

REQUEST FOR PROPOSALS FOR CONSULTANT
TO TRAIN THE REGISTRAR AND STAFF OF
THE NATIONAL INSURANCE APPEALS TRIBUNAL (NIAT)

A. BACKGROUND TO ASSIGNMENT

The National Insurance Board (NIB) was established in accordance with Section 3 of the National Insurance Act No. 35 of 1971 to manage the National Insurance System in Trinidad and Tobago. Section 60 of the Act makes provision for establishing a quasi-judicial independent Appeals Tribunal known as the National Insurance Appeals Tribunal (NIAT). Through this Appeals Tribunal body, persons who are dissatisfied with NIB's decisions can challenge the decisions in respect of claims for benefits and/or other matters under NIB. The NIAT is a Statutory Body under the purview of the Ministry of Finance and the Economy. It operates in accordance with the Act and the relevant regulations thereof.

The Investments Division of the Ministry of Finance and the Economy (MFE) is requesting proposals from interested Consultants to undertake training of the Registrar and relevant staff members on the roles and functions of the Tribunal, the role, function and powers of the Registrar, the preparation and assessment of case files and understanding and awareness of the National Insurance System, its various Benefits and measures to facilitate access of those Benefits by citizens.

B. OBJECTIVES OF THE ASSIGNMENT

- To increase the knowledge and capacity of the Registrar and relevant staff members of the NIAT
- To enhance the operations of the NIAT

C. TERMS OF REFERENCE

The Consultant will be expected to undertake the following over a period of no more than **two months** from the date of engagement:

- Train the current Registrar and relevant staff, approximately four persons in total, to understand the roles, functions and powers of the office. This should include training on the National Insurance System of Trinidad and Tobago, in which the various benefits and timelines required to access the benefits, should be outlined.
- Highlight the various stakeholders and organizations that are a part of the National Insurance System and outline relationships between them.
- Ensure that the current Registrar is aware of the contents of the Act including any amendments that govern NIAT and its interpretation as well as any other legislation relevant to the NIAT.
- Advise the Registrar on the relevant information needed with respect to preparation of Case papers and the proper format for its documentation.
- Compare and contrast the present Appeals process with the Appeals process of at least two different countries and make recommendations.
- Provide training in the calculation of the various benefits accessed from the National Insurance System.

D. DELIVERABLES

The Consultant will be required to provide:

1. Training workshops for the Registrar and relevant staff of the Tribunal in the roles and functions and powers of the Tribunal.
2. A book of procedures on the roles & functions of a Registrar to maintain continuity of the office.
3. Sample format of accurate Case Papers.

4. A report outlining the topics covered in detail with the Registrar and staff over the training period.

E. REPORTING REQUIREMENTS

The Consultant will report directly to the Executive Director, Investment/Divestment, Investments Division, Ministry of Finance and the Economy, who will supervise the assignment.

All reports are to be written in English. The Consultant will provide an electronic version of all the required deliverables. The reporting will be completed in form and substance acceptable to the Ministry of Finance and the Economy.

F. ESTIMATED DURATION

This consultancy has an estimated duration of **no more than two months**. This should consist of approximately two days of training each week over the period.

Estimated Start Date: 2015/02/12

Estimated End Date: 2015/04/12

G. QUALIFICATIONS

- University degree in law or social sciences or relevant combination of knowledge and experience
- Extensive knowledge of the National Insurance Benefits and system of Trinidad and Tobago. Familiarity with Benefits and NIS systems of other countries may prove to be an asset.
- Proven ability and experience in leading and facilitating workshops
- A high standard of professionalism

H. CONTENT OF PROPOSAL

Proposers must submit a response to this RFP, in the following format:

1. A signed cover letter which demonstrates an understanding of the RFP along with detailed contact information.
2. Written narrative describing methodology, strategies and a detailed time specific training plan covering items under section C of this RFP.
3. Qualifications of the individual or firm including the number of years in business and the experience of the individual or firm in the area of the National Insurance System. In addition, information should be provided on the level of experience in training services. List at least two references where similar services were conducted and provide names and telephone numbers of contact persons for each reference.
4. Proposed price and payment schedule.
5. Provide any other relevant information that will assist in understanding and evaluating the proposed training schedule.

I. EVALUATION CRITERIA

Proposers must attain a minimum of seventy (70) points overall and a minimum of fifty per cent for each of the following criteria in order to qualify:

1. Qualifications and Experience (40)
 - a. Qualifications and relevant experience of the individual or firm.
 - b. Experience undertaking training of a similar nature
2. Training approach: (35)
 - a. Content of training material
 - b. Proposed strategies for conducting the training/workshops.
 - c. Proposed timeline.
3. Price (25)

J. TERMS AND CONDITIONS

1. The MFE reserves the right to reject any or all proposals.
2. The MFE is not obligated to accept the lowest bidder.
3. The MFE reserves the right to request clarification of information submitted, and to request additional information if required.
4. The MFE shall not be responsible for any costs incurred by the firm in preparing, submitting or presenting its response to this RFP.
5. The MFE may negotiate separately, with the selected bidder in its best interest and in the interest of NIAT.
6. The MFE requests that all submitted RFPs state that “the proposal shall remain open and valid for a period of at least ninety (90) days from the designated closing date indicated for receipt of proposals in the RFP”. The price quoted in the chosen proposal must remain unchanged for the entire period of the resulting contract unless otherwise specified in this RFP.

Respondents are required to submit one original and three copies of their proposals as follows:

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The Permanent Secretary
Ministry of Finance and the Economy
Level 8, Eric Williams Financial Complex
Independence Square
Port of Spain

Proposals should be received on or before **January 12th, 2014 at 3:00 pm** to be treated as valid.

Response packages should be submitted in sealed envelopes addressed as detailed above with the company's complete name and address detailed in the upper left hand corner.

Proposals must be signed by an authorized agent in order to be considered valid. Unsigned offers will not be considered. Telephone or facsimile offers will not be accepted.

Questions in relation to this Consultancy should be directed to Mr. Perry or Ms. Gordon at 627 – 9700 Extension 2509 or 2543.