



An Roinn Oideachais  
agus Óige  
Department of Education  
and Youth



**Programme Management and Quantity Surveying Services for  
the Department of Education & Youth and SEAI 2027/2028  
Pathfinder Schools Programme**

**Scope of Services Document**

14.09.2026

## **CONTENTS**

1. Introduction
2. Specification of Requirements
3. Abbreviations

## 1 Introduction

### Programme Management and Quantity Surveying Services

The Sustainable Energy Authority of Ireland (SEAI) and the Department of Education and Youth (DEY) have agreed to collaborate on the delivery of a **National Energy Efficiency Upgrade Pathfinder Programme for Schools** (the “*Pathfinder Programme*”).

The objective of the Pathfinder Programme is to implement a range of energy efficiency and decarbonisation measures across a representative sample of schools. The Programme will pilot and evaluate a variety of delivery approaches with a view to establishing a scalable and replicable model for the decarbonisation of the school sector, subject to future funding availability.

## 2. SPECIFICATION OF REQUIREMENT

### 2.1 Outline of Requirements

The Sustainable Energy Authority of Ireland (SEAI) and the Department of Education and Youth (DEY) are jointly delivering an Energy Efficiency and Decarbonisation Pathfinder Programme for the education sector (the “*Pathfinder Programme*”).

The Programme supports the achievement of national public sector climate objectives, namely to:

- Reduce greenhouse gas emissions by 51% by 2030; and
- Improve energy efficiency by 50% by 2030.

Project delivery and governance shall align with the Infrastructure Guidelines and the Capital Works Management Framework (CWMF) applicable to public sector construction projects. Further details on stage requirements and deliverables are available at:

<https://cwmf.gov.ie/en/>

**You are advised to read carefully the Information Note document titled ‘DEY PF 27-28 Information Note 14.09.26’ for Scope of Programme**

## **2.2 Detailed Scope of Services**

The Programme Manager (PrM) shall be responsible for the overall planning, governance, procurement, monitoring, administration, reporting and successful delivery of the Pathfinder Programme.

### **2.2.1. Programme Governance**

The Programme Manager shall:

- Establish and maintain an appropriate programme governance structure aligned with Department requirements.
- Develop and maintain a Programme Execution Plan (PEP) within one month of appointment.
- Define programme roles, responsibilities, decision-making authorities and approval pathways.
- Establish reporting frameworks, governance protocols and programme controls.
- Develop and maintain programme-wide procedures for issue escalation, decision management and change control.
- Maintain programme registers including:
  - Risk Register
  - Issues Register
  - Decisions Register
  - Change Register
  - Actions Register
  - Lessons Learned Register
- Provide secretariat services for Steering Group meetings including agendas, reports, meeting minutes and action trackers. (Meetings should not be recorded or transcribed by any means including using AI tools)
- The PrM shall create a Stage 1 and Stage 2 DT report templates in word format from a spreadsheet format using mail merge or similar
- Establish Key Performance Indicators (KPIs) with input from the Stakeholders and performance measurement criteria across all programme activities.
- Develop and maintain programme dashboards providing real-time visibility of programme performance.
- Coordinate governance activities between the Department, ETBs, schools, Technical Advisory Team, consultants and contractors.
- Ensure consistent application of governance procedures across all programme bundles.

### **2.2.2 Strategic Planning and Programme Management**

The Programme Manager shall:

- Develop and maintain an integrated master programme for all Pathfinder Programme activities.
- Prepare programme schedules incorporating procurement, design, construction, commissioning and close-out activities.
- Develop detailed Gantt charts identifying programme milestones, dependencies and critical path activities.
- Monitor programme performance against agreed baselines.

- Coordinate activities across all school bundles to ensure programme objectives are achieved.
- Identify and proactively manage programme dependencies and constraints.
- Facilitate collaboration and communication across all stakeholders.
- Manage programme interfaces between consultants, contractors, schools, ETBs and the Department.
- Issue programme communications and correspondence on behalf of the Department as required.

