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TERMS OF REFERENCE

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LIST OF ABBREVIATION

MOLSP – Ministry of Labour and Social Policy

NGO – Nongovernmental organisation

CBO – Community based organisation

DLSP – Department of Labour and Social Protection

EU – European Union

DFID – Department for International Development of the UK Government

WB – World Bank

USIF – Ukrainian Social Investment Fund

SIDA – Swedish International Development Agency

SARAP – Social assistance reform administration project

UEPLAC – Ukrainian-European Policy and Legal Advice Centre

BACKGROUND INFORMATION

1.1. Beneficiary country

Ukraine

1.2. Contracting Authority

The European Community, represented by the Commission of the European Communities, for and on behalf of the Government of Ukraine.

1.3. Relevant country background

Since 1991 Ukraine has been undergoing a transition process from centrally planned economy to market economy, which has brought about phenomena like economic stagnation, increased inequality of incomes, increased poverty and deterioration of living standards of families and children. The general situation of economic decline has led to the deterioration of living standards due to an abrupt depreciation of wages and other sources of income together with limited possibility of employment opportunities. The continuing economic crisis has resulted in growth of poverty and disparity of the impact of transition on different population groups.

In this context, the Government has brought the issue of poverty in Ukraine to the political and developmental agenda through a series of documents and in particular "The European Choice" (The Strategy of Economic and Social Development of Ukraine 2002-2011) presented by the President to the nation in May 2002, the Presidential decree on poverty alleviation approved August 2001, and the Action Programme of the Cabinet of Ministers approved December 2001. All these documents clearly proclaimed support to the people of Ukraine by 1) developing policies at the national level and 2) adopting practices at the local level that result in European standards of living through poverty alleviation. Thus, one of the trends in this direction is the reforming of the existing social assistance system including the development of efficient and target-oriented social services.

1.4. Current state of affairs in the relevant sector

For the past few years Ukraine made an extraordinary effort to streamline social benefits and improve their targeting. Some progress has been achieved in reforming the pension system and the social safety net while the system of social care services in Ukraine remained largely unchanged. The existing social assistance system characterized by permanent under-financing and thus lead to quality decrease of social services to vulnerable groups. With a few exceptions, pilots of service provision supported by national and international charities or donor organisations as well as local authorities in a limited number of cities of Ukraine), the state is still the only financier and provider of social care.

Economic decline and increasing poverty have led to a growing inflow of clients into residential care. At the same time, constraint public resources, fragmental administrative, management and financing responsibilities have further exacerbated the problems of quality of services and social exclusion.

Designing a social assistance system that is transparent, fully funded, fiscally sustainable and well targeted will be the focus of the next phase of the social protection policy development. Under the constraint of lacking reliable income future social assistance system would need to rely on a combination of targeted financial benefits and different types of social services provided to vulnerable groups at national and local levels.

The reform of social care will need to address the following issues:

Deinstitutionalisation and introduction of community based models of social care.

Although out-reach services began developing in Ukraine following the Presidential Decree on creation of a network of territorial centres to provide care to elderly people, they are still limited by scope of services provided and categories of population eligible to them. Currently, the absence of alternatives to residential care, insufficient and ineffective support to vulnerable groups of the population contributes to maintaining and even expanding the residential care provision.

Quality, relevance and standards of social care services.

The current system does not adequately address specific needs of disadvantaged groups. Improving quality of care would require preparation of service standards, important training and re-training efforts.

Management, monitoring and evaluation.

Diversifying provision and financing to include private and NGO sectors, re-defining the role of the state and building the government capacity to formulate policies, contract out services and monitor service provision are critical elements of the reform.

Last year an important step, by the Ukrainian Parliament to support and enhance the development of new mechanisms in social service provision, was adopting the new law "On social services"(N966-IV 19/06/2003) that came into force from 1 January 2004. This law set forth the major organisational and legal principles of the provision of social services to individual and families in need and requiring outside assistance. The text defines vulnerable groups to be identified and targeted by social workers and entitled to the provision of social services. Understood as a set of legal, economic, psychological, educational, medical, rehabilitation and other measures focused on particular social groups or individuals having complex circumstances of life in order to improve, restore their vital activity and social adaptation.

According to the law different types of social services need to be rationalised and provided to vulnerable groups: in the place of individual's residence; in boarding institutions and establishments; in rehabilitation institutions and establishments; in day-care institutions and establishments; in temporary or permanent-stay institutions or establishments; in territorial social service centres; in other social support (care) establishments some of these are also administered by the Ministries of Health, Education, and the State Committee for Family and Youth (now transformed into the Ministry of Family and Youth Affairs).

The Law stipulates the process of reform in the system of social service provision. It requires changes within the current administrative structure that should be

equipped and staffed to deliver more appropriate forms of assistance, and be able to support local initiatives in alternative forms of care. It also creates conditions for the integration at regional levels of poverty reduction strategies, social assistance, safety nets and social services. The setting up of a new administrative structure is a crucial element in developing an integrated approach.

As of today the former structure of social assistance is still operating up to the rayon level (District) through the Department of Labour and Social Protection with six sub-departments (Pensions, Social assistance, Registration of privileges, Housing subsidies, Labour issues, Veterans of war and labour) while a Territorial Centre focused on servicing old people and the disabled.

The MOLSP has considerable experience with Territorial Centres, which are now established in almost all regions. They are seen as important in preventing institutionalisation and supporting local initiatives, but developing new systems for assessing needs is still problematic and may require a major training and in-service training programme for social workers along the chain of social services delivery.

Social work is a relatively new profession in Ukraine. Although there are currently "Social Officers" working within municipalities, they rarely perform duties of social workers with the focus on target groups rather they are used as family support personnel mostly for elderly care activities. The first professional staff under Territorial Centre supervision is the "Social Coordinator" in charge of application and often based in the city council.

Several organisations, bi-lateral donors and training institutes have been developing schemes and providing training on social work in the country. A number of Tempus/Tacis projects supported Ukrainian higher educational institutions in developing curricula and training teachers in social work. Some of these institutions are located in pilot regions: the Open University for Human Development in Rivne with a branch in Lutsk.

The Ministry for Family and Youth Affairs in cooperation with Kiev University and SIDA developed their own curricula for social workers. Concerted efforts have yet to be organised in this area to harmonise training and skills development process.

