

## **TERMS OF REFERENCE FOR CONSULTANTS**

1. A total of 70 consulting inputs will be allocated as follows: (i) 33 person-months for 16 international individual consultants; (ii) 25 person-months to 2 national individual consultants; and (iii) 12 person-months for 3 firms/institutions to conduct survey. The international individual consultants, including out-of-pocket expenses are estimated to cost \$441,000 while the national individual consultants, are estimated at \$180,000.

### **A. INTERNATIONAL CONSULTANTS**

#### **1. Economists (15 persons, 27 person-months)**

The economists will conduct in-depth innovative and policy-relevant knowledge on population aging in the region including but not limited to demographics, gerontology, public health, and the changing socioeconomic characteristics and preferences of older population. They should have a PhD in economics and have at least 10 years of specific experience relevant to the assignment as well as strong publication records to show in-depth knowledge in population aging issues, and preferably have good knowledge of the region's context and relevant policy dynamics. Specific tasks include the following:

- (i) conduct literature reviews and research design to enhance existing economic literature on trends based on assigned topics;
- (ii) compile data, analyze, and provide sensible economic interpretation of the empirical results and possible policy implications;
- (iii) draft and finalize research reports that will serve as background materials for the research online working papers and executive report;
- (iv) make necessary revisions to the research based on feedbacks from reviewers, readers, and editors; and
- (v) participate in related seminars, workshops, and conferences, as needed.

#### **2. Economics Editor (6 person-months)**

The editor will review and edit the content of the research working papers, executive report as well as policy briefs, blogs, and social media items to ensure coherence and readability, sound economic arguments, and the highest publication standards. The consultant should have at least 10 years of relevant experience in editing economic reports and publications. Specific tasks include the following:

- (i) examine economic arguments to assess if they are logical and based on accepted economic theory and principles;
- (ii) rewrite, add, or delete information, and help revise pages or sections, if necessary, to tighten economic arguments, fill in gaps in the discussions, and ensure the smooth flow of ideas;
- (iii) examine the tables, figures, and charts to ensure data consistency within pages and documents, and suggest deletions and additions to ensure that they are useful; and
- (iv) ensure that documents adhere to the ADB Handbook of Style and Usage and conform to high publication standards.

**B. NATIONAL CONSULTANTS****1. Research Associate (2 persons, 25 person-months)**

The research associate should have in-depth knowledge of the economic developments and support knowledge production through analytical and data gathering tasks. He/She will also support the TA activities to achieve the intended outcomes of the TA. The research associate should have bachelor or master's degree in finance or economics with a minimum 5 years of specific experience relevant to the assignment. Specific tasks include the following:

- (i) provide technical support in research, including data collection and compilation of key information from various sources, data processing and analysis as assigned by supervising international staff;
- (ii) provide research assistance, including the management of datasets, and perform and assist in econometric studies;
- (iii) contribute to drafting of executive reports;
- (iv) provide editorial and proofreading support in the final reports;
- (v) assist in the preparation of presentation materials and briefing notes;
- (vi) assist smooth dissemination of research work and TA outputs;
- (vii) work closely with working paper authors and relevant staff at ADB; and
- (viii) perform other tasks as required by the supervising staff.

## TERMS OF REFERENCE FOR FIRM CONSULTANT

### FIRM CONSULTANT FOR THE CONDUCT OF THE *SURVEY ON AGING POPULATION IN (COUNTRY)*

(Survey to be conducted for Project Number 54116-001 Challenges and Opportunities of Population Aging in Asia: Improving Data and Analysis for Healthy and Productive Aging)

#### A. Background

1. The Asian Development Bank, under the Knowledge and Support Technical Assistance for *Challenges and Opportunities of Population Aging in Asia: Improving Data and Analysis for Healthy and Productive Aging*, invites firms and research institutions with prior experience in surveys to submit proposals to conduct a survey on the characteristics of aging population in targeted ADB's developing member countries (DMCs). The survey is expected to provide quality datasets on the economic, social, and health status of older persons for targeted DMCs. Survey results will be utilized in producing innovative research and assessments on healthy and productive aging.

#### B. Objectives

2. The ultimate objective of the survey is to increase knowledge and understanding of the aging population profile for targeted DMCs through quality data to help governments monitor aging-related developments and thus make informed decision when reforming health and social security systems and crafting broader policies to adapt to population aging.

3. The survey should be able to:

- a. Collect data on the demographic, economic, social and health status of older persons.
- b. Identify their existing needs, the extent of social protection coverage, and other policy relevant attributes.
- c. Identify constraints and gaps in the provision of health and social services to the elderly population.
- d. Be able to be used to summarize findings on demographic profile of the aging population in the society.

