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“Introduction to Public Finance Management”

E-learning Course

Terms of Reference for the Design Phase

02 August 2006

1. Background

The Paris Declaration on Aid Effectiveness spells out the need for donors to base their overall support on partner countries' national development strategies, institutions and procedures. Using a country's own institutions and systems increases the effectiveness of development assistance, provided that they give assurance that development assistance will be used for agreed purposes. Public finance management is at the heart of such systems.

The internal task force on harmonisation in the MFA in Denmark has prepared a set of recommendations for competence development in the Danish development assistance delivery system, pointing to an urgent need for increasing the organisation wide knowledge and skills in the area of public finance management.

To date, Danida's Centre for Competence Development (DCCD) has implemented two training courses for Head office staff but has been unable to provide the representations with possibilities for such training programmes. There is an urgent need to meet the needs of representations in this respect. Analysis shows that the costs of providing basic training in public finance management using traditional face to face training will be prohibitively expensive, and that e-learning will be a more cost-effective option. It is also believed that, in particular, the basic training in public finance management is a topic well suited for internet-based learning.

Other donors are ahead of the Ministry of Foreign Affairs of Denmark/Danida in this area. Notably, the Netherlands Ministry of Foreign Affairs is the leading donor in this area having launched a Public Finance Management Support Programme for their Embassies. The material developed under this support programme is well developed and will – as agreed with the Netherlands Ministry - form the basis for the e-learning course.

DCCD has considered various options concerning the most effective general approach to design and production of the E-learning course. It has been decided to adopt a two-stage approach with an initial

Design Phase that includes a pilot module and a usability test and provides a solid foundation for focused and cost-effective production of the course and its individual modules during the ensuing **Production Phase**. The latter will also include a user test and thus leave the E-learning course ready for launch and implementation.

The present Terms of Reference (TOR) cover the Design Phase only. These TOR contain sections specific to the Design Phase on Objectives, Target Group, Outputs, Scope of Work and Activities, Method of Work, Composition of the Team, and Timing. Annex 1 sets out the specifications for the PFM E-learning course that will result from the Design and Production phases. Annex 2 is a Process Action Plan (PAP) detailing the planned timetable of major activities and who is responsible; the PAP will require thorough updating at the end of the Design Phase. Annex 3 describes the CURSUM platform selected by DCCD for E-learning.

Another set of TOR for the Production Phase will be prepared by DCCD at the end of the Design Phase.

The two phases will be contracted separately by DCCD to an external Consultant, using as **contract form** the “7th edition of the Rules and Guidelines for Short-term Service Agreements between the Ministry of Foreign Affairs (Danida) and Enterprises” (**KR-rules**). Pending a successful outcome of the Design Phase, the same Consultant may be contracted by DCCD for the Production Phase, but there is no guarantee that the same Consultant will automatically continue in the Production Phase - and in any event, the types of input will differ between the two phases, necessitating a new contract.

2. Objectives

The **overall objective of the introductory course on Public Finance Management** (PFM) is to enable participants to engage in a dialogue internally in Danida about how to align Danish development assistance to partner country systems in practice¹. Having participated in the course, participants will have acquired an overview of how PFM systems work and information about a number of key analytical tools and assessments carried out on partner country PFM systems.

The **objective of the Design Phase** is that a detailed course outline, including a proposal for design of structure and interface has been agreed, a pilot module has been produced and that a process action plan and inputs required for production of the course have been prepared/identified in detail. This will then be the basis for TOR and a Contract for the Production Phase.

3. Outputs of the Design Phase

The key outputs to be delivered in the Design Phase are:

1. A detailed course outline, including proposal for design of structure and interface
2. A proposal for process action plan and inputs required for production of the course
3. A pilot module (Module 3: MTEF, specified in Annex 1, has been selected as pilot module)
4. A brief paper summarising lessons learned during the design phase

4. Scope of Work and Activities

In the Design Phase the Consultant will undertake the activities required to prepare:

- A detailed course outline, including proposal for design of structure and interface

¹ / Reference is made to the Sept. 2005 note ‘Including Aid Funds in Partner Country Budgets’, which can be found on the Aid Management Guidelines web-site.

- A proposal for process action plan and inputs required for production of the course
- One pilot module (Module 3, MTEF identified as the most suitable)

The scope of work and activities will include - but not necessarily be limited to - those set out below as well as those summarised in the draft PAP in Annex 2. Agreement on the activity/work plan will be reached between DCCD and the Consultant before commencement of the Design Phase work.

