

## **Third Regional Development Project**

### **TERMS OF REFERENCE**

#### **Individual Advisory Service for Promotion of Selected Cultural Heritage Sites in Samtskhe-Javakheti region**

##### **Introduction and Background**

The Municipal Development Fund of Georgia (MDF) is a Legal Entity under Public Law (LEPL) with the objective of assisting to enhancement of institutional and financial capacities of local self-governmental bodies, making investments in local infrastructure and services, and improvement of main economic and social conditions for the local population. MDF implements infrastructural projects such as: urban renovation of the cities, arrangement of infrastructure at tourist and cultural heritage monuments, construction and rehabilitation of schools and kindergartens, improvement of infrastructure aimed at preventing the natural disasters, creation of sustainable economic base for IDPs, rehabilitation of water supply and wastewater management systems, etc., Towards implementation of these investments, MDF engages with other public agencies and the private sector under Public-Private Investment (PPI) arrangements.

The Third Regional Development Project (RDP3) is one of the active investment operations of MDF co-financed by the World Bank Group and the Government of Georgia (GoG). The aim of RDP 3 is to promote tourism development in Mtskheta-Mtianeti and Samtskhe-Javakheti Regions<sup>1</sup>.

##### **Objective of the Assignment**

The objective of this assignment is to promote selected cultural heritage sites, supported under RDP3, in the Samtskhe-Javakheti region, as touristic destinations and improve their management and commercial appeal. MDF (the Employer) is seek consulting services of an individual Expert (the Consultant) preferably with international experience, who will offer expertise, provide guidance and advice, help prepare management plans, offer ideas and strategies for product development and provide capacity building (trainings and knowledge exchange) opportunities for the staff of the selected cultural heritage sites, local Destination Management Organization (DMO) located in Akhaltsikhe, and for the representatives of National Agency for Cultural Heritage Preservation (NACHP) and MDF.

The Consultant will work closely with NACHP, DMO and management of the selected cultural heritage (CH) sites listed in Annex 1 to develop management and commercialization plans for the

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<sup>1</sup> See <http://documents.worldbank.org/curated/en/571991468000614527/Georgia-Third-Regional-Development-Project> for details

selected CH sites with the aim to provide recommendations on how to diversify cultural and commercial products and services offered to the visitors, resulting in increased income generation and creation of high value jobs.

### **Scope of Service**

Considering the objective stated above, the Consultant is expected to offer expertise, provide guidance and advice, and capacity building (trainings and knowledge exchange) opportunities for the staff of the selected cultural heritage sites and NACHP, as well as the local DMO, resulting in improved site management plans and skills, and increased income generation through the development and offering of various products at these sites. The representatives of the local DMO shall be closely involved in the process to enhance their skills in the preparation of commercialization and other plans and products development for sustainability purposes.

The Consultant shall work under direct supervision of and report to the MDF's RDP3 Program Manager, while the beneficiary of the services delivered under this consultancy will be for NACHP and the DMO.

To achieve the set objectives, the Consultant shall perform the following duties:

1. Conduct desk research and analysis of available information for the development of the management and commercialization plans, such as:
  - Existing budget and financial allocations for the site management, products and services, structure, events, institutional gaps and management constraints (consider pre and post COVID-19 scenarios).
  - Relevant counterparts/stakeholders, their legal status and competencies related to site management and governance;
  - In close coordination with the local DMO, identify and analyze other tourism attractions and sites in the region, including their tourism offerings, products and services and how they are correlated to the existing sites, and offer strategies how to improve the linkages for better offers (among others, combined tickets, combo offerings, packages, etc.)
2. Conduct field visits and inspect facilities and learn about tourist and commercial offerings currently available, including accessibility assessments for diverse groups (PWDs, elderly, etc.) at the selected sites in Samtskhe-Javakheti.
3. Identify and propose products and services that have most potential for the economic development and sustainability of the site, considering the following criteria: potential to create high value jobs for diverse groups (females, males, youth, etc.), generate new investments and increase revenues. Illustrate relevant international best practices that can be taken as reasonable benchmarks for other Samtskhe-Javakheti touristic sites, always keeping in mind the crucial importance of the context (geographic, social, economic, etc).
4. In collaboration with the relevant stakeholders and including the DMO, identify possible strategic alliances (with local, national and international actors) and lay the foundations for the construction of cultural networks that will facilitate the process of cultural and economic

development of the sites and effective governance of the sites managed by NACHP and other relevant agencies.

5. Develop management and commercialization plan for the selected CH sites. The management plan should include all the aspects that contribute to a visitor's experience, taking account of the needs of the visitors, local stakeholders and the environment. The plan is a shared statement of intent to manage the site over a specific period of time (to be clearly indicated; possibly not less than 3 years), defining the roles of the stakeholders, identifying specific actions and estimating costs and revenues.

