

**REQUEST FOR EXPRESSIONS OF INTEREST/HIRING ADVERTISEMENT
(INDIVIDUAL CONSULTANT)**

COUNTRY: VIETNAM

PROJECT: REDUCING INCOME- AND HEALTH-RELATED VULNERABILITY OF OLDER PERSONS IN VIETNAM

Loan No./Credit No./ Grant No.: TF0B3229

Assignment Title/Position: Final Evaluation Consultant

Reference No. (as per Procurement Plan): IC-08

HelpAge International is global network of organisations working towards a world where older people fulfil their potential to lead active, dignified, healthy and secure lives. The HelpAge global network is made up of 158 members in 86 countries working to support older people and promote their rights, with programmes managed by hubs in London, Africa, Asia and the Middle East.

The HelpAge International in Vietnam (HAIV) has received financing from the World Bank toward the cost of the Reducing Income- and Health-Related vulnerability of Older Persons in Vietnam Project under the Grant No. TF0B3229, and intends to apply part of the proceeds for consulting services.

The detailed Terms of Reference (TOR) for the assignment are attached to this request for expressions of interest.

Further information can be obtained at the address below during office hours.

Interested candidates are requested to submit a technical proposal and CV of the consultant who implements this assignment to the address below (by email, or by mail) **by 15h00, September 10, 2024**. Please clearly note which position you are applying in your email title.

- Email to: halt@helpagevn.org; Cc: dathq@helpagevn.org
- Address: HelpAge International in Vietnam, Room A201, No. 2, alley 59, Lang Ha street, Thanh Cong ward, Ba Dinh district, Hanoi, Vietnam
- Attn: Le Thi Ha (Ms.) – Finance and Admin/Procurement Officer (halt@helpagevn.org ; 024 32474145, 0985 142863)

TERMS OF REFERENCE (TOR)

FOR AN EXTERNAL/INDIVIDUAL CONSULTANT TO CONDUCT THE FINAL EVALUATION

“Reducing Income and Health-Related Vulnerabilities of Older Persons in Viet Nam” (VIE071-P171030 PROJECT)

1. About HelpAge International

HelpAge International (HelpAge) is an international non-government organization and the secretariat of a global network of organizations promoting the right of all older people to lead dignified, healthy and secure lives.

Our vision is a world in which all older people can lead dignified, healthy and secure lives. **Our mission** is to promote the wellbeing and inclusion of older women and men and reduce poverty and discrimination in later life.

We want every older person, everywhere can say:

- I enjoy the well-being
- I am treated with dignity
- My voice is heard.

HelpAge International’s strategy 2020-2030 promises that ‘by 2030, millions of the older people will enjoy a better quality of life, through improved wellbeing, dignity, and voice. We believe that everyone should have the opportunity to live a long and healthy life, experience wellbeing and do what they value.

Our Values

At HelpAge International we work hard to achieve our goals together as a team with a clear shared purpose. Everyone who works at HelpAge shares our values and are committed to behaviours that demonstrate and support them.

Our values inform how we work together:

Inclusive	We respect people, value diversity and are committed to equality.
Impact	We value and recognise the contribution of our staff and network members as we put older people at the centre of everything we do.
Partners	We work alongside network members and others to increase reach, influence and impact. We are committed to a culture of collaboration and building positive relationships.
Learning	We are passionate about learning, accountable and work together to find creative solutions

Equal Opportunities

HelpAge International is committed to creating an inclusive working environment, promoting, and providing equal opportunities and respecting diversity in employment. We welcome applications from all suitably qualified individuals regardless of their age, disability, gender

reassignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief, sex and sexual orientation. We encourage and facilitate a flexible working environment.

Safeguarding

Everyone has a role in creating and sustaining a safe and respectful working environment, where no one comes to any harm or is maltreated. At HelpAge we take our responsibilities very seriously and will take action against wrongdoing. We will do everything we can to ensure that we do not engage people that pose a safeguarding risk and will undertake criminal record checks as required.

2. Introduction of the Project

2.1 General information

- **Project name:** Reducing Income and Health-Related Vulnerabilities of Older Persons in Viet Nam (VIE071-P171030 Project)
- **Project duration:** 2020 - 2024 (Period covered by the evaluation: 30/11/2020 – 30/09/2024)
- **Budget:** 2,75 million USD
- **Project sites:** Hoa Binh, Thanh Hoa, Da Nang, Quang Binh, Khanh Hoa, Ninh Thuan
- **Donor:** Government of Japan through Japanese Social Development Fund (JSDF), administered by World Bank in Vietnam (WB)
- **Local implementing partners:** Association of the Elderly (AE) in 6 provinces, with technical support from HelpAge and National AE.
- **Main beneficiaries:** Older persons, their families and communities in the project areas

2.2 Project development objective

To reduce the income- and health-related vulnerabilities of older persons, the project development objective (PDO) is to increase the participation of older persons in income-generating activities and their use of community-based health and social care services in the selected communities in six provinces (Hoa Binh, Thanh Hoa, Da Nang, Quang Binh, Khanh Hoa, Ninh Thuan).