Preparation of detailed course outline;

The Consultant will:

- Familiarise himself with the existing material and the principal course documents
- Familiarise himself with the design templates used by DCCD as described in section A1.6 in Annex 1
- Participate in workshop/meetings with DCCD and resource persons
- Prepare the detailed course outline including proposal for design of structure and interface

The detailed course outline will specify the pedagogical strategy outlined in section A1.3 in Annex 1, and describe how to motivate the target group. The detailed course outline will also describe in detail each of the seven modules of the course. This encompasses; detailed learning objectives ranked in terms of difficulty and relevance; the exercises to be carried out, and the types of tests to be applied. The course outline will also give an overview of the amount of text, exercises, tests, and other material to be produced for and included in each module.

Proposal for Process Action Plan and inputs required for production of the course;

The Consultant will:

- Familiarise himself with the PAP attached as Annex 2
- Produce a recommended PAP for the Production Phase in the same format as Annex 2 (to follow) that sets out a credible rationale for a realistic timetable for production of the course, including pilot testing, enabling DCCD to launch and implement the course immediately afterwards
- Produce a detailed matrix overview by course module of a) the types/expertise and experience profiles and b) person/hours of input required for production, thus providing a detailed rationale for negotiation of a contract for the production phase

Preparation of pilot module;

The Consultant will:

- Prepare a pilot of Module 3: MTEF based on specifications in Annex 1 and the course outline and interface design being specified during the design phase

The draft pilot module will be submitted to a usability test to be conducted at DCCD with Danida staff representing the target group, to be selected and invited by DCCD.

The course outline, proposal for design of structure and interface, pilot module, and proposal for process action plan and input for production of the course must be approved by DCCD before a contract for production of the course can be negotiated.

5. Method of Work

Danida's Centre for Competence Development (DCCD) is the Project Manager. The Consultant (ECORYS together with its sub-consultant TinQwise on E-learning) will be responsible for undertaking the activities and delivering the outputs required in the Contract and the Terms of Reference (TOR) that are part of the Contract. The contracts office (ERH) in the Ministry of Foreign Affairs of Denmark will approve and sign the Contract with ECORYS.

An international Resource Group consisting of members of the Train4Dev PFM Sub-group will provide comments on draft course outline and pilot module. DCCD will be responsible for all communication with the Resource Group.

Throughout the assignment, there will be close coordination and communication on all points requiring comments, decisions, and follow-up action. The Consultant will appoint a Project Manager, and all day-to-day correspondence will be between the DCCD Project Manager and the Consultant's Project Manager (both identified in Section 6 below), unless otherwise agreed. The Consultant will be responsible for quality assurance on a continuing basis, as per the standard KR Contract provisions.

To facilitate the design process the Consultant will participate in one meeting at DCCD during the design phase, where the Consultant and DCCD will discuss comments on pilot module from the resource group, results of the usability test performed by TinQwise, summarise lessons learned in terms of inputs required for production. The objective of the meeting is to adjust course design, list adjustments for the pilot module to be implemented during production, and to finalise the PAP for the production phase and – subject to a satisfactory progress and outcome of the design work - agree the basis for a KR Contract for the Production Phase, so as to ensure a smooth transition between the two phases.

6. Composition of the Team

Consultant team

The team will consist of:

1. Mr. John Zevenbergen, Overall Project Manager, ECORYS
2. Mr. Christian Hiddink, PFM Expert, ECORYS
3. Mr. Erik Huisman, Project Manager, E-learning, TinQwise
4. Mr. Jaap van Nes, Content Developer, TinQwise
5. Mr. Joost Uitdewilligen, EduTechnical Developer, TinQwise,

DCCD project management

Project Manager: Chief Advisor Mr. Jens Lorentzen

E-learning Specialist: Web Coordinator Ms. Kirstine Schjermer

Resource Group

An international resource group with representatives of key donors involved in PFM activities will provide comments on course outline and pilot module. Inputs from resource group will be provided on request from DCCD and be channelled to the consultant through DCCD.

7. Timing

The tentative timing of major steps in the process of designing preparing and launching this E-learning course are summarised in Annex 2 – Draft Process Action Plan.

Annex 1 - Course Specifications

Summary:

The output of the Design Phase and the Production Phase is an introductory E-learning course on Public Finance Management, comprising an introduction, seven substantive modules (modules 1-7) and evaluation/follow-up. The estimated study time for the course as a whole is 11-15 hours. The estimated study time for each module is specified in section A1.2.

