

## **TERMS OF REFERENCE**

### **Options overview for integrated social protection MIS, Myanmar**

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#### **1. Background**

HelpAge International has supported Myanmar since 2004 and has been an implementing partner of the Livelihoods and Food Security Trust Fund (LIFT) since January 2010. Building on its field experience, HelpAge began a policy oriented project funded by the LIFT donor consortium in 2014, called Strengthening the Ministry of Social Welfare To Fulfil Its Role in Expanding Social Protection.

Social protection is becoming an increasingly important component of both strategic policy development and public expenditure in Myanmar. The government's expanding investments in social protection are underpinned by the National Social Protection Strategic Plan, approved in December 2014. That Strategic Plan has eight flagships of which four are unconditional cash transfers (cash transfers to pregnant women and children under 2, gradual extension of that allowance to other children, cash transfers to persons with disabilities, and social pensions).

For the Ministry of Social Welfare, Relief and Resettlement (MSWRR), social protection is becoming the most extensive form of service it provides to the public. MSWRR is playing the central coordination role in the extension of social protection systems and is supported by external partners. The Livelihoods and Food Security Trust Fund (LIFT) is supporting government to pilot a maternal child cash transfer (MCCT) beginning in Chin State with technical support from Unicef. MSWRR's Department of Social Welfare (DSW) in 2017 has begun providing a national social pension for everyone aged 90 and older, with assistance from LIFT-funded HelpAge projects. While MSWRR is the ministerial owner of the social protection programmes, the cash transfer deliveries are supported through local government structures (the General Administration Department, under the Ministry of Home Affairs), as DSW does not have an operational presence at local levels.

While cash transfers are becoming more important in Myanmar, the systems are still being developed and are fragmented. The MCCT and social pension programmes operate largely independently, including separate databases. This is partly because they have relatively little overlap – they reach different target groups, have different geographic targeting, are supported by different technical partners and originally fell under different administrative offices of DSW. However, as social protection expands, the systems should anticipate the future and be developed with efficiency and cost-effectiveness in mind, avoiding duplication and disconnects and aiming to take advantage of economies of scale in delivery. This is particularly relevant in light of a five-year Medium Term Sector Plan for Social Protection currently being developed by the government with development partners.

Management information systems (MISs) are core to the design of social protection schemes. The various components of social protection schemes – such as "registration", "payments", "grievance systems" and "exit and graduation" – all require information to be captured, transferred, stored and analysed. While Myanmar's MISs need to be more integrated and efficient, the term "Single Registry" may or may not be relevant in Myanmar's context. Internationally, the promotion of a Single Registry is closely linked to initiatives requiring poverty targeting to develop single national targeting mechanisms for all social protection programmes, yet Myanmar's two operating cash transfer programmes involve no poverty targeting.

## 2. Purpose

The purpose of this assignment is to provide a top-line expert analysis of options for further integration DSW's social protection management information systems, based on international best practice but rooted in the context of Myanmar.

## 3. Key research questions

The Consultant will elaborate and refine key research questions as part of Output 1 below, for further discussion with HelpAge and LIFT. The overall research question is: *What option or options for more integrated management information system(s) are the most appropriate for Myanmar's Government to pursue in delivery of its social protection programmes?* This refers to mainly to current and potential cash transfers planned under the National Social Protection Strategic Plan flagships, which may be expanded further under the forthcoming Medium Term Sector Plan for Social Protection. Research areas are expected to include questions such as these:

- What are the lessons from other countries in establishing MISs for multiple, government-led social protection programmes, which Myanmar can learn from?
- What is the likely scale and scope of future information requirements for social protection schemes in Myanmar, assuming expansion targets expected to be proposed in the Medium Term Sector Plan? What MIS parameters are appropriate for such schemes, incorporating needs for monitoring and learning?
- To what extent, how and why should the various social protection programmes be integrated? Is a Single Registry useful, practical and relevant for Myanmar, or is some level of alignment among separate MISs sufficient and more practical?
- What are the options and considerations for decentralisation of information management in Myanmar, in light of the government's delivery capacities, systems and technologies available. Bear in mind the government's sub-national structures, roles and capacities. What should be the functions and levels of responsibility for data at each level?
- What are the probable hardware, software and staffing requirements for the MIS options proposed? (This study does not involve design: this refers to indicative requirements for the purpose of aiding management decisions.)
- Re hardware, aligned with IT/telecoms capacity, what options fit best with the level of decentralisation recommended? To what extent could and should decentralised systems be linked online, and how should information access be managed?
- Re software, recommend key features or off-the-shelf products in light of Myanmar's capacity and requirements, avoiding unnecessarily complex options but ensuring they offer room to expand.
- Re staffing and human resources, recommend the staffing levels required for the proposed MIS options and the expected training requirement in light of DSW's current HR capacity. Suggest best practice in enhancing such capacity.
- For costing purposes, estimate roughly the number of units that might be required (e.g. no./type of hardware/software products and scope/type of training required and for whom). Which cost components might be best suited for the government or development partners to meet? (This refers to key cost parameters, not a full budget.)

