

Terms of reference (ToRs) for the procurement of services below the EU threshold

Upgrade of MTAI's E-learning Platform and Development of an E-course on Participatory Budgeting

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List of abbreviations

BMZ	German Federal Ministry for Economic Cooperation and Development
GGLD	Good Governance for Local Development South Caucasus
HRM	Human Resources Management
LMS	Learning Management System
MoF	Ministry of Finance
MTAI	Ministry of Territorial Administration and Infrastructure
PB	Participatory Budgeting
ToRs	Terms of Reference

1. Context

The “Good Governance for Local Development South Caucasus” (GGLD) Programme advises and supports respective partner organisations at national, regional (sub-national) and local levels in Armenia and Georgia in the implementation of cooperation initiatives towards improved local governance. It supports the improvement of frame conditions, addresses regional (sub-national) governance issues and works towards the improvement of municipal services and citizens’ participation at municipal level.

The Programme is implemented on behalf of the German Federal Ministry for Economic Cooperation and Development (BMZ) and in Armenia co-financed by the Swiss Agency for Development and Cooperation (SDC) through its “Improvement of the Local Self-Governance System in Armenia” Programme. It is carried out in close cooperation with the Ministry of Territorial Administration and Infrastructure (MTAI) as the main political partner.

Background

One results area of the Programme is the improvement of human resources management (HRM) in local self-government bodies. In the recent years, the Programme has provided extensive methodological and technical support to MTAI for establishing a viable HRM system, that would allow for effective capacity development and continuous learning for municipal servants. A key element of this system is e-learning. In order to provide convenient learning opportunities for municipal servants, on the one hand, and to ensure the sustainability of Programme interventions in various areas of local governance, on the other hand, since 2019 the Programme has been supporting MTAI in the establishment and operation of a Moodle-based Learning Management System (LMS, www.elearning.mta.gov.am), offering online access to training materials to municipal servants.

As of November 2024, 14 e-learning courses have been developed on various topics relevant for municipal service, such as annual planning and budgeting, local economic development, Municipal Management Information System (MMIS) and accounting, employing a wide range of tools, including screen recording (video tutorial), voiceovers, interactive slides, questionnaires, etc. At the same time, the system is also used to post learning materials in Microsoft PowerPoint and other formats.

The e-learning system, developed in 2019, is based on Moodle version 3.7, which, over time, has become increasingly limited in terms of functionality and user experience. With the release of Moodle 3.9 and later 4.2, the gap between the platform’s existing capabilities and those offered by modern e-learning solutions has grown significantly, raising concerns that the system may become outdated and even dysfunctional by 2025 if left unaddressed. The latest Moodle version introduces several improvements, including enhanced accessibility, streamlined navigation, and more robust security features, all of which are essential for meeting the evolving training needs of municipal staff. To maintain the platform’s relevance, GIZ has committed to supporting the MTAI in upgrading the system to the latest version. This update will not only ensure continuity of learning for municipal staff but also allow MTAI to leverage advanced Moodle features for a more effective and engaging training experience.

Furthermore, GIZ intends to develop an interactive e-learning course on Participatory Budgeting (PB). In October 2022, Armenia's government approved an Action Plan for the "Open Government Partnership" Initiative, with the fifth commitment focused on implementing PB at the local level. Key activities included introducing an electronic PB system, developing a methodological guideline, piloting in three municipalities, and raising public awareness. GGLD supported MTAI and the Ministry of Finance (MoF) in this effort. The electronic PB platform, integrated with MMIS, was introduced in all municipalities, including Gyumri. A working group with pilot municipalities (Abovyan, Ashtarak, Armavir, and Jermuk), MTAI, MoF, and civil society

coordinated the 2023 PB pilot. Four municipalities allocated PB budgets, with GGLD co-financing citizen-proposed initiatives in Abovyan, Armavir, and Jermuk. Building on the pilot's success, the government approved a decree in November 2023 for subventions to municipalities for PB projects, allocating 500 million AMD for 2024. Additionally, 13 municipalities initiated PB for 2024, supported by GGLD using the 2023 methodology. The e-course is to be developed using the existing manual and training materials (annexed to this ToR). It will equip municipal staff with essential knowledge and tools to engage citizens in the budgeting process, promoting transparency, accountability, and collaborative decision-making. The e-course should provide interactive modules covering core concepts, best practices, and practical steps for implementation.

