

Terms of Reference

Options study on older people in case management services

A. Background and rationale

HelpAge is advocating for prevention and response services that are inclusive of older people, and for laws and policies that deliver on the right to protection from violence, abuse, and neglect. Freedom from violence, abuse and neglect is a human right and the State has an obligation to protect older people at risk. Violence, abuse and neglect can be carried out by those who are close to older people, such as family and caregivers, or by social structures and institutions. Neglect can also arise from the lack of responsive and sufficient social work services, including those that can identify and protect people who are socially isolated. HelpAge is interested to explore how low- and middle-income countries have expanded case management systems to embrace older people who are at risk. This background research can set the stage for expansion of social work and social protection coverage in low- and middle-income countries in the future and make systems more shock responsive.

B. Purpose of the assignment

The purpose of this study, through a review of international experience, is to document how governments have expanded public case management systems to embrace more services for at-risk older individuals and propose practical steps for incorporating older people more proactively into case management services in low- and middle-income countries in the future.

C. Methodology and specific tasks for the consultant

This is a home-based desk study, based primarily on a scoping of international experience and drawing on the consultant's expertise. The key expected tasks are as follows:

- Clarify the nature and scope of the task with HelpAge, by distance.
- Conduct a scoping of global literature on case management services for vulnerable older individuals. Priority should be given, in order, to low- or middle-income countries in Asia, low- or middle-income countries in other parts of the world, and finally high-income countries if evidence is limited among countries with fewer resources. Produce an initial draft of section (c) of the report.
- From an initial literature search, propose a shortlist of countries to study in greater depth. Agree the selection of three study countries with HelpAge. Criteria for selection will be discussed with the consultant. One target Asian country will be informed at the start of the study and the other two countries will be selected after the initial literature search.
- Research how such systems and services were established in the three case study countries, how they expanded, and the sequence of steps in their evolution, with a view to proposing how case management for older people might develop in similar countries without adequate structures and relatively limited resources and capacity. Draft section (d) of the report.
- Draft the full Output below, revise based on feedback, and complete the assignment.

D. Output

The consultant will produce the following Output under the assignment:

Report: An analytical report of about 20-30 pages plus bibliography in a structure to be discussed. The page lengths below are indicative only. The consultant should write the study in clear English, avoiding long sentences, jargon, and abbreviations as much as possible. Technical terms should be clearly explained or else avoided. This is the starting assumption about content:

- (a) *Executive summary* (about 2-3 pages)
- (b) *Introduction and background:* This section will briefly describe the purpose, methodology and limitations of the study. (about 1-2 pages)
- (c) *Case management services for older people:* From the literature review and the consultant's experience, this section will draw a picture of the nature and provision of services for at-risk older individuals across multiple contexts. This should include an assessment of issues such as interactions between case management services and families and communities; implementation issues unique to older clients; priority targeting (e.g. types of risks or older sub-group characteristics, incorporating gender, disability and urban-rural settings); implications of a human rights approaches for implementation; the nature of typical priority services; HR and specialization; mainstreaming of older persons into prominent categories of case management services (e.g. gender based violence); linkages with non-government service providers such as NGOs and charities; and other analytical issues the consultant may identify. Place case management services for older people within a wider context of protective services for various societal groups, and note any implicit or explicit prioritization of services among these groups. Describe the potential connections and synergies between services for these various groups in society. (about 6-10 pages)
- (d) *Case studies: How social work and case management services for older people have developed:* Building on the broader discussion above, draw lessons from three countries studied in more depth. Analyze how their case management services evolved, both practically and in terms of political will. In these lower-income settings, where did governments start? Which risks or target groups did the governments address first? How have they balanced scale (number of potential clients), range of risks and severity of risk? Were systems and services framed within a rights-based approach? What are the institutional arrangements and staffing for such services? Explore financing, including the balance of central and local government financing or other sources. How heavily do they rely on international donors or non-government service providers such as NGOs, faith-based organisations or charities? How easily did case management services for at-risk older persons grow naturally from, and integrate with, a system providing child protection or other types of services? Did they draw on established international guidelines? What have been the driving factors that push governments to expand case management services for older persons? (about 8-12 pages)
- (e) *Conclusions and recommendations:* Based on the analysis in sections c and d above, where should governments or advocacy players invest their efforts in aim for more expansive and responsive case management services for at-risk older individuals? How can services be delivered using a rights-based approach? What are important

practical first steps and priorities? What challenges or opportunities should be anticipated? (about 2-3 pages)

Appendix: Bibliography

E. Duration and timing

Below is a tentative timeline for the assignment:

- May: Consultant selection and contracting
- Early August: Report draft submitted to HelpAge
- Mid-September: All final Outputs submitted and assignment completed

F. Qualifications of Consultant

HelpAge anticipates hiring an individual Consultant, but applicants may also be teams or organizations (e.g. firms or academic bodies). HelpAge is looking for the following qualifications:

Essential

- Advanced degree(s) in social work, social policy or another field relevant to the nature of the study
- Experience with social work systems and case management services, ideally in low- or middle-income countries
- Demonstrable experience conducting similar research assignments including literature reviews and analysis
- Professional background demonstrating a clear understanding of social policy interventions addressing such issues as income insecurity and food insecurity in low- and middle-income contexts, ideally in Asia
- Exceptional analytical and summarising skills
- Appropriate IT/computer skills
- Access to online academic journals as needed
- Strong writing skills in English with a clear, simple writing style

Desirable

- Knowledge and experience related to ageing and older people
- Understanding of the context of Asia

G. How to apply

Interested applicants are invited to submit an Expression of Interest (EOI) of about 4 pages for delivery of the assignment, including:

- 1) Summary of skills and experience relevant to Section F above
- 2) Consultant's understanding of the assignment in their own words, and access to resources for the literature review
- 3) Any comments or suggested revisions to this TOR including the approach or framing, based on the consultant's expertise
- 4) Workplan with target dates
- 5) Budget (see below)
- 6) Appendixes (not included in 4 pages)
 - a) CV
 - b) 1-2 relevant studies previously produced as attachments

The costing/budget (point no. 5 above) should include professional fees (daily rates x number of days) and any other costs to carry out each assignment. The contract will be output-based rather than time-based. HelpAge anticipates spending between US\$8,000 to \$10,000 for this assignment.

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 the proposed budget (i.e. value for money, within resources available).

The deadline for submission is **Thursday, 27 May 2021**. Please contact peter.morrison@helpage.org for further information or to submit your EOI.