1.5. Related programmes and other donor activities:

The Government is looking for foreign donor assistance and cooperation in developing its social policy. Projects focused on know how transfer from member states of the European Union and administrative reform of social assistance supported by the World Bank are the main interventions recorded in the sector. Some project have been already implemented or in the process of implementation.

DFID funded a project "Enhancing the capacity for the delivery of social assistance benefits in Lviv and Kharkiv oblasts" in 1999-2002. The project was to stimulate and develop pro-poor poverty reduction policies strategies. The purpose was to enhance local capacity to deliver targeted social assistance benefits to the poorest members of society. At the moment DFID plans to start a project "Support to the Ukrainian Social Investment Fund –Implementation Phase"2004 – 2008. Within this project technical assistance will be provided to support piloting social care

reform in Khmelnytska and Kharkivska oblasts (complimentary to a WB USIF Project Loan).

The long-term co-operation between Sweden and Ukraine in the social sector began in 1997 with the project "Social Worker Training". Since then numerous projects were launched. A number of projects has been implemented with the focus to improve social work and the system for care of elderly and disabled people. Due to these projects links between the policy and operational level have been strengthened.

The World Bank is in the process of implementing two projects. The first is the "Social Investment Fund Loan Project" with a main objective to build local community and municipal capacity and skills through rehabilitation of social infrastructure has three main components: 1. Community base Micro-projects including community based services and targeted social services (innovative social care actions); 2. Capacity building at central, regional and local level; 3. Project management: monitoring and evaluation. Second is the "Social Assistance Reform Administration Loan with the objective to facilitate the reform of social protection. This project is due to start late this year.

To increase cooperation and coordination several international donor organisations and the World Bank together with the European Commission have maintained close contacts and regular information sharing meetings are held in the area of social policy.

The concept of these TOR has been discussed and presented to other donors. Close coordination with other projects is essential during the project implementation. The consultant is encouraged to present innovative approaches to maximize the impact of this project by participating in relevant task force meetings and regularly cooperating with other donors.

2. CONTRACT OBJECTIVES

The project will focus on providing comprehensive support to the implementation of the new law on "Social Services"

2.1. Overall objective

To improve the effectiveness and cost efficiency of social services in Ukraine by providing comprehensive support to the Ministry of Labour and Social Policy and its regional departments in the implementation of the on-going reform of the social protection system

2.2. Specific objectives

The specific objectives of this contract are as follows:

1. To increase the capacity of the MOLSP and its regional departments to facilitate the effective implementation of the provisions of the Law on "Social Services"
2. To develop and test innovative models of social services for vulnerable groups in two pilot rayons (in Rivno and Volyn oblasts).

2.3 Results to be achieved by the Consultant

The Consultant will have to work on a central level (MOLSP) and in two pilot regions bearing in mind that results to be achieved within the two specific objectives are interrelated and reinforcing each other.

Results to be achieved on specific objective No 1. "To increase the capacity of the MOLSP and its regional departments to facilitate the effective implementation of the provisions of the Law on Social Services"

The legal basis including by-laws, instructions, etc needed for the effective implementation of the Law on Social Care Services reviewed and necessary adjustments proposed.

The capacity of key managers at central, oblast and rayon levels to implement and monitor the required reform of the existing system of social services increased

Quality standards and control procedures including a mechanism for accreditation of social service providers developed and introduced

A human resource development plan including job descriptions for managers working in the social sphere (territorial centres, social workers, institutions employees and specialists) reviewed and revised according to the provisions of the new Law

Comprehensive curricula for professional social workers and social service providers developed and tested in pilot rayons

The capacity of the MOLSP to launch public awareness and dissemination campaigns to create public and private support for the required social service reforms increased.

Results to be achieved on specific objective No 2. "To develop and test innovative models of social services for vulnerable groups in two pilot rajons (in Rivno and Volyn oblasts)."

- Scope, financial mechanisms and organizational structures of the existing social services assessed

- Needs on social services assessed and priorities defined
- Methodology to budget for social services corresponding to the needs and financial capacities of the district and community level developed and implemented
- List of services covered by public funds prepared and proposed for approval
- List of services provided against payment prepared and proposed for approval
- Models of social service delivery following an integrated and coherent approach based on the possibilities offered by the new law developed and tested
- Mechanism for the supervision and monitoring of social service provision in line with standards designed and implemented
- Local administrative capacity to organize the delivery of social services to the most vulnerable groups of the population enhanced in two rayons in order to fight social exclusion and poverty.
- Capacity of staff of rayon and oblast administrations to make use of public media to improve the process of informing the public of changes and developments in social assistance enhanced
- Public awareness campaign on social service reform to encourage community based initiatives launched
- Pilot projects for the provision of social services to different vulnerable groups supported

3. ASSUMPTIONS & RISKS

3.1. Assumptions underlying the project intervention

The following assumptions are underlying:

The Government of Ukraine strongly follows its commitment to reform social policy and promote new types of social care services, based on new standards, skills and financial resources.

Training and in-service training for social workers, staff from institutions, managers, local administration's and municipality's employees, as well as NGO's volunteers involved in social services delivery is recognized as essential by the participants and official bodies.

The development of new forms of care leads to improved care/services rendered in institutions.

Local administrations and municipalities will afford budgetary support to new forms of care and allocate extra-budgetary funds according to social needs.

All state and non-state institutions involved in social service provision will make their contribution to project working groups.

3.2. Risks

There are no major risks identified at this stage, however, the consultant should pay particular attention to the following:

Budgetary constraints may jeopardise sustainability of innovative approaches and pilot models of social service provision.

Civil society, social entities, NGOs and community based organisations may not be developed enough to design and operate alternative forms of social service provision independently and additional fund raising faces local economic limitations.

Standards for social assistance are not harmonised yet and beyond the financial capacities of State and local budgets.

Local authorities may be reluctant to use the provisions of the new law to introduce new forms of social services and make social contracts with NGOs and other non-state social service providers.

4. SCOPE OF THE WORK

4.1. General

It is important to stress that the Consultant will need to develop excellent relations with all Ukrainian stakeholders involved in the social protection field (Ministries, oblast, rayon and municipal administrations, state and non-state social service providers, public organisations) and with international donors operating in this sector.

