CONSULTANTS TERMS OF REFERENCE FOR CIVIL ENGINEERING WORKS – GUIDANCE NOTES

OECS ENGINEERS WORKSHOP
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General

- This presentation is based on my personal experience and information from the following websites

  - worldbank.org/procure
ToRs are to some extent prescriptive in the sense that there must be certain “must have” content.

On the other hand, ToRs are written to satisfy certain objectives and will thus vary accordingly.

You gain experience with time and feedback from consultants and funding agencies.
What are Terms of Reference?

- “Scope allowed to persons conducting an enquiry of **any** kind”
What does a ToR do?

PRE - CONTRACT

A ToR provides:

- A clear statement of the purpose and objective(s) of the contract
- A list of tasks, services and deliverables to be provided
- A selection tool
What does a ToR do?

POST CONTRACT

A ToR provides:

- A communication tool between the consultant and client
- A tool for monitoring the contract during project implementation
- A key part of the contract documentation
Contents of ToR

- Typical contents page
- Context and background to assignment
- Objective
- Duration
- General Requirements
- Scope of Services
- Client Inputs
Contents of ToR

- Typical contents page (contd)
- Consultants Input
- Reporting Requirements (or Deliverables)
- Working Team minimum requirements
The genesis to the context and background to the ToR, is in many instances the disastrous consequences of a significant weather event as the following pictures show.
Congo Valley Bridge Failure
Landslip in RoseBank
Damage to Hydro Pipeline
Jetty Collapse in Chateaubelair
Road Failure in Golden Grove
North River
A silver lining in every cloud
Typical narrative would include paragraphs on:

- Beneficiary Country
- Project Funding Agency
- Contracting Authority
- Relevant country background
- Problem to be solved
- Purpose of project
Objective(s) of project
Objective(s) of project
Objective of project
Objective of the Project

- Keep it short and to the point.
- The objective should be guided by the previous section on the context and background.
- Some projects have multiple objectives
Duration: Client provides estimate of project duration
This section speaks to the professional approach expected of the consultant

All hands on deck to cover all possibilities that may arise during the assignment
Scope of services

- This section should not be too detailed as to prevent the experience of the consultant to contribute towards the solution.
- You can include technical specifications for the various disciplines in Appendices.
Scope of Services

- This may include but not be limited to the following:
  - Topographical
  - Geotechnical
  - EIA
  - Hydraulic
  - Hydrology
  - Coastal Defence
  - Design and Supervision
Client and Consultant Inputs

- The content of this section is fairly constant as shown in the ToR example.
- On the client side, be careful not to include what cannot be provided as this will have cost implications.
Reporting Requirements or Deliverables

- Inception Report (see example)
- Preliminary Designs (consultant to present)
- Draft Final Designs (ditto)
Reporting Requirements or Deliverables

- Final Bid Documents
- Design Completion Report

- Remember to put timelines (delivery and review), number of copies for each deliverable
Size and experience of team should be relevant to the scale of the project
Do not request unnecessary qualifications
Remember some team members can multitask
Estimate man-days, based on personal experience, previous consultants submissions and as a percentage of the construction cost
You can view a ToR as the consultants equivalent to a contractors Bills of Quantities, Specifications and Construction Drawings
That’s all folks