

PROJECT MANAGEMENT STANDARD SCOPE OF SERVICE

In terms of any project, the scope of services provided is unique and tailor-made to the client's needs. However, in terms of the standard scope of service defined by the governing legislation for the Project Management Industry¹. These standard services are included within the gazetted fee scales provided by the Project Management Council. This standard defined six work stages during a project lifecycle.

These are defined as;

Work Stage 1:	Project Initiation and Briefing
Work Stage 2:	Concept and Feasibility
Work Stage 3:	Design Development
Work Stage 4:	Tender Documentation and Procurement
Work Stage 5:	Construction Documentation and Management
Work Stage 6:	Project Close Out

The following pages detail the standard scope of service is provided in terms of a generic approach to the work stages listed;

STAGE 1 - PROJECT INITIATION AND BRIEFING

Definition

Agreeing client requirements and preferences, assessing user needs and options, appointment of necessary consultants in establishing project brief, objectives, priorities, constraints, assumptions and strategies in consultation with the client.

Standard Services

- 1.1. Facilitate the development of a Clear Project Brief
- 1.2. Establish the client's Procurement Policy for the Project
- 1.3. Assist the client in the procurement of the necessary and appropriate consultants including the clear definition of their roles, responsibilities and liabilities.
- 1.4. Establish in conjunction with the client, consultants, and all relevant authorities the site characteristics necessary for the proper design and approval of the intended project.
- 1.5. Manage the integration of the preliminary design to form the basis for the initial viability assessment of the project.
- 1.6. Prepare, co-ordinate and monitor a Project Initiation Programme.
- 1.7. Facilitate the preparation of the Preliminary Viability Assessment of the project.
- 1.8. Facilitate client approval of all Stage 1 documentation.

Project Management Deliverables

- Project Brief
- Project Procurement Policy
- Signed Consultant/Client Agreements
- Project Initiation Programme
- Record of all meetings
- Approval by Client to proceed to Stage 2

STAGE 2 - CONCEPT AND FEASIBILITY

Definition

Finalization of the project concept and feasibility.

Standard Services

- 2.1. Assist the client in the procurement of the necessary and appropriate consultants including the clear definition of their roles, responsibilities and liabilities.
- 2.2. Advise the client on the requirement to appoint a Health and Safety Consultant.
- 2.3. Communicate the project brief to the consultants and monitor the development of the Concept and Feasibility within the agreed brief.
- 2.4. Co-ordinate and integrate the income stream requirements of the client into the concept design and feasibility.
- 2.5. Agree the format and procedures for cost control and reporting by the cost consultants on the project.
- 2.6. Manage and monitor the preparation of the project costing by other consultants
- 2.7. Prepare and co-ordinate an Indicative Project Documentation and Construction Programme.
- 2.8. Manage and integrate the concept and feasibility documentation for presentation to the client for approval.
- 2.9. Facilitate client approval of all Stage 2 documentation.

Deliverables

- Signed Consultant/Client Agreements
- Indicative Project Documentation and Construction Programme.
- Approval by Client to proceed to Stage 3

STAGE 3 - DESIGN DEVELOPMENT

Definition: Manage, co-ordinate and integrate the detail design development process within the project scope, time, cost and quality parameters.

Standard Services

- 3.1. Assist the client in the procurement of the balance of the consultants including the clear definition of their roles, responsibilities and liabilities.
- 3.2. Establish and co-ordinate the formal and informal communication structure, processes and procedures for the design development of the project.
- 3.3. Prepare, co-ordinate and agree a detailed Design and Documentation Programme, based on an updated Indicative Construction Programme, with all consultants
- 3.4. Manage, co-ordinate and integrate the design by the consultants in a sequence to suit the project design, documentation programme and quality requirements.
- 3.5. Conduct and record the appropriate planning, co-ordination and management meetings
- 3.6. Facilitate any input from the design consultants required by Construction Manager on constructability.
- 3.7. Facilitate any input from the design consultants required by Health and Safety consultant
- 3.8. Manage and monitor the timeous submission by the design team of all plans and documentation to obtain the necessary statutory approvals
- 3.9. Establish responsibilities and monitor the information flow between the design team, including the cost consultants.
- 3.10. Monitor the preparation by the cost consultants of cost estimates, budgets, and cost reports
- 3.11. Monitor the cost control by the cost consultants to verify progressive design compliance with approved budget, including necessary design reviews to achieve budget compliance
- 3.12. Facilitate and monitor the timeous technical co-ordination of the design by the design team
- 3.13. Facilitate client approval of all Stage 3 documentation

Summarized Deliverables

- Signed Consultant/Client Agreements
- Detailed Design & Documentation Programme
- Updated Indicative Construction Programme
- Record of all meetings
- Approval by Client to proceed to Stage 4

STAGE 4: TENDER DOCUMENTATION AND PROCUREMENT

Definition: The process of establishing and implementing procurement strategies and procedures, including the preparation of necessary documentation, for effective and timeous execution of the project.

