



**MINISTRY OF EDUCATION, SUSTAINABLE DEVELOPMENT, INNOVATION, SCIENCE  
TECHNOLOGY AND VOCATIONAL TRAINING**

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**TERMS OF REFERENCE<sup>i</sup>  
DEVELOPMENT AND DELIVERY OF TRAINING SEMINAR IN:  
FACILITIES MAINTENANCE MANAGEMENT**

**1. BACKGROUND**

- 1.01 The Ministry of Education, Sustainable Development, Innovation, Science Technology and Vocational Training (MOE) subscribes to the notion that education is an entitlement of all St. Lucians, and as such plays a critical role in their holistic development. However, despite the substantial investment and the laudable progress made by successive governments, important challenges remain with regard to the effective maintenance of school infrastructure. Such issues may be directly related to climate change as well as the inadequate care administered in the overall maintenance of school plant.
- 1.02 As a strategic response to the rising infrastructural issues encountered by various plant within the purview of the MOE, human capital development in facilities maintenance management is an imperative. The development of trained personnel in this area, likewise the implementation of effective monitoring and evaluation strategies, should mitigate against the resurgence of such issues. Improved facilities maintenance may reduce the overall recurrent expenditure of the MOE, likewise foster the development of environments that are conducive to quality instruction and productivity. There is need to institutionalise a culture of maintenance, that is, buy-in from all stakeholders who inhabit, use or maintain the plant of the MOE.
- 1.03 The MOE, through the Project Coordinating Unit (PCU) of the Education Quality Improvement Project (EQIP), wishes to engage a consultancy firm to develop and deliver a training seminar centered on facilities maintenance management to relevant personnel within the Ministry of Education.

**2. OBJECTIVES**

- 2.01 The objectives of the assignment are to:

- (a) develop the competence of relevant personnel in effective facilities maintenance management;
- (b) foster greater sustainability of all plant within the purview of the MOE;
- (c) develop stakeholder awareness of the varied physical, environmental and human factors which may compromise the integrity of a plant facility;
- (d) foster effective monitoring and proactive management of school plant by principals and other relevant officers; and
- (e) foster a culture of maintenance, accountability and responsibility with regard to all facilities within the purview of the MOE.

### **3. METHODOLOGY**

- 3.01 The Consultants will perform all investigative work and analyses to realise the objective stated above. They will use participatory and consultative methodologies in working closely with the MOE and other critical stakeholders in the sector. These will include, but are not limited to principals, the Director of Works, the Superintendent of Works, Building Officers, cleaners, caretakers/grounds men, facilities manager(s), school safety officer, Chief Education Officer, Deputy Chief Education Officer, Deputy Permanent Secretary, Permanent Secretary.
- 3.02 The consultants will work closely with the Director of Works (DOW) and Project Officer (Education) (POE), who shall be assigned by the MOE to act as a counterpart and coordinate the work of the Consultants, and other relevant technical officers at the MOE. In consultation with the MOE, the Consultants will organize meeting(s) with critical stakeholders at Draft Report stage to share and discuss the findings and major recommendations emanating from the consultancy.
- 3.03 The Consultants will also conduct a series of workshops (inclusive of the practical element of site visits) for the various groups of stakeholders, specialists and other relevant persons to orient them to facilities maintenance management; physical, environmental and human factors which may compromise the integrity of a plant facility; risk reduction strategies and their respective roles in mitigating against the rise of select maintenance issues. The consultant will secure assistance of the MOE Building Officers in the execution of the workshop series given these officers recently benefitted from a scholarship to complete a certificate course in Facilities Maintenance Management with the University of the West Indies (Open Campus) Saint Lucia.
- 3.04 The Consultants will, as part of the workshop training, expose relevant stakeholders to (a) cost-effective facilities maintenance management system(s) or software application(s)

which may be integrated into the MOE to enhance efficiency in the overall management of plant facilities within the purview of the MOE.

#### **4. SCOPE OF SERVICES**

4.01 The Consultants will perform duties of the “Workshop Facilitator” as detailed in the Conditions of Contract by the MOE. At the start of the contract, the Consultants will review all technical documentation, including reports and manual(s) related to facilities maintenance management, to ensure, *inter alia*, their technical adequacy with reference to the TOR for this consultancy, and the adequacy of the expected outcomes of this training session. The consultant(s) will also make recommendations for enhancements to the existing manual relative to current issues within the local and global environment, likewise internationally accepted codes/standards for the maintenance of plant facilities. The requirements of the St. Lucia National Building Code will be applied, and all maintenance will be informed by relevant maintenance manual(s) and other relevant International Building Codes and Maintenance Codes. The scope of work is understood to cover all activities necessary to accomplish the objectives of the consultancy, whether or not a specific activity is cited in this TOR. The scope of services of the Consultants will include, but not be limited to, the following:

