

## TERMS OF REFERENCE FOR CONSULTANTS

1. The technical assistance (TA) will require a total of 46 person-months of consulting services (five international consultants for a total of 17 person-months and eight national consultants for a total of 29 person-months). The international consultants should preferably have a postgraduate degree or equivalent with about 10 years of international experience in the areas of expertise. The national consultants should preferably have a master's degree or equivalent and about 8 years of professional experience in the areas of expertise. Consultants will be engaged as individual consultants in accordance with the Asian Development Bank (ADB) Procurement Policy (2017, as amended from time to time) and the associated project administration instructions/technical assistance staff instructions. The consultants will be responsible for the timely submission of TA outputs and deliverables, and organizing and implementing all TA activities. All reports are to be of high quality and produced in English for the submission to ADB. Precise work timelines of deliverables with dates will be defined at inception, documented in the final inception report, and agreed upon with the executing agency and ADB.

2. Since the elderly care is an emerging issue, and the scope of the required expertise is broad, including elderly care, medical, information and communication technology (ICT), business and financing, it would be difficult to find a quality firm which could comprise those quality experts in a timely manner. Therefore, the individual consultant selection (ICS) will be applied to select the following specialists. All below indicated inputs will be provided on an intermitted basis.

3. **Elderly care specialist** (international, 4 person-months). The specialist should have professional expertise and experience in elderly care system development. Knowledge of elderly care services and the social security system in the People's Republic of China (PRC) would be preferable. The specialist will perform the following duties:

- (i) work closely with other consultants, the executing agency, and ADB;
- (ii) analyze international good practices on elderly care systems by focusing on (a) care needs assessment scheme, (b) a referral scheme between elders and elderly care providers, (c) elderly care-related service standards, (d) service quality monitoring scheme, (e) three-tiered structure of elderly care services (home-based care, day-care, and residential care). The analysis will also examine the role of governments to ensure provision of adequate elderly care services for those in need, and potential areas where the private sector and the third parties could take a role. It will also examine the institutional arrangements among relevant ministries and agencies for a functional elderly care system;
- (iii) advise the national elderly care specialist on preparing and finalizing the inception report, his/her technical report, and the final report of the TA;
- (iv) draft and complete synthesis paper 1 of elderly care system development, covering the above-mentioned analysis of international practice, PRC domestic practice (prepared by the national consultant), and policy recommendations; and submit it to the executing agency and ADB;
- (v) assist in organizing workshops, identifying resource persons, and identifying key issues to be covered, and deliver sessions at workshops and/or training seminars with appropriate presentation materials; and
- (vi) support the executing agency to prepare the agenda and identify the destination of field visit trainings.

4. **Elderly care specialist and team leader** (national, 5 person-months). The specialist should have professional knowledge and experience in elderly care system and services. The

expert must be knowledgeable about the PRC's current practice on elderly care service provision and related service providers. S/he should also be knowledgeable on PRC elderly care-related policies both at the central and local levels. The specialist will perform the following duties:

- (i) work closely with other consultants, the executing agency, and ADB; and be responsible for overall management of TA implementation and the coordination between international and national consultants and the executing agency;
- (ii) with advice of international specialist, be responsible for preparing and finalizing an inception report, and a final project report;
- (iii) review the PRC's current status on (a) types of elderly care services; (b) elderly care service providers and institutions; (c) service standards, if any; (d) quality monitoring scheme, if any. The analysis will also examine the current status of the responsibility alignment between the governments and the private sector, including non-profit organizations. It will also examine the practice on institutional arrangements for elderly care service provisions. It will take several localities of PRC as case studies for the analyses. Based on the analyses, the specialist will draft and complete a technical report 1 (domestic practice) on the elderly care system; submit it to the executing agency, ADB and the international elderly care specialist;
- (iv) with support from other consultants, prepare and finalize an inception, interim, and final project progress reports; and submit them to the executing agency and ADB.
- (v) collect needed data, information policy documents and circulate them to team members, the executing agency and ADB;
- (vi) lead discussions with other consultants, the executing agency in identifying key issues to be covered during workshops and/or training seminars. The specialist will deliver sessions with appropriate presentation materials; and
- (vii) support the executing agency to prepare the agenda and identify the destination of field visit trainings.

