

**TERMS OF REFERENCE**  
**FOR**  
**CONSULTANTS' COMPANY DELIVERING SERVICES IN PILOTING OF DRAFT**  
**NATIONAL DISABILITY ASSESSMENT METHODOLOGY**

## **TERMS OF REFERENCE AND SCOPE OF SERVICES**

### **Consultants' company delivering services in piloting of Draft National disability assessment methodology**

#### **I. Background**

The Government of the Republic of North Macedonia has received a Loan from the International Bank for Reconstruction and Development, for implementing the Macedonia Social Insurance Administration Project (SIAP).

The SIAP development objectives are to improve the quality of services in administering social insurance and strengthen the regulatory framework for people with disabilities and hazardous occupations. The Social Insurance Administration Project will support the Government of North Macedonia (GoNM) to address challenges that affect the functioning of the social insurance system and social protection of persons with disabilities.

The project will support the establishment of the Central Registry of Socially Insured Individuals (SURS) and the modernization of the pension administration, will contribute to the establishment of the Central Disability Certification Coordination Unit (CDCCU) and will assist in the establishment of the National Registry of Persons with Disabilities.

The overall SIAP project will be organized into two main components, with a third component related to project management.

- Component 1. Improving the quality of the social insurance administration services
- Component 2. Strengthen the regulatory framework for people with disabilities and for hazardous occupations
- Component 3. Project Management

This assignment will be undertaken within Component 2 - 'Subcomponent 1 - Establishment of the Central Disability Certification Coordination Unit (CDCCU)' – and will support the piloting of Draft National disability assessment methodology.

#### **II. Specific Background Information**

Disability assessment (certification) is complex, involving various different standards and agencies, with no single registry or procedure to unite the system. Disability assessment (certification) is the gateway for anyone who claims any publicly or privately provided disability-related benefit, service, or product. Disability certification in North Macedonia is required and initiated by several central and local government institutions; social insurance agencies; and social networks (Ministry of social policy, democracy and youth (MSDY), Ministry of Education, local governments, Pension Fund, social centers, education facilities, Employment Service Agency, and Health Fund). Certification processes are performed in parallel, uncoordinated, last too long, are not user friendly for the clients, lack supervision and control, and are inefficient.

Complex and ring-fenced processes and lack of coordination between the agencies have resulted in parallelism, duplication, and red tape throughout the disability assessment process. For each benefit, individuals need to pass different medical expert commissions for determination and assessment of disability. Separate commissions run the medical exam and confirm eligibility only for specifically required social or employment benefits. The medical definition of disability and a person with disability in North Macedonia is strictly medical and lacks the aspects of functionality and a needs-focused approach. North Macedonia has been using a standardized classification of diseases (MKB10) based on impairment (Barema) scale. Many countries have been broadening it to WHO-DAS II, a generic assessment instrument for health and disability developed by the WHO to produce standardized disability levels and profiles directly linked at the level of concepts to the International Classification of Functioning, Disability and Health (ICF).

The decision by the North Macedonia Government to unify the parallel disability assessment channels and methodologies follows best international practice. The scope of the reform includes moving to a more holistic assessment of disability requires setting up integrated disability assessment committees to perform a comprehensive assessment of the claimant based on medical, functional, and socioeconomic factors after which it issues a report describing the claimant's main impairments in bodily function and structure, limitations in activities, and restrictions in participation.

Under SIAP project, during 2023 Draft National Methodology for Disability Assessment was prepared.

### **III.Objectives of Assignment and Scope of Work**

The Draft National Methodology for Disability Assessment establishes the methodological basis that defines the content and the way of conducting the disability assessment, the closer determination of the criteria and rules for qualifying a person with a disability or at risk of developing a disability the steps and instruments that are used in the implementation of the disability assessment, the determination of the criteria for determining the disability eligible for the realization of rights and services defined in advance by law, the professional profiles and the way of work of the assessment commissions.

The Draft National Methodology is a socio-health and functional methodology for comprehensive assessment of persons with disabilities, i.e. persons with a particular health condition. It provides guidance on proper implementation of observations, assessments and analysis of individual factors, bodily functions and structures, activities and participation of the person with environmental disabilities and interactions with it.

The National Methodology is intended to carry out an assessment of all citizens of the Republic of North Macedonia, regardless of their age, with a health problem or health condition that can lead to disabilities. National methodology refers to a functional assessment of the person interacting with his/her relevant contexts. Functional assessment refers to the interaction between bodily structures, bodily functions, activity/participation and contextual 6 factors (individual and environmental factors). Functional assessment is a continuous collaborative process that combines the use of observations, conversation, analysis, measurement and monitoring of aspects of context, bodily structures, bodily functions, activities and participation of a person with a particular health

problem. A functional assessment determines the extent to which a person with a particular health problem may or may not participate in contexts relevant to him, compared to others who do not have a health problem.