2. Objectives of the assignment

The overall objective of this assignment is to enhance the effectiveness and sustainability of the e-learning system and enriching it with a new e-course on PB, thereby empowering MTAI to offer accessible, and continuously updated online training that supports the professional growth and capacity development of municipal staff across Armenia.

The specific objectives include:

- Conducting upgrade and migration to latest Moodle version.
- Ensuring compatibility and functionality testing.
- Building interactive and engaging learning experience for municipal staff on the topic of PB.
- Training MTAI's staff for sustainable system management.
- Providing post-upgrade support and monitoring.

3. Tasks to be performed by the contractor

The contractor is responsible for providing the following services:

Task 1. Development of E-course on Participatory Budgeting

- Review and familiarize with the available materials (guidelines, standards, style guides) provided by GIZ.
- Recommend appropriate authoring tools for the development of the e-learning modules, considering the needs for interactivity and accessibility.
- Submit the proposed learning methods and tools for approval by GIZ.
- Based on the existing PB manual and training materials (final version to be provided by GIZ at the start of the assignment), define the learning nuggets.
- Develop interactive e-learning materials using the tools agreed with GIZ. The Contractor should possess the necessary software licenses (if applicable) for the development of the materials; GIZ does not assume these costs.
- Submit the e-learning materials for GIZ's approval before proceeding to integration.
- Upload the approved e-learning materials into the LMS and configure the system as necessary.

Task 2. Moodle System Assessment and Development of Upgrade Plan

- Conduct an assessment of the current Moodle 3.7 installation, including plugins, data structure, and existing functionalities.
- Prepare a detailed upgrade plan, outlining the steps required to transition to the latest Moodle version while minimizing downtime and ensuring data integrity.

- Develop a risk mitigation strategy to address potential issues during the upgrade, with contingency plans in case of data loss or system incompatibilities.

Task 3: Platform Upgrade, Data Migration, Testing and Security Enhancement

- Install and configure Required Software for Moodle: Apache, MySQL, and PHP
- Download and set up the latest Moodle version, migrating all existing data, configurations, and content.
- Install all the necessary plugins, including Armenian language support (if possible, transfer all the information, currently translated and available on the existing version). Identify and install alternative plugins and themes if any are no longer supported.
- In case the current theme is incompatible with the latest version, identify a compatible theme, design and perform customisations.
- Export and transfer user database, import users to the new Moodle server,
- Transfer courses from the old Moodle server and restore on the new one.
- Conduct comprehensive testing of the upgraded platform to ensure all functionalities work as expected, including course access, assessments, reporting, and user management.
- Identify and resolve any bugs, performance issues, or incompatibilities resulting from the upgrade.
- Implement the latest security protocols available in the latest Moodle version to safeguard against vulnerabilities, such as SSL certificate.
- Optimize the platform's performance and ensure compatibility with any caching or acceleration tools in the new version.

Task 4: Training and Technical Backstopping to MTAI

- Provide training sessions for MTAI's staff (up to 5 persons) on administering and troubleshooting the upgraded platform.
- Provide a post-upgrade support to address any issues or adjustments following the transition.
- Monitor the system for stability and performance, offering assistance as needed to ensure smooth, ongoing operation of the platform.

Any further task arising during the implementation of the assignment needs prior agreement between the Contractor and GIZ.

Certain milestones, as laid out in the table below, are to be achieved during the contract term. All deliverables are to be submitted in English (language).

Deliverables		Expert days (up to)	Deadline
Task 1	E-course on Participatory Budgeting	35	March 4, 2025
Task 2	Moodle System Assessment and Development of Upgrade Plan	5	April 8, 2025
Task 3	Platform Upgrade, Data Migration, Testing and Security Enhancement	30	May 27, 2025

Task 4	Summary report on Training and Technical Backstopping to MTAI	10	October 28, 2025
Total		up to 80	

Period of assignment: from December 2024 until October 2025.

The Contractor is obliged to perform the assignment based on this ToR while ensuring close contact and cooperation with GIZ throughout the implementation of the assignment. The Contractor is further required to submit all the deliverables to GIZ. Approval from GIZ is mandatory at each stage before moving on to the next level.

Please note that GIZ security regulations, concerning operations in some areas of Tavush and Gegharkunik, Vayots Dzor, and Syunik provinces, are based on the travel warning issued by the German Federal Foreign Office and will be provided upon request.

4. Concept

In the tender, the tenderer is required to show *how* the objectives defined in Chapter 3 (Tasks to be performed) are to be achieved, if applicable under consideration of further method-related requirements (technical-methodological concept). In addition, the tenderer must describe the project management system for service provision.