### **2.2.3. Procurement Management**

The Programme Manager shall:

- Advise the Department on appropriate procurement strategies and delivery models.
- Prepare procurement plans for programme-related appointments.
- Carry out market analysis to aid same
- Develop standardised procurement documentation (PIM, SAQ, ITT, FTS) and tender strategies. Manage consultant and contractor procurement processes.
- Create, upload, download and manage contractor tenders using the Departments etenders and eWorks account using design team volume A and C documents (drawings, specifications, BOQ and information pack), PrM to create volume B (PIM, SAQ, ITT & FTS) for consistency across the programme (Please note biomass schools will be a two stage tender)
- Develop and manage tender packages for:
  - Mechanical & Electrical Consulting Engineering Lead Consultants
  - Asbestos Surveys
  - Other specialist services as required
- Coordinate procurement activities with programme timelines and budget requirements.
- Provide procurement advice throughout the programme lifecycle.
- Ensure compliance with public procurement requirements and Department procedures.
- Coordinate clarification processes during tender periods.
- Facilitate tender evaluations and prepare template evaluation reports.
- Support contract award processes and appointment procedures.

### **2.2.4. Tender Management and Contract Administration**

The Programme Manager shall:

- Develop standardised tender documentation.
- Prepare tender programmes and procurement schedules.
- Coordinate tender issue, receipt and evaluation procedures.
- Establish tender governance and approval processes.
- Ensure consistency in procurement documentation across programme bundles.
- Manage clarification requests and tender communications.
- Assist in evaluating consultant and contractor submissions.
- Support contract award recommendations.
- Monitor consultant and contractor performance against contractual obligations.
- Coordinate contract administration activities and reporting requirements.

- Support management of variations, claims, extensions of time and contractual disputes.

### **2.2.5. Financial Management and Cost Control**

The Programme Manager shall:

- Establish programme financial management procedures.
- Develop programme budget monitoring and reporting systems.
- Prepare and maintain programme cash-flow forecasts.
- Track expenditure against approved budgets.
- Monitor consultant fees, ESB capital contributions, construction costs, variations and programme commitments.
- Provide monthly financial reporting to stakeholders.
- Attend and facilitate monthly financial governance meetings.
- Implement programme-wide cost reporting systems.
- Identify emerging financial risks and budget pressures.
- Develop forecasting models for programme expenditure.
- Monitor financial performance across all project bundles.
- Coordinate contingency management procedures.
- Support financial audits and governance reviews.

### **2.2.6 Quantity Surveying Services**

The Programme Manager shall ensure that Quantity Surveying resources are provided to:

- Prepare and review cost estimates.
- Validate consultant and contractor cost proposals.
- Assess value for money across programme activities.
- Support tender evaluations from a cost perspective.
- Assess variations and change requests.
- Provide independent cost verification.
- Assist with financial reporting and cost forecasting.

### **2.2.7. Risk Management**

The Programme Manager shall:

- Develop and maintain a Programme Risk Management Plan.
- Establish programme risk management procedures.
- Maintain programme and project risk registers.
- Identify, assess and monitor strategic, operational, commercial and financial risks.
- Facilitate risk workshops throughout programme delivery.
- Develop and track risk mitigation measures.
- Escalate significant risks through governance structures.
- Monitor emerging programme risks and opportunities.
- Report risk status to the Steering Group.
- Ensure lessons learned are incorporated into future programme activities.
- Undertake periodic risk reviews and assurance exercises.

### **2.2.8. Compliance and Assurance**

The Programme Manager shall:

- Ensure compliance with all applicable legislation, regulations and Department requirements.
- Ensure compliance with:
  - Infrastructure Guidelines
  - Capital Works Management Frameworks
  - Public Procurement Rules
  - Health and Safety Legislation
  - Building Control Regulations
  - Planning Requirements
  - Fire Safety Requirements
  - Disability Access Requirements
  - Environmental and Sustainability Requirements
  - Green Public Procurement
- Maintain programme compliance registers and monitoring systems.
- Coordinate assurance reviews and compliance audits.
- Monitor compliance across consultants and contractors.
- Ensure appropriate approvals and statutory submissions are obtained.
- Provide advice to the Department on compliance risks and obligations.
- Ensure programme records are maintained for governance and audit purposes.

