**Terms of Reference**

**Organizational Development Training Courses for Svaneti DMO**

**Introduction**

The Austrian Development Agency (ADA), with the financial support from the Delegation of the European Union (EU), Government of Sweden and the Federal Government of Austria, implements the “Green Economy: Sustainable Mountain Tourism and Organic Agriculture (GRETA)” project. The project implements activities to [1] Improve the business environment for organic agriculture and mountain tourism; [2] create new and improved income opportunities in sustainable mountain tourism and organic agriculture and [3] strengthen the capacity of stakeholders active in these sectors. GRETA is implemented between 2019 and 2023 in selected regions of Georgia covering the Mestia, Lentekhi, Tsageri, Oni, Ambrolauri, Sachkhere, Chiatura and Tkibuli municipalities.

**Problem Identification**

Tourism utilizes both public and private sector resources. For an inclusive and sustainable form of tourism within a destination area, both the public and private sector need to work together to develop tourism in a meaningful way. This cooperation and coordination are important in areas that are popular with tourists (critical mass), have a diverse natural & cultural resource base, growing number of enterprises and substantial income from and employment in, the tourism sector. The coordination between public and private sector stakeholders is even more important when environmental and climate change pressure starts to occur for which mountain areas are vulnerable.

Key issues for the growth and effective management of tourism in a specific destination are therefore:

* Operation/Brand: The destination should be recognized as a single entity operating under specific values and approach reflected in a unique brand/value proposition.
* Information/ Promotion: The destination should communicate a common message to both its residents and industry stakeholders as well as (potential) visitors about the diversity, quality and value of tourism.
* Livelihood coordination: Recognizing that tourism is not the only livelihood activity of residents in the area, but that it most likely effects and impacts all residents, there need to be coordinated efforts that safeguard the livelihood of all.

To address and overcome these multi-disciplinary challenges, it is a growing global practice for relevant stakeholders to come together as a **Destination Management Organization (DMO).**

The stakeholders in such an organization should comprise of:

* Government – as custodian of the mountains, rivers, forests, etc. in the public domain and with a mandate to create enterprise & employment opportunities as well as creating economic linkages along the value chain, establish a tax base, provide adequate services and ensure the welfare and wellbeing (safety) of residents and visitors;
* Tourism Entrepreneurs and SMEs – who seek income and a fair competition with clear rules & regulations (medium-long term) to enable their operation as well as support infrastructure of the right capacity and reliable service delivery like water and electricity (at fair rates).

The stakeholders should recognize the expectations of residents – who seek jobs and jobs/ income generating opportunities, as well as (potential) visitors, as target audience looking for a quality experience in a safe and secure destination that offers value for money and is easily accessible.

**Purpose of the Assignment**

The purpose of the assignment is for a training firm or an individual expert to conduct the following professional trainings courses for Svaneti DMO “ShanLand”, plus tourism professionals resident in Upper and Lower Svaneti.

All trainings will be conducted physically in Mestia, Georgia.

The responsibility with selection and renting of the training venue, as well as providing all necessary study materials rests with the service provider and should be envisaged in the budget.

**Organizational Development Training contents:**

1. Organizational Management
2. Fundraising and Proposal Writing
3. Project Cycle Management
4. Financial Management of Grant Projects
5. Organizing:
* Conference
* Events
* Trainings

**Practical course outcomes:**

* Trainees will strengthen theoretical and practical knowledge of organizational management, fundraising and proposal writing, project cycle management, financial management, event organizing and how to apply lessons learned in their practical work.
* Trainees are aware of international organizational and project management standards.
* Trainees improve their personal skills in management, fundraising and event organizing.

**Structure:**

The course will be divided into **FIVE** modules.

For **each module** the following information should be provided:

* Objective(s)
* Duration
* Contents
* Objective/aim
* Lessons (average duration of each lesson)
* Exercise
* Learning outputs
* Structure
* Methodology
* Initial survey
* Final survey
* Outline

For each module included in the course it will be necessary to prepare and submit the detailed curriculum according to the **format below**. Each module will have a separate teacher. CV of each teacher should be included in the application package.

