

TERMS OF REFERENCE

Service for: Developing and Conducting a Workshop to build knowledge and practice on holistic, case management for persons with disabilities.

Location : Vietnam – ability to work remotely (outside or inside of Vietnam) on the development of the workshop, with the workshop to be facilitated in person in Vietnam

Project: Inclusion III-b

Time : August 2025 – November 2025

I. INTRODUCTION

I.A. CRS and Its Partners

Catholic Relief Services (CRS) is the official international humanitarian agency of the Catholic community in the United States. CRS works to *save, protect, and transform* lives in need in more than 100 countries, without regard to race, religion or nationality. CRS' relief and development work is accomplished through programs of emergency response, HIV, health, agriculture, education, microfinance and peacebuilding.

CRS has been operating in Vietnam since 1994. In partnership with government and communities, CRS implements programs in 13 provinces/cities in Vietnam. The Vietnam Program has a diverse funding base in the sectors of Disabilities, Mine Action and Disaster Risk Reduction and Management, and Community-based Climate Change Adaptation.

I.B. Project Summary

CRS is implementing the Inclusion project to improve the quality of life of persons with disabilities in provinces heavily sprayed by Agent Orange. CRS is also working across all implementing and managing partners of the INCLUSION project, and key national stakeholders to implement exchanges and cross-learning experiences. Learning and knowledge sharing activities aim to promote best practice being developed and implemented and to expand the awareness and knowledge of key, underlying approaches and international best practices which can support development of project implementers.

CRS Vietnam is seeking a consultant (individual, team or organization), to organize a two-day workshop to focused on learning and knowledge sharing on holistic approaches and case management / support in disability services. The workshop should have a strong emphasis on sharing lessons learned from existing project implementation practices, addressing challenges with practical solutions and the implementation of strong practices and technical approaches to support holistic, case management for persons with disabilities.

CRS is seeking consultant/s to design and facilitate this workshop, ensuring alignment with Vietnam's regulatory framework and a focus on practical learning.

II. PURPOSE AND SCOPE OF WORK

II.A. Purpose:

The purpose of the consultancy is to support the Inclusion IIIb team:

- To design and facilitate a workshop, ensuring alignment with Vietnam's regulatory framework, focusing on the provision and improvement of holistic case management and disability support under the Inclusion project.

II.B. Scope of work:

Perform the following tasks:

- (1) Identify learning needs from implementing partners to tailor workshop content, ensuring relevance to their challenges and capacity gaps in implementing holistic case management and disability support
- (2) Design a 2-day workshop to enhance the capacity of implementing partner staff in implementing holistic approaches and case management within the Inclusion project.
- (3) Facilitate the workshop on the sharing of lessons learned from implementing partners, focusing on successes, challenges, and solutions in delivering services to persons with disabilities that align with best practices of case management and disability supports.
- (4) Guide participants in how to apply their learnings from the workshop and improve their professional practice.

1. Objectives

The consultants will:

- Collect and review lessons learned and learning needs from the IPs to tailor workshop content and ensure relevance to their implementation challenges and capacity gaps.
- Design a 2-day workshop to enhance the capacity of IP staff members in implementing holistic approaches and case management within the Inclusion project. This includes the principles of holistic and person-centered case management, applying best practices, integration of strengths-based, trauma-informed and culturally responsive approaches.
- Facilitate the workshop on the sharing of lessons learned from IPs' implementation practices, focusing on successes, challenges, and solutions in delivering services to PWDs.
- Guide IPs in planning on applying lessons learned to improve their practices and develop actionable strategies to overcome challenges.

2. Scope of work

The consultant/s will undertake the following tasks to design and deliver a 2-day workshop for Implementing Partners (IPs) of the Inclusion project:

- a. Design the 2-day workshop agenda and facilitation plan:

The consultants develop a detailed 2-day workshop agenda and facilitation plan outlining the structure and activities for the workshop, tailored to IPs' learning. In addition, the consultants develop evaluation criteria to assess participant engagement, knowledge gained, and the potential for other IPs to adapt introduced lessons and good practices.