The target group, modules, the pedagogical/didactic concept, and the technical specifications are outlined in the following sections. Reference is also made to Section 6 Method of Work and to Annex 2 draft Process Action Plan (to follow), concerning the work process including production of interim/draft outputs, commenting and finalisation of outputs.

A1.1 Target Group

The primary target group of this course is staff working with development co-operation at Danish embassies in Danida programme countries. This includes heads and deputy heads of representations, desk or programme officers (both posted and locally employed) as well as chief financial officers. These groups hold university degrees and have adequate professional experience within the field of development co-operation. Some of the staff have a degree in economics or accounting while others have a degree in political science, social sciences, or natural sciences.

This course is specifically designed for those staff members who have little or no previous knowledge of the subject matter. This is believed to be the major part of the desk officers.

A small proportion of the target group typically working as “country economists” at the Danish Representations have more substantial knowledge of the subject matter.

A secondary target group is Danida advisors, in particular those advisors working in sector programmes, where harmonization and alignment is advancing or is expected to develop over the next couple of years.

Both target groups will have previous experience with E-learning, having participated in one of the following e-learning courses: Anti-corruption, Contract Preparation and Management or Get to Know Danida.

The total size of the target group in Danida is estimated at a maximum of 265 participants, comprising:

- 100 locally employed staff
- 80 posted staff (including chief financial officers)
- 35 heads and deputy heads of representations
- 50 Danida advisers (estimated out of 200 currently posted)

A1.2 Modules

Introduction to Public Finance Management and Danish Development

Assistance

Contents

This section will include a) an overview of course objectives; b) an introduction to the relevant PFM elements from the Paris Declaration on Aid Effectiveness, relating these to issues of government

ownership and sustainability; and c) an introduction to how embassy staff can use PFM knowledge in their daily work (e.g. examples of what relevant PFM questions to explore).

Estimated study time: max ½ hour.

Module 1: The budget – general framework and policy relevance Objectives

After this module, the participants will:

- a) Be more familiar with the links between public finance, poverty reduction and economic growth
- b) Know what is meant with ‘Public Finance Management’ (PFM)
- c) Know the differences between fiscal policy and PFM
- d) Be aware of the relationship between public finance and structural adjustment and macroeconomic stabilisation

Contents

This module will include a description of the role of public revenues and expenditures in poverty reduction and economic growth; definition of PFM (policies and systems; linking to fiscal and macroeconomic policies); and the increased importance of PFM. The module will describe the three objectives of PFM (aggregate fiscal discipline, allocative efficiency, and operational efficiency) and explain their importance, their basic elements, and key players of these in some detail. The module will highlight both the differences between fiscal policies and PFM and the relationships between PFM and macroeconomic stabilisation.

Estimated study time: 1- 1½ hour, incl. post-test

Module 2: The budget – phases and parts

Objectives

After this module, the participants will:

- a) Know about the six phases of the budget cycle, their content and their internal linkages
- b) Know who is in charge in each phase of the budget cycle
- c) Know the differences between the four types of budget classifications and their useHave an overview of the most important PFM tools used by:
 - a. governments in the budget process (the Annual Budget, MTEF, and National Audit reports) the donor community - both diagnostic and assessment - (CPAR, PEFA, and CPIA)

Contents

The module will describe the six main phases of the budget cycle (planning, budget preparation, budget execution, accounting and monitoring, reporting and audit, and policy review), who is typically responsible in each phase, and how these phases are linked to fiscal years. In addition, the four different types of budget classifications and their use will be described.

This module will provide an overview of the most important PFM tools used by governments in the budget process (the Annual Budget, MTEF, and National Audit reports). In addition, an overview of PFM tools used by the donor community (both diagnostic and assessment) will be provided (CPAR, PEFA, and CPIA) will be provided and how these relate to the different stages of the budget cycle.

The course material will include a detailed reference list where all relevant PFM diagnostic and assessment tools used by donors are listed and briefly described (including also CFAA, HIPC AAP, ROSC – Fiscal, etc.)