**MODULE 1. Organizational Management**

**The objectives of the training are:**

* Help the trainees …………………………………
* Provide the trainees with relevant knowledge on ……………………….
* Provide the trainees with relevant attitude, knowledge, and skills for implementing …………………………………

The **aim** of this module is to ………………………………… and is split in the following lessons and exercises:

**Lessons:**

………………………….

……………………………

………………………….

**Exercises:**

………………………….

……………………………

………………………….

**Module learning outputs**

By the end of the module the following outputs should be achieved:

……………………………………….. explained

……………………………………………….. described

……………………………………………. illustrated

**Structure and methodology**

The training lasts ………. days divided in **5 modules**. Each module includes from …………… to …………….. lessons; the modules include lectures and working groups, which are held in plenary. The thematic lessons are carried out with presentations and opportunities are created for the exchange of questions and answers between the trainer and the trainees. The working groups are structured to guide the exchange through questions that facilitated the process of individual reflection and group dynamics. The methodology is participatory, participant-centered and designed to encourage exchange among the participants. An initial and a final survey are developed and distributed to monitor the learning process of the participants. The results of the surveys are presented in the following modules. The initial survey assesses participants' expectations, motivations and knowledge of different topics. At the end of the training, a survey is conducted to evaluate: satisfaction of expectations, fulfillment of the training's objective, the instruments used, the contents and their usefulness. Additionally, through a self-assessment, the knowledge acquired is estimated, considering the degree of knowledge previously expressed in the initial survey. Attendance Register (sign-up sheet) is provided to the participants to be filled in and signed.

**Duration:** Each module is estimated to take ………………….. working days

**Average duration of each lesson:** Each lesson is estimated to take from 30 to 60 minutes

**Language:** The training is conducted in Georgian.

**Target group (trainees):** Svaneti DMO ”, plus tourism professionals resident in Upper and Lower Svaneti.

 Maximum 20 participants per module. Participants should be experienced professionals or practitioners with ……………… years of working experience in the fields of ………………………………….

**Resource persons:** ……………….. consultant expert in ………… and 1 facilitator (preferably a senior competent expert in relevant field, respected with a strong reputation)

**Training methods:** Self-introductions, interactive plenary presentations and discussions

**Training materials required and provided by the Consultant:** projector, paper, marker pens, whiteboard, etc.

**Outline:**

Each of the **5 modules** has the same outline consisting of seven parts. These parts are:

* Introduction to the module - context and background to training needs, knowledge and skills gaps being addressed
* Module learning outputs - what trainees are expected to learn
* Module target group - trainee categories
* Module duration - minimum number of hours of exposure to materials
* Module summary - sequence of lessons, training methods, materials and duration
* Facilitators’ guideline - detailed sessions, training methods, materials and session guides
* Module evaluation.

**Steps:**

* Select an appropriate location with training facilities
* Open and maintain a register with lists of trainees/resource persons making sure that the number of trainees per session would not exceed 20
* Prepare sets of brochures covering the thematic areas for distribution among interested parties at the end of the module
* Appoint 1 facilitator for each module
* Arrange meeting(s) between the consultant expert and the facilitators prior to the training programme to agree on the training objectives and the contents
* Prepare budget(s) for the training programme (including estimated cost of refreshments, and printing of documents, handouts, brochures, and stationery, required for the training activities)

**Timeframe:**

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Organizational Development Training | Hours | locations | W1 | W2 | W3 | W4 | W5 |
| Module 1: Organizational Management |  |  |  |   |   |   |   |
| Module 2: Fundraising and Proposal Writing |  |  |  |   |   |   |   |
| Module 3: Project Cycle Management |  |  |  |  |   |   |   |
| Module 4: Financial Management of Grant Projects |  |  |  |  |  |  |  |
| Module 5: Event Organizing |  |  |  |  |  |  |  |

**1st May – 9th June 2023**

**Tasks to be conducted:**

Under this TOR the service provider should conduct **five training modules**. The following tasks should be fulfilled:

* To prepare an inception report and present detailed plan of action and timeline; The inception report should include the curricula for each of the courses to be conducted separately; The CVs attached for the trainers for each course
* Desk research to familiarize themselves with current status and activities of Svaneti DMO. The service provider will be requested to read the relevant documents provided by GRETA as well as conduct an introductory meeting (could be online) to better understand the needs and capacity of members of Svaneti DMO
* To conduct the training course according to the Curriculum approved by GRETA.
* After completion of the course submit the narrative report with the detailed description of actions taken and progress made. Attach signed attendance lists, photo/video proofs, certificates awarded if any, as well invoice for service reimbursement by GRETA

**Deliverables:**

* **Inception report** that includes detailed plan of action and timeline, as well as selected training participants additional to 5 DMO staff members; The inception report should include the curricula for each of the courses to be conducted separately (Organizational Management, Fundraising and Proposal Writing, Project Management, Financial Management of Grant Projects); as well as CVs attached for the trainers of each course, should be submitted 5 days after signing the contract.
1. Conduct the training course in **Organizational Development** (minimum 5 training days, 15 hours). This will be evidenced by the submission of the narrative report with the detailed description of actions taken and progress made. Attach signed attendance lists, photo/video proofs, pre and post evaluation tests, certificates awarded if any, as well invoice for service reimbursement by GRETA (In coordination with GRETA project, integrate visibility materials during the entire training process)
2. Conduct the training course in **Fundraising and Proposal Writing** (minimum 5 training days, 15 hours). This will be evidenced by the submission of the narrative report with the detailed description of actions taken and progress made. Attach signed attendance lists, photo/video proofs, pre and post evaluation tests, certificates awarded if any, as well invoice for service reimbursement by GRETA (In coordination with GRETA project, integrate visibility materials during the entire training process)
3. Conduct the training course in **Project Cycle Management** (minimum 5 training days, 15 hours). This will be evidenced by the submission of the narrative report with the detailed description of actions taken and progress made. Attach signed attendance lists, photo/video proofs, pre and post evaluation tests, certificates awarded if any, as well invoice for service reimbursement by GRETA (In coordination with GRETA project, integrate visibility materials during the entire training process)
4. Conduct the training course in **Financial Management of Grant Projects** (minimum 5 training days, 15 hours). This will be evidenced by the submission of the narrative report with the detailed description of actions taken and progress made. Attach signed attendance lists, photo/video proofs, pre and post evaluation tests, certificates awarded if any, as well invoice for service reimbursement by GRETA (In coordination with GRETA project, integrate visibility materials during the entire training process)
5. Conduct the training course in **Event Organizing** (minimum 5 training days, 15 hours). This will be evidenced by the submission of the narrative report with the detailed description of actions taken and progress made. Attach signed attendance lists, photo/video proofs, pre and post evaluation tests, certificates awarded if any, as well invoice for service reimbursement by GRETA (In coordination with GRETA project, integrate visibility materials during the entire training process)
* After completion of the courses submit the **final narrative report** with the detailed description of actions taken and progress made. Attach signed attendance lists, photo/video proofs, certificates awarded if any, as well invoice for service reimbursement by GRETA

**Payment Schedule:**

|  |  |
| --- | --- |
|  Deliverable |  Payment |
| Inception report with action plan, timeline, curricula, CVs |  First Payment 30 %  |  |
| Course in Organizational Development Closed | Second payment 50%  |  |
| Course in Fundraising and Proposal Writing Closed |  |
| Course in Project Management Closed |  |
| Course in Financial Management of Grant Projects Closed | Final payment 20%  |  |
| Course in Event Organizing Closed |  |
| Final narrative report |  |  |

**Criteria and Documents to be submitted:**

Any Individual or institution/company interested in this task should provide us with the non-binding offer with following documents/information:

**1.** **The TECHNICAL PROPOSAL should comprise of:**

1. Business Profile;
2. Training Curriculum for each subject offered;
3. Detailed course plan – description of how each course will be structured and what subjects will be included in each of the training courses;
4. Any accreditation of the Ministry of Education, Science, Culture and Sport
5. List of similar projects;
6. Detailed timeframe for the implementation;
7. Team composition with indication of roles and CV(s) of the project implementation team;
8. List of teachers with justification of the experience and CVs attached.