5. **Elderly and healthcare specialist** (international, 3.5 person-months). The specialist should have professional knowledge and experience in elderly and healthcare system, services, and relevant policies. Knowledgeable about the PRC's current practice on healthcare, medical hospitals, and elderly care service provision would be preferred. The specialist will perform the following duties:

- (i) work closely with other consultants, the executing agency, and ADB;
- (ii) review and analyze the international good practice on a coordination between healthcare services, including medical hospital services, and elderly care services to provide seamless needed services efficiently for those in need. It will also analyze the needed referral system and institutional arrangements to attain the efficient and effective coordination between healthcare and elderly care service provision;
- (iii) advise the national specialist on preparing and finalizing the technical report of domestic practice on the elderly care and healthcare integration;
- (iv) draft and complete a synthesis paper 2 of elderly care and healthcare integration, covering the above-mentioned analysis of international practice, PRC domestic practice, and policy recommendations; and submit it to the executing agency and ADB;
- (v) assist in organizing workshops, identifying resource persons, and identifying key issues to be covered. The specialist will deliver sessions at workshops/training seminars with appropriate presentation materials; and

- (vi) support the executing agency to prepare the agenda and identify the destination of field visit trainings.

6. **Elderly and healthcare specialist** (national, 3.5 person-months). The specialist should have professional knowledge and experience in elderly and healthcare system and services. The expert must be knowledgeable about the PRC's current practice on healthcare, medical hospitals, and elderly care service provision. S/he should also be knowledgeable on PRC healthcare, and elderly care-related policies both at the central and local levels. The specialist will perform the following duties:

- (i) work closely with other consultants, the executing agency and ADB;
- (ii) review and analyze the international good practice on a coordination between healthcare services, including medical hospital services, and elderly care services to provide seamless services efficiently for those in need. It will also analyze the needed referral system and institutional arrangements to attain the efficient and effective coordination between healthcare and elderly care service provision. Review the current status of relevant PRC practice. Based on the analysis of international good practice as well as PRC status, the specialist will draft and complete technical report 2 (domestic practice) on elderly care and healthcare coordination for the case of PRC; and submit it to the executing agency and ADB;
- (iii) support the elderly care specialist to prepare and complete the analysis of a strategy for elderly care-related human resource development in PRC;
- (iv) collect needed data, information policy documents and circulate them to team members, the executing agency and ADB;
- (v) assist in organizing workshops, identifying resource persons, and identifying key issues to be covered. The specialist will deliver sessions at workshops/training seminars with appropriate presentation materials; and
- (vi) support the executing agency to prepare the agenda and identify the destination of field visit trainings.

7. **Elderly care finance specialist** (international, 3.5 person-months). The specialist should have professional expertise and experience in a financial framework of elderly care system. Knowledge of elderly care services and the social security system in PRC would be preferable. The specialist will perform the following duties:

- (i) work closely with other consultants and the executing agency and ADB;
- (ii) analyze international good practices on elderly care financing by focusing on (a) financial sources for elderly care services, (b) relevant public subsidies, (c) long-term care insurance, (d) a multi-pillar system to finance the elderly care services. The analysis will also examine the role of government to ensure provision of adequate elderly care services for those in need, and potential areas where the private sector and the third parties could take a role. It will also examine the institutional arrangements to structure the multi-pillar financial system;
- (iii) advise the national elderly care finance specialist on preparing and finalizing his/her technical report;
- (iv) draft and complete a synthesis paper 3 on elderly care financial framework, covering the above-mentioned analysis of international practice, PRC's domestic practice on elderly care financing, and policy recommendations; and submit it to the executing agency and ADB;
- (v) assist in organizing workshops, identifying resource persons, and identifying key issues to be covered. The specialist will deliver sessions at workshops and/or training seminars with appropriate presentation materials; and

- (vi) support the executing agency to prepare the agenda and identify the destination of field visit trainings.

