

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

PUBLIC

<b>Support to the Implementation of Civic Monitoring in 6 municipalities</b>	<b>Project number/ cost centre:</b> 23.2131.3-001.00
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## **0. List of abbreviations**

IMD	Integrated Municipal Development in Armenia
GIZ	Deutsche Gesellschaft für Internationale Zusammenarbeit GmbH
BMZ	German Federal Ministry for Economic Cooperation and
SDC	Swiss Agency for Development and Cooperation
MTAI	Ministry of Territorial Administration and Infrastructure
OGP	Open Government Partnership
PB	Participatory Budgeting
NGO	Non-Governmental Organization
MMIS	Municipal Management Information System
CSO	Civil Society Organization
DC	Development cooperation
CV	Curriculum vitae
ToRs	Terms of reference

## 1. Context

### Brief information on the project

The Integrated Municipal Development in Armenia (IMD) project aims to enhance the efficiency, effectiveness, and citizen-orientation of local self-governments. By advising and supporting partner organizations, the project seeks to improve the framework for local development while closely collaborating with selected municipalities known as transformation partners. These efforts focus on implementing reforms to enhance service quality and accessibility, foster local economic growth, optimise local self-governance, and empower citizens in municipal decision-making.

Throughout the project duration from April 2024 to March 2027, success stories and lessons learned from transformation partners will be shared through various exchange platforms, ensuring the replication of successful models for integrated municipal development across Armenian local self-governments.

The project is implemented by GIZ on behalf of the German Federal Ministry for Economic Cooperation and Development (BMZ) and co-financed by the Swiss Agency for Development and Cooperation (SDC). It is carried out in close cooperation with the Ministry of Territorial Administration and Infrastructure (MTAI) as the main political partner.

### Background Information

In October 2022, the Government of Armenia approved the 2022–2024 Action Plan of the Republic of Armenia under the OGP initiative. One of the key commitments of this plan—Commitment 5—was the introduction of PB at the local level, marking a significant step towards institutionalizing citizen participation in local decision-making.

Following this commitment, PB was piloted in 4 municipalities in 2023, expanding to 21 municipalities in 2024, and is expected to reach around 60 municipalities in 2025, 21 of which are receiving state co-financing through subventions. This rapid scale-up demonstrates growing national momentum and commitment to deepening democratic governance in Armenia.

The methodology for PB implementation in Armenia outlines a structured, multi-phase process that includes: preparation and planning, awareness raising, submission of project ideas by citizens, evaluation of proposed ideas, public hearings, voting and implementation with reporting incorporated into all the phases of the process.

As the number of municipalities engaging in PB increases, ensuring the transparency, inclusiveness, and quality of the process becomes increasingly critical. To this end, the introduction of citizen monitoring and evaluation mechanisms is essential. Citizen oversight not only enhances public trust but also provides valuable feedback to local governments on the effectiveness, fairness, and impact of PB processes.

Against this backdrop, the Project is seeking for a qualified CSO support with designing the PB civic monitoring approach and tools and piloting in 6 municipalities. The pilot will help assess the feasibility, relevance, and sustainability of community-led monitoring approaches. The insights and lessons learned from this initiative are expected to inform scaling and institutionalization of civic monitoring practices across other municipalities in Armenia, thereby reinforcing accountability at local level.

## **2. Tasks to be performed by the contractor**

The contractor is responsible for providing the following services:

### **Task 1: Design the Civic monitoring Approach and Tools**

- Develop a practical and context-specific methodology for civic monitoring tailored to the Armenian PB process, covering all the phase of the PB cycle, where relevant.
- Design tools such as checklists, questionnaires, observation forms, and feedback templates for monitoring each phase of the PB cycle.
- Develop clear requirements for integrating collected data into the PB subsystem of the MMIS.
- Ensure tools are user-friendly, inclusive, and adaptable to different municipal contexts.

### **Task 2: Train and Support Local Citizen Monitors from 6 municipalities of Noyemberyan, Akunq, Talin, Tashir, Martuni and Gavar**

- Identify and mobilize potential citizen monitors (up to 10 in each municipality) in collaboration with municipalities and local actors.
- Conduct training sessions to build capacity in monitoring methods, ethical standards, and reporting practices.
- Provide ongoing guidance and mentorship to citizen monitors throughout the process.
- Ensure inclusive participation, with attention to gender, youth, and vulnerable groups.

### **Task 3: Coordinate Monitoring Activities in the 6 Municipalities**

- Support the implementation of monitoring during all phases of the PB cycle.
- Ensure systematic collection of data and observations from monitors.
- Facilitate effective communication and coordination between monitors, municipal staff, and other stakeholders.
- Ensure timely and accurate entry of monitoring data into the MMIS PB subsystem.

### **Task 4: Document and Analyse Findings**

- Consolidate and analyse monitoring reports and feedback collected across the six municipalities.
- Identify trends, best practices, and challenges in the PB implementation process.
- Produce a comprehensive summary report with findings, conclusions, and actionable recommendations.
- If necessary, update the respective section in PB methodological Guideline.