Standard Services

- 4.1. Select, recommend and agree the Procurement Strategy for contractors, subcontractors and suppliers with the client and consultants
- 4.2. Prepare and agree the Project Procurement Programme.
- 4.3. Co-ordinate and monitor the preparation of the tender documentation by the consultants in accordance with the Project Procurement Programme.
- 4.4. Facilitate and monitor the preparation by the Health and Safety Consultant of the Health and Safety Specification for the project
- 4.5. Manage the tender process in accordance with agreed procedures, including calling for tenders, adjudication of tenders, and recommendation of appropriate contractors for approval by the client.
- 4.6. Advise the client, in conjunction with other consultants on the appropriate insurances required for the implementation of the project.
- 4.7. Monitor the reconciliation by the cost consultants of the tender prices with the project budget
- 4.8. Agree the format and procedures for monitoring and control by the cost consultants of the cost of the works.
- 4.9. Facilitate client approval of the tender recommendation(s).

Summarized Deliverables

- Contractors, subcontractors, and suppliers Procurement Strategy
- Project Procurement Programme
- Project Tender/Contract Conditions
- Record of all meetings
- Approval by Client of tender recommendation(s).

STAGE 5 - CONSTRUCTION DOCUMENTION AND MANAGEMENT

Definition: The management and administration of the construction contracts and processes, including the preparation and co-ordination of the necessary documentation to facilitate effective execution of the works.

Standard Services

- 5.1. Appoint contractor(s) on behalf of the client including the finalization of all agreements.
- 5.2. Instruct the contractor on behalf of the client to appoint subcontractors.
- 5.3. Receive, co-ordinate, review and obtain approval of all contract documentation provided by the contractor, subcontractors, and suppliers for compliance with all of the contract requirements.
- 5.4. Monitor the ongoing projects insurance requirements.
- 5.5. Facilitate the handover of the site to the contractor.
- 5.6. Establish and co-ordinate the formal and informal communication structure and procedures for the construction process.
- 5.7. Regularly conduct and record the necessary site meetings
- 5.8. Monitor, review and approve the preparation of the Contract Programme by the contractor.
- 5.9. Regularly monitor the performance of the contractor against the Contract Programme.
- 5.10. Review and adjudicate circumstances and entitlements that may arise from any changes required to the Contract Programme.
- 5.11. Monitor the preparation of the contractor's Health and Safety Plan and approval thereof by the Health and Safety Consultant.
- 5.12. Monitor the auditing of the Contractors' Health and Safety Plan by the Health and Safety Consultant.
- 5.13. Monitor the compliance by the contractors of the requirements of the Health and Safety Consultant.
- 5.14. Monitor the production of the Health and Safety File by the Health and Safety Consultant and contractors
- 5.15. Monitor the preparation by the Environmental Consultants of the Environmental Management Plan.
- 5.16. Establish the construction information distribution procedures.
- 5.17. Agree and monitor the Construction Documentation Schedule for timeous delivery of required information to the contractors.
- 5.18. Expedite, review and monitor the timeous issue of construction information to the contractors.
- 5.19. Manage the review and approval of all necessary shop details and product propriety information by the design consultants.
- 5.20. Establish procedures for monitoring, controlling and agreeing all scope and cost variations.
- 5.21. Agree the quality assurance procedures and monitor the implementation thereof by the consultants and contractors.

- 5.22. Monitor, review, approve and certify monthly progress payments.
- 5.23. Receive, review and adjudicate any contractual claims.
- 5.24. Monitor the preparation the preparation of monthly cost reports by the cost consultants.
- 5.25. Monitor long lead items and off-site production by the contractors and suppliers.
- 5.26. Prepare monthly project reports including submission to the client
- 5.27. Manage, co-ordinate and monitor all necessary testing and commissioning by consultants and contractors.
- 5.28. Co-ordinate, monitor and issue the Practical Completion Lists and the Certificate of Practical Completion.
- 5.29. Co-ordinate and monitor the preparation and issue of the Works Completion List by the consultants to the contractors.
- 5.30. Monitor the execution by the contractors of the defect items to achieve Works Completion.
- 5.31. Facilitate and co-ordinate adequate access with the occupant for the rectification of defects by the contractors.

Summarized Deliverables:

- Signed Contractor(s) Agreements
- Agreed Contract Programme
- Adjudication and award of contractual claims
- Construction Documentation Schedule
- Monthly progress payment certificates
- Monthly project progress reports.
- Record of all meetings
- Certificates of Practical Completion.