4.1.1 Project description

The proposed project is designed to support the Ukrainian Government to reform social service delivery system based on the proposed activities in two pilot sites to develop more effective and efficient mechanisms for the provision and monitoring of social care services to the most vulnerable groups of society. The new mechanisms should be developed in close relation with the reform of cash benefits delivery. In this aspect the project should cooperate with the WB project focused on the development of a unified model for citizens' applications for social assistance.

It must be supported by a clear legal base, appropriate financial and human resources, effectively managed structures, broad support and recognition by local society.

The project will contribute to the development and implementation of a proper legal framework, which must allow full involvement of local authorities and civil society in the delivery of social services.

While providing legal advice the project is also aimed at harmonisation of the social assistance system in Ukraine with the EU acquis and practices. For this reason the Consultant will closely cooperate with the Parliamentary Committee on European Integration and provide this entity with legal expertise on the subject. An

important partner in this field should be UEPLAC as a well-recognised institution providing legal advice to the Government of Ukraine.

Within the project an effective financing mechanism should be developed to ensure that vulnerable groups are supported within the community or the family rather than through systematic institutionalisation by state or non-state social service providers. This mechanism should encourage local authorities to use public funds for social contracting.

Within the project, the partnership between different agents and level of executive bodies is to be improved with particular attention to integrated approaches of social service provision and targeted interventions addressing the social needs that have been identified with adapted methodologies for targeting and monitoring poverty and vulnerability.

In this context, there is an immediate need for professional social workers capable to provide social services to children, families at risk, the elderly without support and disabled and to pilot and support services alternative to those provided by state care institutions.

The project will contribute also to build capacities at all levels for the following groups: staff working in institutions and territorial centres accommodating vulnerable people, managers of the social assistance system, rayon, oblast and MOLSP managers and employees dealing with social policy and assistance, volunteers and NGOs. Efforts should be directed toward an in-depth training needs assessment and identification of trained personnel who had been trained by international or local institutes and could work as trainers in the project.

The Project will also support the MOLSP in implementing the new policy towards regions and communities as underlined by the Law. The ability of local communities to solve the problems of institutionalised children, adults, the elderly and the disabled and of those who are at risk or vulnerable need to be enhanced developed and supported.

4.1.2. Geographical area to be covered

Besides dealing with national aspects, two pilot sites have been selected for project implementation. These are Rivne city (Rivenska oblast) and Kovel city (Volynska oblast). Rayons administrations and local authorities have expressed their willingness and commitment to the project objectives. The selected rayons of Rivne city and Kovel city are mostly rural with limited heavy industries and populations of 88000 and 44000 respectively. The number of people with disabilities amount to about 7% of the population and more than 25% are on pension.

4.1.3. Target groups

The Ministry of Labour and Social Protection and its departments at the oblast and rayon level are the main beneficiaries. They shall benefit from assistance in legal approximation in the field, training of staff members on technical issues relevant to

their specific policy decisions, funding mechanisms, list of services and developed standards.

Recipients of this present project are:

boarding institutions and establishments; rehabilitation institutions and establishments; day-care institutions and establishments; temporary or permanent-stay institutions or establishments; territorial social service centres; and other private and public social support (care) establishments and members of their staff.

Around these core institutions the future alternative forms of care and integrated services will be developed. The above-mentioned intermediate beneficiary groups will profit from this project's technical assistance concerning staff training in management, organisation principles, assessment and processing and easily available training and information materials.

The final target groups are:

The vulnerable population will benefit from new models of social care and enhanced delivery of social services.

Citizen associations and technical structures such as training centres, and others as may be deemed necessary;

Government organisations and agencies wherever necessary, such as the Ministries of Health, Education, the Academy of Science and other research institutes;

4.2. Specific activities

Inception phase (maximum 3 months)

During the inception phase, up to three months after the beginning of the project the Consultant should establish close cooperation with the Project Partner and elaborate precise recommendations for the adjustment of the TOR to a potentially changed local environment.

Within this phase the consultant will execute the following actions:

- Review and analyse the current legislation, the reform agenda and donor supported initiatives for administrative reform of social services delivery
- Review and analyse the existing administrative structure of social assistance, identify stakeholders in social services delivery and implementing structures
- Review and analyse the existing form of social services provision, integrated social services piloted by other donors and identify social services providers in the selected rayons;
- Review existing training opportunities and practices piloted by different donors, identify training providers and curricula available;
- Together with the Project Partner validate the pilot rayons and oblast where new models will be implemented.
- Agree with the beneficiary to set up working groups or task forces for each project component (legal and policy advice; training; implementation and public awareness). These working groups should be composed of a team of project experts and specialists from respective state executive bodies.

Terms of reference

- Set up the project Steering Committee.
- Develop a detailed work plan for the implementation phase of the project, agreed with the Project Partner and approved it by the Steering Committee.
- Establish project offices in selected rayons and a liaison office at central level.

Implementation phase

Activities related to the first specific objective:

- To assist the Ministry of Labour and Social Policy in preparing the necessary legal framework (by-laws, regulations, instructions, standards) for the implementation of the Law on Social Services and the development and implementation of an integrated approach to social assistance
- To increase the capacity of key managers at central, oblast and rayon levels to undertake the required reforms of the existing system of social care services by counselling and on job training
- To prepare a human resource development plan including job descriptions for managers of territorial centres, social workers and various categories of specialists working in institutions
- To assist the MOLSP to develop necessary quality standards and control procedures including mechanisms of accreditation of social service providers.
- To assist the Ministry and its regional departments in launching public awareness campaigns to inform the population on the new policy and practice in social service delivery through training seminars, organisation of press conferences, publishing information leaflets, developing communication facilities (like web site) and other means.
- Develop or adapt curricula for professional training of social workers in cooperation with international agencies and specialised training institutions
- Support the Ministry in designing at oblast/rayon level a pilot programme of vocational training through the training centre for social workers, managers and civil servant involved in the social sphere;
- Support the Ministry's efforts to increase the capacity of local managers and community authorities to organise and monitor the provision of social care services according to approved standards with special attention to social contracting

Activities related to the second specific objective:

- To define needs in social care services in two selected regions.
- To develop list of social care services to be financed by state and local budgets
- To develop and agree a list of services to be provided against payment.
- To develop a methodology to define the cost of services tailored according to the needs and allocated financial resources.
- To identify the most appropriate financial mechanism for each pilot rayon to cover the provision of social services.

