report will reflect the tasks conducted in during the activity. It shall provide a meaningful contribution towards the final deliverables of the action.
- Annex to AcR: **D3**: Workflow tool detailing the workflow actions of the administrative and scientific procedures needed for DACs to carry out their services, and especially the work the case manager (social worker)

4.3 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.

4.4 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.

4.4.1 Pre-mission deliverables

- Pre-mission deliverables shall be submitted *no later than 5 working days before the start of activity or departure of the mission of the experts, whichever is the earliest.*
- 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.

4.4.2 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+.

5 REQUIRED EXPERTISE

5.1 Expertise profile

Expert 2:

Area(s) of expertise: *Disability benefits*

Specific skill(s) of expertise: *Organisational management & administration*

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 assessing the efficiency of workflow processes within a disability centre or related structure, in view to the development of organisational tools, SOPs and manuals;*
- *Specific experience in the design and conduct of on-the-job training of trainers in the field of functional disability assessment tools and techniques;*
- *Acute sense of diplomacy and institutional relations.*

Additional assets (advantageous in selection):

Fluent in English, written and oral;

5.2 Estimated workload

To adjust as necessary

	Preparation	On-site work	Travel	Reporting & deliverables	Total Working days
Principal expert (#1)	3	10	2	3	18
Expert (#2)	2	10	2	2	16
Total	5	20	4	5	34

6 APPLICATIONS

6.1 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.

6.2 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.

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

6.3 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.

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

² Europass templates for CVs are available here: <http://europass.cedefop.europa.eu/en/documents/curriculum-vitae/templates-instructions>

6.4 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.

6.5 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).

7 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.

8 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.

9 OTHER CONSIDERATIONS

If applicable

...Text...

10 ANNEXES

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ABOUT SOCIEUX+

The European Union (EU) promotes and maintains dialogue on social protection and inclusive employment policies with an increasing number of partner countries. This effort has been confirmed by the European Commission (EC) Communication COM (2016) 740 final - "Proposal for a new European Consensus on Development, entitled *Our world, our dignity, our future*. A significant number of cooperation initiatives in these fields are funded by geographic or thematic instruments of the EU in different countries. Those initiatives are highly structured and address the medium- to long-term needs of partner countries. However, short-term measures and peer-to-peer cooperation to promote the development of social protection systems are needed to complement the EU's cooperation with third countries. SOCIEUX+ - EU Expert Facility on Employment, Labour and Social Protection responds to this need.

The SOCIEUX+ facility was setup by the EU through co-funding from France, Spain and Belgium and the resources managed by the European Commission's Directorate for Development and Cooperation (EuropeAid). The facility is implemented by a partnership composed of development cooperation agencies from Member States: Expertise France (the partnership lead), Fundación Internacional y para Iberoamérica de Administración y Políticas Públicas (FIIAPP) from Spain, Belgian International Cooperation on Social Protection (BELINCOSOC), and the Belgian Development Agency (Enabel).

The general objective of the Facility is to expand and improve access to better employment opportunities and inclusive social protection systems in partner countries. Its specific objective is to enhance the capacities of partner countries to better design, manage and monitor inclusive, effective, and sustainable employment strategies and social protection systems through short-term, peer-to-peer technical assistance and knowledge development.

SOCIEUX+ recognises the impact of social protection and employment in reducing poverty and vulnerability. It supports the efforts of partner governments in promoting inclusive and sustainable social protection and employment systems. SOCIEUX+ also complements the efforts made through other European Union initiatives.

The Facility is an expansion of SOCIEUX Social Protection EU Expertise in Development Cooperation, established in 2013.

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