



European Union



Republic of Serbia
Ministry of Labor, Employment and Social Policy



Republic of Serbia
Ministry of Health

Enhancing the position of residents in residential care institutions for persons with mental disability and mental illness and creation of conditions for their social inclusion in the local community

Terms of Reference Short-Term, Junior Assignment

ASSESSOR, JUNIOR EXPERT No. NKE27

Project:	Enhancing the position of residents in residential care institutions for persons with mental disability and mental illness and creation of conditions for their social inclusion in the local community. CRIS no: 2012/299-893 (11SER01/11/11).	Location:	Serbia
Position:	Assessor	Reference:	NKE26
Period:	November 2013 – December 2013 (up to 25 non-consecutive working days per expert)	Expert Name	

Background

Article 168 of the Treaty on the Functioning of the European Union (TFEU) foresees that the Union action is to complement national policies and be directed towards improving public health, **preventing physical and mental illness and diseases, and obviating sources of danger to physical and mental health**. The TFEU also states that *“In defining and implementing its policies and activities, the Union shall take into account requirements linked to the promotion of a high level of employment, **the guarantee of adequate social protection, the fight against social exclusion, and a high level of education, training and protection of human health**”, and that “In defining and implementing its policies and activities, the Union **shall aim to combat discrimination based on sex, racial or ethnic origin, religion or belief, disability, age or sexual orientation**”, in its Articles 9 and 10, respectively.*

In line with the above, Article 101 of the Stabilisation and Association Agreement (SAA) between the **EU and Serbia** foresees that: *“Cooperation shall also seek to support the adaptation of the Serbian social security system to the new economic and social requirements, and shall involve the adjustment of the legislation in Serbia concerning working conditions and **equal opportunities for women and men, for people with disabilities and for people belonging to minority and other vulnerable groups**”.*

In December 2010, having ratified UN Convention on the Rights of Persons with Disabilities (CRPD), the EU has committed itself to *“**promoting human rights and fundamental freedoms for all persons with disabilities**”, Article 19 of the CRPD particularly promotes the right of **people with disabilities to live independently and be included in the community**. Serbia has ratified the CRPD in 2009.*

EU’s Disability Strategy 2010-2020 highlights that *“the EU will support national measures to ensure the quality and sustainability of social protection systems for people with disabilities” and “promote decent living conditions for persons with disabilities”*. One of the stated objectives is to: *“**promote the transition from institutional to community-based care**”.*

As a result of Vladimír Špidla, then the EU Commissioner for Employment, Social Affairs and Equal Opportunities a group of experts was set in 2009 on the Transition from Institutional to Community-based Care, that have developed the **Toolkit on the Use of European Union Funds for the Transition from Institutional to Community-based**, providing in there the practical advice about how to make a sustained transition from institutional care to family-based and community-based alternatives.

Over the past decade and with continuous support from the international community, consecutive Governments of the Republic of Serbia put forward a pro – poor, pro-vulnerable and pro - inclusion legislative change in the social welfare system. In particular, the **Social Welfare Law** from 2011 (in its Article 27) highlights that one of the principles of social welfare is the provision of services that have a community-based nature. Pluralisation of service providers and establishment of local services has been the core of the past reforms, through Social Innovation Fund and through other similar programmes, and has also included efforts that aimed

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at transformation of residential institutions.

The **Strategy for Development of Mental Health**, which was adopted by the Serbian Government in 2007, also emphasizes the need for deinstitutionalization of people with mental disorders and disabilities from special psychiatric hospitals to their natural environments in community settings and the need for inter-sectoral co-operation towards social inclusion of mental health service users in the community. In May, 2013 the Serbian Parliament enacted the **Law on the Protection of people with Mental Disorders** (Zakon o zaštiti lica sa mentalnim smetnjama). The **Law on prohibition of Discrimination of People with Disabilities** has been in power since 2006.

In spite of these positive changes, recent (2012) European Commission's progress report on Serbia reported that **"Community-based mental health services should be further supported as an alternative to institutional care, across the life-span. Further action needs to be taken to promote inclusion of people with mental health problems and ensure equal enjoyment of basic human rights and equal access to employment, education and social services."**

Similarly, when depicting the area of social inclusion the EC's 2012 Progress report for Serbia highlighted that: **"The availability of community-based social services across the country remains limited."**

To respond to the challenges referenced above the project **"Support for deinstitutionalisation and social inclusion of persons with mental disability and mental illness"** has been developed within the IPA 2011 financial agreement. **This Call for Proposals (CfP) is a component of this project.** The project focuses on 13 social protection residential care institutions for persons with mental disability and mental illnesses (in Kragujevac, Veliki Popovac, Kulina, Tutin, Stara Moravica, Pancevo, Paracin, Blace, Curug, Stari Lec, Becej, Novi Knezevac, Aleksinac) and 5 special psychiatric hospitals (in Gornja Toponica, Novi Knezevac, Vršac, Kovin and in Belgrade "Dr. Laza Lazarević")¹, however the CfP is not limited to them alone.