**2. The FINANCIAL PROPOSAL in EUR (excluding VAT\*) \*\*:**

Should comprise of a detailed breakdown of fees per person

Should you/your organization/company be interested in this assignment, we would invite you to fill in the budget template as below:

**The financial proposal must be compliant with the budget template attached to the ToR.**

**The bidders are requested to provide the financial proposal filling in the budget template attached to the ToR ONLY.**

**Financial proposal not compliant with the budget template will be rejected.**

NOTE#1: Budget includes administration fees, logistic fees (transportation, per diem, accommodation, contingency costs, etc.) and translation expenses. No other budget lines/other costs can be added. All the costs must be included in the respective budget lines. No expense verification documents are required.

NOTE#2: ADA/GRETA may change the quantities of the budget line at its own discretion using the same agreed rates indicated in the budget. New changes can be made only within contracted maximum amount.

**Budget template to be submitted:**

**Budget Template /Deliverables**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| #  | Deliverable  | Description of the deliverables  | Cost net EUR  | Management cost EUR | Total EUR  |
| Phase 1 – Inception Report |    |    |    |
| 1,1  | Desk research and selection of the training participants  | Desk research to familiarize themselves with current status and activities of Svaneti DMO. The service provider will be requested to read the relevant documents provided by GRETA as well as conduct an introductory meeting (could be online) to better understand the needs and capacity of members of Svaneti DMO Besides 5 staff of Svaneti DMO select up to 15 tourism professionals resident in Upper and Lower Svaneti |  |  |  |
| 1,2 | Inception Report  | Inception report that includes detailed plan of action and timeline; The inception report should include the curricula for each of the modules to be conducted separately (Organizational Management, Fundraising and Proposal Writing, Project Cycle Management, Financial Management of grant projects, Event Organizing); as well as CVs attached for the trainers of each course, should be submitted 5 days after signing the contract. |  |  |  |
| Subtotal - Phase 1  |  |
| Phase 2 – Conduct trainings of Module 1, 2 and 3  |    |    |    |
| 2,1  | Organizational Management | Conduct the training course in Organizational Development (minimum 5 training days, 15 hours). This will be evidenced by the submission of the narrative report with the detailed description of actions taken and progress made. Attach signed attendance lists, photo/video proofs, pre and post evaluation tests, certificates awarded if any, as well invoice for service reimbursement by GRETA (In coordination with GRETA project, integrate visibility materials during the entire training process)Lectures delivered in Mestia, including: Lecturers flight from Tbilisi to Mestia and back; Lecturers accommodation and full board meals in hotel during stay; Conference hall in Mestia; Coffee break for trainees; Providing lectures; Certificates |  |  |   |
| 2,2  | Fundraising and Proposal Writing | Conduct the training course in Fundraising and Proposal Writing (minimum 5 training days, 15 hours). This will be evidenced by the submission of the narrative report with the detailed description of actions taken and progress made. Attach signed attendance lists, photo/video proofs, pre and post evaluation tests, certificates awarded if any, as well invoice for service reimbursement by GRETA (In coordination with GRETA project, integrate visibility materials during the entire training process) Lectures delivered in Mestia, including: Lecturers transportation from Tbilisi to Mestia and back; lecturers accommodation and full board meals in hotel during stay; Conference hall in Mestia; Coffee break for trainees; Providing lectures; Certificates |  |  |  |
| 2,3  | Project Cycle Management | Conduct the training course in Project Cycle Management (minimum 5 training days, 15 hours). This will be evidenced by the submission of the narrative report with the detailed description of actions taken and progress made. Attach signed attendance lists, photo/video proofs, pre and post evaluation tests, certificates awarded if any, as well invoice for service reimbursement by GRETA (In coordination with GRETA project, integrate visibility materials during the entire training process)Lectures delivered in Mestia, including: Lecturers transportation from Tbilisi to Mestia and back; lecturers accommodation and full board meals in hotel during stay; Conference hall in MestiaCoffee break for trainees; Providing lectures; Certificates |  |  |  |
| Subtotal - Phase 2  |  |
| Phase 3 - Professional skill  trainings  |    |    |    |
| 3,1  | Financial Management of Grant Projects | Conduct the training course in Financial Management of Grant Projects (minimum 5 training days, 15 hours). This will be evidenced by the submission of the narrative report with the detailed description of actions taken and progress made. Attach signed attendance lists, photo/video proofs, pre and post evaluation tests, certificates awarded if any, as well invoice for service reimbursement by GRETA (In coordination with GRETA project, integrate visibility materials during the entire training process) Lectures delivered in Mestia, including: Trainers flight from Tbilisi to Mestia and back; Trainers accommodation and full board meals; Conference hall in Mestia; Coffee break for trainees; Providing trainings; Certificates  |  |  |  |
| 3,2  | Event Organizing | Conduct the training course in Event Organizing (minimum 5 training days, 15 hours). This will be evidenced by the submission of the narrative report with the detailed description of actions taken and progress made. Attach signed attendance lists, photo/video proofs, pre and post evaluation tests, certificates awarded if any, as well invoice for service reimbursement by GRETA (In coordination with GRETA project, integrate visibility materials during the entire training process). Lectures delivered in Mestia, including: Trainers flight from Tbilisi to Mestia and back; Trainers accommodation and full board meals; Conference hall in Mestia; Coffee break for trainees; Providing trainings; Certificates |  |  |  |
| 3,3 | Final Narrative Report  | Final narrative report with the detailed description of actions taken and progress made. Attach signed attendance lists, photo/video proofs, certificates awarded if any, as well invoice for service reimbursement by GRETA |  |  |  |
| Subtotal - Phase 3  |   |
| Grand total in EURO without VAT  |   |
| No expense verification documents will be requested  for any budget line  |