STAGE 6 - PROJECT CLOSE OUT

Definition: The process of managing and administering the project closeout, including preparation and co-ordination of the necessary documentation to facilitate the effective operation of the project.

Standard Services:

- 6.1. Issue the Works Completion Certificate
- 6.2. Manage, co-ordinate and expedite the preparation by the design consultants of all as-built drawings and design documentation.
- 6.3. Manage and expedite the procurement of all operating and maintenance manuals as well as all warranties and guarantees.
- 6.4. Manage and expedite the procurement of all statutory compliance certificates and documentation.
- 6.5. Manage the finalization of the Health and Safety File for submission to the Client.
- 6.6. Co-ordinate, monitor and manage the rectification of defects during the Defects Liability Period.
- 6.7. Manage, co-ordinate and expedite the preparation and agreement of the final account by the cost consultants with the relevant contractors.
- 6.8. Co-ordinate, monitor and issue the Final Completion Defects list and Certificate of Final Completion.
- 6.9. Prepare and present Project Closeout Report.

Summarized Deliverables:

- Works Completion Certificate
- Certificate of Final Completion
- Record of all meetings
- Project closeout report

SUPPLEMENTARY SERVICES

In addition to the standard scope of services additional services can be provided to the client as agreed between the parties. The associated remuneration for additional services is excluded from the recommended tariff fee scale.

Examples of services that are defined as supplementary include;

4.1. Development Management Services the Project Construction Manager may, by prior mutual consent, provide the following supplementary services. This will require agreement of both the Client and Project Construction Manager on the adjustment of the fees and disbursements. .

- 1 Facilitate the opportunity realization process.
- 2 Procuring of land and finance .
- 3 Procuring of tenants, tenant co-ordination and tenant installations.
- 4 Drafting of appointment contracts for other members of the professional team.
- 5 Project management services in relation to direct contractors engaged by the client, such as those engaged for furniture, fittings and equipment .
- 6 Mediation, arbitration proceedings and similar services. Such services will commence upon the notification of a dispute or the initiation of such proceedings.
- 7 All work arising out of the failure of any consultant, contractors, suppliers or other external party to perform its obligations.
- 8 Services required in respect of damage to or destruction of the works, insurance matters, postponement or cancellation of agreements.
- 9 Additional services resulting from changes by the client to previously issued instructions.
- 10 Any other services not specifically incorporated in the identified scope of services mentioned in this document

4.2. Supplementary Services Pertaining to all Stages of the Project T

- 1 Appointment as agent in accordance with Regulation 4.(5) of the Construction Regulations 2003, issued in terms of the Occupational Health and Safety Act, 1993 (Act 85 of 1993), to specifically ensure compliance in terms thereof .
- 2 Procuring of land and finance .
- 3 Procuring of tenants, tenant co-ordination and tenant installations.
- 4 Drafting of non-standard contracts.
- 5 Project management services in relation to direct contractors engaged by the client, such as those engaged for furniture, fittings and equipment Mediation, arbitration and litigation proceedings and similar services.

6. Where the client requires the construction project manager to, on his behalf, perform the services listed hereunder or similar work, the extent thereof and remuneration therefore is subject to agreement between the client and the construction project manager:
 - i. Dealing with matters of law, obtaining parliamentary or other statutory approval, licenses or permits
 - ii. Assisting with or participating in contemplated or actual mediation, arbitration or litigation proceedings
 - iii. Officiating at or Attending courts and commissions of enquiry, select committees and similar bodies convened by statute, regulation or decree.
- 7 All work arising out of failure of any consultant, contractor, supplier or other external party to perform its obligations, provided that such failure is not due to default by the Construction Project Manager.
- 8 Services resulting from damages to or destruction of the works, insurance matters, postponement or cancellation of agreement.
- 9 Additional services resulting from the client changing previously issued instructions. 10 Construction management.
- 11 Calculation and certification of professional fees applicable to other professionals engaged by the client on the project.
- 12 Any other services not specifically incorporated in this Guideline Scope of Services and Tariff of Fees for Registered Persons

SCOPE OF SERVICE RELATED TO PARTIAL SERVICES.

The project management profession recommends that should a commission be terminated the fee for the services completed shall be calculated in accordance with the Tariff of Fees and the fee for services partially completed shall be determined pro rata to the complete service Further it is advised that should a commission be terminated by the client after the commencement of the commission then, in addition to the fee calculated in accordance with the fee scales, a surcharge of 10 percent shall be payable on the difference between the full fee calculated in accordance with the Tariff of Fees for the services commissioned and the fee calculated.