Estimated study time: 1-1½ hour, incl. post-test

Module 3: Medium-Term Expenditure Framework (MTEF)

Selected as pilot module

Objectives

After this module, the participants will:

- a) Be familiar with the concept, objectives and features of an MTEF
- b) Know why there is an increased focus from donor community on MTEF
- c) Have insight into MTEF practices in developing countries
- d) Know about main lessons and pitfalls of MTEFs

Contents

This module will describe the core features of a MTEF (e.g. government tool, not diagnostic, linked with the annual budget) and its role in operationalising the country's PRSP (or overall development strategy). The three pillars and different stages of MTEF will be explained with a description of which government agency is responsible for the different stages. The module will also include an overview of how the MTEF works in practice (at least one country example as specified below), the inclusion of donor funding, and of the key lessons for Embassy staff, including how and why they should be engaged in the process.

Example

An example of a good MTEF (Uganda is a possible example). The example will be used to present (partly) a real-life example, some of the limitations to its usefulness (is all donor funding included?; how well are annual budgets linked to the MTEF?), and how the MTEF is used for policy dialogue. The example should clearly illustrate how the MTEF plays an important role in operationalising the country's development strategy (and through this, why there is increased focus on the MTEF from the donor community) by including examples of how policy decisions carry cost implications over the medium term (not just one year). Through the example, the participants should familiarise themselves with what a well-functioning MTEF would look like and some of the key issues to look for with respect to real-life MTEFs.

Estimated study time: 2 hours

90 min of reading material (text and pictures) in pdf-files

10 questions with feedback for information transfer

2 flash animations to explain models and concepts

5 questions for final self-test

Part of the 90 min reading material and part of the 10 questions are spent on the MTEF example.

Module 4: Public Expenditure Review (PER)

Objectives

After this module, the participants will:

- a) Have an insight into the elements and key features of a good PER
- b) Be familiar with concerns about sectoral PERs
- c) Know why PERs are important input to policy dialogue
- d) Get an idea how PETS can be used.

Contents

This module will describe the PER diagnostic tool, focusing on its role in policy review (rather than review of PFM systems, which is more the purpose of PEFA). The seven key elements of a PER will be described, and features of a good PER will be presented. The module will also include a brief description of both overall and sectoral PERs, as well as different prototypes of PERs, based on country ownership. Finally, the module will include key lessons for Embassy staff – how and why to get involved in a PER.

Exercise – case study

The exercise will be used to present (partly) a PER summary and how this can be used for policy dialogue – the exercise should be designed to challenge the participants with formulating concrete policy measures for government and the difficulty in prioritising such measures. The exercise should focus on interpretation of a PER summary (either overall or at sector level) and the policy implications that are drawn from the analyses, rather than the underlying analytical work in the PER.

Estimated study time: 2-3 hours including post-test and case study (1-2 hours)

Module 5: Public Expenditure and Financial Accountability (PEFA)

Objectives

After this module, the participants will:

- a) Have an insight into the PEFA as a PFM performance measurement framework
- b) Be familiar with the role PEFA assessments can play in relation to PFM reforms undertaken in partner countries
- c) Have an insight into how the Embassy may use a PEFA assessment in the internal dialogue on alignment of Danish development assistance
- d) Be familiar with how PEFA and PER complement each other
- e) Have an overview of the differences between PEFA and other donor diagnostic tools (mainly CFAA, HIPC AAP, fiscal ROSC)

Contents

This module will describe the rationale for increased focus on accountability, the core objectives of the PEFA as an assessment tool with a focus on PFM systems (as opposed to policies dealt with under PER). The module will explain the overall purpose of assessing a country's PFM system in order to inform the PFM reform efforts as well as measuring the impact of such reforms over time. The module will explain what is and what is not covered by a PEFA in the assessment of fiduciary risks (e.g. why corruption is not explicitly included in the PEFA framework). The six critical dimensions and structure of a PEFA assessment will be explained. The description should focus on PEFA's role in providing an assessment of a country's PFM system (not its policies) and the associated fiduciary risks – and highlight the international agreement to use this framework for such assessments. In addition, the module will include an overview of how donors may use PEFA assessments as an input to elaborating a fiduciary risk assessment in connection with more aligned aid modalities (i.e. why it is relevant for all Embassy staff, not just those responsible for dialogue with government on PFM systems). It is not the intention of this course to provide detailed training on how to use the PEFA or how to interpret its results – this will be the subject of other courses. Finally, this module will briefly describe how the PEFA links to other diagnostic tools (CFAA, fiscal ROSC, HIPC AAP) will be briefly described. This will include the potential need for using aspects of the PEFA methodology for more detailed assessment of PFM in a specific sector.