- b. Develop the workshop materials:

Develop a set of workshop materials, including presentations, handouts, case studies, action plan templates, evaluation criteria and after-action review form and follow-up activity framework. The after-action review form and follow-up activity framework are a structured after-action review form to capture IPs' reflections on workshop content and applications, along with a framework for follow-up activities to reinforce learning.

- c. Facilitate the 2-day workshop:

Based on the workshop agenda and facilitation plan, the consultants facilitate the 2-day workshop, ensuring active engagement and practical learning for IP staff members.

- The consultants facilitate IP members to share lessons learned from IPs' implementation practices, highlight best practices and solutions to address identified challenges. The consultant/s moderate discussions to identify actionable solutions/models that align with Vietnam's disability policies.
 - Guide IPs in applying lessons learned and improve their practices.
 - Facilitate the IPs to do an after-action review to capture reflections on workshop content, key takeaways, practical applications, and areas for improvement.
- d. Make final report and provide digital copies of all workshop materials for CRS

The final report should include lessons learned, solutions proposed, participant feedback, after-action review findings, and recommendations for CRS and IPs. Workshop materials are to be produced in English and Vietnamese.

III. METHODOLOGY OF THE CONSULTANCY

Guiding all aspects of the consultancy are:

- Principles of holistic case management
- Understanding disability through rights-based, social justice lenses including social and/or interactional models of disability
- Social role valorization as it applies to equity, dignity and person-centered support
- Interdisciplinary collaboration, building partnerships and ethical advocacy
- Adult learning principles: interactive, experiential and reflective
- Theory grounded in practical application through case studies, role playing, group sessions, etc.

The consultant/s will use these concepts and approaches to design and deliver a 2-day workshop for leaders of disability clubs:

1. Identification of learning needs:

- Conduct pre-workshop consultations (e.g., questionnaires and online interviews) to identify current understanding of proposed key content and learning needs and priorities of implementing partners.

2. Design the 2-day workshop agenda and facilitation plan:

- Develop a detailed 2-day workshop agenda and facilitation plan, outlining the structure and activities tailored to participants' learning needs.
- Incorporate adult learning principles and interactive approaches into the design.
- Develop after-action review form to get participants' feedback and assess participants' knowledge gained, and the potential for participants to adapt lessons into their practices.

3. Develop the workshop materials:

- Create a set of workshop materials in accessible formats, including workshop agenda, presentations, handouts, case studies, reflection activities and an after-action review forms
- Incorporate materials and exercises for participants to complete post workshop and support the implementation of their learning.
- The after-action review form will capture participants' reflections on workshop content and applications for sustaining disability club operations.

4. Facilitate the 2-day workshop:

- Facilitate the 2-day workshop, ensuring active engagement and practical learning for 35 participants
- Moderate discussions to share knowledge, experiences within their work and challenges to implement key approaches
- Guide participants to apply knowledge and lessons learned in their professional practice
- Facilitate an after-action review to capture participants' reflections on workshop content, key takeaways and areas for improvement.

5. Make final report and provide digital copies of all workshop materials:

- Produce a final report on the workshop outcomes.
- Provide a complete set of digital copies of all workshop materials for ongoing use by CRS and IPs.

VI. DELIVERABLES AND TIMELINE

VI.A. Deliverables:

The consultant will provide the following deliverables as agreed with the Inclusion IIIb team:

- (1) Detailed workplan, to agree and guide the consultancy
- (2) Pre-workshop analysis report outlining consultations and findings to support the development of the workshop agenda
- (3) Two day workshop agenda and facilitation plan
- (4) Workshop materials (electronic copies)
- (5) Two day workshop held in Vietnam
- (6) Final report covering the consultancy activities, learnings and outcomes.