Terms of reference

- To develop a monitoring system for community based social services to ensure quality standards, state supervision and agreement to operate as well as on financial resources provided out of public funds
- To initiate and support pilot projects in new model for social care services. To this extent support will be provided for the initiatives that better targeted allocation of public funds to the selected population groups most in need. Special attention should be devoted to the development of social contracting and the involvement of NGO's volunteers in social care provision on a competitive base

Activities in the pilot rayons may involve a large range of interventions from alternative forms of institutionalization of disabled to community based social services or MOLSP initiatives for rehabilitation centres. Expected results should lead to concrete indicators of achievement in number of centres, shelters, day centre, and beneficiaries:

It is recommended to use a subcontracting scheme to select social service providers for the implementation of innovative models on competitive base.

Activities related to dissemination and public information:

Assist the Ministry in designing a public awareness campaign and to develop wide public and private sector support for social service providers;

- Design dissemination campaign and supportive information material (web site, leaflets, seminars, workshops,) on the law 966-IV on social services;
- Support the Ministry in the integration of pilot projects into policy and in a dissemination campaign on best practices
- Enhance the involvement of NGOs in public awareness of social services provision

In order to achieve the project objectives and results the Tenderer may propose complementary activities to those identified, where it can provide clear justifications.

The Consultant must also observe the latest visibility guidelines (published at the following web site: http://europa.eu.int/comm/europeaid/visibility/index_en.htm) concerning acknowledgement of EC financing of the project.

4.3. Project management

Responsible body at the Contracting Authority and Project Partner

The Operations Section of the Delegation of the European Commission in Ukraine represented by the EC Project Manager is responsible for managing this contract.

Project Partner

The Project Partner is the Ministry of Labour and Social Policy of Ukraine.

In addition, the consultant will work with the Parliamentary Committee for European Integration, Ministries of Education and Health, and oblast and rayon administrations in the two pilot regions.

4.3.2. Management structure

The Consultant will establish a Steering Committee to guide project implementation. It will review project progress every three months and give guidance at key junctures. The Steering Committee will include all relevant project stakeholders.

The permanent members will be the representatives of the following institutions:

Ministry of Labour and Social Policy,

Ministry for Family and Youth Affairs,

State Social Services Centre for Youth,

The oblast and rayon administrations from the pilot regions and

The EC Delegation in Ukraine.

The Consultant will agree the exact composition of the Steering Committee with the Project Partner and the Contracting Authority. The representative of the Project Partner will chair the meetings. The Consultant will ensure the proper functioning of the committee meetings, such as writing minutes, preparing agendas etc.

Ad hoc members such as representatives of the Ministries Education and Science Health and/or representatives of the international donor community like representatives of UEPLAC or DFID project might be invited on a case-by-case basis and with the approval of the permanent Steering Committee members.

The Steering Committee will:

- Ensure co-operation among all parties of the project
- Ensure high-level commitment to the work of the project
- Act as a forum for discussion of project inputs and outputs
- Make recommendations to the Contractor and the Contracting Authority concerning major strategic decisions (this also includes the discussion of major project reporting and planning documents)

4.3.3. Facilities to be provided by the Project Partner

The Project Partner will contribute basic office facilities appropriate to the structure of the project. This will include office accommodation and furnishings, and telephone equipment and lines with national and international access to a liaison office based in Kiev in preferably in the Ministry building and two project offices in pilot rayons of Rivneska and Volynska oblasts.

The Project Partner shall appoint a senior member of its staff to liaise with the Consultant, and shall ensure that staff of the appropriate level are made available to work alongside the staff of the Consultant. Staff of the Project Partner shall not be paid from project funds.

The Project Partner will provide such assistance to the Consultant as necessary to arrange visas for expatriate personnel of the Consultant, and customs clearance and inland transport (from border point to final destination) for the Consultant's imported equipment.

The Project Partner should also provide all possible assistance to solve unforeseen problems that the Consultant may face. The possible failure to solve some of the Consultant's problems encountered locally will not free the Consultant from meeting its contractual obligations vis-à-vis the Contracting Authority.

Responsibilities for contract performance, finances, expenditures and reports

The Consultant and the Project Partner will share responsibility for the successful delivery of the specific outputs and activities required by these Terms of Reference.

The Consultant will be responsible for timely provision of reports and appropriate management of project finances in accordance with these Terms of Reference.

5. LOGISTICS AND TIMING

5.1. Location

The project will be located in the cities of Rivno and Kovel (Volynska Oblast) with a liaison office in Kiev.

The Consultant will ensure regular exchange of data/information between the national level and the pilot rayons.

5.2. Commencement date & Period of execution

The intended commencement date is November 2004 and the period of execution of the contract will be 30 months from this date. Please refer to Articles 4 and 5 of the Special Conditions for the actual commencement date and period of execution.

6. REQUIREMENTS

Tenderers should structure their proposals in such a way that their proposed approach and their preliminary work plan does not exceed 30 pages of text exclusive of any charts (e.g. Logical Framework Matrix, estimated working days per month table, project timetable etc.)

Tenderers are required to provide a Logical Framework Matrix reflecting their proposed approach in accordance with Annex A to these Terms of Reference.

Tenderer shall propose a team of international and local experts. International and local experts will have the nationality of EU Member States or recipient countries of PHARE and Tacis programmes and be in accordance with the specific requirements of these Terms of Reference.

Tenderers are required to indicate for every key expert, CVs to be included in the proposal, the position proposed and the expert categorized (whether short term or long term), international or local, senior or junior).

A significant presence in Ukraine during the entire project duration is considered essential for the success of this project. The minimum percentage of expertise time for all experts to be spent in Ukraine is 80%.

Tenderers are reminded that they are required to provide the exact number of working days for each category of experts for each month during the period of execution of the contract using the MS Excel spreadsheet "Estimated Working Days per month"(see Annex B to these Terms of Reference).

6.1. Personnel

6.1.1. Key experts

All experts who have a crucial role to play in implementing the contract are referred to as key experts. The profiles of the key experts for this contract are as follows:

Key expert 1: Team Leader

The Team Leader (EU/PHARE nationality) will work on the project for a minimum of 25 months. He/she will serve all the project components as well as the general management of the project and he/she will hold the full responsibility for the provision of deliverables including the development and implementation of innovative models of social care services in the pilot districts, an integrated approach for social services provision and capacity building for the project's stakeholders.