The PDO will be achieved through:

- a) **Livelihood support:** increasing the income of older persons through appropriate, age-friendly and pro-poor livelihoods activities that generate income in old age;
- b) **Health promotion and care:** strengthening linkages between community-level Inter-generational Self-Help Clubs (ISHCs) health-related activities and formal primary health care services to enhance the health-related activities of the ISHCs and improve access of older people to basic health care (especially for non-communicable diseases), thus keeping older people healthier and economically active longer;
- c) **Social care:** developing, implementing and advocating for appropriate community and home-based long-term care to enhance quality of life and independence for people whose ability to perform activities of daily living (ADLs) and instrumental activities of daily living (IADLs) is declining.

All of the above will be implemented by community led, innovative, effective and sustainable ISHCs, in partnership with local AE, authorities and service providers. Totally 180 ISHCs will be established and supported to provide comprehensive services for disadvantaged people, majority

of them are older people. By end of 2024, there are 186 ISHCs have been established, one in each village in six project provinces. Project direct beneficiaries include ISHC members, ISHC management board members, homecare receivers, local partners, etc.

3. Specific objectives and scope of final evaluation

- Validate project achievements against the implementation plan and results framework
- Assess the OECD DAC criteria of relevance, coherence, effectiveness, impact, efficiency, and sustainability of the project
- Analyze project lesson learnt and good practices
- Provide recommendations for expansion

This final evaluation will assess the whole project performance from its start (Nov. 2020) to end of Sep. 2024 and will be restricted to the 6 project provinces with traveling required to at least 3 provinces. Key to this, the final evaluation will be as participatory as possible with key partners playing key roles to ensure a high degree of ownership, accountability and transparency.

4. Evaluation questions

A complete list of evaluation questions and sub-questions will be jointly developed together with HAI and the WB team. The below questions are indicative of the types of questions to be addressed in the evaluation:

Relevance:

- To what extent did the project model (ISHC) benefit targeted project beneficiaries and address the issues identified (income and health related vulnerability of older persons)?

Effectiveness:

- Does the project achievement reach result framework indicators and targets, both at PDO and intermediate result levels?
- How is the Environment and Social Framework (ESF) is implemented? How effectively were the project activities monitored? Were the Monitoring & Evaluation (M&E) activities relevant and appropriate?

Impact:

- What are the changes in economic and health status of the targeted beneficiary community, as a result of the project, including both intended and unintended effects?

Efficiency:

- Evaluate efficiency in terms of cost and implementation. Are funds committed and spent in line with the implementation timescale? If not, why not?
- Were the financial resources and other inputs used efficiently to achieve outputs? If appropriate, how does the project utilize local resources?

Sustainability

- What is the evidence that the ISHC's in each community to continue or grow without the support of the project;
- What is the evidence that the local partners and or local authorities show commitment to the continuation of investment

5. Final evaluation methodology and Data Collection Methods

The selected consultant is expected to develop the technical proposal that helps address the above evaluation questions and ensure guarantee the reliability of the evaluation. During the Final Evaluation, field qualitative survey which will provide primary information will be conducted. A set of broad Final Evaluation questions with relevant sub-questions, will be formulated to collect the information related to the project achievement of its objectives and results. Quantitative data and information (e.g. on outputs and outcomes achieved) will be gathered from the project reports (six months and annual), baseline and annual evaluation reports including 2024 one. The consultant is expected to employ a variety of data collection and analysis techniques for both quantitative and qualitative data to ensure a comprehensive evaluation exercise. This will likely include, at a minimum:

- **Desk review:** Review of existing documentations, including but not limited to project reports, project document including result framework and monitoring and evaluation system/result, project manuals, baseline and annual evaluation reports.
- **Focus Group Discussions (FGD):** Conduct FGD with target groups and other stakeholders to assess implementation experiences and effectiveness, document successes, challenges and lessons learned, and develop recommendations for improvement.
- **Key Informant Interviews (KII):** Conduct consultations with key project stakeholders, including HelpAge staff, ISHC consultants, local partners leaders, project officers, etc.
- **Home visits:** Conduct observation and interviews with ISHC members and non ISHC members who are ISHC beneficiaries (home care, self-help/emergency support....) at their homes.

