# PM Africa Services Scope

5.1 STANDARD SERVICES

The construction process can be broken up into Six (6) distinct stages, each with its own set of scope and deliverables in line with the below Project Stages:

| Project stage | Description |
|---|---|
| 1 | Inception |
| 2 | Concept and Viability |
| 3 | Design development |
| 4 | Documentation and Procurement |
| 5 | Construction |
| 6 | Close out |

**General Notes**

- The order of the Standard Services does not necessarily reflect the actual sequence of implementation.

## 5.2 **STAGE 1 – INCEPTION**

Establish the client requirements and preferences, assess user needs and options, appointment of necessary consultants, establish the project brief including project objectives, priorities, constraints, assumptions, aspirations and strategies.

| Stage | Fee Allocation per Stage | Generic scope of work (Activities) | Project Manager Deliverables | Completed |
|---|---|---|---|---|
| 1 | 10.0% | Facilitate the development of a Clear Project Brief | Project Brief | |
| | | Establish the client's Procurement Policy for the Project | Project Procurement Policy | |
| | | Assist the client in the procurement of the necessary and appropriate consultants including the clear definition of their roles, responsibilities and liabilities | Signed Consultant/Client Agreements | |
| | | 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 | Project Initiation Programme | |
| | | Manage the integration of the preliminary design to form the basis for the initial viability assessment of the project | Record of all meetings | |
| | | Prepare, co-ordinate and monitor a Project Initiation Programme | Approval by Client to proceed to Stage 2 | |
| | | Facilitate the preparation of the Preliminary Viability Assessment of the project | | |
| | | Facilitate client approval of all Stage 1 documentation | | |

## 5.3 **STAGE 2 – CONCEPT AND VIABILITY**

Prepare and finalise the project concept in accordance with the brief including the scope, scale, character, form, function and preliminary programme and viability of the project.

| Stage | Fee Allocation per Stage | Generic scope of work (Activities) | Project Manager Deliverables | Completed |
|---|---|---|---|---|
| 2 | 10.0% | Assist the client in the procurement of the necessary and appropriate consultants including the clear definition of their roles, responsibilities and liabilities | Signed Consultant/Client Agreements | |
| | | Advise the client on the requirement to appoint a Health and Safety Consultant | Indicative Project Documentation and Construction Programme. | |
| | | Communicate the project brief to the consultants and monitor the development of the Concept and Feasibility within the agreed brief | Approval by Client to proceed to Stage 3 | |
| | | Co-ordinate and integrate the income stream requirements of the client into the concept design and feasibility | | |
| | | Agree the format and procedures for cost control and reporting by the cost consultants on the project | | |
| | | Manage and monitor the preparation of the project costing by other consultants | | |
| | | Prepare and co-ordinate an Indicative Project Documentation and Construction Programme | | |
| | | Manage and integrate the concept and feasibility documentation for presentation to the client for approval | | |
| | | Facilitate client approval of all Stage 2 documentation | | |

## 5.4 **STAGE 3 – DESIGN & DEVELOPMENT**

Develop the approved concept to finalise the design, outline specifications, cost plan, financial viability and programme for the project

| Stage | Fee Allocation per Stage | Generic scope of work (Activities) | Project Manager Deliverables | Completed |
|---|---|---|---|---|
| 3 | 25.0% | Assist the client in the procurement of the balance of the consultants including the clear definition of their roles, responsibilities and liabilities | Signed Consultant/Client Agreements | |
| | | Establish and co-ordinate the formal and informal communication structure, processes and procedures for the design development of the project | Detailed Design & Documentation Programme | |
| | | Prepare, co-ordinate and agree a detailed Design and Documentation Programme, based on an updated indicative Construction Programme, with all consultants | Updated Indicative Construction Programme | |
| | | Manage, co-ordinate and integrate the design by the consultants in a sequence to suit the project design, documentation programme and quality requirements. | Record of all meetings | |
| | | Conduct and record the appropriate planning, co-ordination and management meetings | Approval by Client to proceed to Stage 4 | |
| | | Facilitate any input from the design consultants required by constructability | | |
| | | Facilitate any input from the design consultants required by Health and Safety consultant | | |

## 5.5 **STAGE 4 – DOCUMENTATION & PROCUREMENT**

Prepare the construction and procurement documentation, confirm and implement the procurement strategies and procedures for effective and timeously procurement of necessary resources for the execution of the project

| Stage | Fee Allocation per Stage | Generic scope of work (Activities) | Project Manager Deliverables | Completed |
|---|---|---|---|---|
| 4 | 10.0% | Select, recommend and agree the Procurement Strategy for contractors, subcontractors and suppliers with the client and consultants | Contractors, subcontractors, and suppliers Procurement Strategy | |
| | | Prepare and agree the Project Procurement Programme. | Project Procurement Programme | |
| | | Co-ordinate and monitor the preparation of the tender documentation by the consultants in accordance with the Project Procurement Programme | Project Tender/Contract Conditions | |
| | | Facilitate and monitor the preparation by the Health and Safety Consultant of the Health and Safety Spec. for the project | Record of all meetings | |
| | | 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 | Approval by Client of tender recommendation(s). | |
| | | Advice the client, in conjunction with other consultants on the appropriate insurances required for the implementation of the project. | | |
| | | Agree the format and procedures for monitoring and control of the cost of the works. | | |
| | | Facilitate client approval of the tender recommendation(s) | | |