Exercise – case study

The purpose of this exercise will be to familiarise the participants with the scoring system used in PEFA assessments. Based on the training material provided by the PEFA secretariat, the exercise will concentrate on one or two of the PEFA dimensions (i.e. selection of one of the cases prepared by the PEFA secretariat). In addition, the 3 donor indicators will be included in the exercise in order to provide the participants with an understanding of how non-aligned development assistance contributes to weakening the performance of the country's PFM system.

Estimated study time: 2-3 hours including post-test and case study (1-2 hours)

Module 6: National Audit

Objectives

After this module, the participants will:

- a) Know about the different types of national audit and Supreme Audit Institutions (SAIs)
- b) Know/Understand the role of Parliament in the audit process
- c) Have an insight into typical success factors for SAIs
- d) Know about the difference between internal control and external audit

Contents

This module will describe both internal and external audit functions, with the main focus on external audit. The three main types of audits; financial audit, compliance audit, and performance audit will be explained. The cycle of financial and democratic accountability will be described, including the key actors and their relationships, and highlighting the key role of Parliament. The fundamental conditions for a successful Supreme Audit Institution will be described. Finally, the key lessons for Embassy staff will be explained – focusing on the key role of external audits in increasing domestic accountability.

Example

The example will present the Zambian experience of collaboration between the SAI in Zambia with SAIs from donor countries. The example should focus on key features to analyse in assessing the

functioning of the SAI and how to ensure the required audits of donor funds (where donor funds are merged with government funds) in a manner that supports, rather than undermines the role of the SAI.

Estimated study time: 1½-2 hours, incl. post-test

Module 7: PFM systems in Francophone and Anglophone Countries

Objectives

After this module, the participants will:

- a) Know the principal differences between the two PFM systems

Contents

Using the concepts learnt in this introductory course, this module will describe the main similarities and differences between the Anglophone and Francophone PFM systems. The module will provide an overview of these differences and similarities based on the types of control, the agencies exercising the control, what is controlled, and the mode of accountability. The focus of this module will be to highlight the main advantages and disadvantages in the two systems. The module will also provide recent examples of how the systems are changing, e.g. the case of Benin.

Estimated study time: 1 hour, incl. post-test

Evaluation and Follow-up

Objectives

After completing this section, the participants will:

- a) Have made an outline action plan for further specific actions with regard to further alignment of their country portfolio
- b) Have made an assessment of their own needs with regard further PFM training, consulting support, head office support, etc.

Estimated study time: 1 hour

Estimated study time for the PFM course in total: 11-15 hours

A1.3 Pedagogical Considerations

Pedagogical and Technical Building Blocks

The following are building blocks of every module:

- Introduction text on screen
- Instruction sentences on screen referring to material in pdf
- Pdf-files including texts and pictures with the information density of a popular newspaper
- Questions for information transfer, incl. feedback
- Explanatory interactive animations
- Brief post-test

Group Based Work and Individual Study

Based on DCCD's previous experience with implementation of the anti-corruption training course, it is found that a combination of individual study and group work (centred on exercises) is the optimal solution. This enhances individual and collective learning, increases completion rates, and enhances application of the matter taught in the daily work.

Exercises

The course will include generic case exercises from selected countries. It will not be possible and meaningful to apply specific exercises for each country in this introductory course. The exercises will therefore be made with due consideration to the fact that a facilitator will be assigned during course implementation. It is proposed that the exercises will be group exercises.

Facilitator

A facilitator will be assigned to the course. The role of the facilitator will be to provide feedback to working groups on their answers to the exercises. The role of the facilitator may be extended to facilitating a discussion forum related to the e-learning course.

Testing and Certification

The course will include a question appetizer, and a brief post-test for each module, allowing the participants to test their acquired knowledge. The course will not include certification of the completion or participation in the course.

A1.4 Course Material

The elements to be included in the E-learning course will comprise:

- Module texts (introduction, seven substantive modules as described above, and evaluation/follow up section, as described in the foregoing)
- Module Tests (seven in total)
- Cases – two larger cases for the modules 4-5 on PER and PEFA
- Exercises and examples – a number of smaller exercises and examples to support the objectives of each module
- Glossary of terms
- Links and toolbox, including links to good published PERs MTEFs, etc.
- Questionnaire and report format for participants' needs assessments and action plans
- Course Evaluation Questionnaire (based on DCCD generic evaluation format)

The training material on which this e-learning course is based includes a series of illustrations in Power Point format. A number of these illustrations should be maintained to provide an overview to the reader.