For FGD, KII and home visits, the consultant is expected to select provinces among the 6 project provinces to ensure the evaluation represents rural/urban, kinh/ethnic groups. Hoa Binh, Da Nang and Ninh Thuan are recommended for field survey. All primary data collected during the field survey must be disaggregated by gender, age, ethnicity, and disability status when relevant and possible. The Evaluation consultant is expected to apply or adjust the provided tools and/or develop new ones providing that they can ensure the quality of tools to be used in this evaluation.

A range of project documentation and tools will be made available to the Evaluation consultant that provides information about the design, implementation and operation of the Project. Document includes: Project paper, Project Operational Manual, Project Revolving Loan Fund Management Manual, Project periodical reports, Project Result Framework, Project M&E system, Baseline report, Annual evaluation reports, and others if appropriate.

6. Major Tasks and Responsibilities of consultants

Task 1: Desk review

- Desk review will be done prior to any field visit. Preliminary discussions with the project staff from HelpAge will also take place during this desk review.
- Review relevant project documents, including but not limited to: Project Operational Manual, Project Revolving Loan Fund Management Manual, Project periodical reports, Project Result Framework, Project M&E system, Baseline report, annual evaluation report (from year 2), midterm evaluation report and others if appropriate.
- Collect and review relevant local partners' and/or government policy/guideline document, relevant secondary data etc.

Task 2: Development of inception report, survey tools and evaluation plan

In consulting with HelpAge staff, the consultant(s) will

- Revise technical proposal which include methodology, proposed final report outline and the evaluation plan. The evaluation plan needs to include timeline, human resource and budget for activities of the survey. Data collection methods will be age, gender and disability as appropriate. The revised technical proposal will be submitted for HelpAge' comments.
- Develop the inception report which reflects the evaluation objectives mentioned in Section 3. The inception report will consist of rational and technical proposal and will be submitted for WB' and HelpAge' comments and approval.

Task 3. Implementation of the field survey

The consultants will conduct data collection in at least three project provinces with supports from HelpAge and local partners. Ensure that data collection processes are systematic and consistent, capturing comprehensive information from diverse sources. The consultant will implement field survey including but not limited to following activities:

- Conduct focus group discussions with project beneficiaries who are relevant ISHC/community members, both male and female, to assess implementation experiences and effectiveness, document successes, challenges and lessons learned, and develop recommendations for improvement.
- Carry out key informant interviews i.e. consultations with key project stakeholders, including relevant government officers and project partners (Association of the Elderly), Club Management Board members. Guidance on appropriate stakeholders will be provided by project team

Task 4: Analysis of information and report writing

- Collate and analyse data.
- In the combination of utilizing the data and information from previously and this year annual evaluation results, the consultant will propose the list of key findings, lesson learnt and recommendations which need to be approved by HelpAge.
- The consultants will draft report following report outline described in inception report and covering entire above-mentioned list of key findings and recommendations. The first and second draft reports will be sent to HelpAge for review and comment.
- Incorporate comments and produce final report. The final report must be written both in English and Vietnamese. The final report will be approved by HelpAge Int. and WB.
- Adhere to HelpAge International's safeguarding and data protection policies as well as Environmental and Social Policies of the World Bank

Task 5: Develop PowerPoint Presentation

- The consultants will develop PowerPoint presentation consisting of main findings, lesson learn and recommendations of this evaluation.
- The consultant(s) will present this PowerPoint to HelpAge and WB and facilitate the discussion.

7. Expected Deliverables

- Approved Inception report (in English) consists of following parts:
 - Evaluation design including rationale, study methodology

- o Data collection tools
- o Detail work plan

The Inception report (in English) is approved by HelpAge Int.

- Approved Final Evaluation report (in Vietnamese and English) contain following parts:
 - o Executive summary
 - o Background description of the Program and context relevant to the evaluation
 - o Overview of the evaluation methodology and data collection methods, including a Study matrix and Scope and focus of the evaluation
 - o Findings aligned to each of the key Study questions.
 - o Specific caveats or methodological limitations of the evaluation
 - o Conclusions outlining implications of the findings or learnings
 - o Recommendations
 - o Annexes (Evaluation schedule, List of people involved, raw data, survey tools, and any additional documentation)

Final Evaluation report is approved by HelpAge Int and WB

- Approved PowerPoint Presentations (in Vietnamese and English) includes following parts:
 - o Evaluation methodology and data collection tools
 - o Key findings
 - o Conclusion
 - o Lesson learnt and recommendation

PowerPoint presentation is approved by HelpAge Int.

