



This project is funded
by the European Union

**EU Grant to Improve Access to Vocational Education, Skills Training and Remedial Learning in the Traditional Banana Growing Communities in Jamaica
Financing Agreement No. B7-8710/856/25**

HEART Trust/NTA Banana Sector Retraining Project

**TERMS OF REFERENCE – Revision (December 1, 2008)
Training Needs Analysis Consultant**

Background Information:

The HEART Trust-National Training Agency has been approved under the EU Grants to Improve Access to Vocational Education, Skills Training and Remedial Learning in the Traditional Banana Growing Communities in Jamaica. The 15-month project with an EU contribution of 300,000 euros, proposes an education and training project aimed at banana farmers and farm and port workers in the traditional banana growing areas of Jamaica, the parishes of St. Thomas, Portland, St. Mary, St. Catherine, Clarendon and St. James. In phase one of the project, the Agency will work with the groups to understand their education and training needs through a comprehensive set of training needs studies, career development workshops, remedial education programmes using new information and communications technologies, prevocational training and vocational skills training.

The overall objective of the project is to provide greater access to alternative training and certification opportunities for ex-banana farmers, who exited the industry within this last decade, farm and port workers who were laid off, and other persons in the communities who have been affected by the decline in the banana industry, to enable their transitioning into new, diverse and sustainable income generating activities. This will improve the income and standard of living of project participants.

The specific objective of the project is to learn a sufficient amount from the project experience to inform a more comprehensive remedial and technical and vocational skills training programme design, through conducting research and pilot projects, for an intended Phase 2 of the project.



This project is funded
by the European Union

Outputs-Results

The project will target a total of 620 project participants who will participate in pilot programmes specifically designed for the needs of the target group members and their communities. These pilot programmes will be conducted in the six target parishes. Pilot programmes offered will include:

1. **Pre-vocational training programmes** that focus on employability skills of the participants consisting of “Unit Competencies” such as
 - Communicate Effectively in the Workplace
 - Work in a Team
 - Work with Colleagues and Customers
 - Carry Out Data Entry and Retrieval Procedures
 - Communicate on the Telephone
 - Describe and Analyse Data using Mathematical Principles
 - Craft a Personal Entrepreneurial Strategy
2. **Vocational training programmes**-HEART Trust-NTA has a wide array of existing programmes already in place, and has no limitation on age of participants. Thus, some members of the target group may be admitted to these existing training programmes that match the interest and aptitude of the applicant. Generally, participants need to pass a test pegged at a grade nine level of academic achievement focusing on general knowledge, English language and practical mathematics. HEART Trust-NTA has 61 locations in the six target parishes already offering skills training in 20 skill areas covering 12 economic sectors. Of the 61 locations, 9 are HEART-operated institutions and 52 are operated in conjunction with partner organisations
3. **More specialised vocational skills training programmes** will also be piloted based on small projects designed in conjunction with specific communities and existing and possibly new community based training providers. These will be developed following our existing project development procedures
4. **ICT enabled remedial education programmes** that build on recent experiences gained with the HeadSpace Software that was piloted last year at Rockfort Vocational Training Centre in Kingston. The 3part training programme comprising WordCraft 1 – Reading; WordCraft 2 – Writing; MathCraft – Grades 1-9; will be conducted over a six-month period. Learners will advance through the programme at their own pace supported by the on-site facilitators and the consultants’ virtual support network –via e-mail, Skype and the Learning Management System.

On conclusion of the 6month training programme, those learners who have successfully completed the HEART Grade 9 test, will be invited to apply for any of the HEART funded programmes or re-integrate into academic programmes at the secondary level. Those who are not successful will have the opportunity to re-do the Literacy programme as required through their respective centres as they will have on-going access to the software and the on-site facilitators trained under the project. Based on the success of the project, the idea is to extend the Literacy programme to other centres, including those outside of the pilot area, either via the web-based Learning Management System, or, if they do not have access to high-speed internet, via CD-ROM.



This project is funded
by the European Union

5. **A Training Needs Analysis** will be conducted to provide additional knowledge about the target population to sharpen the focus and improve services for an intended Phase 2 of the project. A consultant will be hired to conduct the Training Needs Analysis under the direction of the Director, Research & Evaluation, HEART Trust-NTA, and this document is that same Terms of Reference to be used for competitive tendering to select said consultant.
6. **Career Development Workshops** will be conducted in each of the six parishes for 50 persons per parish and a total of 300 individuals. Participants will be exposed to career counselling workshops aimed at their specific needs and priorities. There will be a need to expose participants to the wide range of careers and corresponding education and training opportunities available through the HEART Trust-NTA. The large expansion of tourism presently occurring in Jamaica provides fertile ground for change in occupation by participants, who can benefit from new opportunities in hotel housekeeping, grounds and landscape, food and beverage services, and hotel maintenance. This will be particularly relevant for participants from Portland, St. Mary and St. James.

