

**Republic of the Marshall Islands**  
**Ministry of Finance, Banking & Postal Services**  
**Terms of Reference**  
**Firm Selection**

Title:	Diaspora Survey
Location:	Ministry of Finance, Banking & Postal Services & Economic Policy, Planning and Statistics Office, Republic of the Marshall Islands
Duration:	10 months
Tentative State Date:	April 1, 2026

## **I. Background**

The Republic of the Marshall Islands (RMI) faces persistent constraints related to human resource capacity, labor mobility, and challenges in retaining skilled professionals within the public sector, particularly in Public Financial Management (PFM). Strengthening workforce planning and recruitment strategies is a national priority as the Government seeks to improve financial management, service delivery, and long-term institutional resilience.

The World Bank is currently partnering with the Government of the RMI to implement the Project for Strengthening Public Financial Management II (PFM-II). Under the World Bank–financed PFM-II project, Component 3 aims to enhance PFM capacity, transparency, and citizen engagement. Sub-component 3.3 specifically seeks to strengthen the evidence base for recruitment and retention strategies by conducting:

1. An updated Household Income and Expenditure Survey (HIES), and
2. A Diaspora Survey targeting Marshallese residing overseas.

The Diaspora Survey will collect data on education, skills, professional experience, gender-specific barriers to returning, and interest in employment opportunities—including certification programs—within Ministry of Finance, Banking & Postal Services (MOFBPS) and the broader public sector, of Marshallese Diaspora. The results will provide critical inputs for developing a new Recruitment and Retention Strategy for MOFBPS.

The Economic Policy, Planning and Statistics Office (EPPSO) will lead the survey implementation, with support from MOFBPS.

To support this effort, EPPSO seeks to engage a qualified consulting firm to design, implement, analyze, and produce the full RMI Diaspora Survey.

The assignment will be implemented using a collaborative, co-delivery approach, with structured shadowing and hands-on involvement of EPPSO staff to support capacity building and knowledge transfer over the course of the assignment.

## **II. Objectives**

The proposed PFM II Project consists of four components:

- Component 1: Improving PFM practices in budget execution and financial reporting
- Component 2: Increasing modernization of PFM systems
- Component 3: Improving PFM Capacity, Transparency and Citizen Engagement
- Component 4: Project Management

The objective of this assignment is to design and implement a comprehensive Diaspora Survey to generate a robust evidence base that will inform:

- MOFBPS workforce planning,
- Recruitment and retention strategies,
- Gender-responsive HR policies,
- Development of PFM certification pathways, and
- Broader talent pipeline initiatives for the Government of RMI.

In parallel, the assignment aims to strengthen EPPSO's institutional capacity in survey design, implementation, and analysis through practical on-the-job learning embedded within the Consultant's work.

## **III. Implementation Arrangements**

The Consulting firm will report to the Project Manager of the PFM II project & work with EPPSO on a daily basis and in close collaboration with:

- The Secretary of Finance
- Deputy Secretary of Core Financial Services
- MOFBPS Human Resource Unit
- The Public Service Commission (PSC)
- PFM II Project Implementation Unit (PIU)
- The HRD Advisor (Component 3.1)
- The Gender Advisor (Component 3.2)

The Central Implementation Unit (CIU) in MOFBPS', Division of International Development Assistance (DIDA) will provide support to the PIU on procurement, financial management, and compliance with World Bank guidelines.

The Consulting firm shall work closely with designated EPPSO counterparts through a co-delivery and shadowing arrangement, under which EPPSO staff will participate in key stages of survey preparation, field coordination, data management, and analysis, with the aim of transferring practical skills and methodologies.

The Consulting firm will also be expected to work closely with overseas Marshallese community organizations, churches, diaspora groups, state government partners, and NGOs in the United States and its territories.

#### **IV. Scope of Services**

The Consulting firm will undertake, but not be limited to, the following activities:

##### **A. Survey Design and Methodology**

1. Conduct a methodological review of international best practices for diaspora surveys and propose an approach suitable for the RMI context.
2. Identify target diaspora locations (e.g., Hawaii, Arkansas, Washington, Oregon, Oklahoma, Guam, etc.) and develop a sampling strategy for a representative sample of Marshallese diaspora.
3. Co-design the survey questionnaire with EPPSO, considering:
  - Cross-survey comparability with the HIES and Census of Population
  - EPPSO survey design standards for nationally representative household surveys
  - Demographics and migration history
  - Education and qualifications
  - Employment experience and skills
  - Interest in public sector or PFM-related employment
  - Conditions under which individuals may return to RMI
  - Gender-specific barriers to recruitment and retention
4. Translate survey tools into Marshallese and ensure cultural relevance
5. Pilot test the questionnaire and refine based on results.

##### **B. Stakeholder Coordination and Community Engagement**

6. Develop a detailed engagement plan for working with overseas Marshallese communities and networks.
7. Coordinate with diaspora leaders, churches, NGOs, and community organizations to facilitate participation.
8. Develop communication materials (flyers, social media posts, announcements) to support outreach.
9. Conduct consultations with MOFBPS HR department, PSC, and HRD Advisor to ensure alignment with workforce planning needs.