Qualifications and skills

He/she should hold a university degree in social sciences and/or civil administration,

The Team Leader should have a considerable experience in:

- Managing a team composed of expatriate and local technical specialists;
- Supervising and coordinating all aspects of the project technical work;
- Ensuring good communication with the Project Partner institution
- Organising and overseeing administrative and logistic support

-Knowledge of Ukrainian/Russian language would be an advantage. Fluency in English is required.

General professional experience

He/she should have at least 10 years experience in the area of social policy and social assistance. He/she should have strong expertise in working with state institutions, senior officials and in providing technical assistance. He/she should have at least 3 years experience in technical assistance project in transition countries.

Specific professional experience

At least 5 years relevant experience of work in state or private institutions responsible for the formulation and implementation of social assistance policy with direct involvement in the provision of social care services in EU or PHARE countries

Extensive experience in budgeting and managing public funds allocated for social assistance.

Experience in developing new instruments for the provision of social care services for vulnerable groups.

Experience in transfer of know-how of such experience to Tacis / PHARE countries including the provision of institution building support for social protection institutions would be an advantage.

Key expert 2: Senior legal advisor

The expert (EU/PHARE nationality) will work at least 20 months in Ukraine. He/she should have assisted Ministries at a senior level in the preparation of by-laws, decrees and instructions related to social policy and presented recommendations on amendment of legal documents governing social assistance and the provision of social care services. He/she should also cooperate with the Parliament and be able to provide legal expertise as to the approximation of the drafts of Ukrainian laws to EU acquis directives concerning pensions, social assistance and services.

Qualifications and skills

He/she should hold a university degree in Law and be specialised in Civil Law

He/she should have skills in drafting laws, by-laws and regulations

Good Knowledge of Ukrainian or Russian and fluency in English would be an important precondition.

General professional experience

He/she should have at least 7 years experience in the areas of legal advice, policy planning and a proven experience in implementation and supervision of social assistance regulations in EU or PHARE countries. He/she should be familiar with the legal aspects of accreditation and quality standards implementation.

Specific professional experience

He/she should have at least 3 years experience and active involvement in reforming social assistance systems in other transition countries especially those, which have similar socio-economic conditions to Ukraine.

Key expert 3: Senior Training Specialist

A specialist in professional training will be Tacis expert and will work a minimum of 22 months during the course of the project. He/she will be responsible for the capacity building component and all aspects related to training activities for social workers, managers of social services, training of staffs from institutions, NGOs and local administrations.

Qualifications and skills

He/she should hold a degree in social sciences or education

Terms of reference

He/she should have extensive experience in designing training master plans, vocational education programmes as well as curricula development in close collaboration with training providers and institutions preferably in the social sector. Good knowledge of Russian/Ukrainian languages is essential.

General professional experience

He/she should have at least 7 years of experience in organising the teaching process and training courses for adults. Her/she should have knowledge as to the ongoing reform in social sector of Ukraine and recent developments in this sector in neighbouring countries.

Specific professional experience

He/she should have at least 3 years of professional experience in education and/or training of social workers and related professions. Practical experience of work in social assistance system would be an advantage.

Key expert 4: Senior Social Sector Specialist

The Social Sector Specialist will be EU/PHARE nationality and will work a minimum of 25 months during the course of the project.

He/she will work with all key stakeholders of the project and will be responsible of the promotion of civil society initiatives, an integrated approach to social services delivery and targeted assistance to the most vulnerable. He/she will work in close contact with managers of social assistance, territorial centres, local administration and municipalities as well as NGOs and CBOs. He/she will also develop models for alternative form of care and design community empowerment schemes. He/she will be also responsible for organising support of the pilot project. He/she will be involved in developing quality standards for social services, developing a list of services, and together with the Project Partner will define priorities and make an analysis of services needed for the selected pilot groups.

Qualifications and skills

He/she should have university degree in social sciences or social work. Good knowledge of Russian/ Ukrainian languages is an important asset. Fluency in English is essential.

General professional experience

He/she should have at least 7 years of professional experience as a manager of social assistance structures or as a social worker. He/she should also have strong expertise in community/civil society development, safety net provision for vulnerable groups and reform of social policy in transition countries.

Specific professional experience

He/she should have experience in designing social assistance instruments, implementation of social contracting schemas and be familiar with recent process of reform in transition countries. He/she should have at least 3 years experience of working on international donor' projects in transition countries, preferably in Russia or Ukraine.

Key expert 5: Senior Public Awareness Specialist

A specialist in public awareness will be local expert He/she will be responsible for designing and implementing public awareness campaigns at central level and in pilot regions. He/she also will be responsible for raising community initiatives in developing new forms of social care. Dissemination of positive experience will be one of the tasks for this specialist.

Qualifications and skills

He/she should have a relevant university degree, good knowledge of Ukrainian/Russian and fluency in English.

General professional experience

He/she should have 7 years of professional experience in developing information materials

Specific professional experience

He/she should have experience in launching PR campaign, be familiar with the content of ongoing reform in social sector of Ukraine.

6.1.2. Other experts

CVs for experts other than the key experts (non-key experts) are not examined prior to the signature of the contract and they should not be included in tenders.

The Consultant shall select and hire non-key experts as required according to the profiles identified in the Organisation & Methodology and these Terms of Reference. These profiles must indicate whether they are to be regarded, as long-term/short-term, international/local and senior/junior so that it is clear which fee rate in the budget breakdown will apply to each profile. For the purposes of this contract, international experts are considered to be those whose permanent residence is outside the beneficiary country while local experts are considered to be those whose permanent residence is in the beneficiary country.

The Consultant should pay attention to the need to ensure the active participation of local professional skills where available, and a suitable mix of international and local staff in the project team It is recommended that each of the key and short term international experts will have an Ukrainian counterpart.

The selection procedures used by the Consultant to select these non-key experts shall be transparent, and shall be based on pre-defined criteria, including professional qualifications, language skills and work experience. The distinction between senior and junior expert is made on the basis of the years of documented relevant experience. Experts having more than 7 years of relevant experience will be categorised as senior experts, experts having more than 3 years and less than

5 years of relevant experience will be categorised as junior experts, notwithstanding the duration of their assignment for this specific project. The findings of the selection panel shall be recorded. The selection of experts shall be subject to approval by the Contracting Authority.