### **2.2.9. Stakeholder Engagement and Communications**

The Programme Manager shall:

- Liaise directly with the steering group, ETBs, schools, principals and school personnel.
- Coordinate engagement with consultants, contractors and the Technical Advisory (TA) Team.
- Engage with ESB networks and Flogas (current OGP LPG provider) on a programme level
- Develop and implement stakeholder communication plans.
- Facilitate Town Hall meetings with principals, design teams and contractors.
- Manage programme communications and stakeholder reporting.
- Seek as built drawings, utility bills and smart meter data/MRSO from schools
- Request details from schools of current EWS, CASWS, ASA, modular and SEN reconfigurations projects etc
- Meet with schools and ETB's regularly to guide them through the process including tracking, creating and collating and timely consent for SLA's, ESCo heat agreements, fire safety certificates, planning permission from landowners, board of management and or board of directors
- Coordinate information sharing and correspondence using Microsoft Teams or equivalent collaboration platforms.
- Allow for engagement with local authorities on planning permission requirements on a programme level
- Be informed of the DEY BIM information management system, including drawing/information/asset registers naming convention/format, (design and as

builds) and monitor that the DT are adhering to DEY BIM information management requirements. These projects are envisaged to be designed in 2D generally

- The Programme Manager shall develop, maintain, and administer a BIM Compliance Checklist to be completed and validated at each project stage and prior to acceptance of any BIM submission. The checklist shall, as a minimum, include verification of the following:
  - Information Management Compliance
  - Compliance with ISO 19650 information management principles.
  - Compliance with the National BIM Framework and programme-specific BIM requirements.
  - Compliance with Employer's Information Requirements (EIR) and BIM Execution Plans (BEPs).
  - Use of agreed naming conventions, file structures, and document control procedures.
  - Support stakeholder engagement throughout programme delivery.

#### **2.2.10 The Programme Manager responsibilities will include the following;**

- Working closely with the Steering Group, the Programme Manager will manage and coordinate all aspects of the design and delivery processes to ensure successful completion of the programme in 2028-2029. The design team will act as Employers Representative for the works.
- Agree a realistic and achievable project programme, setting out the key milestones along the critical path to completion in 2028-2029.
- The Programme Manager is to develop a tender package and procure a Mechanical & Electrical Consulting Engineering Lead consultant team.
- The Programme Manager is to develop a tender package and procure Asbestos surveys for each school.
- Monitor and oversee the performance of the appointed Mechanical & Electrical Consulting Engineering Lead Consultants contractors on the individual project to ensure compliance with the overall programme.
- Coordinate the programme for completion of works with appointed Mechanical & Electrical Consulting Engineering Lead Consultants contractors and building management personnel.
- The appointed programme manager must be familiar with all relevant SEAI and DEY Schools Guidance Documents (SGDs), guidelines and procedures.
- The successful Programme Manager will also be expected to provide appropriate advice and guidance with respect to ensuring compliance with statutory and legislative responsibilities, health & safety requirements, planning permission, fire certs, disability access certs etc, in consultation with a Technical Advisory team, which will be separately appointed by the DEY for this programme.
- Develop a programme (Gantt chart) for the programme
- Ensure compliance with relevant regulations, standards, and industry best practices related to energy retrofit projects e.g., compliance with Green Public Procurement & Infrastructure Guidelines.

- Liaise with Mechanical & Electrical Consulting Engineering Lead Consultants contractors on requirements in project execution plan, including reporting to steering group and facilitating the following: health and safety plan, post completion energy performance evaluations, certificate of Substantial Completion and BCAR requirements if applicable.
- Develop a project and programme Risk management plan.
- Keep a lessons learnt log at the end of each stage
- Establish procedures for issue escalation and resolution.
- The PrM will have access to and manage a common data environment for all stakeholders, contractors and MDDT's to access and share documents
- Issue correspondence on behalf of the Department to schools