The Career Development programme will include exposure to career information about the variety of jobs and qualifications in the economy, assessment of aptitude, occupational interest and academic achievement, individual and group counselling about vocational choice, remedial, pre-vocational, or vocational skills training selection, resume development, and interviewing skills. These workshops will be located at various HEART venues including HEART regional and parish offices.

7. **A Programme Evaluation** will be conducted between months five and fourteen of the project to assess the strengths and weaknesses of the project and to gather lessons learnt so as to inform an intended Phase 2 of the project. Each result area and the activities associated with it will be evaluated in terms of relevance, effectiveness and efficiency. A qualified Evaluation Consultant will be selected. HEART Trust-NTA also has Evaluation expertise on staff who will compose Terms of Reference and supervise the work of the consultant selected.

Scope of Work:

The TNA Consultant will be contracted to research and provide further information about the target group beneficiaries, to sharpen the focus and improve services to be provided to them in an intended Phase II of this project.

The elements of the work that need to be done are specified below.

The work elements should be executed in the specified time periods so as to link effectively to other aspects and actions of the related project.

Objectives:

The TNA consultant will conduct activities to provide a representative profile of the target group beneficiaries which are banana workers, small banana farmers and banana port workers in the 6 targeted parishes of:

- St James
- Clarendon
- St Catherine
- Portland
- St Mary
- St Thomas



This project is funded
by the European Union

The aim of the analysis is to gather extensive information on the target group including:

- The geographic, gender and age distribution
- The labour market status, particularly focusing on reasons for both unemployment and withdrawal from the labour market
- The educational background of members of the group
- The work experience history, patterns, sequences, skill sets and their transferability
- The occupational interests and economic aspirations of members
- The availability of members for participation in education and training and work experience activities and constraints in accessing these activities
- An analysis of special needs and consideration as to how to sub-divide the groups according to needs

Activities:

The consultant will perform:

1. Desk Research of Target Group

- a. Collate existing information about the banana industry workers in the 6 identified parishes of Jamaica – macro and micro-economic labour research.
- b. Secure information from third parties - such as RADA and Jamaica Producers - about the structure and composition of workers and farmers in the banana sector
- c. Design methods and gain access to these target groups for individual and group research activities
- d. Conduct this phase of the research starting 5th January 2009 and completing no later than 31st January 2009.

2. Primary Research of Target Group

- a. Design and develop a questionnaire to be used in the 1-2-1 interviews with target group members – with said questionnaire to be approved by Project Team
- b. Perform 1-2-1 interviews with at least 120 workers (total to be confirmed) in the banana across at least 4 relevant parishes during the period 5th January 2009 to 1st May 2009.
- c. Conduct at least 2 focus group sessions of representative target beneficiaries during the period June to September 2009
- d. These focus groups should be conducted in 2 different parishes of the 6 specified parishes in the contract
- e. The data collected from this aspect of the research should include the elements of information specified in the Objectives Section above in this document, such as age, gender, work experience etc.

3. Stakeholder Consultations

- a. Conduct at least 3 stakeholder consultations as specified by the project manager/director, with the first to be conducted and written up before the end of February 2009 and the last one facilitated and results written up before September 30, 2009.



This project is funded
by the European Union

4. Data Collection

- a. Ensure that all data on the participant beneficiaries in this TNA exercise is collected on provided EU project forms and signed off by the relevant participant.
- b. Provide confirmation that the participants are workers from the Banana Industry sector and collect their contact details for future reference
- c. Ensure Project Office receives all relevant documentation pertaining to all the related research activities in a timely manner

Deliverables:

1. Raw data for 120 workers or recent workers in the banana industry across the 6 specified parishes as specified and agreed with the HEART project manager
2. Data sheets on prospective beneficiaries completed and signed by the participants of the interviews and the focus groups
3. A summary report on the transition issues and comments on HR development needs as outlined by the stakeholders derived from the 3 consultation sessions
4. A summary of the findings on the target beneficiary group as required in the section above on Objectives
5. Reports of the findings from the 2 Focus Group discussions

Time Period and Payment Schedule:

The TNA research into individual beneficiaries should commence by January 5th 2009 and be completed no later than May 1st, 2009.

The 3 Stakeholder Consultations should be conducted by July 31st, 2009 and the 2 Focus Group discussions should be completed by September 30th 2009 at the latest.

The entire elapsed period will therefore run from January 5th 2009 to September 30th, 2009.

The estimated time for the consultant fees is between 60-75 consultant days.

The consultant will be paid quarterly in arrears after an initial mobilisation payment of 20% of consultant fees in the first month after signing the contract.

A final payment of 15% will be withheld for payment at the end, pending successful completion of the research and sign off by the relevant Project Committee.

A separate budget for the 2 Focus Groups and for the 3 Stakeholder Consultations will be made available to cover costs of venue and refreshments. Quotes for these costs should be provided separately.