##### **C. Fieldwork and Data Collection**

10. Hire, train and supervise survey enumerators
11. Implement the survey using a combination of:

In-person interviews and/or phone interviews, using computer assisted personal interviewing (CAPI) and Computer-Assisted Telephone Interviewing (CATI). Data

collection methods will depend on the sampling strategy. It will likely not be possible to do all interviews via CATI.

11. Achieve high response rates, which may require callbacks or multiple visits to sampled households.
12. Ensure adherence to ethical standards, confidentiality, and data security.
13. Maintain strong data quality control, including daily verification, logic checks, and back-checks.

#### D. Data Analysis and Reporting

14. Clean, validate, and analyze collected data using appropriate statistical methods.
15. Produce an analytical report including:
  - Key findings, trends, and gender analysis
  - Skill mapping and workforce readiness
  - Barriers to return and employment motivations
  - Policy recommendations for MOFBPS recruitment strategy
16. Present findings to EPPSO, MOFBPS, PSC, HRD Advisor, and PFM II stakeholders.

#### E. Contribution to Recruitment and Retention Strategy

17. Provide inputs and recommendations for:
  - Certification pathways
  - Public sector talent pipeline initiatives
  - Diaspora engagement strategies
  - Gender-responsive recruitment approaches
18. Support EPPSO and MOFBPS in interpreting results for policy and strategic planning.

### V. Institutional and Organizational Arrangements

EPPSO shall have overall responsibility for survey implementation. The Consulting firm will report to the EPPSO Survey Manager or designated focal point, with technical oversight from the MOFBPS, PIU and HRD Advisor.

Knowledge transfer will be achieved through joint planning, shared execution of tasks, practical mentoring, and handover of survey tools, datasets, and analytical methods to EPPSO staff.

The Consulting firm will participate in:

- PFM II Project Steering Committee meetings (when relevant),
- Technical working sessions with MOFBPS and PSC,
- Joint review meetings with the World Bank during missions when needed.

## **VI. Duration, Location, and Conditions of Assignment**

1. The assignment will be conducted remotely with mandatory overseas fieldwork in major Marshallese diaspora locations
2. The duration of the assignment is 10 months, with possible extension based on need and performance.
3. EPPSO will provide relevant documentation, administrative support, and coordination with MOFBPS and diaspora networks.
4. Consulting firm is responsible for ensuring secure data storage and compliance with confidentiality requirements.

## **VII. Outputs**

The Consultant shall deliver the following outputs:

1. Inception Report – methodology, sampling plan, workplan, and survey instruments.
2. Stakeholder Engagement and Communications Plan.
3. Pilot Test Report and finalized questionnaire.
4. Fieldwork Progress Reports (biweekly updates).
5. Cleaned and validated dataset (raw and processed).
6. Comprehensive Analytical Report including:
  - Gender analysis
  - Skill mapping
  - Return/readiness analysis
  - Policy recommendations
7. Presentation Deck for EPPSO, MOFBPS, PSC, and development partners.
8. Inputs to the MOFBPS Recruitment and Retention Strategy (briefing note or annex).

## **VIII. Qualifications and Experience Requirements of the Firm**

### **Essential**

- At least 10 years of experience designing and implementing large-scale surveys, preferably diaspora, labor force, or demographic surveys.
- Demonstrated experience with overseas fieldwork and cross-cultural research.
- Strong skills in survey design, sampling, quantitative analysis, and statistical software (Stata, R, SPSS, etc.).
- Experience working with government institutions or development partners.
- Excellent written and oral communication skills in English.
- Demonstrated ability to engage and build trust with community groups.

Key experts shall possess the following qualifications:

- Postgraduate degree in statistics, economics, sociology, demography, public policy, or a related field.

Desirable

- Experience conducting surveys in the Pacific region or with Pacific Island diaspora communities in the United States
- Knowledge of Marshallese cultural norms.
- Familiarity with World Bank guidelines and reporting requirements.
- Experience developing policy-relevant analytical reports.

## IX. Deliverable and Payment Schedule

Deliverable #	Deliverable	Description	Expected Completion (Month #)	% of Payment
1	Inception Report & Stakeholder Engagement Plan	Survey design, workplan, sampling approach, draft questionnaire, and outreach plan for engaging the diaspora.	Month 2	20%
2	Final Survey Tools, Fieldwork & Dataset	Pilot completed; final survey tools approved; overseas data collection conducted; cleaned dataset submitted with codebook and documentation.	Month 6	35%
3	Draft Analytical Report & HR Inputs	Analysis of survey results (including gender and skills mapping) and draft recommendations to support MOFBPS recruitment and retention strategy.	Month 8	25%
4	Final Report & Dissemination	Final report incorporating stakeholder feedback and presentation of findings to government and partners.	Month 10	20%