The CfP supports the efforts of the Serbian Government in the area of provision of social protection services to various vulnerable groups, **focusing on the adults group of mentally disordered and intellectually disabled beneficiary groups.**

The **global objective** of this Call for Proposals is:

- To contribute to enhancing the social inclusion of persons with mental disability and mental health disorders in Serbia.

The **specific objective** of this Call for Proposals is:

To support development, launch, improvement and/or sustainable functioning of available, affordable and accessible community-based services that respect user's rights, have adequate physical infrastructure and

- enable de-institutionalisation of persons with mental disability and mental health disorders, that are currently placed in 13 social protection residential institutions and 5 special psychiatric hospitals covered by the project, and/or
- support independent community living of people with mental disability and mental health disorders in Serbia and/or
- Reduce the need for alternative or residential care of people with mental disability and mental health disorders in Serbia by preventing unnecessary separation from the family care.

Details of the Call are available in the corresponding [Guidelines for Applicants](#). This is an open Call for Proposals.

Objective, Purpose & Expected Results

Overall objective

To mobilise a team of highly experienced assessors of proposals to assist the Contracting Authority in the selection of the best proposals received under *'Support for de-institutionalisation and social inclusion of persons*

¹ Including residential institutions belonging to the social protection system: Dom za smeštaj odraslih lica "Gvozden Jovančičević", Veliki Popovac; Zavod za smeštaj odraslih lica "Male pčelice" Kragujevac; Dom za smeštaj odraslih lica "Kulina", Kulina; Dom za smeštaj odraslih lica "Tutin", Tutin; Dom za smeštaj odraslih lica "Trbunje", Trbunje; Centar za socijalni rad Paraćin, domsko odeljenje "Izvor", Paraćin; Dom za smeštaj odraslih lica "Jabuka", Pančevo; Dom za smeštaj odraslih lica "Otthon", Stara Moravica; Dom "1.Oktobar", Stari Lec; Plandište; Dom "Čurug", Čurug; Dom "Vasilije Ostroški", Novi Bečej; Gerontološki centar "Jelenac" sa radnom jedinicom za smeštaj duševno obolelih lica u Tešici, Aleksinac; Centar za socijalni rad "Novi Knezevac", domsko odeljenje "Novi Knezevac" and special psychiatric hospitals "Dr.Laza Lazarević", Beograd; "Dr.Slavoljub Bakalović", Vršac; "Sveti Vračevi", Novi Knezevac; Specijalna bolnica za psihijatrijske bolesti "Kovin", Kovin Specijalna bolnica za psihijatrijske bolesti "Gornja Toponica", Niš.



with mental disability and mental illness', according to the PRAG rules and the Guidelines for Applicant..

Results to be achieved by the Contractor

- Assessors will carry out the technical assessment of concept notes in accordance with guidelines to be provided by the Contracting Authority and which are based on the published evaluation grids. At least 100 concept notes are expected. Each concept note has to be assessed individually by 2 assessors.
- Assessors will also carry out the technical and financial assessment of full applications in accordance with guidelines to be provided by the Contracting Authority and which are based on the published evaluation grids. Assessment of at least 50 full applications is expected. Each full application has to be assessed individually by two assessors.
- Assessors will also carry out tasks related to administrative and eligibility checks of the received proposals, as required, support DEU in drafting and requesting clarifications from applicants, and in drafting letters to applicants.

These assessments will be used by the Evaluation Committee in the process of selecting the best proposals.

Results to be achieved

- The Concept notes of all administratively compliant proposals are evaluated according to the criteria listed in the Guidelines for Applicants (p.17-23).
- The applications pre-selected after the Concept note evaluation stage are evaluated according to the selection and award criteria listed in the Guidelines for Applicants (p.17-23).
- The number of proposals evaluated by a third assessor is limited to maximum 10% of the applications evaluated at the respective Step.
- The selection of the applications proposed to be awarded is well justified and there are no serious objections raised against the evaluation results.