All experts must be independent and free from conflicts of interest in the responsibilities accorded to them. In particular, civil servants, staff of the Project Partner and other staff of the public administration of the beneficiary country cannot be recruited as experts or be paid by the project's funds. For Ukrainian experts, the definition of civil servants and the public administration shall be the one contained in Ukrainian law.

6.1.3. Support staff & backstopping

All backstopping and support staff costs are considered to be included in the fee rates of the experts.

6.2. Office accommodation

Office accommodation in Kiev (preferably within the building of the MOLSP) and in two pilot rayons of a reasonable standard and of approximately 10 square metres for each expert working on the contract is to be provided by the Project Partner free of charge. This will include also furniture, telephone equipment and lines with national and international access.

6.3. Facilities to be provided by the Consultant

The Consultant shall ensure that experts are adequately supported. In particular it shall ensure that there is sufficient administrative, secretarial and interpreting provision to enable experts to concentrate on their primary responsibilities. It must also transfer funds as necessary to support its activities under the contract and to ensure that its employees are paid regularly and in a timely fashion.

The Consultant must ensure that the project personnel (including all key and non-key experts and support staff) are equipped with any equipment, which the Consultant estimates is required in order for them to carry out their tasks effectively. This includes equipment for the offices to be set up by the project, such as computer equipment, furniture, telephones, printers, faxes, photocopiers etc. Sufficient provision must be made for these costs in the Consultant's fee rates.

If the Consultant is a consortium, the arrangements should allow for the maximum flexibility in project implementation. Arrangements offering each consortium partner a fixed percentage of the work to be undertaken under the contract should be avoided.

6.4. Equipment

No equipment is to be purchased on behalf of the Contracting Authority / beneficiary country as part of this service contract or transferred to the Contracting Authority / beneficiary country at the end of this contract.

This contract will be run in parallel with a supply tender procedure for equipment for a maximum amount of **€ 500 000**. This equipment will be used mainly for the support of MOLSP Departments in the regions, territorial centres, boarding

institutions and other facilities including newly developed innovative models with a focus on the provision of social care for vulnerable groups. Financial resources will be provided to equip training institutions (mobile or permanent training centres) where social workers, managers and NGO volunteers will be trained. Equipment will be used to upgrade institutions accommodating vulnerable people in order to allow innovative physical or psychological treatments. Identification of equipment, needs, including a draft of technical specifications, will be prepared by the Consultant. The procurement of this equipment, including contracting, will be carried out by the Contracting Authority. The Consultant will assist in the preparation of tender documents, in the evaluation of offers and in supervising the installation of the equipment.

This contract will be run in parallel with a works tender procedure for reasonable renovation of premises allocated for institutions providing new forms of social services for vulnerable groups (day time centres, shelters, rehabilitation centres, etc.) in pilot regions. The maximum amount allocated for this is € 200 000. Tendering and contracting will be carried out by the Contracting Authority. The Consultant will assist in the preparation of tender documents, in the evaluation of offers and in supervising works at the spot.

6.5. Incidental expenditure

The total budget available to implement the contract is **€2. 800.000**

The Provision for incidental expenditure for this contract is **€ 400. 000**

This amount must be included without modification in the Budget breakdown. The Provision for incidental expenditure covers the eligible incidental expenditure incurred under this contract. It cannot be used for costs, which should be covered by the Consultant as part of its fee rates, as defined in these Terms of Reference. Its use is governed by the provisions in the General Conditions and the notes in Annex V of the contract.

It covers:

- a) study tours, training; workshops, seminars, development and publication of training materials
- b) design, publication and dissemination of promotion materials, running public awareness campaigns;
- c) local and international travel costs and subsistence allowances for missions to be undertaken as part of this contract from the base(s) of operations in the beneficiary country as defined in paragraph 5.1; i.e. from Kiev and the main offices in the pilot regions, in which the project is being implemented;

The Consultant will need prior written approval from the Contracting Authority before spending the funds related to following components within Incidental Expenditure: a) and b).

No written approval from the Contracting Authority will be needed for spending funds related to the (c) component, however all supporting documents must be kept by the Consultant as indicated in Article 25 of the General Conditions for service contracts financed by the EC.

No funds of the Incidental Expenditure budget may be used for fees for experts.

During contract implementation the Consultant may request the Contracting Authority for a transfer of funds from Fees to Incidental Expenditures. Such a change will require prior written approval from the Contracting Authority. Transfer of funds from Incidental Expenditure to Fees will not be possible.

Any subsistence allowances to be paid for missions undertaken as part of this contract from the base of operations in the beneficiary country must not exceed the per diem rates published on the Web site http://europa.eu.int/comm/europeaid/index_en.htm at the start of each such mission

7. REPORTS

7.1. Reporting requirements

The Consultant should refer to Article 26 of the General Conditions. An inception report shall be submitted three months after the commencement date of the contract. Subsequently, progress reports will be submitted every three months during the period of execution of the contract unless otherwise agreed by the EC Project Manager.

Progress reports should respect the format approved by the European Commission (available upon request from the EC Project Manager) and must be accompanied by a corresponding invoice at six monthly intervals.

There must be a final report and final invoice at the end of the period of execution. The draft final report must be submitted at least one month before the end of the period of execution of the contract.

In addition, the cash flow monitoring spreadsheet must be updated and submitted with each of the above reports. The monitoring spreadsheet must contain details of the time inputs of the experts and of the incidental expenditure. The final report must be accompanied by the final invoice and an audit certificate (as defined in Article 30 of the General Conditions and in accordance with the template in Annex VI of the contract) confirming the final certified value of the contract.

The inception, progress and final reports will be prepared in English and translated into Ukrainian, and will follow general Tacis guidelines.

Training materials and reports of short-term specialists referred to above shall be provided by the Consultant to the Contracting Authority in electronic and hard copies.

In addition, notes must be submitted to the EC Project Manager, as frequently as considered necessary by the EC Project Manager, in order to monitor the substance and the quality of the technical assistance. Meetings between the Consultant and the EC Project Manager and other appropriate EU Commission services, will be organised as required.

In addition to the above formal reports, the Consultant shall provide information on project progress as required by the EC Project Manager, and shall regularly inform the EC Project Manager of political, economic or institutional developments of relevance to the project.

The Consultant shall in particular provide the EC Project Manager with copies of all technical reports (including assessment studies, reports for dissemination etc.) and publications produced under the contract in the quantity requested. In addition, before the end of the contract, the Consultant will provide the Contracting Authority with a CD ROM containing all the documents/report/publications produced during the implementation of the project.