Note: The numbers in parentheses correspond to the lines of the technical assessment grid.

Technical-methodological concept

Strategy (1.1): The tenderer is required to consider the tasks to be performed with reference to the objectives of the services put out to tender (see Chapter 1) (1.1.1). Following this, the tenderer presents and justifies the explicit strategy with which it intends to provide the services for which it is responsible (see Chapter 2) (1.1.2).

Processes (1.4): The tenderer is required to describe the key processes for the services for which it is responsible and create an operational plan or schedule (1.4.1) that describes how the services according to Chapter 2 (Tasks to be performed by the contractor) are to be provided.

5. Personnel concept

The tenderer is required to provide personnel (an expert pool consisting of 3-5 experts) who are suited to fulfilling the tasks described, on the basis of their CVs (see Chapter 7).

The below specified qualifications represent the requirements to reach the maximum number of points in the technical assessment.

Team leader

Tasks of the team leader

- Pre-mission preparation of the project / Preparation phase
- Overall responsibility for the advisory packages of the contractor (quality and deadlines)
- Coordinating and ensuring communication with GIZ, partners and others involved in the project

- Personnel management, in particular identifying the need for short-term assignments within the available budget, as well as planning and steering assignments and supporting local and international short-term experts
- Regular reporting in accordance with deadlines

Qualifications of the team leader

- Language (2.1.2): C2 proficiency level in Armenian; B2 proficiency level in English
- General professional experience (2.1.3): 10 years of professional experience in project management
- Specific professional experience (2.1.4): 5 years of professional experience in designing and implementing learning management systems
- Leadership/management experience (2.1.5): 7 years of management/leadership experience as project team leader or manager
- Development cooperation experience (2.1.7): 5 years of experience of implementing donor-funded projects

Short-term expert pool (3-5 experts)

Tasks

- Develop interactive, accessible e-learning modules for Participatory Budgeting (Task 1)
- Assess Moodle 3.7 and handle backup and migration of Moodle data, ensuring data integrity (Task 2)
- Upgrade and optimize Moodle 3.7 to the latest version, ensuring system compatibility, and implement security protocols (Task 3)
- Conduct post-upgrade monitoring, provide training, and ongoing technical support for MTAI staff (Task 4)

Qualifications

- General professional experience (2.6.3): 7 years of experience in e-learning, Moodle administration, or IT system upgrades
- Specific professional experience (2.6.4): 5 years of experience and technical expertise in production of e-learning materials, including use of voiceover technique, and administration of Moodle-based Learning Management Systems.

6. Costing requirements

Specification of inputs

Fee days	Comments
Fee of Experts	Expert fee(s), per working day and in total
Travel expenses	Comments
Overnight allowance in country of assignment	Accommodation is reimbursed by 5.000 AMD per night as a lump sum or upon provision of evidence.
Transport	Comments

Travel expenses (train, car)	Travelling by private car is reimbursed with 120 AMD per km as a lump sum or upon provision of evidence-based on the market price of transportation service.
Other costs	Comments
Other costs	Any other expenses essential for implementing the assignment, e.g., costs for materials. Evidence of these expenses must be submitted.

7. Requirements on the format of the tender

The structure of the tender must correspond to the structure of the ToRs. In particular, the detailed structure of the concept (Chapter 3) should be organised in accordance with the positively weighted criteria in the assessment grid (not with zero). The tender must be legible (font size 11 or larger) and clearly formulated. It must be drawn up in English (language).

The complete tender must not exceed 15 pages (excluding CVs and title page/ list of contents). If one of the maximum page lengths is exceeded, the content appearing after the cut-off point will not be included in the assessment. External content (e.g. links to websites) will also not be considered.

The CV of the personnel proposed in accordance with Chapter 4 of the ToRs must be submitted using the format specified in the terms and conditions for application. The CV shall not exceed 4 pages. They must clearly show the position and job the proposed person held in the reference project and for how long. The CV shall also be submitted in English (language).

Please calculate your financial tender based exactly on the parameters specified in Chapter 5 Quantitative requirements. The contractor is not contractually entitled to use up the days, trips, workshops or budgets in full. The number of days, trips and workshops and the budgets will be contractually agreed as maximum limits. The specifications for pricing are defined in the price schedule. The financial proposal must be submitted separately from the technical proposal.

Annexes: Manual on Participatory Budgeting, including annexes in Armenian language