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**Targeting technical task force members:** SCI, PCPM, Mercy Corps, IRC, NRC, UNHCR, DKH, CCD

**Duration of set-up:** 6 months

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### Objective

Recognizing that resources are limited, and that certain individuals have higher needs, this document seeks to provide a prioritization of those with specific needs for immediate assistance, MPCA and sectoral cash top ups in Poland. It is produced based on contributed inputs and efforts from the TF members and if needed, the CWG can recommend having a specific targeting approach (For instance, a socio-economic or a categorical approach(s)).

### Context

Cash interventions in Poland started in March 2022, and followed guidelines agreed upon by the Cash Working Group in the early stage of the response in Poland. The MPCA assistance was designed as short-term and temporary to support refugees while they adjust to the new situation and either join the labour market or are included in the social protection system of Poland. As per the RRP 2022 final report, cash assistance was provided to over 615,000 refugees across the country. The initial criteria for MPCA were broad and open to majority of refugees from Ukraine.

However, entering the second year of the crisis in 2023, and in the face of declining funding opportunities for cash assistance, it became clear that a more targeted approach to cash assistance is necessary. CWG in Poland agreed to create targeting guidelines to ensure that cash assistance is harmonized across cash partners, and that the assistance is complementary to the Polish social protection system, considering also the social cohesion.

## Mapping of targeting approaches

The technical targeting TF mapped out its members' prioritization and targeting approaches for cash assistance as per the following table, noting the evolution of approaches over time:

Organization	Programme type (MPCA, winterization, cash for rent, ...).	Duration of implementation	Current prioritization (Targeting) approach.	Current prioritization (Targeting) details.
Save the Children	MPCA	April 22-Feb 22	Categorical	Those who fled the war and are not receiving cash assistance from other organizations. Which was later tightened to: HHs with members with chronic illness/serious medical conditions. HHs with elders (60+) HHs with children under 5 HHs with members with disabilities HHs with PLW.
Save the Children	Winterization		Categorical	Similar as above.
NRC/PCPM	MPCA	Starting in October 2022; ongoing in 2023	Mixed method	<ul style="list-style-type: none"> <li>- Household composition</li> <li>- Risk of social exclusion (no economic. vulnerabilities)</li> <li>- Distress</li> <li>- Cross-cutting functional limitation/disability</li> </ul>
Mercy Corps	MPCA		Mixed method	Socioeconomic vulnerability calculations

DKH/Diakonia Poland	MPCA II		Mixed method	<p>Who can apply?</p> <ol style="list-style-type: none"> <li>1. The applicants who arrived in Poland on or after 24 February 2022 and was principally residing in Ukraine before that date regardless of their nationality.</li> <li>2. The applicants who registered in Poland and has a PESEL number.</li> <li>3. The household did not benefit from MPCA before</li> <li>4. The applicant who are economically vulnerable (Household members do not have access to regular income which is enough to cover minimum living standards of the household.)</li> </ol> <p>Who will receive the cash support?</p> <p>Scoring will be done among most vulnerable HHs (such as age, disability and health condition, pregnancy and other protection concerns) and capacities of the households.</p>
IRC	MPCA II		Vulnerability score system (embryonic)	<ol style="list-style-type: none"> <li>1. New arrivals not having received assistance previously (arrived post 1st October)</li> <li>2. Vulnerabilities scored that incooperated "Oblast of origin" and "living situation (collective accommodation, hosted, private rent)" as significant vulnerabilities</li> </ol>
UNHCR	MPCA II (Targeted cash)	October 2022 - December 2023	Categorical	<ol style="list-style-type: none"> <li>1. Older persons (Person aged 60 or older; includes single older persons; or households including only older persons; or older persons caring for children)</li> <li>2. Sole caregiver for an older person or persons; or sole caregiver for young children (1 or more children from 0 to 7 years of age)</li> <li>3. Unaccompanied or separated children (UASC) residing outside state institutions or designated facilities</li> <li>4. Pregnant woman</li> <li>5. Person living with disabilities</li> </ol>

				6. Person with serious medical condition that impacts ability to meet basic needs
UNHCR	Winterization	January 2023 – December 2023	Categorical	Households with at least two specific needs registered in UNHCR's specific needs code.