No report or document shall be distributed to third parties prior to the approval by the Contracting Authority. The Consultant shall pay particular attention to the confidentiality of data. Reports, as well as press statements, etc, made by the Consultant will make clear that any opinions expressed therein remain those of the Consultant and do not represent the opinion of the European Commission.

Copyright on all reports and other material prepared under this contract shall reside with the Contracting Authority.

7.2. Submission & approval of reports

Reports produced in this project will be submitted by the Consultant to:

The EC Project Manager:	2 copies in English and 1 copy in Ukrainian;
The Project Partner	1 copy in English and 2 copies in Ukrainian;
The National Co-ordinating Unit	1 copy in English and 1 copy in Ukrainian;
The Tacis Monitoring Team	1 copy in English and 1 copy in Ukrainian;

The reports shall be submitted in hard copy and electronic format (as a single Word file). The Project Partner shall be encouraged to submit comments on the report to the EC Project Manager.

The EC Project Manager is solely responsible for the approval of reports.

8. MONITORING AND EVALUATION

The project will be monitored according to standard procedures.

Project monitoring and evaluation will be based on periodic assessment of progress on delivery of specified project results and towards achievement of project objectives.

8.1. Definition of indicators

During the implementation of the contract, suitable objectively quantifiable indicators will be agreed between the Contracting Authority and the Consultant, supported as necessary by the Monitoring Consultant. These may be **quantitative**: measures of quantity, including statistical statements; or **qualitative**: judgements and perceptions derived from subjective analysis. In all cases quantifiable indicators must provide valid, useful, practical and comparable measures of progress towards achieving the expected targets.

8.2. Special requirements

None

Terms of reference

ANNEX A: LOGICAL FRAMEWORK MATRIX

Only the parts specified below are to be completed by Tenderers:

	Intervention logic	Objectively verifiable indicator	Sources of verification	Assumptions
Overall Objective	To improve the effectiveness and cost efficiency of social services in Ukraine	Social parameters and indicators on vulnerability and poverty significantly reduced by the end of the Project Public expenditures and national account "transfer to households" on social assistance.	Statistics and reports prepared by EC and the World Bank National Budget Oblast Policies and budgets	Economic recovery maintained to support affordable resources transfers to Social protection and assistance systems Participation of Private or CBOs in financing a part of social assistance system is not hampered by economic constraints.
Project objectives	1. To increase the capacity of the MOLSP and its regional departments to facilitate the effective implementation of the provisions of the Law on Social Services	Ministry new internal regulations and instructions to departments on implementation of Law and of new models of care available. Agreements delivered to civil society organisations to implement delivery of social services according to MoLSP Quality Standards. MOLSP Staff Training master plan, Job Descriptions and validated curricula from Training Providers available. Number of Social workers managers, practitioners, civil servants and NGO's trained. MoLSP internal budgets increased	MOLSP internal reports World Bank Administrative reform project reports Relevant Project reports and social statistics	Commitment of Government to continue with the social reform and the devolution of responsibilities Parliament continue to support the social reform Increasing MoLSP budget to meet the cost of staff capacity building plan is deemed possible.
	2. To develop and test innovative models of social service provision for population vulnerable groups in two pilot rayons (in Rivno and Volyn oblasts).	Sustainable Community Based Models for alternative social assistance delivery & applying MoLSP quality standards while using private or public funding. Reviewed and adopted Indicators and techniques to assess, analyse and monitor evolution of social	Relevant Project reports and social statistics MOLSP Social services delivery annual reports Province district reports	Active interest by Ministry and participating regional and municipal authorities is maintained. Public response to social cohesion stakes is positive.

Terms of reference

Intervention logic	Objectively verifiable indicators	Sources of verification	Assumptions
	<p>needs (poverty maps, social benefits integrated data base, social assistance budget calculation methods)</p> <p>Public reached by Information Campaign on social services delivery</p> <p>Volume of deliveries of State benefits to institutionalised persons in the selected districts reduced as well as local contributions from Oblast/district and Private increased.</p>		
Results	<p>1.1 Legal basis including by laws, instructions etc needed for the effective implementation of the Law on Social Care Services) reviewed and necessary adjustments proposed.</p> <p>1.2 Capacity of key managers at central, oblasts and rayon levels increased</p>	<p>Official journal MOLSP policy department publication Internal department on Territorial Centre</p>	<p>No legal constraints recorded in the reform of internal organisation of MoLSP.</p>
	<p>Number of staff trained with adapted curricula Internal orders and instructions for the implementation of new alternative social services in the region.</p>	<p>MOLSP reports Staff training assessment form Staff reports Project reports</p>	<p>Staff motivation for implementation and monitoring of the reform of the existing system of social services is maintained</p>
1.3 Quality standards and control procedures including mechanism of accreditation of social service providers developed and introduced	<p>Developed Standards and accreditation procedures for social services providers Number of staff trained in standards and control procedures Number of seminar and information campaigns directed to social service providers. Quality control procedures and instructions for monitoring social service providers activities</p>	<p>Project report Standards working group reports MLSP departments publications MLSP web site information leaflets</p>	<p>Inter-departments cooperation is insured Cooperation with other ministries is possible in standards definitions. Quality Standards (premises, equipment quality, qualifications of staff, organisation & management, audit and internal control,...) can be sustainability applied by Private / Civil society organisations.</p>