Counterpart and Reporting Structures

The overall project will be managed by the HEART Trust-NTA through its Planning & Project Development Division under the auspices of the Director, Projects and Partnerships.

The TNA consultant will report to the Director, Projects and Partnerships but have day to day contact with the Project Administrator with regards to operational and logistical matters.

The Director of the HEART Trust-NTA Research & Evaluation Department will provide advice and oversight on analysis as it is proposed and is being conducted by the TNA consultant engaged.



This project is funded
by the European Union

The Projects and Partnerships Unit will provide the required project secretariat services.

Counterpart Responsibilities:

1. Provide sources of exiting secondary data (if available) and information on leads for interviews and consultation as necessary
2. Set-up introductions for sessions with Stakeholders for the 3 consultations
3. Provide venues for the conduct of the 2 Focus groups and 3 Stakeholder Consultation sessions

Cost of Tendering

The tenders shall bear all costs associated with the preparation and submission of their tenders and that the procuring entity will in no case be responsible or liable for those costs, regardless of the outcome of the tendering process.

Language of Tendering

Tenders documents should be prepared and submitted in the English Language.

Tender Prices

A detailed budget outlining the labour price, travelling and other resource costs must be clearly done and submitted along with the pre-qualification documents.

The proposer should submit labour rates on an hourly and daily basis for any effort billable under the project including professional effort of a lead or associate consultant, junior professional effort that may be used to gather, organize and present secondary data, and any clerical assistance that may be required.

The proposer should indicate the estimated cost for travelling from one location to another clearly identifying the base from which they will operate and the purpose for which they need to travel.

Other resource costs (e.g., material, overheads, etc.) must be clearly described and tied to the various activities planned for the project.

Clarification of Tender Documents

Methods by which tenders may seek clarification on the tender document should be done in writing on their official letterhead and e-mailed, hand delivered, mailed or faxed. Telephone queries are not acceptable.

All clarification queries are to be addressed to Mrs. Elizabeth Terry, Director of Projects and Partnerships at the HEART Trust/NTA, 6b Oxford Road, Kingston 5 or e-mailed to elizabeth_terry@heart-nta.org. The Fax telephone number is 960-9486.



This project is funded
by the European Union

Amendment of Tender Documents

If at any time prior to the deadline for submission of tenders the procuring entity amends the tender document(s), the details of the amendment will be issued as an addendum and where it becomes necessary, the procuring entity may extend the deadline for submission of tenders. This will be communicated via e-mail, NCC website or the printed media depending on the media originally used for advertising the tender.

Late Tender

Any tender submitted to the procuring entity after the prescribed deadline for the submission of tenders will not be accepted.

Modification and Withdrawal of Tenders

Bidders may modify or withdraw their tenders after tender submission provided that written notice of the modification or withdrawal is received by the procuring entity prior to the prescribed deadline for submission of tenders.

The requirements for tender submission remain the same for the submission of modifications or withdrawals.

Proposals should be sent to:

Elizabeth Terry
Director, Projects and Partnerships
Planning & Project Development Division
HEART Trust/NTA
6B Oxford Road
Kingston 5

Procurement Process

Proposals (both hardcopy and softcopy versions) are due by 12:00 noon on **Wednesday December 17, 2008**. No submissions will be accepted past this deadline.

Proposals will be delivered to the HEART Planning Division offices on the second floor and placed in the box at the reception area marked Proposals for TNA of Banana Sector Retraining Programme.

A receipt will be provided to those submitting proposals.

Electronic versions of the bid quote document must also be emailed to Elizabeth.Terry@heart-nta.org.

Proposals will be opened at 9:00am on Thursday, December 18 at the offices of the HEART Trust/NTA 6B Oxford Road, and those submitting proposals are invited to witness the opening of the proposals.

All proposals submitted by incorporated firms must contain a valid Tax Compliance Certificate and all those submitting proposals must be on the National Contracts Commission Register of Public Sector Contractors.



This project is funded
by the European Union

HEART's Procurement Committee oversees the competitive bidding process. This committee, including the Director and Senior Director of the Division will evaluate the proposals based on:

1. The technical capability and experience of the individual(s) or firms demonstrated by evidence of the quality of the proposal submitted, qualifications and experience of similar work undertaken and the ability to produce on time as evidenced by references to other contracts and projects undertaken, broken down as follows:
 - a. Quality of proposal/approach to consultancy – 25%
 - b. Qualifications of supplier - 20%
 - c. Completion of similar projects - 25%
2. On time performance-will be checked with referees, but not scored; those with poor references will be rejected
3. Price. 30%

Notification of Award

Within **10 working days of the closing date**, the procurement entity will notify the successful bidder in writing and promptly notify unsuccessful bidder of their unsuccessful bid for the contract.

Signing of Contract

Following the completion of the acceptance letter, the procuring entity will arrange with the successful bidder for the signing of a contract.