Among other recommendations, the plan should include:

- Site presentation including existing services (access, infrastructures, visitor services), overall appeal and appearance, tourist presence, possibly highlighting strengths and weaknesses;
  - Assessment of the possible commercial value of the cultural and educational offer, and analysis of the diverse groups of visitors (females, males, youth, PWDs, elderly, etc.) - for example, tourist guides and tours, translation services, catering, shopping, events organization, overnight, etc. and other, always considering the context of the site;
  - Define competitors and barriers to be considered (direct and indirect);
  - Conduct a prospect analysis, identifying potential donors, sponsors, government institutions, and make a (key) stakeholder analysis;
  - List of the actions, that should be taken for the site preservation (also considering environment sustainability) and its cultural and economic sustainability;
  - Present financial projections based on operation and maintenance (O&M) costs, administrative costs and revenue analyzes. The Plan should include recommendations on commercialization of each facility, services and potential income sources, such as: entry tickets, guides services, concessions, facility rent, event charges, concessions, educational and etc;
6. Develop promotion strategy for the selected cultural heritage site (meaning: define the site image, branding and marketing).
  7. Conduct validation workshop/s with main stakeholders, interested parties, and present developed management plan.
  8. Provide additional support to NACHP during the Management Plan implementation phase to secure the satisfactory results as described in the plans.
  9. Conduct need assessment of the DMO and NACHP staff in the beginning of this assignment and throughout undertake capacity-building activities (training and knowledge exchange, on the job training, etc) for the selected CH site staff, DMO and the NACHP representatives. The training plans and programs shall be agreed with the Client before implementation.
  10. Coordinate closely with other donor funded consultancies (for example USAID funded commercialization of Rabati Castle) and seek synergies to promote better outputs.

### **Deliverables:**

The Consultant shall submit the following reports:

- Task 1 - Inception Report: Report shall include a list of stakeholders consulted (including other donor funded activities), the results of the site visits (if travel is permitted and possible), a narrative of preliminary findings, a timeline and the next steps for the development of the management and commercialization plans and promotion strategy for the selected CH sites. Also a list of relevant participants to be invited to the validation workshop(s) (public and private, local and national).
- Task 2 – Management and commercialization plan, and promotion strategy. The final draft of the management and commercialization plan for the selected sites; Marketing and promotion strategies. All these documents shall use a practical approach to help the Project investment funds in the activation of the delivered plans and strategies (descriptions of the proposed products, terms of references to hire a firm or other consultancy for goods preparation and delivery, etc.)
- Task 3 - Validation workshops and final report: Presentation slides prepared for the validation workshop/s; list of participants (segregated by organization, position, name, sex and age); photos/screenshots from the workshop; narrative of the workshop; final management and commercialization plans with emphasis on product development and organization at site to increase the site’s visibility and attractiveness, leading to increased revenue generation.
- Task 4 – Capacity Building Report: Presentation slides prepared for the validation workshop/s throughout contract duration; list of participants (segregated by organization, position, name, sex and age); photos/screenshots from the activities conducted during the contract implementation; narrative of the activities delivered, other relevant materials such as PPTs, session plans, etc.

### Duration and Deliverables Schedule

N	Deliverable	Timeline	Payment %
1	Task 1	2 months after the contract is signed	30%
2	Task 2	4 months after acceptance of Task 1	20%
3	Task 3	2 months after acceptance of Task 2	30%
4	Task 4	10 months after the contract is signed	20%

The Consultant shall submit the reports in English and Georgian. Reports shall be submitted in two hard copies and a soft copy. The Consultant is entitled to move to the next task only after receiving MDF’s written confirmation on the current report acceptance which is also a prerequisite to issue the payment for the selected task.

### **Qualification Requirements for Consultant:**

- Higher Education: Master's degree or PHD in tourism, , Economics for cultural heritage, Heritage Management or other related fields;
- Proficiency in English language;
- Experience in the preparation of management plans (at least 3). Having international experience for the similar task will be an advantage;
- Experience in development of marketing and promotion strategies (at least 3). Having international experience for the similar task will be an advantage;
- At least 3 years' experience in cultural heritage site management and/or economic development of museums or heritage sites (possibly including also historic urban centers); proven experience in preparing management and commercialization plans (at least 5).
- Provide at least 2 recommendation letters from the previous collaborators.

### **Will be considered an advantage:**

- Proven experience in projects funded by international financiers (such as the European Union, Council of Europe, World Bank, UNESCO, etc.);
- At least 1 collaborative cultural heritage-related projects with Georgian institutions;
- At least 1 collaborative cultural heritage-related project with the international team and outside of Georgia.

### **Annex 1 – The list of cultural heritage sites touristic infrastructure**

1. **Saphara Monastery Touristic infrastructure;**
2. **Khertvisi Castle Touristic infrastructure;**
3. **Vardzia Touristic infrastructure;**
4. **Vanis Kvabebi Touristic infrastructure;**
5. **Zarzma Monastery Touristic infrastructure;**