Terms of reference

Intervention logic	Objectively verifiable indicators	Sources of verification	Assumptions
<p>1.4 Human resource development plan including job descriptions for managers working in the social sphere (territorial centres, social workers, institutions employees and specialists) reviewed and revised according to the provisions of the new Law</p>	<p>MoLSP Human Resources Development plan include assessment of additional skills and experiences needed for implementation of the Law. Job analysis and job descriptions MoLSP new internal organisation</p>	<p>Human resources department MoLSP Administrative forms on Job description MoLSP new organisation chart Project reports, Interviews</p>	<p>MoLSP HR development Plan meets staff personal development and career requirements Discrepancies between existing qualification and those required by Job Descriptions are reduced by the Training Master Plan.</p>
<p>1.5 Comprehensive curricula for professional social workers and social service providers developed and tested in pilot rayons</p>	<p>Curricula developed and agreed by MoLSP. Number of Training sessions conducted with curricula certified/validated by the MoLSP. Number of Workshops seminars held</p>	<p>MOLSP training department publications on revised curricula Training provider contracts Project reports</p>	<p>Curricula are developed according to the new internal organisation.</p>
<p>1.6 Capacity of the MOLSP to launch public awareness and dissemination campaigns to aware wide public and private support for the required social service reforms increased</p>	<p>Number of Staff trained in Public communication campaign. Number of Information centres opened, leaflets published, Seminars, press conference, public media meetings held</p>	<p>MOLSP Information communication department Project reports</p>	<p>Public interest for solidarity and social cohesion is maintained.</p>
<p>2.1 Scope, financial mechanisms and organizational structures of the existing social services assessed</p>	<p>Reviews and assessments of rules and methods to identify eligibility to social assistance, to set and allocate budgets and to deliver benefits. Review of mechanisms set for eligibility to access care institutions (Day centre, permanent accommodation, rehabilitation centres.) Review of applications for social assistance and delay in delivery of benefits.</p>	<p>Review of "delivery of social assistance" published. Project reports</p>	<p>Institutions providing care for specific categories are involved in the review</p>
<p>2.2 Needs on social services assessed and</p>	<p>Poverty and social vulnerability</p>	<p>Project reports</p>	<p>Cost of living indicators from other</p>

Terms of reference

Intervention logic	Objectively verifiable indicators	Sources of verification	Assumptions
<p>priorities defined</p>	<p>identification indicators established Categories of vulnerable groups identified (Elderly, disabled, Single parent family, child without care, homeless adult/children...non exhaustive list) Needs for social assistance of each category defined (cash benefit, foster families, accommodation in day centres,...)</p>	<p>Publication of the review on "needs for social assistance"</p>	<p>Ministries and statistical organisations made available to the MoLSP.</p>
<p>2.3 Methodology to define budget for social services corresponding to the needs and financial capacity of the district and community level developed and implemented</p>	<p>District administration staff trained And supported by MoLSP staffs in budget making and priorities definition. Guidelines for budget definition set in new MoLSP organisation.</p>	<p>Provinces Districts/ territorial centre meeting & reports Project reports Amended Local budgets on social assistance</p>	<p>District / commune Budget planning exercise keep social cohesion as a priority. Economic performances of districts generate enough revenues for social transfers according to needs. Priorities in social assistance understood by budget makers. Cost of living available per province</p>
<p>2.4 List of services covered by public funds elaborated and proposed for approval</p>	<p>Eligibility criterion to state /Province/ district Free Social Assistance. List of social services and related benefits covered by public funds.</p>	<p>MOLSP/Project reports Territorial centre lists</p>	<p>Contribution to services do not prevent the most vulnerable to access them</p>
<p>2.5 List of services provided against payment elaborated and proposed for approval</p>	<p>Standardised costs for services established. List of services eligibility and costs for final users.</p>	<p>MOLSP/Project reports Territorial centre lists</p>	<p>Budgetary constraint will not restrict: to bridge gap between 2.2 & 2.3, to lead to integrated and coherent approach based on the possibilities offered by the new law available at rayon level</p>
<p>2.6 Models of social service delivery developed and tested</p>	<p>Number of models developed by civil society and communities Number of models of integrated delivery of social benefit tested according to instructions of the MoLSP.</p>	<p>Project reports MoLSP internal procedure for Law implementation and monitoring of integrated delivery</p>	<p>MOLSP Internal monitoring reports Project reports</p>
<p>2.7 Mechanism for the supervision and monitoring of social service provision implemented</p>	<p>Number of Staff trained in territorial centre Monitoring format, Procedures guidelines and organization chart of MoLSP available & applied</p>	<p>Indicators on social exclusion and poverty</p>	
<p>2.8 Local administrative capacity to organize the delivery of social services to</p>	<p>Nb Staff trained in vulnerable group identification and Territorial Center</p>		

Terms of reference

Intervention logic	Objectively verifiable indicators	Sources of verification	Assumptions
the most vulnerable group of population enhanced in two rayons	management. Integrated data base on social service delivery developed. Reduced delays between identification/application/delivery	Nature and volume of social assistance delivered	
2.9 Capacity of staff of rayons and oblast administration to make use of public media to improve the process of informing the public of changes and developments in social assistance sphere enhanced	Number of staff trained in Information Communication Number of public meeting held Number of persones / institutions informed	Project reports Information campaign contents	Budgets for information and communication are available
2.10 Public awareness campaign on social service reform to encourage community based initiatives launched	Number of public campaigns Number of application forms , requests for agreement from communities recorded .	Project reports CBOs, Civil society, Private, application for pilot projects.	
2.11 Pilot projects for the provision of social services supported by micro-grants on a competitive base, technical advice and expertise.	Number of pilot projects implemented and eligible to micro-grant Number strengthening programmes for pilot project conducted by MoISP staffs and project staff.	Civil society applications & reports Cost/services ratio Local and regional department of the MLSP monitoring report.	Civil society can handle sustainable pilot projects
	Specification of inputs	Specification of resources¹	
Activities	<i>To be completed by Tenderers</i> 1.1. 1.2. 1.3. ... 2.1. 2.2. 2.3. ...	<i>To be completed by Tenderers</i> Tenderers should indicate here the amount of expertise time in working days per activity proposed indicating the key expert(s) involved.	<i>To be completed by Tenderers</i>

¹ Tenderers are reminded that the information required in this matrix is part of the Technical offer and should not contain any financial information

Terms of reference

Intervention logic	Objectively verifiable indicators	Sources of verification	Assumptions
			To be completed by PM 1. 2. 3.

Preconditions:

ANNEX B: ESTIMATED WORKING DAYS PER MONTH TABLE

To be completed by Tenderers

	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7	Month 8	Month 9	Month 10	Month 11	Month 12	Year Cumulative total
<i>Long-term international experts</i>													
- Team leader													0
- Senior experts													0
- Junior experts													0
<i>Long-term local experts</i>													
- Senior experts													0
- Junior experts													0
<i>Short-term international experts</i>													
- Senior experts													0
- Junior experts													0
<i>Short-term local experts</i>													
- Senior experts													0
- Junior experts													0

² Tables are to be provided for the entire project duration, further months should be added if necessary.

Terms of reference

Tenderers are reminded that the information required in this table is part of the Technical offer and should not contain any financial information.