The whole evaluation process is successfully conducted between 1st November 2013 to 31st December 2013.

Scope Of The Work

General

The objective of assignment of assessors is to assist the EU Delegation to the Republic of Serbia in selecting the best proposals in line with the criteria set for the 'Support for de-institutionalisation and social inclusion of persons with mental disability and mental illness' Call for Proposals on the basis of well documented high-quality assessment process.

As provided in the PRAG , the evaluation of the applications submitted will be implemented in two consecutive steps:

Step 1: Concept note (CN) evaluation of administratively compliant applications.

Step 2: Full application form (FAF) evaluation of applications provisionally selected after Step 1.

The Assessors will report directly to Senior Grant Scheme Expert (SGSE) from the 'Support for de-institutionalisation and social inclusion of persons with mental disability and mental illness' project.

The working language of this assignment is English.

The evaluation steps to go through and the evaluation grids to be used by the assessors in the CN-evaluation and FAF-evaluation are presented in details in the Guidelines for Applicants.

Specific Activities

During both evaluation steps the assessors are supposed to assess each of the proposals on its own quality by:

Awarding scores for each of the sub-headings in the respective evaluation grid;

Making comments for each heading (and subheadings, if the need is) on the basis of the questions and criteria used for that heading;

Ensuring coherence between the comments and the scores awarded;

Commenting in writing on the strengths and weaknesses of the evaluated proposal;

Justifying the opinion to propose or not the proposal for pre-selection.

Each completed evaluation grid shall be duly signed before being submitted to the SGSE and subsequently Secretary of the Evaluation Committee.

If requested, the assessors shall be available to present and justify their evaluations in front of the Evaluation Committee.

Assessors are bound by a Declaration of Impartiality and Confidentiality to be signed before starting each phase of the assessment. If an assessor believes there might be a situation of conflict of interests in relation to one or more applicants, he/she must inform the Contracting Authority immediately. In addition, strict confidentiality is required from the experts involved in the implementation of this contract, notably on the assessments of individual applications.

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Role and tasks of assessors

The Call is launched as an open Call for Proposals. The evaluation and selection process is described in the Section 2.3 of the corresponding Guidelines for Applicants.

Assessors should provide written technical and financial assessments to the Contracting Authority of **concept notes and full applications**.

All administratively compliant proposals will be subject of a Concept Note evaluation. This evaluation will cover the relevance and design of the action.

According to the criteria listed in the Evaluation Grid on pages 17 to 19 of the Guidelines for Applicants, each evaluated application will be scored with up to 50 points. The Concept Note evaluation shall also verify the compliance with the instructions provided in the guidance for Concept Note, part A of the grant application form.

The full application form (part B of the application form) of proposals pre-selected after the CN-evaluation will be evaluated for proposal's quality, including the proposed budget, and the capacity of the applicant and its partners. The Evaluation Grid on page 19-21 of the Guidelines for Applicants will be used for this evaluation.

The scores awarded for each of the criteria shall be fully coherent with the respective comments justifying the opinion of the assessor.

Also, the assessment will include identification of any needs for additional clarification, and clearing of the budget proposed by the applicants (including the verification of the budget proposed by the applicants for the action, assessing its overall coherence and particularly its cost-effectiveness, with an emphasis on the identification of potential anomalies and/or overpriced items or budget lines).

The assessors shall be available to answer questions and explain their evaluations, if requested by the Evaluation Committee and/or SGSE.

At least two assessors must assess each concept note and each full application, working independently of each other.

The assessments must be undertaken in accordance with the guidelines and instructions provided by the Evaluation Committee. These are based on the published evaluation grids in the Guidelines for applicants. The overall assessment should be based on the scores obtained under each subheading, added up by heading and the final score is the arithmetical average of the scores given by the assessors.

Each application must be assessed on its own merits and not by comparing different applications. External assessors are expected to bring their own experience of the sector and project implementation to bear in the analysis of each proposal.

The assessors will report directly to the Senior Grant Scheme Expert (SGSE) of the 'Support for deinstitutionalisation and social inclusion of persons with mental disability and mental illness' project. The SGSE is in charge of coordinating the assessments and of undertaking the overall quality checks of the concept notes and full applications, without compromising the principle of individual assessments. The SGSE will ensure that every assessor is familiar with the relevant working documents provided (such as Guidelines for applicants, Guidelines for Assessors etc.), ensure strict adherence to standardised assessment methodology and conformity with the set evaluation grids, and will act as the sole interlocutor between the assessors and the Contracting Authority /Evaluation Committee, summarising the results of Assessors work and requesting additional information to justify their views, if needed. Assessors are expected to attend briefing and debriefing meetings with the SGSE.