### **2.2.11 Meetings**

- Attend/arrange meetings/consultations as necessary to deliver the programmes and produce meeting minutes and trackers. AI is only to be used as per the Guidelines for the Responsible Use of AI in the Public Service, it does not recommend the use of GenAI (Generative AI) see below link to document [https://assets.gov.ie/static/documents/09fe3ad4/Guidelines for the Responsible Use of AI in the Public Service 20250918.pdf](https://assets.gov.ie/static/documents/09fe3ad4/Guidelines%20for%20the%20Responsible%20Use%20of%20AI%20in%20the%20Public%20Service%2020250918.pdf)
- Meetings will generally be online but PrM should allow for one site meetings at each school and four number at DEY offices in Tullamore or SEAI offices in Dublin.
- Stakeholder (SEAI and DEY) meetings are to be fortnightly
- TA and stakeholder meetings are to be fortnightly and weekly in the month prior to design stage submissions (Stage 1 and 2). Meeting shall be weekly during tender return phase as well
- Meeting/workshops with design teams and TA as necessary, meetings are to be fortnightly and weekly in the month prior to design stage submissions (Stage 1 and 2)
- A monthly financial reporting meeting to the stakeholders will be required for the programme
- Workshops with design teams and TA as necessary
- Deliver a Town Hall meeting to the design teams and principals in relation to background information and planning permission issues
- Deliver three separate Town Hall meetings, per programme to the design teams, principals and contractors in relation to location of Heat Pumps and Biomass boilers and
- Ensure all schools are aware of and sign a Letter of Authorisation as part of the introduction to the Pathfinder programme.

### **2.2.12 Delivery**

- Provide templates and other relevant documents for completion by the Mechanical & Electrical Consulting Engineering Lead Consultants contractor at various stages of process, to facilitate easy interpretation and flow of queries and responses with stakeholders.
- Track the receipt of completed templates and documentation at each stage of the process.
- Monitor the construction projects in terms of programme, cash-flow, variations, etc. during 2028-2029.
- Provide financial management support in terms of regular reporting through an agreed format of cash flow including consultant fees, contract costs, change orders, variations, claims, etc. Attend monthly financial governance meetings with stakeholders.
- In addition to standard financial reporting a quantity surveyor is required to provide cost estimates and verify Mechanical & Electrical Consulting Engineering Lead Consultants contractor estimates, at various stages of the process, particularly during the tender development and finalising phases.
- This quantity surveyor will assist the TA team with evaluation variations and change orders throughout the programme
- Provide regular reports to the technical steering group in relation to project progress and deliverables
- Provide regular reports to the Stakeholders Steering group in relation to project progress, financial reporting, compliance, programme etc.
- Cost estimates for design, procurement, construction, and project management services.
- Resource allocation for project team members.
- Contingency planning for unforeseen costs and risks.
- Develop monitoring mechanisms to track project performance against KPIs and milestones.

### **2.2.13 Conclusion/ Post Completion:**

- Ensure delivery, review and approval of all Measurement and Verification (M&V) Plans and Post-Implementation M&V Reports in accordance with programme requirements, SEAI guidance and project-specific performance targets.
- Ensure timely delivery of all project close-out documentation as specified within the Project Execution Plan (PEP), BIM Execution Plan (BEP), consultant appointments, and construction contracts.
- Verify that all project documentation has been reviewed, approved, archived within the Common Data Environment (CDE), and transferred to the relevant ETB, school, and Department representatives.
- Ensure completion of all snagging, defects management, outstanding actions, and close-out activities required for successful project handover.
- Coordinate collection and verification of energy performance data and completion of post-occupancy evaluations, where required.
- Prepare a programme-wide Close-Out Report summarising delivery performance against programme objectives, budget, schedule, quality, sustainability and stakeholder requirements.

- Establish and maintain a Lessons Learned Register throughout programme delivery and undertake structured lessons learned workshops at key milestones and programme completion.
- Engage with the Steering Group, Technical Advisory Team, ETBs, schools, consultants, contractors and other stakeholders to ensure effective dissemination of lessons learned, best practices, programme outcomes and recommendations for future Pathfinder and school decarbonisation programmes.
- Ensure that all contractual, statutory, governance, audit, compliance and record-retention requirements have been satisfied prior to programme closure.
- Provide final programme reporting and recommendations to support future programme development, continuous improvement initiatives and ongoing asset management requirements.
- 

#### **2.2.14 Reporting**

Prepare fortnightly progress reports for stakeholders.