The training material for Module 5 (PEFA) will be based on the training material prepared by the PEFA secretariat and posted on the PEFA website (www.pefa.org).

A1.5 Follow-up and Application

As a Danish undertaking

The intention is to make a follow up workshop at a selected sample of Danish embassies (maybe 3 in a pilot phase) with the aim of discussing and deciding how to further align Danish development assistance to the national systems in the country, using the available analyses and diagnoses carried out in the country. These workshops will be carried out and facilitated by MFA staff from Technical Advisory Services or/and the Quality Assurance Department.

In preparation for these workshops each Embassy is requested to prepare a joint follow-up report describing how they would like to follow-up on this training course. This may be in the form of requests for further training required, assistance from consultant, assistance from HQ, policy clarifications, etc. The purpose of this is to provide MFA and DCCD with information allowing design and implementation of follow-up.

As a joint donor undertaking

A similar follow up may be made for a group of donors in a given country but with a number of substantial differences. Firstly, of course is the mode of implementation. Participants will be from a number of embassies and to the extent possible, the group work should be across agencies to facilitate dialogue and discussion. Secondly, the follow-up report prepared by the participating embassies should preferably be a joint undertaking between the embassies. Thirdly, the team conducting the workshop should probably be a joint team from different donor agencies' headquarters perhaps assisted by external consultants. Finally, one should consider how best to involve the national partner staff in the undertaking.

A1.6 Graphical Design

The graphical design must be in line with the formats on the DCCD E-learning Portal, www.e-learning.danida-dccd.dk, see Annex 3. The formats are defined in the CURSUM style sheet "DCCD E-learning Portal" and a standard, both available in the CURSUM administration module, when developing the course.

The general page layout must be as illustrated and described below:

Top Bar	
Left Bar	Main Area

Top Bar

Top bar will contain DCCD logo as specified in CURSUM style sheet "DCCD E-learning Portal".

Left Bar

Left bar will contain the main navigation with a foldout menu.

The active menu item will be highlighted, indicating present position in the course.

Format for menu buttons will be adopted and, if deemed necessary, developed from menu buttons in CURSUM style sheet "DCCD E-learning Portal".

Main Area

Main area is intended for course material, e.g. texts and illustrations.

Due to scrolling issues and printing options, DCCD does not find it desirable to divide the main area, e.g. in two columns.

A1.7 Technical Specifications

The following section contains a brief general description of CURSUM and a list of technical requirements for the e-learning course.

A1.7.1 System Description

The e-learning course will be implemented in the Learning Content Management System CURSUM, which is DCCD's platform for e-learning activities.

SCORM Compatibility

CURSUM is SCORM (Sharable Courseware Object Reference Model) compatible, which means that course content can be created in other environment and imported into CURSUM as a SCORM package.

Technical requirements for use of CURSUM

To build or undertake a course the following technical requirements have to be met:

- General use of CURSUM: A browser (version 5 compatible or later version – both Internet Explorer and Netscape are supported)
- Use of CURSUM Administration section: Internet Explorer 5+.
- An Internet connection minimum 28,8 kps modem (depends on the content of the course, i.e. streaming video will require a relative faster connection)
- Username and password

For further specifications please refer to *CURSUM Technical White Paper, February 2004*, attached as Annex 3 to these TOR.

A1.7.2 Technical Requirements for e-learning course

The course material must be developed on the CURSUM platform or be SCORM compatible in order for it to be imported in CURSUM.

The course material must be available as printable or/and downloadable pdf-files, as course material is expected to be comprehensive.

Flash (version 7.0) may be used, but otherwise the course should use standard CURSUM functionality.

Audio may be used, but the course must be designed not to disfavour users with no audio options (e.g. by providing speak in text as well).

The course must be designed in a way that makes it possible to use the CURSUM functionality for making a CD ROM version of the course.

The course material must be optimised for the following requirements:

- Screen resolution: 1024x768
- Internet bandwidth: 128 kb

The course materiel must include a section on the technical requirements in order for course user to assess if their IT-equipment has the needed capacity or not.

A1.7.3 Future of the System

This section briefly describes the future of CURSUM and of the e-learning course.

CURSUM will be developed and updated regularly by the supplier (VEG). No major changes are foreseen.