## Socio-Economic vulnerabilities

### A) Social/ Categorical vulnerabilities

The exchange of experiences and approaches led the TF members identify the following categories of vulnerable refugees:

Vulnerability categories	Recommended prioritization	Further Analysis
<b>Older Persons</b>	Older person Headed HH without family members able to work	Proposed definition: persons over 60+ (both men and women), considering the retirement age for men in Ukraine is 60.
<b>Separated children</b>		Children who have official caregivers; support to be provided including the temporary guardians; UAC are not a category targeted by cash assistance; cash can only be used in very specific cases
<b>Persons with disabilities</b>	<ul style="list-style-type: none"> <li>- Facing barriers in accessing the labour market</li> <li>- With higher level of expenditures expenses related to medical and other costs of life</li> <li>- Children with disability</li> </ul>	Various approaches exist among partners to determine disability, including the Washington Group Question (recommended as part of international standards) or legal disability certificates (medical approach)
<b>Caretakers of persons with disabilities</b>	<ul style="list-style-type: none"> <li>- Facing barriers in accessing the labour market</li> </ul>	

<b>People with serious medical conditions or chronic disease</b>	- Unable to work / permanently or temporarily - With high expenses related to their specific needs	Despite the formally free healthcare system, severe medical conditions incur large costs including medicine, hygiene items, adaptation of living spaces etc.
<b>People at risk of eviction/homelessness (including in collective shelters)</b>	Refugees in collective sites unable to cover their contribution of accommodation costs and not covered by the Special Act exceptions	
<b>Refugees without legal status, as well as undocumented persons</b>	- Third Country Nationals - Roma and other minorities	This includes persons with no ID documents; no PESEL
<b>Pregnant &amp; lactating women</b>		As per generally recognized standards, with children up to 36 months old
<b>Single parents excluded from labour market due to caretaking obligations</b>		Single-parents with children below the age of 7 and without other adult-caregivers (as per Polish regulations children under 7 cannot be left alone at home).

## B) Economic Vulnerabilities

Assessing the economic aspects of HHs is a complex process and requires the gathering of additional datasets. The following outlines relevant economic vulnerability references, assessments, and considerations.

### Meeting basic needs

Acknowledging that one of the fundamental purposes of providing cash assistance supporting target population to meet their basic needs, the following are the existing reference point.

Basic needs reference: **IPISS** minimum expenses values

The institute of labour and social affairs (IPISS) have recently issued the estimated social minimum living standards for the third quarter of 2022. The social minimum living standards serve as a benchmark for the expenditures of low-income households. This model predicts the range and level of needs that must be met to enable individuals in the household to sustain their lives, have and raise

children, and maintain social ties. It assumes that these needs are met at a reasonable, though modest level, taking into account scientific guidelines (e.g. nutritional standards), as well as cultural and legal norms (e.g. housing and education requirements). It is also used as a reference point in the analysis and activities of public institutions (e.g. the justice system, tax offices) as well as private ones (e.g. banks, NGOs). The values presented in the report were estimated assuming conditions close to normal. At the time of drafting this document, the latest released MEB can be found [here](#) and the latest SMEB can be found [here](#). In June 2023, the latest SMEB was used as a basis for revising the transfer value and new recommendations were issued by the CWG. It is however still recommended to produce an MEB specifically adjusted to the needs of refugees through the members of the CWG, and keep monitoring the accuracy of the transfer value.

The following table summarizes the main differences of items considered in the MEB and SMEB

IPISS <sup>1</sup> MEB	IPISS SMEB <sup>2</sup>
Food, accommodation maintenance & Utilities, education, culture & recreation, clothing and footwear, health care, hygiene, transport and communication and other expenses.	Food, accommodation maintenance & Utilities, education, clothing and footwear, medicines, hygiene, and other expenses.