- Original data/ information collected from field qualitative survey. This should be organized and submitted in a format that allows for easy verification and further analysis if needed

8. Tentative evaluation timeline and consultancy days

No.	Activity	Timeline (tentative)	Consultancy days
1	Documentation review, desk research	09 – 13 Sep	3 days
2	Develop Inception report in English (including brainstorming with HelpAge team, develop draft, review and finalize) which is approved by WB and HelpAge Int.	16 – 20 Sep	4 days
3	- Preparation for field survey - Data collected in 3 project sites	21 Sep – 5 Oct.	9 days
4	- Data and information analysis	06 – 31 Oct	3 days
5	- Develop a list of key findings, lesson learnt and recommendations (in Vietnamese and English) which is sent for HelpAge' Comments - Develop PowerPoint presentation (in Vietnamese and English) which is approved by HelpAge and present to HelpAge Int and WB. - Present PPT to WB and HelpAge	01 - 15 Nov	5 days
6	Develop and finalize Final Evaluation report in English and Vietnamese (after accommodating HelpAge and WB comments) which is approved by HelpAge Int. and WB	16 – 30 Nov	8 day
	Total of working days:		32 days

9. Budget

The number of days to complete each activity may be changed, but the total number of working days must not exceed 32 days.

The total value for this consultation must not exceed 8000 USD. This amount includes the consultant's fee and all other costs related to conducting this service. In which, all other costs may include, but not limited to the followings: transportation cost, per diem and accommodation, data collection, data entry fees, translation fees (if any) (including all kind of taxes and insurances (if any)).

Total value of consultancy contract (later on) is subjected to the personal income tax. HAI will withhold this tax to pay to the tax authority as per the law

Note: HelpAge does not apply allowance, gifts of any kind for interviewee.

Payment information

- 30% of the consultancy fee will be paid within 7 working days upon satisfactory completion of inception report.
- The remaining consultancy fee and other costs (if any) will be paid within 7 working days of satisfactory completion of final report (both in Vietnamese and English) and providing other deliverables described in part 7. **Expected Deliverables.**
- The currency to use in consultancy contract (later on) and for the payments will be in VND. Exchange rate announced by the bank HelpAge International opened its bank account will be applied to convert from USD to VND when preparing the consultancy contract.

10. Ethical Considerations

It is expected that this evaluation will be:

Inclusive. Ensure that beneficiaries (with older people as the main target group) from different age groups, gender, ethnic and social backgrounds have the chance to participate.

Ethical: The evaluation must be guided by the following ethical considerations:

- Safeguarding – demonstrating the highest standards of behaviour towards beneficiaries, especially vulnerable adults.
- Sensitive – to older people rights, gender, inclusion and cultural contexts.
- Openness - of information given, to the highest possible degree to all involved parties.
- Confidentiality and data protection - measures will be put in place to protect the identity of all participants and any other information that may put them or others at risk.
- Public access - to the results when there are not special considerations against this
- Broad participation - the relevant parties should be involved where possible.
- Reliability and independence - the evaluation should be conducted so that findings and conclusions are correct and trustworthy.

It is expected that:

- Study activities will provide a safe, creative space where beneficiaries (mostly older people) feel that their thoughts and ideas are important, and that they are treated with dignity.
- A risk assessment will be conducted that includes any risks related to vulnerable adult's participation.

- A referral mechanism will be in place in case any safeguarding or security issues arise.
- Informed consent

11. Experience and skill set required

The consultant demonstrates skills, expertise and experience in:

- Master’s degree or higher specialized in community development, social sciences or a related discipline
- At least 7 years of experience in conducting studies, surveys, assessment and M&E, ideally related to older people and ISHC model
- Have experience of a team leader for at least 3 survey/ studies/ evaluations with the similar scale. Excellent skills in both qualitative and quantitative data analysis
- Working experience with local governments, community groups, especially older people
- Strong written and verbal skills in communicating technical and/ or complex findings to non-specialist audiences (especially report writing)
- Excellent command of the English languages – both written and oral
- Having strong knowledge on older people issues is plus

12. Submitting Expressions of Interest

All Expressions of Interest (EOI) must include the following:

- Technical proposal that covers:
 - o Understanding of the TOR, a brief overview of the facilitation methodology, workplan
 - o Financial section: The financial section should outline the cost estimates for services rendered including professional fees (daily rates x number of days) and all other costs (if any, such as transportation cost, perdiem and accommodation, data collection, data entry fees, translation fees, etc.) to carry out the assignment.
- CV: Brief explanation of the consultant, with a focus on relevant previous experience in similar work.

All interested individuals are requested to submit the technical proposal and CV via email to: halt@helpagevn.org and dathq@helpagevn.org by **15h00 of September 10, 2024**. Please include some wordings in your email title “*IC-08 - Individual Consultant to conduct the Final Evaluation*”.

Shortlisted candidates will be contacted for next steps.

Contract type: after negotiation, selected consultant shall enter with HelpAge a consultation contract which is not an employment contract for staff.