8. **Elderly care finance specialist** (national, 3 person-months). The specialist should have professional knowledge and experience in elderly care financing, including related public subsidies, user charges and long-term care insurance. The expert must be knowledgeable about the PRC's current practice on those issues, including the long-term care insurance pilots. The specialist will perform the following duties:

- (i) work closely with other consultants, the executing agency and ADB;
- (ii) with the advice from the international expert, review and analyze the PRC's current financial scheme for elderly care services, focusing on (a) types and levels of public subsidies, covering central and local subsidies, (b) types of and levels of user charges. Based on the analyses, the specialist will draft and complete a technical report 3 on PRC status of elderly care financing; submit it to the executing agency, ADB and international elderly care finance specialist;
- (iii) based on the analyses of the international good practice and the PRC domestic practice, discuss with the international expert about an applicable financial framework for PRC elderly care system; and assist the international expert in preparing policy recommendations;
- (iv) collect needed data and information, and circulate them to team members, the executing agency and ADB; and
- (v) assist in organizing workshops, identifying resource persons, and identifying key issues to be covered. The specialist will deliver sessions at workshops/training seminars with appropriate presentation materials.

9. **Long-term care insurance specialist** (national, 3 person-months). The specialist should have professional knowledge on long term-care insurance. The expert must be knowledgeable about the PRC's long-term care insurance pilots, and other elderly care-related subsidies and financing in PRC. The specialist will perform the following duties:

- (i) work closely with other consultants, the executing agency and ADB;
- (ii) with the advice from the international expert, review progresses of the PRC's long-term care insurance pilots, categorize the pilots based on insurance factors, such as types of funding schemes and contributions, and analyze the good practices and challenges. Prepare a technical report 4 on PRC long-term care insurance pilots;
- (iii) based on the analyses of the international good practice and the PRC pilots, discuss with the international expert about applicable long-term care insurance scheme(s) for PRC elderly care system; and assist the international expert in preparing policy recommendations;
- (iv) collect needed data and information, and circulate them to team members, the executing agency and ADB; and
- (v) assist in organizing workshops, identifying resource persons, and identifying key issues to be covered. The specialist will deliver sessions at workshops/training seminars with appropriate presentation materials.

10. **Elderly care human resource specialist** (national, 4 person-months). The specialist should have professional knowledge and experience in elderly care-related human resource development. The expert must be knowledgeable about the PRC's current status on elderly care-related human resources and the relevant educational and training institutions. S/he should also be knowledgeable on PRC relevant policies, as well as local practices. The specialist will perform the following duties:

- (i) work closely with other consultants, the executing agency and ADB;
- (ii) with support of other experts, review and analyze the international good practice on a strategy of elderly care-related human resource development, as well as the PRC current status of elderly care-related human resources. It will analyze the needed types and scale of skilled workers and experts, including care manager, caregivers, medical experts, therapists, counselors etc., and examine a plan of human resource development. It will also examine career path plans in the elderly care sector, and strategies to retain skilled workers/experts in this sector;
- (iii) prepare synthesis report 4 on elderly care human resource development, covering the analysis of international good practice, PRC current status and policy recommendations;
- (iv) collect needed data, information policy documents and circulate them to team members, the executing agency and ADB; and
- (v) assist in organizing workshops, identifying resource persons, and identifying key issues to be covered. The specialist will deliver sessions at workshops/training seminars with appropriate presentation materials.

11. **Elderly industry specialist** (international, 3 person-months). The specialist should have professional expertise and experience in elderly care industry development. Knowledge of elderly care operation and businesses in the PRC would be preferable. The specialist will perform the following duties:

- (i) work closely with other consultants and the executing agency and ADB;
- (ii) analyze international good practices on an elderly care industry by focusing on (a) key factors to develop an elderly care industry, (b) the role of the government to support the elderly care industry development, (c) major actors in the elderly care market and their expected roles, (d) potentials of public-private partnership (PPP), and (e) potentials of nonprofit organizations (NPOs) and civil society organizations (CSOs);
- (iii) advise the national elderly care business model specialist on preparing and finalizing his/her technical report;
- (iv) draft and complete synthesis paper 4 on elderly care industry development, covering the above-mentioned analysis of international practice, the analysis of ICT and high-tech for elderly care, PRC domestic current business cases, and policy recommendations; and submit it to the executing agency and ADB; and
- (v) assist in organizing workshops, identifying resource persons, and identifying key issues to be covered. The specialist will deliver sessions at workshops and/or training seminars with appropriate presentation materials.