The e-learning course will be subject to updates and therefore it must be designed in a way that makes it possible for DCCD to make revisions to the material, e.g. updating the referenced documents.

The course must also be designed in a way that makes it technically possible to add new modules.

A service agreement for updating the course will be negotiated separately between DCCD and the Consultant.

Annex 2 – Draft Process Action Plan

Action	Target Date (2006)	Responsible ²	Comments
Launch joint PFM e-learning initiative by DCCD	January	DCCD	at Train4Dev core group meeting held at DFID, London
Seek interest and substantive comments from donor community in developing this course as a joint undertaking led by DCCD	March - April	DCCD	DGIS/Netherlands agrees to use of “introduction to PFM” materials developed by ECORYS for DGIS under the PFM Support Programme
Upload draft specification for information/comments on the OECD/DAC website of the Joint Venture (JV) on PFM	April	DAC JV	DCCD’s PFM E-learning initiative will be discussed at the DAC PFM JV meeting on 29-30 June
Finalise course specification	April	DCCD	
Comments/endorsement of proposal/specification from Train4Dev PFM Subgroup via DGIS	1 May		
Separate comments from NORAD, Norway	2 May		
Circulate/discuss course specification with interested donor colleagues and reach agreement on international resource group comprising key donor representatives, in the form of the Train4Dev PFM Sub-group	21-24 May	DCCD	Train 4Dev Annual Assembly in Oegstgeest/Netherlands
Meeting DCCD/DGIS with ECORYS at Oegstgeest	24 May	DCCD	Agreement in principle on general approach and DCCD-ECORYS cooperation

² Danida’s Centre for Competence Development (DCCD) is the Project Manager. ECORYS will be responsible for undertaking the activities and delivering the outputs required in the Contract and the Terms of Reference (TOR) that are part of the Contract. The contracts office (ERH) in the Ministry of Foreign Affairs of Denmark will approve and sign the Contract with ECORYS. An international Resource Group consisting of members of the Train4Dev PFM Sub-group will provide substantive comments and possibly, case material to be included in the course. DCCD will be responsible for all communication with the Group.

Correspondence and negotiations DCCD-ECORYS to reach agreement on approach to the assignment and selection of IT sub-consultant	June	DCCD/ ECORYS	
Agreement to proceed with a Design Phase with ECORYS/TinQwise, followed by a Production Phase under separate contract	30 June	DCCD/ECORYS With TinQwise	
Draft TOR for Design Phase to ECORYS	11 July	DCCD	
Meeting DCCD/ECORYS/TinQwise in Copenhagen to agree Design Phase	14 July	DCCD	Outcome: required basis for DCCD to proceed with contracting ECORYS/TinQwise for Design Phase
Finalise TOR for design Phase	14 July	DCCD	
Draft Contract in electronic version from ECORYS/TinQwise to DCCD	24 July	ECORYS	
Comments on draft Contract to ECORYS	24 July	DCCD	
Complete Contract and send via E-mail/fax/post to DCCD	24 July	ECORYS	(2 signed originals)
Request to MFA Contracts Office (ERH) for Contract	27 July	DCCD	
Contracts office to issue signed contract to ECORYS	31 July	ERH	
<u>Design Phase:</u>			
Submit pilot module and first draft of course outline, incl. draft PAP for production phase to DCCD	25 September	ECORYS/ TinQwise	
Undertake initial review of pilot module and first draft of course outline, incl. draft PAP for production	27 September	DCCD	
Submit pilot module and first draft of course outline, incl. draft PAP for	27 September	DCCD	

production to resource group for comments			
Usability test	5 October	TinQwise	At DCCD with selected representatives form target group (alternative date before 11 October can be agreed)
Receive comments from resource group on pilot module, course outline and PAP and provide comments to ECORYS	11 October	DCCD	
Submit summary of result of usability test to DCCD	11 October	TinQwise	
Meeting to discuss – comments and lessons learned	20 October	DCCD, ECORYS/ TinQwise	
Submit final Course Outline (+lessons learned paper) and PAP for production phase to DCCD	23 October	ECORYS/ TinQwise	
Production Phase	November – December 2006		
End Date of course production	22 December		
Implementation of 3 pilot courses	January 2007 -	DCCD, ECORYS	Contract for production phase to include ECORYS facilitation of 3 pilot courses and follow-up workshops

Annex 3 - CURSUM Technical White Paper, February 2004

(separate file attachment)