The Draft National Methodology is based on the International Classification of Functioning, Disabilities and Health (ICF) and the United Nations Convention on the Rights of Persons with Disabilities, focusing on health and health-related conditions in persons with disabilities, their functionality, interaction and participation in the community.

During the development of the Draft National Methodology, the question "at which level, the cut-off thresholds for declaring a person with a disability/at risk of disability should be set?" arised. Considering that the answer to this question will have significant implications on the cash benefit rights and services for the persons who use them in the existing system (would the person continue to use cash benefit rights and services or would lose the right to use them), the need for piloting of disability assessments according to the New Methodology is necessary.

This piloting should answer the question: How many people with disability who are currently using rights and services from social protection would lose them/ or gain more, if the cut-off thresholds in methodology for: 1. indicator relating to relevant aspects of bodily structures or bodily functions and 2. Indicator relating to aspects of activity/participation are set at different levels?

The activities should focus on analyzing and piloting disability assessments according the new Draft Methodology.

The Client will provide an insight into new Draft Methodology to the potential Consultant upon request.

The Contractor's main tasks shall include (but not be limited to):

- Inception report with detail plan and schedule for piloting disability assessments according the new Draft Methodology in different commissions for disability assessments
- Field work- piloting of the disability assessments according the new Draft Methodology- the contractor should analyze/ assess approximately 5% of cases from currently processed assessments in current disability commission (for pension rights, war veterans, children assessments, third party care assessments and disability assessments) with different cut-off thresholds of indicators. The 5% threshold of currently processed randomly selected cases (app.35.000 ) should be proportionally maintained across currently independent disability commissions to the highest extent possible. This is to assure that the assessment of the pilot for each category is based on a representative and reliable sample.
- Report with simulations for different cut-off thresholds of indicators (indicator relating to relevant aspects of bodily structures or bodily functions and indicator relating to aspects of activity/participation) with projections of number of people (with disability/ risk of disability who are currently using rights and services from social protection) who would lose or gain more rights and services. The report should include forecast for potential savings or additional fiscal implication for social and pension rights and services and recommendation for the cut-off thresholds. The report should

also present policy and/or transitional options for current beneficiaries who would lose their benefit and recommend the optimal one for N Macedonia.

- On the basis of piloting and recommendations the contractor should prepare adjustments in the Draft National Methodology for disability assessment
- Conduct training for new methodology for disability assessment of the future disability assessment experts

The Contractor shall work closely with representatives of Ministry of Social Policy, democracy and youth, Center for Functional Assessment and Support of Children and Youth in North Macedonia and other relevant committees and institutions.

## IV. Deliverables

The Consultant shall submit the following key deliverables. The Consultant may also propose additional deliverables based on the Consultant's proposed approach and methodology.

- 1) Project Inception Report and Project Plan:** Describes Contractor's approach to project; affirmation of deliverables timeline, activities and outputs; mobilization of Contractor's team; project management; identified risks, mitigation strategies, as well as schedule for piloting disability assessments according the new Draft Methodology in different commissions for disability assessments
- 2) Report from field work- piloting of the disability assessments according the new Draft Methodology**
- 3) Report with simulations for different cut-off thresholds of indicators** (indicator relating to relevant aspects of bodily structures or bodily functions and indicator relating to aspects of activity/participation) with projections of number of people (with disability/ risk of disability who are currently using rights and services from social protection) who would lose or gain more rights and services. The report should include forecast for potential savings or additional fiscal implication for social and pension rights and services and recommendation for the cut-off thresholds. The report should also present policy and/or transitional options for current beneficiaries who would lose their benefit and recommend the optimal one for N Macedonia.
- 4) Adjusted Draft National Methodology** for disability assessment in accordance with piloting and given recommendations
- 5) Training for new methodology**, for at least 60 disability assessment experts (three cycles of at least 20 participants)

The above Deliverables should be sufficiently detailed for use by the Client. The Consultant is expected to hold meetings and workshops throughout the project when required and these should be determined within the proposed project work plan. These events should be used to gather and verify information, discuss existing problems and potential solutions, brief management and key staff in the participating institutions, and reach agreement on future solutions. The deliverables by the Client will be reviewed within 60 working days.

## V. Reporting Arrangements

The Consultant will report on a regular basis to MSDY, PMU Team to ensure work undertaken is delivered on schedule and with expected quality. All deliverables shall be available in English and Macedonian languages. All written reports should be discussed in full with the MSDY and PMU Team and this should be reflected within the final version of the report being written. The MSDY shall give the final approval with regards to document acceptance and any disagreements.