12. **Elderly business model specialist** (national, 3 person-months). The specialist should have professional knowledge and experience in PRC elderly care business models, including a large-scale residential service and a small-scale business. The expert must be knowledgeable about the PRC's current practice on those issues and operations. The specialist will perform the following duties:

- (i) work closely with other consultants, the executing agency and ADB;
- (ii) with the advice from the international expert, review and analyze the PRC's current business cases of elderly care sector, focusing on (a) business models for elderly care businesses, (b) roles of the governments in the elderly care market, (c) risks taken by the private sector, (d) potentials of NPOs and CSOs. The analysis will also examine critical bottlenecks in developing a sustainable business model of elderly care sector in PRC including the view of elderly care industry development. Based on the analyses, the specialist will draft and complete a technical report 5

- on PRC elderly care business models; submit it to the executing agency, ADB, and international elderly industry specialist;
- (iii) based on the analyses of the international good practice and the PRC domestic practice, discuss with the international expert about an applicable business model for PRC elderly care system; and assist the international expert in preparing policy recommendations;
- (iv) collect needed data and information, and circulate them to team members, the executing agency and ADB; and
- (v) assist in organizing workshops, identifying resource persons, and identifying key issues to be covered. The specialist will deliver sessions at workshops/training seminars with appropriate presentation materials.

13. **Elderly care - ICT specialist** (international, 3 person-months). The specialist should have professional expertise and experience in designing management information system; and be knowledgeable about elderly care ICT and high-technology. The specialist will perform the following duties:

- (i) work closely with other consultants and the executing agency and ADB;
- (ii) analyze international good practices on utilizing ICT system, high-technology and those related equipment and goods for the efficient elderly care service provision. It will also review the status of those utilization in PRC; and find a gap to further enhance those utilizations to support efficient and effective service provision. It will also examine the needed environment to enhance the utilization of ICT and high-technology in the elderly care sector of PRC. Based on the analyses, the specialist will draft and complete a technical report 6 on ICT and high-tech for elderly care, including policy recommendations; submit it to the executing agency and ADB; and
- (iii) deliver sessions at workshops and/or training seminars with appropriate presentation materials.

14. **Elderly care - ICT specialist** (national, 3.5 person-months). The specialist should have professional expertise and experience in designing management information system in the areas of public services, including elderly care and healthcare; and be knowledgeable about elderly care related information and communication technology (ICT) and high-technology. The expert must be knowledgeable about the PRC's current practice on those issues. The specialist will do the following:

- (i) work closely with other consultants and the executing agency and ADB;
- (ii) with the advice from the international expert, review and analyze the PRC's status of ICT solutions in the elderly care-healthcare sector, including a management information system EC-healthcare, covering (a) elderly care-healthcare information system, (b) institutional elderly care management system, (c) elderly care-healthcare provider-network, and (d) elderly population information system, if any. Based on the analyses, the specialist will draft and complete a technical report 6 on PRC status of ICT and high-tech for elderly care utilization; submit it to the executing agency, ADB and the international elderly care-ICT specialist;
- (iii) With the international elderly care-ICT specialist, discuss applicable ICT solutions and high-technology in PRC to enhance the efficient provision of elderly care-healthcare services; and assist the international elderly care-ICT specialist in preparing policy recommendations;
- (iv) collect needed data, information policy documents and circulate them to team members, the executing agency and ADB; and
- (v) deliver sessions at workshops and/or training seminars with appropriate presentation materials.

15. **Project management specialist** (national, 4 person-months). The specialist should have an experience of working on ADB funded projects. A university degree in project administration or other relevant disciplines is preferred with demonstrated experience in the coordination of consultants, communication with clients, and requirement of ADB documentation. The specialist will perform the following duties:

- (i) closely work with ADB team, the consultant team, and the executing agency;
- (ii) make the overall coordination among project team members, the government counterparts, including the executing and executing agencies, and other relevant stakeholders;
- (iii) with other consultants, collect needed data and information, and related policy documents for respective analyses;
- (iv) coordinate all activities during TA implementation including all workshop and training, all data collection activities and communications with the executing agency; and
- (v) assist the team leader in all aspects of project management and maintain a consistent presence in the field in close coordination and communication with the executing agency, including needed translation.