\* You can check the VAT exemption status effective within Georgia at RS.GE (ID: 205305560);

\*\* Financial proposal should include all respective expenses of the training. The participants of the training will not be paid for participation and no expense for students’ travel, food, accommodation and transportation will be covered (as opposed to teachers, that are fully covered).

|  |  |
| --- | --- |
| Please list the position and rates of the personal involved in the implemantation of the activities. This rates will be used for the service not included in the main buget. All the service not included in the main budget should be pre approved by GRETA |  |
|  | **Position**  | **Gross Rate in EURO per day (8 hour)**  |  |
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|  |  |  |  |
|  | full name | Signature | Date |

**Organization Identification Number**

**Evaluation:**

|  |  |  |
| --- | --- | --- |
| CRITERIA   | DESCRIPTION  | RATING  |
| Quality of Personnel to be assigned to the project    | Organizing team (minimum 2 persons)  | 25%  |
| Team composition - Pool of Experts, teachers (CVs) |
| Expertise and Capacity of the bidder  | Proven track record of training experience in the specified subject matter | 25%  |
| Project Management Plan     | Operational plan   | 30%  |
| Team structure/roles and responsibilities    |
| Timeframe |
| Reporting |
| Financial Offer\*   | Value for money  | 20 %  |
|  | 100%  |

\* Utilizing budget template

Questions for clarification should be directed to:

1. **Content – Irakli Kutsia (Sustainable Mountain Tourism Project Manager)** **irakli.kutsia@ada.gv.at**
2. **Document submission: Mariam Tsereteli (Procurement and Grants Officer)** **mariam.tsereteli@ada.gv.at**

Non-binding offer free of charge in the English language should be submitted via Email to greta@ada.gv.at; before: 01.05.2023 17:00 Please indicated “CFP – Organizational Development Training Courses for Svaneti DMO” in the subject line.

**Processing of Personal Data**

During initiation and performance of contracts, ADA may process personal data of natural persons that are collected by ADA or transferred or disclosed to ADA by prospective contractors or third parties under their instruction, e.g., personal data of employees, legal representatives, agents or other partners of the prospective contractors or such third parties.

By submitting information to ADA, you, as a prospective contractor, acknowledge:

* to have taken note of ADA’s Privacy Notice https://www.entwicklung.at/en/media-centre/privacy-notice (’ADA Privacy Notice’);
* to ensure that each direct or indirect transfer or disclosure of personal data to ADA during the initiation or performance of a contract is lawful pursuant to applicable data protection law;
* to ensure that all persons, whose personal data are transferred or disclosed to ADA, were promptly and demonstrably provided the ADA Privacy Notice; and
* that if a contract is concluded and in accordance with its terms, ADA publishes, in particular on the ADA website, information about the contract and the contracting parties.