Role and tasks of the Evaluation committee

The Evaluation Committee is appointed by the Contracting Authority comprising a non-voting Chairperson, a non-voting Secretary and an odd number of voting members (minimum of three). Its role is to advise the Contracting Authority on contract award in accordance with pre-established criteria.

The Chairperson is responsible for coordinating the evaluation process in accordance with the procedures in the Practical Guide and for ensuring its impartiality and transparency. The Secretary to the Committee is responsible for carrying out all administrative tasks connected with the evaluation procedure. These include circulating and collecting the Declarations of Impartiality and Confidentiality and keeping the minutes and any other relevant records and documents.

Where the proposals received are particularly numerous or highly technical, all or part of the detailed examination may be carried out by assessors so that the Evaluation Committee may conduct its deliberations on the basis of their assessments, including the opinion of the EU delegation in the country where the proposed action will take place.

Assessors work under the supervision of the Chairperson of the Evaluation Committee.

Should the assessments not satisfy the quality expected by the Contracting Authority, it may return the

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applications to the contractor and ask for a re-assessment by the same or another expert.

Logistics And Timing

Location

Location of the assignment is Belgrade, Republic of Serbia

Start date and period of implementation

The indicative commencement date of the assignment is 1st November 2013.

The tasks shall be implemented within a period of 61 calendar days after the commencement day, but not later than 31.12.2013.

Assessors are expected to provide services in the period of time 1st November – 31st December 2013, in total duration of **twenty five (25) working days** per assessor.

Activity	Start *	End *	max. WD** per expert
Concept Note Evaluation	1.11.2013	30.11.2013	15
Full application evaluation	1.12.2013	31.12.2013	10
Total days worked:			25

* all dates are provisional

** working days

Requirements

Assessors

Three assessors will be recruited, all meeting the below presented minimum requirements:

All experts mobilised under this contract must:

- be proficient in English;
- have excellent drafting and analytical skills;
- be proficient in report drafting and
- be computer literate

Qualified experts are invited to submit their respective CV clearly presenting qualifications, skills and experiences required by this ToR.

Any qualifications, skills and experience stated in the respective CV of an expert must be substantiated by supporting documents (with accurate translation into English), such as copies of degrees or diplomas and employers' certificates, otherwise they may not be taken into account. In addition, for all the references stated in the CVs of the key experts, the exact duration of the key experts project involvement/employment must be indicated in the format "from MM/YY to MM/YY"

Minimum requirements for potential assessors include the following:

Qualification and skills

- University degree in humanities and social sciences, or psychiatry, where a university degree has been awarded on completion of at least three years study;
- In-depth expertise and knowledge of the issues covered by the Call for proposals (mental health, social assistance, community based services, deinstitutionalisation);
- Knowledge of Serbian language would be an asset;

General professional experience

- 8 years of general professional experience.

Specific professional experience

- At least 5 years of experience in fields relevant to the priorities of the Call for proposals, where such experience includes first hand involvement in community based care, direct working with beneficiaries of the Call, and familiarity with Serbian social protection and health care functioning, with particular emphasis on residential care.
- Experience in project cycle management, design and implementation of donor funded projects.
- Extensive experience in grant scheme assessment and project evaluations in field relevant to the priorities of the Call.

The selected experts shall be available during the whole duration of the assignment.

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Facilities
<p>The work will be carried out in the premises of the EU Delegation and of the project. Each assessor must have his/her own IT equipment. The software used by the EU Delegation is Microsoft Word and Excel 2007.</p>
Reports
<p>Reporting requirements Each one of the assessors has to report the task implementation on the following:</p> <ul style="list-style-type: none"> • Duly completed and signed evaluation grids (CN-grids and FAF-grids) • Duly completed and signed monthly timesheets (days worked and tasks implemented) • Final report with observations and recommendations about the evaluation process. <p>The reports shall be submitted within the following deadlines:</p> <ul style="list-style-type: none"> • Evaluation grids – on daily basis to the SGSE; • The time sheets – by the 25th day of the month following the reported one; • The Final report – within a week after completion of all tasks contracted. <p>Submission & approval of reports All reports shall be written in English and submitted in a hard copy and an identical electronic format to the address of the project. If after 5 working days from the receipt of the respective report the Contracting Authority did not formulate any objection, the report is deemed to be approved.</p>

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