Economic vulnerability assessment(s):

Value	Categories	Analysis	Considerations
Expenditures	General	Total expenditures can be compared to the MEB adjusted for family size. It can also establish proportional comparisons between HHs.	<ol style="list-style-type: none"> <li>1. Ensure that recorded expenditures are relevant to the outlined items of the MEB. The MEB typically includes essential expenses such as food, housing, healthcare, education, transportation, and other basic needs. By comparing the household's expenditures to the MEB, you can determine if they are meeting the minimum requirements for these essential items.</li> </ol>

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<sup>1</sup> [Minomum socjalne \(ipiss.com.pl\)](http://ipiss.com.pl)

<sup>2</sup> [Minomum egzystencji \(ipiss.com.pl\)](http://ipiss.com.pl)

			<ol style="list-style-type: none"> <li>2. Closely monitor relatively high and low expenditures for further assessment. Relatively high expenditures may indicate that the household is spending sufficiently above the minimum but might also indicate there is a significant item that is consuming the HHs income in replacement of other essentials. For example; check HHs that have a significant high expenditure on health and a very low spending on food items.</li> <li>3. Temporary or extraordinary expenses: Sometimes households may have temporary or extraordinary expenses that can significantly impact their total expenditures. These could include one-time purchases, unexpected medical expenses, or major life events. When comparing to the MEB, it's important to identify and separate these exceptional expenses from regular monthly expenditures to get a more accurate picture of the household's ongoing financial situation.</li> </ol>
<b>Income</b>	Negative coping strategies	Total income can be compared to the MEB adjusted for family size. It can also establish proportional comparisons between HHs.	<ol style="list-style-type: none"> <li>1. Identify the sources of income and check for negative coping strategies when generating it (families resorting to borrowing, selling assets or consuming all savings).</li> <li>2. Evaluate impacts and risks for families resorting to said measures as they should not be considered a sustainable source of income.</li> </ol>
<b>Savings</b>	Savings		<ol style="list-style-type: none"> <li>1. Income from savings needs to be recorded as it might continue to deplete and, in most cases, not considered a sustainable source of income.</li> </ol>
<b>Type of employment</b>	Type of employment		<ol style="list-style-type: none"> <li>1. Differentiate between regular, temporary, seasonal and daily employment for having different sustainability prospects.</li> </ol>
	Income from Ukraine		<ol style="list-style-type: none"> <li>1. During the discussion, some partners suggested that some refugees from Poland are able to rent out their houses especially those located areas outside the west.</li> </ol>

			2. Record pension, and income from sources outside of Poland noting the significant difference of currency and value.
<b>Assistance from GoP , GoU</b>	Assistance from GoP		<ol style="list-style-type: none"> <li>1. At the moment, almost all refugees who have registered their UKR PESEL, are able to access the government's 500+ programme which provide 500 PLN for each child. This income should be considered when drawing an economic profile of assessed families.</li> <li>2. Detailed breakdown of social protection schemes provided by the GoP, and further insight into categories of individuals not eligible for those benefits or facing challenges in accessing them can be found in the recommendations prepared by the Social Protection Task Force.</li> </ol>

**The targeting TF recommends to:**

- 1) Focus cash partners' CVA activities on the groups identified above.
- 2) Prioritize HHs with intersectional vulnerabilities, either by use of a scoring system or mixed methods (social + economic /socio-economic vulnerabilities).
- 3) The transfer value was revised and adjusted recently by the CWG, following the IPiSS SMEB for 2022. It is recommended to consider development of a refugee specific MEB. Also, results of the country-wide Multi-Sectoral Needs Assessment (MSNA) should be considered. All this will help the CWG to calculate transfer values that are more comprehensive and realistic, and more aligned with the needs of refugees.
- 4) Comprehensive Assessment: Conduct a thorough economic vulnerability assessment that includes income sources, expenditures, and savings to identify HHs at higher risk



- 5) Regular Monitoring: Continuously monitor the economic status of targeted households through PDMs to ensure that assistance remains relevant and effective over time.
- 6) Collaboration with GoP: Collaborate with the Government of Poland to align assistance with existing social protection systems and ensure maximum support for vulnerable households. More details on the linkages to social protection can follow the recommendations of the Social Protection Task Team.