VI.B. Schedule and timeline

Deliverables	Estimated number of days needed to complete	Target dates to complete
Pre-workshop analysis report (remote): A concise report summarizing findings from pre-workshop consultations on lessons learned and learning needs from IPs, identifying good practice, challenges, and capacity gaps to tailor workshop content.	4 days	August 2025
Detailed 2-day workshop agenda and facilitation plan (remote): An agenda and facilitation plan outlining the structure, activities and evaluation for the workshop, tailored to IPs' learning needs	3 days	August 2025
The set of materials includes an after-action review form to capture IPs' reflections on workshop content and applications (remote).	3 days	September 2025
Facilitation of the 2-day workshop (in-person): Delivery of the 2-day workshop for approximately 35 participants, ensuring active engagement through interactive activities, peer-to-peer learning, and knowledge-sharing	3 days	October – November 2025
Final report (remote)	2 days	November 2025
Post workshop follow up (remote)	3 days	December 2025

- The time for the consultant to complete the task is expected to be approximately 18 working days, from August 2025 to November 2025.

VII. LOGISTICS

- The following support will be provided to the consultant by Inclusion IIIb:
 - Contacts to relevant project partners and their staff
 - Coordinate and arrange logistics for the consultant and workshop participants including transport, accommodation, meals and workshop venue.
 - Coordinate and obtain relevant approvals for activities from authorities
- The consultant will work closely with the Senior Project Officer of the Inclusion IIIb team at CRS.

4. Consultant Qualifications

The consultants (or consultancy team) must meet the following qualifications:

- Master's degree in disability studies, social work, public health or other relevant fields.
- International consultants may team up with a local consultant to ensure alignment with Vietnam's context and regulatory framework
- At least 05 years of experience designing and conducting activities for learning for non-governmental organizations (NGOs);
- Demonstrated expertise in case management, provision of disability services, and holistic support for persons with disabilities.
- Proven track record of collecting and analyzing lessons learned and learning needs from implementing partners or similar stakeholders, with experience tailoring training content to address capacity gaps and implementation challenges.
- Extensive experience in designing and facilitating interactive workshops for 25-30 participants, using active methods to foster peer-to-peer learning, problem-solving, and practical skill-building.
- Ability to guide groups or organizations in developing actionable strategies and action plans to apply lessons learned, address challenges, and align with project goals and Vietnam's disability policies.

Excellent oral communication skills and the ability to deliver high quality written reports in English and Vietnamese.

X. APPLICATION PROCEDURE

This consultancy is open to national and international consultants. CRS will consider applications from individual consultants, consultancy teams, consultancy agencies, NGOs and INGOs. Proposals which include a local consultant and/or involvement of an Organization of Persons with Disabilities will be highly regarded.

Interested parties are requested to submit the proposal in English, including:

Technical proposal:

- Expression of Interest
- A copy of business license (if any)
- Company profile (if any)
- A concise technical proposal
- A tentative work plan.
- Curriculum vitae (CVs) demonstrating relevant capacity and experience.
- Minimum 02 references for similar assignment

Financial proposal:

- Propose consultancy fees with a detailed breakdown of the daily rate in Vietnamese Dong, including tax (VAT/PIT) and travel-related expenses. All proposals, regardless of location of the consultant should be submitted in Vietnamese Dong.
- Please note that CRS Vietnam is obligated to with-hold all relevant taxes, on the entire cost of the proposal, for direct payment to the Government. Proposals **must be** inclusive of the tax obligations.
- Air-travel is required to comply with the Fly American Act.
- Proposals should identify the need for translation services, however all translation costs will be covered by the project as required and should not be included in the financial proposal.

Method for submission:

- Proposals should be duly signed, stamped (if any) and submitted to CRS's email: vn_procurement@crs.org
- Questions should be submitted to ruth.whereat@crs.org.
- ssClosing date for submission: **15 July 2025**