##### **TASK 1: STAKEHOLDER CONSULTATIONS AND REVIEW OF RELEVANT DOCUMENTATION**

- 1.1 Consult with relevant stakeholders, including but not limited to: the Permanent Secretary; Deputy Permanent Secretary; Building Officers, Director of Works; Superintendent of Works Chief Education Officer; Deputy Chief Education Officer; regarding existing issues with plant under the purview of the MOE and the overall maintenance of these facilities;
- 1.2 Review maintenance/assessment reports, work orders, or other relevant documents on plant facilities to identify trends or patterns in the maintenance issues faced by institutions within the purview of the MOE;
- 1.3 Review the MOE’s maintenance manual and make recommendations for enhancements to the manual relative to current issues within the local and global environment, likewise internationally accepted codes/standards for the maintenance of plant facilities;
- 1.4 Submit an Inception Report, no later than 21 days after commencement of the assignment, detailing the methodology to be applied in the completion of the assignment, recommendations for enhancement of the existing facilities maintenance management manual, and a related Work Plan.

## **DELIVERABLES:**

The firm will be required to submit to MOE and Caribbean Development Bank (CDB) one electronic copy of the following report:

Inception Report, no later than three (3) weeks after commencement of the assignment, detailing the methodologies to be used in conducting the assignment, recommendations for enhancement of the existing facilities maintenance management manual, and a related Work Plan.

**Duration: Three (3) weeks**

## **TASK 2: DEVELOP SEMINAR/WORKSHOP TRAINING**

2.1 Develop a workshop/seminar to develop stakeholder competence in facilities maintenance management and the effective use of the maintenance manual developed for the MOE. Whilst the training seminar should expose participants to key theory regarding effective maintenance management, particular attention should be placed on ensuring that the training session is highly interactive, practical and relevant to the portfolio(s) or role(s) of the respective stakeholders. Targeted stakeholders include:

### **Policy and Administration Officers**

- The Permanent Secretary (MOE)
- Deputy Permanent Secretary (MOE)
- Chief Education Officer
- Deputy Chief Education Officer

### **School Administrators**

- All public school principals

### **Building Maintenance Officers**

- Director of Works
- Superintendent of Works
- Building Officers
- Facilities Manager (Sir Arthur Lewis Community College)
- School Safety Officer

### **Building Maintenance Support Personnel**

- All school cleaners
- All school bursars

Training sessions for School Administrators and Building Maintenance Support Personnel, respectively, are to be scheduled for personnel based in the North of the island, and personnel based in the South of the island.

- 2.2 As part of the training session, conduct visits to select facilities with relevant participants of the training exercise to explore existing maintenance issues and the role(s) of the respective participants/stakeholders in stemming/mitigating against these maintenance issues. This should bring some context and relevance to participants regarding the significance of their individual roles in addressing existing maintenance challenges and the need for improved response time where issues surface;
- 2.3 Equip cleaners and caretakers with the requisite skills in preventative maintenance and sensitise these stakeholders on the importance of their roles in stemming emerging maintenance issues with plant facilities within the purview of the MOE;
- 2.4 Develop participants' awareness of appropriate risk reduction strategies that may be employed to minimize the rise of environmental or physical hazards which may compromise the integrity of plant facilities within the purview of the MOE;
- 2.5 Recommend and expose relevant stakeholders to training in facilities maintenance management system(s) or software application(s) which may be used to facilitate effective monitoring and evaluation of facilities and the overall maintenance of plant under the purview of the MOE. The nominated system/software application should be cost-effective and user-friendly.

**DELIVERABLE:**

The firm will be required to submit to MOE and Caribbean Development Bank (CDB) one electronic copy of the following report:

First Progress Report, for approval by the MOE and the CDB, no later than three (3) weeks after submission of the approved Inception Report. This report should report the outcomes of follow-up stakeholder consultations the consultants engaged in as the seminar was prepared/drafted, likewise the draft of the proposed workshop/seminar training.

**Duration: Three (3) weeks**

**TASK 3: DELIVER SEMINAR/WORKSHOP TRAINING**

- 3.1 Deliver the seminar in fulfillment of 2.1 to 2.5.
- 3.2 Facilitate the development of an action plan by the MOE building officers for the continued training and professional development of school cleaners, likewise grounds men, and any other relevant personnel.