#### C. Scope of Work and Detailed Tasks

4. The tasks expected of the survey firm are as follows:

- a. Have a questionnaire which is designed to identify statistically the critical information on the aging profile of the target DMCs. It will be comprised of both quantitative and qualitative questions. The questionnaire will be pre-tested and finalized in collaboration with ADB and may draw on existing HRS family surveys.<sup>1</sup>
- b. Field survey of household samples with the minimum target number of observations.<sup>2</sup>

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<sup>1</sup> The TA may consult with relevant ADB divisions in finalizing the survey questionnaire, when needed.

<sup>2</sup> The sample size of the surveys may vary by country, depending on the context and the policy environment/objective of the country.

- c. Create a prescreener to ensure that we obtain quota amounts which can ultimately be used as weights to get representation of distribution of household samples in certain location.
- d. Follow steps for sampling and surveying (but will ultimately be agreed upon in conjunction with ADB).
- e. Data encoded for screener.
- f. Data encoded for full questionnaire of all household samples.
- g. Data encoded for subset of questionnaire of all household samples.
- h. Production of relevant codebook and short notes on challenges encountered in surveying.

#### **D. EXPERTISE, INPUTS REQUIRED, COMPETENCIES AND MAJOR TASKS**

5. The survey will require the services of 3 national experts, rendering a total of 12 person-months. Further details are given below:

Expert/Task/Qualification	No. of Person-months
<b>1. One (1) Survey Expert, National (Team Leader)</b>	
<b>1.a Main Responsibility/Tasks</b>	
<ul style="list-style-type: none"> <li>- Oversees planning and implementation of the field survey</li> <li>- In close consultation with ADB staff, develop appropriate questionnaire that will cover all the survey objectives to be provided by ADB staff</li> <li>- Prepare all the survey instruments—questionnaire, supervisors' and enumerators' manuals, training materials</li> <li>- Train enumerators and relevant personnel associated with the survey roll out</li> <li>- Together with the Fieldwork Supervisor, pilot the survey instrument and finalize questions as necessary</li> <li>- Monitor progress towards completing the survey and do "spot checks" on interviewers and also on the fieldwork supervisor to ensure he/she is carrying out his/her quality control function</li> <li>- Provide a brief report on the survey and survey process</li> </ul>	
<b>1.b Qualifications</b>	
<ul style="list-style-type: none"> <li>- At least Master's degree in Statistics or Economics</li> <li>- At least 10 years experience in planning, managing, and conducting surveys of enterprises</li> <li>- Has extensive experience in research and project management in the area of aging population including but not limited to demographics, gerontology, public health</li> <li>- Proven track record in project and staff management for international organizations</li> </ul>	
<b>2. One (1) Statistician/Survey Designer, National</b>	
<b>2.a Main Responsibility/Tasks</b>	
<ul style="list-style-type: none"> <li>- Develop an appropriate and workable probability sampling design that allows for testability of certain subgroups of samples</li> </ul>	

- Ensure that the sampling design is accurately implemented and that measurement errors are minimized in the survey process
- Participate in sampling selection
- Assist in the training of interviewers, as needed
- Devise an appropriate audit mechanism that will randomly re-survey 10% of all samples on a shortened questionnaire to verify the validity of the answers
- Validate and process the survey data including the audited sub-sample and the prescreener questionnaire

### **2.b Qualifications**

- At least Master's degree in Statistics
- At least 10 years experience in applying sampling techniques, survey design, and database management for surveys
- Extensive experience in research and team management

## **3. One (1) Survey Implementation Specialist (Fieldwork Supervisor), National**

### **3.a Main Responsibility/Tasks**

- Coordinate daily activities of interviewers and performs quality control in the field
- Together with the Survey Expert, pilot the survey instrument and finalize questions as necessary
- Organize and direct the fieldwork
- Assist in the training of interviewers
- Check the work of each interviewer to minimize number of errors and missing values
- Ensure that questionnaires are correctly filled out and that the information in them is accurate by conducting random spot checks of enterprise interviews
- Report regularly to the manager on progress and any irregularities in the field

### **3.b Qualifications**

- At least Master's degree in Statistics or Economics
- At least 10 years experience in supervising fieldwork of large-scale surveys and censuses
- Prior experience in conducting quantitative surveys (including as an interviewer)
- Should have strong leadership skills, excellent attention to details and time management

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**Total Person-months (National)**

**12**

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**E. OUTPUT DELIVERABLES AND TIME FRAME**

<b>Output Deliverables</b>	<b>Time Frame</b>
Survey questionnaires designed and pretested	December 2020–March 2021
Survey conducted	April–October 2021
Survey results validated and tallied	November–December 2021

**F. Milestone Payments**

- a. 30% milestone payment for finalized questionnaires approved by ADB
- b. 50% milestone payment for encoded questionnaires, screener, and audited subsample, as well as paper based questionnaires
- c. 20% milestone payment for delivery of short report