## 5.6 **STAGE 5 – CONSTRUCTION**

Management, administer and monitor the contracts and processes, including the preparation and co-ordination of the procedures and documentation to facilitate practical completion of the works

| Stage | Fee Allocation per Stage | Generic scope of work (Activities) | Project Manager Deliverables | Completed |
|---|---|---|---|---|
| 5 | 40.0% | Appoint contractor(s) on behalf of the client including the finalization of all agreements | Signed Contractor(s) Agreements | |
| | | Instruct the contractor on behalf of the client to appoint subcontractors. | Agreed Contract Programme | |
| | | 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 | Adjudication and award of contractual claims | |
| | | Monitor the ongoing projects insurance requirements | Construction Documentation Schedule | |
| | | Facilitate the handover of the site to the contractor | Monthly progress payment certificates | |
| | | Establish and co-ordinate the formal and informal communication structure and procedures for the construction process. | Monthly project progress reports. | |
| | | Regularly conduct and record the necessary site meetings | Record of all meetings | |
| | | Monitor, review and approve the preparation of the Contract Programme by the contractor. | Certificates of Practical Completion. | |
| | | Regularly monitor the contractor on Programme | | |

| Stage | Fee Allocation per Stage | Generic scope of work (Activities) | Project Manager Deliverables | Completed |
|---|---|---|---|---|
| 5 | 40% | Review and adjudicate circumstances and entitlements that may arise from any changes required to the Contract Programme | | |
| | | Monitor the preparation of the contractor's Health and Safety Plan and approval thereof by the Health and Safety Consultant | | |
| | | Monitor the auditing of the Contractors' Health and Safety Plan by the Health and Safety Consultant | | |
| | | Monitor the compliance by the contractors of the requirements of the Health and Safety Consultant | | |
| | | Monitor the production of the Health and Safety File by the Health and Safety Consultant and contractors | | |
| | | Monitor the preparation by the Environmental Consultants of the Environmental Management Plan | | |
| | | Establish the construction information distribution procedures | | |
| | | Agree and monitor the Construction Documentation Schedule for timeous delivery of required information to the contractors | | |
| | | Expedite, review and monitor the timeous issues | | |

| Stage | Fee Allocation per Stage | Generic scope of work (Activities) | Project Manager Deliverables | Completed |
|---|---|---|---|---|
| 5 | 40% | Manage the review and approval of all necessary shop details and product propriety information by the design consultants | | |
| | | Establish procedures for monitoring, controlling and agreeing all scope and cost variations | | |
| | | Agree the quality assurance procedures and monitor the implementation thereof by the consultants and contractors | | |
| | | Monitor, review, approve and certify monthly progress payments | | |
| | | Receive, review and adjudicate any contractual claims | | |
| | | Monitor the preparation the preparation of monthly cost reports by the cost consultants | | |
| | | Monitor long lead items and off-site production by the contractors and suppliers | | |
| | | Prepare monthly project reports including submission to the client | | |
| | | Manage, co-ordinate and monitor all necessary testing and commissioning by consultants and contractors | | |
| | | Co-ordinate, monitor and issue the PC Lists and the Certificate of Practical Completion | | |

## 5.7 **STAGE 6 – CLOSE OUT**

Fulfil and complete the project close-out including the preparation of the necessary documentation to facilitate effective completion, handover and operation of the project

| Stage | Fee Allocation per Stage | Generic scope of work (Activities) | Project Manager Deliverables | Completed |
|---|---|---|---|---|
| 5 | 5.0% | Issue the Works Completion Certificate | Works Completion Certificate | |
| | | Manage, co-ordinate and expedite the preparation by the design consultants of all as-built drawings and design documentation. | Certificate of Final Completion | |
| | | Manage and expedite the procurement of all operating and maintenance manuals as well as all warrantees and guarantees. | Record of all meetings | |
| | | Manage and expedite the procurement of all statutory compliance certificates and documentation. | Project closeout report | |
| | | Manage the finalization of the Health and Safety File for submission to the Client. | | |
| | | Co-ordinate, monitor and manage the rectification of defects during the Defects Liability Period. | | |
| | | Manage, co-ordinate and expedite the preparation and agreement of the final account by the cost consultants with the relevant contractors. | | |
| | | Co-ordinate, monitor and issue the Final Completion Defects list and Certificate of Final Completion. | | |
| | | Prepare and present Project Closeout Report | | |