#### **4. Methodology and specific tasks for Consultant**

The methodology for the study includes (1) a summary of international experience, (2) desk review of Myanmar documents, and (3) key stakeholder interviews in Myanmar (mainly Yangon and Nay Pyi Taw). The resulting paper will be introduced through a presentation and exchange in Myanmar. The assignment requires of one visit of about a week to 10 days in Myanmar, with the remaining tasks conducted from home. Specifically the tasks include:

- Hold distance discussions with key stakeholders in the assignment particularly HelpAge, and others as arranged with HelpAge, to shape understanding of the information required for the research and the options in play.
- Produce Output 1 for comment by HelpAge and its partners. Revise based on feedback.
- To set recommendations within international lessons learned and best practice, briefly summarise the key lessons from MIS and/or Single Registry development from international literature, particularly the successes and challenges of developing countries that have successfully developed integrated MIS options for expanding social protection systems. This discussion should not be abstract, but specifically aimed at guiding the Myanmar players. *Note:* The Consultant is expected to be generally familiar with international literature, so this step is expected to be done quickly and not involve a full literature review.
- Conduct a desk review of the Myanmar context including key relevant studies on social protection and government structures, overviews of social protection interventions in Myanmar, and government documents including the National Social Protection Strategic Plan and guidelines for the Medium Term Sector Plan.
- Produce Output 2 for comment by HelpAge and its partners. Revise based on feedback.
- Make a trip of about one week to 10 days to Myanmar (Yangon and Nay Pyi Taw). Conduct interviews with key stakeholders including DSW and HelpAge to address the key research questions, test the assumptions of Output 2 and produce the required analysis. Stakeholders are expected to include government ministries responsible for delivery and oversight (especially MSWRR).
- Assess the results and produce a draft of Output 3, the options report and the presentation based on that report. *Note:* The government is now preparing a five-year plan, to be drafted by February 2018. The Consultant should offer initial findings of the study as possible before end January to support that process.
- Present findings of the study in Nay Pyi Taw and help facilitate a discussion with MSWRR and other key players in a workshop of about half a day.
- Incorporate comments/feedback from the meeting and produce a final Output 3.

#### **5. Outputs**

The Consultant is responsible for producing the following three Outputs in English:

- Output 1: Research plan
- Output 2: Initial options based on international experience and hypotheses to test in Myanmar
- Output 3: Analytical options report along with PowerPoint presentation of its key findings

Output 1 will be a research plan of about 5 pages including a revised workplan/timetable with milestones; elaborated description of methodology, tools and parties to meet; elaboration of research questions; and proposed Output 3 report structure.

Output 2 will be an analytical assessment of about 7-10 pages summarising the key issues to test and explore, based on international experience in establishing more integrated MISs or Single Registries, including challenges, successes and specific lessons learned. This should focus on contexts of relevance to Myanmar and shaped in the form of hypotheses to test and confirm through the visit to Myanmar. Output 2 will later be incorporated into Output 3, the assignment report.

Output 3 is the assignment report and is expected to be at least 15-20 pages in length, with attachments if appropriate, analysing options and proposing a basic action plan for developing more integrated MISs based on recommendations. The report structure is to be agreed through Output 1. Output 2 should be incorporated into the discussion. A PowerPoint presentation should highlight key findings. As noted above, the government is now preparing a five-year plan, to be drafted by February 2018. The Consultant should offer initial findings for Output 3 as possible before end January to support that process.

The consultant should write the Outputs in clear English so that they can be easily understood and translated, avoiding complex sentences, jargon, and abbreviations as much as possible. Technical terms should also be clearly explained or else avoided when possible.

## **6. Time requirements and duration**

The assignment is expected to start as soon as possible after selection of the consultant, and be completed by around end February 2018, with the visit to Myanmar *completed* by January 27th and preliminary findings available at the end of that visit. The assignment is timed to support development of the government's Medium Term Sector Plan for Social Protection.

Late November 2017 – Consultant appointed  
December – Desk-based research: (Outputs 1 and 2)  
January – Investigation in Myanmar (ending by January 27th)  
Late January – Initial findings presented for planning purposes  
January-February – Report writing  
End February 2018 – Assignment including reporting finished

## **7. Qualifications of Consultant(s)**

HelpAge seeks a Consultant with practical expertise in MIS development/use and knowledge of international experience in MISs for social protection programmes in developing countries. HelpAge is looking for a Consultant or team with the following qualifications:

- advanced degree in a relevant field
- demonstrable expertise in social protection MIS development and use, including in-depth knowledge of integrating systems and Single Registries
- clear understanding of cash transfer delivery mechanisms and procedures, especially in low-resource contexts
- familiarity with international literature on social protection and cash transfer MIS
- database knowledge and skills (hardware, software, HR requirements)
- experience conducting similar assessments or analytical research work; Myanmar knowledge preferred
- exceptional analytical skills
- strong English writing skills with a clear writing style

## 8. How to apply

Interested consultants are invited to submit an expression of interest for carrying out this documentation by **21 November 2017** by email to Ms Chitlekar Parintarakul at **fon@helpageasia.org**. The short expression of interest (about 3-4 pages) should include (1) comments on the TOR, (2) proposed outline methodology for carrying out the study, (3) workplan and (4) budget including daily rate x no. of days to complete the work and any other costs. The CV of the named consultant(s) (plus organisational profile, if submitted by a firm) and contact information for 2 professional references should be attached (not included in 3-4 pages). Any relevant studies previously produced should also be attached (1 or 2 only).

Final negotiated fees will be specified in the consultancy contract. The costs of any travel, accommodation etc. for one trip to Myanmar (if outside the country) can be met directly by HelpAge and do not need to be included in the EOI budget. Preference will be given to candidates who can commit to completing the visit to Myanmar before 27 January 2018, as hosting the consultant's visit during February will not be possible. Selection of the consultant will be by a panel and based on the experience of the consultant, the quality and relevance of the expression of interest, and cost, with value for money in mind.