Prepare monthly programme performance reports.

Develop programme dashboards and management reports.

Report on:

- Programme progress
- Procurement status
- Financial performance
- Risks and issues
- Compliance and governance matters
- Consultant and contractor performance
- Delivery milestones

Provide reports to both the Technical Steering Group and Stakeholder Steering Group.

Maintain accurate programme records and reporting documentation.

- A quantity surveyor is required to provide cost estimates and verify consultant estimates.
- A Procurement Specialist is to provide support with various aspects of Mechanical & Electrical Consulting Engineering Lead Consultants contractor appointment and Contract Administration
- Implement monitoring mechanisms to track project performance against KPIs and milestones.
- Establish procedures for issue escalation and resolution.
- Define reporting requirements and frequency for project progress, budget, and risk management.

## 2.3 Deliverables

| The following schedule is envisaged for the DEY 2027 Schools Pathfinder Programmes |                                                                                                                                                                                                    |                                                                            |
|------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------|
| Stage Process                                                                      | Project Stage                                                                                                                                                                                      | Indicative Target Deadlines                                                |
| Project Planning & Design                                                          | <b>Programme Management appointment</b><br><b>Technical Advisory Team appointment (By DEY)</b><br><b>Mechanical &amp; Electrical Design team appointment</b>                                       | <b>November 2026</b><br><b>November 2026</b><br><b>Feb 2027 &amp; 2028</b> |
|                                                                                    | <b>Mechanical &amp; Electrical Design team</b> <ul style="list-style-type: none"> <li>- Presentation of design and recommendation to Stakeholders Stage 1</li> <li>- Stage 2</li> </ul>            | <b>April 2027 &amp; 2028</b><br><b>June 2027 &amp; 2028</b>                |
|                                                                                    | <b>Project tendering</b><br><b>Contractors appointed</b>                                                                                                                                           | <b>July 2027 &amp; 2028</b><br><b>November 2027 &amp; 2028</b>             |
| Implementation Period                                                              | <b>Construction Works on site</b> <ul style="list-style-type: none"> <li>- Report and monitor the progress of each individual project and the programme as a whole</li> </ul>                      | <b>2028 &amp; 2029</b>                                                     |
| Post Completion Period                                                             | <b>Commissioning &amp; Handover &amp; Final Account</b> <ul style="list-style-type: none"> <li>- Lessons Learned Report/ /Post occupancy Reporting</li> <li>- Validation and Monitoring</li> </ul> | <b>Q4 2029 &amp; 2030</b>                                                  |

### **3. Abbreviations**

|        |                                           |
|--------|-------------------------------------------|
| AI     | Artificial Intelligence                   |
| ASA    | Additional School Accommodation           |
| ASHP   | Air Source Heat Pump                      |
| BC(A)R | Building Control (Amendment) Regulations  |
| BIM    | Building Information Modelling/Management |
| CASWS  | Climate Action Summer Works Scheme        |
| DEY    | Department of Education & Youth           |
| DT     | Design Team                               |
| ESB    | Electricity Supply Board                  |
| ETB    | Education and Training Board              |
| EU     | European Union                            |
| ESCo   | Energy Supply Company                     |
| EWS    | Emergency Works Scheme                    |
| KPI    | Key performance indicators                |
| LPG    | Liquefied Petroleum Gas                   |
| M&E    | Mechanical and Electrical                 |
| M&V    | Measurement and Verifications             |
| MRSO   | Meter Registration System Operator        |
| PEP    | Project Execution Plan                    |
| PF     | Pathfinder                                |
| PIN    | Prior Information Notice                  |
| PIM    | Project Information Memorandum            |
| PrM    | Programme Manager                         |
| PSDP   | Project Supervisor Design Process         |
| PSBPS  | Public Sector Biomass Pilot Scheme        |
| SEAI   | Sustainable Energy Authority of Ireland   |
| SEN    | Special Educational Needs                 |
| SDG    | Schools Design Guidance (Previously TGD)  |
| SLA    | Service Level Agreement                   |
| OGP    | Office of Government Procurement          |
| TA     | Technical Advisory                        |
| TGD    | Technical Guidance Document               |