### **Task 5. Integrate Civic Monitoring into PB Methodological Guideline**

- Draft dedicated section or an appendix on civic monitoring within the existing PB Methodological Guideline as a core component of the PB process.
- Define roles and responsibilities for civic actors, including monitors, CSOs, and other stakeholders at each phase of the PB process.
- Specify the expected frequency, content and format of monitoring reports to ensure regular, structured feedback is provided to both the municipality and the public.
- Provide guidance on how municipal staff and community monitors can collaborate effectively, including mechanisms for feedback loops and follow-up on findings.
- Incorporate tools and templates to facilitate consistent and structured civic engagement.
- Ensure alignment with the MMIS framework and legal/regulatory requirements where applicable.

Certain milestones, as laid out in the table below, are to be achieved during the contract term:

<b>Milestones/process steps/partial services</b>	<b>Deadline</b>
Task 1: Design the Civic monitoring Approach and Tools	July 30, 2025
Task 2: Train and Support Local Citizen Monitors	August 30, 2025
Task 3: Coordinate Monitoring Activities in the Municipalities	March 15, 2026
Task 4: Document and Analyse Findings	May 15, 2026
Task 5: Integrate Civic Monitoring into PB Methodological Guideline	September 10, 2025

Period of assignment: from July 2025 until June 2026.

### 3. Concept

In the tender, the tenderer is required to show *how* the objectives defined in Chapter 2 (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.

#### 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 Context) (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 Tasks to be performed) (1.1.2).

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.

### 4. Personnel concept

#### Team leader

##### Tasks of the team leader

- 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 short-term experts.
- Oversight of the implementation.
- Regular reporting in accordance with deadlines.

### Qualifications of the team leader

- Education/training (2.1.1): university degree (German 'Diplom'/Master) in Social Sciences, Economics, Management or other degree relevant for the assignment
- General professional experience (2.1.3): 7 years of professional experience in the civil society sector.
- Specific professional experience (2.1.4): 3 years of professional experience in supporting Participatory Budgeting introduction or implementation at local level.
- Leadership/management experience (2.1.5): 7 years of management/leadership experience as project team leader or manager in a company
- Development cooperation (DC) experience (2.1.7): 5 years of experience in working in/cooperating with DC projects

### **Short-term expert pool with 4 members**

For the technical assessment, an average of the qualifications of all specified members of the expert pool is calculated. Please send a CV for each pool member (see below Chapter 7 Requirements on the format of the bid) for the assessment.

### Tasks of the short-term expert pool

- Design the Civic monitoring Approach and Tools
- Train and Support Local Citizen Monitors
- Coordinate Monitoring Activities in the Municipalities
- Document and Analyse Findings
- Integrate Civic Monitoring into PB Methodological Guideline
- Support in reporting in accordance with the deadlines.

### Qualifications of the short-term expert pool

- Education/training (2.6.1): university degree (German 'Diplom'/Master) in Social Sciences or other degree relevant for the assignment
- General professional experience (2.6.3): 5 years of professional experience in activating citizens, including women, youth and vulnerable populations, for community development initiatives in municipalities.
- Specific professional experience (2.6.4): 3 years of professional experience in supporting PB introduction or implementation at local level.

The tenderer must provide a clear overview of all proposed short-term experts and their individual qualifications.

## **5. Costing requirements**

### **Assignment of personnel and travel expenses**

Specification of inputs

Fee days	Number of experts	Number of days per expert	Total	Comments
Team Leader	1	20	20	
Short-term expert pool	4	25	100	
Transport	Quantity	Number	Total	Comments
Travel expenses		6000	6000 km	The number of kilometres is fixed for all tenderers. The travel costs are reimbursed by 120 AMD per km upon provision of evidence. The travel expenses should not be included in the financial offer to be submitted.
Overnight allowance in country of assignment	-	-	-	Fixed budget in the amount of 2,600,000 AMD is defined for overnight allowance. Overnight accommodation costs are reimbursed by 5,000 AMD per night as a lump sum or upon provision of evidence based on market prices for overnight accommodation. The accommodation modalities should not be included in the financial offer to be submitted.
Training sessions/ Workshops	2	-	-	Fixed budget in the amount of 3,000,000 AMD is defined for up to 2 training sessions/workshops are anticipated for capacity building of monitors. The costs should not be included in the financial offer to be submitted. Payments will be made against evidence.

## 6. Inputs of GIZ or other actors

GIZ and/or other actors are expected to make the following available:

- Information on assignments and project context

- Task delivery takes place within the framework of trainings, events or workshops organized by GIZ and/or partners

## **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.

The complete tender must not exceed 10 pages (excluding CVs). 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 CVs 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 CVs shall not exceed 4 pages each. They must clearly show the position and job the proposed person held in the reference project and for how long. The CVs can also be submitted in English.

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.