3.3 Prepare a report on the outcomes of the workshop session within two (2) weeks of completion of the seminar.

**DELIVERABLE:**

The firm will be required to submit to MOE and Caribbean Development Bank (CDB) one electronic copy of the following report:

Second Progress Report, for approval by the MOE and the CDB, no later than two weeks after the training session is complete. The consultants should report on the delivery and outcomes of the workshop/seminar training. The consultants will also submit a video recording of the entire seminar to the MOE.

**Duration: Two (2) weeks**

**TASK 4: CONDUCT CLOSING MEETING WITH MOE AND SUBMIT DRAFT FINAL REPORT**

4.1 Develop a monitoring and evaluation plan to facilitate the continued and progressive maintenance and management of facilities within the purview of the MOE.

4.2 Report to the relevant administration of the MOE at a closing meeting on the outcomes of the training; and

**DELIVERABLE:**

The firm will be required to submit for approval to the MOE and Caribbean Development Bank (CDB) one electronic copy of the following report:

Draft Final Report, no later than two weeks after the closing meeting. The consultants should report on the outcomes of the closing meeting with the MOE and submit a draft monitoring and evaluation plan to facilitate the continued and progressive maintenance and management of facilities within the purview of the MOE.

**Duration: Two (2) weeks**

**TASK 5: PREPARE AND SUBMIT FINAL REPORT**

**DELIVERABLE:**

The Consultants will be required to submit to the MOE and Caribbean Development Bank (CDB) one electronic copy of the following report:

Final Report no later than ten working days after receipt of the comments of CDB and MOE on the draft Final Report.

**Duration: Two weeks**

## **5. QUALIFICATIONS AND EXPERIENCE**

5.01 The Consultants should possess the following minimum qualifications:

- (a) A university degree in civil or structural engineering with post-graduate qualification in structural engineering, facilities maintenance management or related discipline;
- (b) A minimum of ten years professional experience in the design and construction of buildings and the development of facilities management plans; and
- (c) Strong spoken and written communication skills and fluency in the English language.

5.02 The Consultant firm must specify the qualifications and experience of the expert(s) to be assigned to this consultancy.

## **6. DURATION**

6.01 The consultancy is expected to last for no more than 60 days over a twelve (12) week period from the date of contract signing. Sessions and practical site visits with the aforementioned groups of stakeholders may be staggered within this period.

## **7. REPORTING REQUIREMENTS**

7.01 The Consultants shall report to the Project Coordinator (PC), in the PCU of the EQUiP, through the Project Officer (Education). The Consultants will submit formal reports on the deliverables as set out in the Scope of Services of this consultancy to the MOE and CDB in electronic format. One electronic copy shall be provided to the MOE and CDB, respectively. The electronic copy of the reports shall also be provided in Portable Document Format (PDF) to the MOE and CDB. The reports shall be submitted as indicated below. The reports shall outline (but not limited to):

- outcomes of stakeholder consultations/desk reviews;
- the approach or methodology/methodologies applied in the delivery of the seminar;
- maintenance management issues identified by stakeholders during consultations and the seminar;
- training received by stakeholders to mitigate against or stem current maintenance management issues;
- training received by relevant stakeholders in facilities maintenance management system(s) and relevant software application(s) that should enhance their overall efficiency in the discharge of their duties;
- Recommendation(s) on a suitable and cost-effective software application that the MOE can integrate to enhance the overall management of plant facilities;

- Recommendations for the overall improvement in the maintenance of facilities by the MOE.

## **8. REPORTS AND PAYMENT SCHEDULE**

<b>Report</b>	<b>Payment (%)</b>
On contract signing and submission of deliverable:	
<p><b>Task 1</b> Inception Report, no later than 14 days after commencement of the assignment, detailing the methodologies to be used in conducting the assignment and a related Work Plan.</p>	25%
<p><b>Task 2</b> First Progress Report highlighting the draft of the proposed workshop/seminar training for vetting and/or approval by the MOE and the CDB.</p>	20%
<p><b>Task 3</b> Second Progress Report highlighting the delivery and outcomes of the workshop/seminar training for vetting and/or approval by the MOE and the CDB.</p>	20%
<p><b>Task 4</b> Draft Final Report, reflecting the outcomes of the closing meeting with the MOE and a draft monitoring and evaluation plan to facilitate the continued and progressive maintenance and management of facilities within the purview of the MOE.</p>	15%
<p><b>Task 5</b> Final Report no later than ten working days after receipt of the comments of CDB and MOE on the draft Final Report.</p>	20%
	<b>100%</b>

<sup>i</sup> The Terms of Reference as laid out here are a draft and may be adjusted by the MOE at any point.