## VI. Duration of the assignment

This task is expected to begin in the third quarter of 2024 and duration of assignment is for a minimum of 10 calendar months.

## VII. Qualification requirements

To carry out this assignment, the Client seeks a Company (Consultant) who needs to provide a team of experts with relevant experience and qualifications in their subject area as indicated further below. The Consultant may associate with other Consultant firm(s) in the form of a joint venture to complement their respective areas of expertise, strengthen the technical responsiveness of their proposal, and avail themselves to a broader pool of experts.

The qualification requirements of the Consultant firm are summarized as follows. The Consultant shall be a firm or a group of firms with following qualifications:

- Proven experience in projects and verifiable track-record in providing services in the public sector at national level in the past five years
- Proven expertise in at least five assignments related to disability or work capability issues or in the health sector related to disability, in the past ten years
- Proven expertise in assignments related to disability or work capability assessment
- Proven experience in providing training in the subject or similar area
- ISO 9001 valid certificate
- Proven successful track record of implementation of donor funded projects for persons with disability
- International certification program for designing, delivering and mentoring of persons with disabilities
- Human capacity-at least 10 number of employees on a regular basis

The credibility of mentioned experience and expertise shall be presented in a list of project references with description of services provided (including information on contract value, contracting entity/client, project location/country, duration, percentage carried out by consultant in case of association of firms or subcontracting and main activities) and accompanied by certificates of orderly fulfillment of the contracts verified by other party from such contracts.

Qualification requirements	Total points	Max. Points
	100	

Proven experience and verifiable track-record in providing services in the public sector at national level in the past five years	10	3- One realized project in the public sector at national level in the past five years 7- Two realized projects in the public sector at national level in the past five years 10- Three or more realized projects in the public sector at national level in the past five years
Proven expertise in at least five assignments related to disability or work capability issues or in the health sector related to disability, in the past ten years	15	5- Five realized assignment related to disability or work capability issues or in the health sector related to disability, in the past ten years 10- Six to Seven realized assignments related to disability or work capability issues or in the health sector related to disability, in the past ten years 15- More than eight realized assignment related to disability or work capability issues or in the health sector related to disability, in the past ten years
Proven expertise in assignments related to disability or work capability assessment	15	5- Two realized assignments related to disability or work capability assessment 10- Three to four realized assignments related to disability or work capability assessment 15- More than four realized assignment related to disability or work capability assessment
Proven experience in providing training in the subject or similar area	20	10- Two realized trainings in the subject or similar area of at least 20 participants 20- More than two realized trainings in the subject or similar area of at least 20 participants
ISO 9001 valid certificate	10	0-without valid certificate 10-with valid certificate
Successful track record of donor funded project	10	
International certification program for persons with disabilities	10	
At least 10 number of employees on a regular basis	10	0- less than 10 employees on a regular basis 10- 10 or more than 10 employees on a regular basis

## VIII.Key staff requirements

**The Consultant must provide at least the following expert staff for completing the assignment:**

It is expected that the Consultant's team will be comprised of at least 10 experts, out of which:

- 1 (one) Team Leader

- 2 (two) researchers-experts in medical science (Specialization in orthopedics, traumatology or psychiatry or occupational medicine will be considered as an advantage), with minimum university degree and at least 5 years experience in the relevant area after the specialization.
- 5 (five) researchers - experts in psychology/ special education and rehabilitation/ social work, with minimum university degree in this professions and at least 5 years experience in the relevant area
- 1 (one) data analyst with minimum university degree and at least 5 years experience in the relevant area
- 1(one) Trainer with at least 5 years experience in the providing trainings in the subject or similar area, with minimum university degree in Medical or Social science, and fluent in Macedonian language

Team Leader should have:

- At least a university degree in economy and management, medical science or psychology/ special education and rehabilitation/ social work
- Managerial experience on projects related with disability or work capability;
- Experience on projects dealing with disability or work capability assessment
- Excellent knowledge of English language

At least 5 researchers must have knowledge of Macedonian language, having in consideration that they will be responsible for piloting/ disability assessments-field work.

The Team Leader shall coordinate the work of all experts with appropriate qualifications written above and ensure that their schedules are coordinated.

The Team Leader will also ensure the quality of reports, and that the work of Consultant's team is coordinated with each other so that their outputs are consistent and delivered on time.

## **IX. Selection Method and Contract**

The selection method is "Consultant's Qualifications Based Selection" and the contract shall be Lump Sum according to the World Bank Procurement Regulations for Investment Project Financing (IPF) Borrowers – Procurement in IPF of Goods, Works, Non-Consulting and Consulting Services, (Regulations) issued in July 2016, revised November 2017 and August 2018, [www.worldbank.org](http://www.worldbank.org)