

10.27.4 Stage 4

- 10.27.4.1 Recommending and agreeing procurement strategy for contractors, subcontractors and suppliers with the client and the other professional consultants
- 10.27.4.2 Preparing and agreeing the procurement programme
- 10.27.4.3 Advising the client, in conjunction with the other professional consultants on the appropriate insurances
- 10.27.4.4 Managing procurement process and recommending contractors for approval by the client
- 10.27.4.5 Agreeing the format and procedures for monitoring and control by the quantity surveyor of the cost of the works
- 10.27.4.6 Co-ordinating the assembly of the contract documentation for signature

and for which the following deliverables are applicable:

- 10.27.4.7 Procurement programme
- 10.27.4.8 Tender/contract conditions
- 10.27.4.9 Record of all meetings
- 10.27.4.10 Obtaining approval by the client of tender recommendation(s)
- 10.27.4.11 Contract documentation for signature

10.27.5 Stage 5

- 10.27.5.1 Arranging site handover to the contractor
- 10.27.5.2 Establishing the construction documentation issue process
- 10.27.5.3 Agreeing and monitoring issue and distribution of construction documentation
- 10.27.5.4 Instructing the contractor on behalf of the client to appoint subcontractors
- 10.27.5.5 Conducting and recording regular site meetings
- 10.27.5.6 Reviewing, approving and monitoring the preparation of the construction programme by the contractor
- 10.27.5.7 Regularly monitoring performance of the contractor against the construction programme
- 10.27.5.8 Adjudicating entitlements that arise from changes required to the construction programme
- 10.27.5.9 Receiving, co-ordinating and monitoring approval of all contract documentation provided by the contractor(s)

- 10.27.5.10 Agreeing quality assurance procedures and monitoring implementation thereof by the other professional consultants and the contractor(s)
 - 10.27.5.11 Monitoring preparation and auditing of the contractor's health and safety plan and approval thereof by the health and safety consultant
 - 10.27.5.12 Monitoring preparation of the environmental management plan by the environmental consultant
 - 10.27.5.13 Establishing procedures for monitoring scope and cost variations
 - 10.27.5.14 Monitoring, reviewing, approving and issuing payment certificates
 - 10.27.5.15 Receiving, reviewing and adjudicating any contractual claims
 - 10.27.5.16 Monitoring preparation of financial control reports by the other professional consultants
 - 10.27.5.17 Preparing and submitting progress reports
 - 10.27.5.18 Monitoring preparation of final account(s)
 - 10.27.5.19 Co-ordinating, monitoring and issuing practical completion lists and the certificate of practical completion
 - 10.27.5.20 Facilitating and expediting receipt of occupation certificates
- and for which the following deliverables are applicable:
- 10.27.5.21 Signed contracts
 - 10.27.5.22 Approved construction programme
 - 10.27.5.23 Construction documentation
 - 10.27.5.24 Payment certificates
 - 10.27.5.25 Progress reports
 - 10.27.5.26 Record of all meetings
 - 10.27.5.27 Certificate(s) of practical completion

10.27.6 Stage 6

- 10.27.6.1 Co-ordinating and monitoring rectification of defects
- 10.27.6.2 Managing procurement of operations and maintenance manuals, guarantees and warranties
- 10.27.6.3 Managing preparation of as-built drawings and documentation
- 10.27.6.4 Managing procurement of outstanding statutory certificates
- 10.27.6.5 Monitoring, reviewing, approving and issuing payment certificates

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- 10.27.6.6 Issuing completion certificates
- 10.27.6.7 Managing agreement of final account(s)
- 10.27.6.8 Preparing and presenting the project close-out report

and for which the following deliverables are applicable:

- 10.27.6.9 Completion certificates
- 10.27.6.10 Record of necessary meetings
- 10.27.6.11 Project close-out report

10.28 **"PRINCIPAL AGENT"** means the entity appointed by the client to manage and administer the agreement entered into between the employer and a contractor for the execution of the project or part thereof

10.29 **"PRINCIPAL CONSULTANCY"** means the services of the **principal consultant** listed in columns 2 and 3 of clause 2.5, which in broad terms include the following:

10.29.1 **Stage 1**

- 10.29.1.1 Facilitating development of a clear project brief
- 10.29.1.2 Establishing the procurement policy for the project
- 10.29.1.3 Assisting the client in the procurement of necessary and appropriate other professional consultants including the clear definition of their roles and responsibilities
- 10.29.1.4 Establishing in conjunction with the client, other professional consultants and all relevant authorities, the site characteristics, rights and constraints for the proper design of the intended project
- 10.29.1.5 Defining the **principal consultant's** and other professional consultants' scope of work and services
- 10.29.1.6 Concluding the terms of the client/**principal consultant** and other professional consultants' professional services agreements with the client
- 10.29.1.7 Facilitating a schedule of the required consents and approvals
- 10.29.1.8 Preparing, co-ordinating and monitoring a project initiation programme
- 10.29.1.9 Facilitating client approval of all **Stage 1** documentation

and for which the following deliverables are applicable:

- 10.29.1.10 Project brief
- 10.29.1.11 Agreed **scope of work**
- 10.29.1.12 Agreed **services**

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- 10.29.1.13 Project procurement policy
- 10.29.1.14 Signed client/consultant professional services agreements
- 10.29.1.15 Integrated schedule of consents and approvals
- 10.29.1.16 Project initiation programme
- 10.29.1.17 Record of all meetings

10.29.2 Stage 2

- 10.29.2.1 Assisting the client in the procurement of necessary and appropriate other professional consultants including the clear definition of their roles and responsibilities
- 10.29.2.2 Advising the client on the requirement to appoint a health and safety consultant
- 10.29.2.3 Communicating the project brief to the other professional consultants and monitoring the development of the concept and viability
- 10.29.2.4 Agreeing format and procedures for cost control and reporting by the other professional consultants
- 10.29.2.5 Preparing a documentation programme and indicative construction programme
- 10.29.2.6 Co-ordinating concept and viability documentation for presentation to the client for approval
- 10.29.2.7 Facilitating approval of the concept and viability by the client
- 10.29.2.8 Facilitating approval of the concept and viability by statutory authorities

and for which the following deliverables are applicable:

- 10.29.2.9 Signed client/consultant professional services agreements
- 10.29.2.10 Indicative documentation programme and construction programme
- 10.29.2.11 Record of all meetings
- 10.29.2.12 Approval by the client to proceed to **Stage 3**

10.29.3 Stage 3

- 10.29.3.1 Agreeing and implementing communication processes and procedures for the design development of the project
- 10.29.3.2 Assisting the client in the procurement of necessary and appropriate other professional consultants including the clear definition of their roles and responsibilities
- 10.29.3.3 Conducting and recording consultants' and management meetings

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10.29.3.4 Facilitating input required by health and safety consultant

10.29.3.5 Facilitating design reviews for compliance and cost control

10.29.3.6 Facilitating timeous technical co-ordination

10.29.3.7 Facilitating client approval of all **Stage 3** documentation

and for which the following deliverables are applicable:

10.29.3.8 Additional signed client/consultant professional services agreements

10.29.3.9 Record of all meetings

10.29.3.10 Approval by the client to proceed to **Stage 4**

10.29.4 **Stage 4**

10.29.4.1 Co-ordinating and monitoring preparation of procurement documentation by consultants in accordance with the project procurement programme

10.29.5 **Stage 5**

10.29.5.1 No services

10.29.6 **Stage 6**

10.29.6.1 No services

10.30 "**PRINCIPAL CONSULTANT**" means the entity appointed by the client to manage and administer the services of all the professional consultants

10.31 "**PROCESS ENGINEERING WORKS**" means process piping, flow control systems and equipment associated with process plants

10.32 "**PROJECT MONITOR**" means the entity appointed by the client to carry out a watching brief and to financially monitor the project on behalf of the client

10.33 "**PROJECT MONITORING**" means the services of the **project monitor** listed in columns 2 and 3 of clause 2.5, which in broad terms include the following:

10.33.1 **Stage 1**

10.33.1.1 Receiving commission/instruction from the client to establish his requirements and advising on various courses of action and procedures to suit the particular requirements of the project

10.33.1.2 Attending technical and progress meetings as may be deemed necessary

10.33.1.3 Commenting on fee proposals submitted by the professional consultants

10.33.1.4 Commenting on the **Stage 1** deliverables provided by the professional consultants

and for which the following deliverables are applicable:

10.33.1.5 Report to client on matters of concern and action taken

10.33.2 Stage 2

10.33.2.1 Attending technical and progress meetings as may be deemed necessary

10.33.2.2 Commenting on estimates of project cost and financial viability reports prepared by others and providing such other cost advice as may reasonably be required

10.33.2.3 Commenting on fee proposals submitted by the professional consultants

10.33.2.4 Commenting on the **Stage 2** deliverables provided by the professional consultants

and for which the following deliverables are applicable:

10.33.2.5 Report to client on matters of concern and action taken

10.33.3 Stage 3

10.33.3.1 Attending technical and progress meetings as may be deemed necessary

10.33.3.2 Commenting on estimates of project cost and financial viability reports prepared by others and providing such other cost advice as may reasonably be required

10.33.3.3 Commenting on fee proposals submitted by any further professional consultants

10.33.3.4 Commenting on the **Stage 3** deliverables provided by the professional consultants

and for which the following deliverables are applicable:

10.33.3.5 Report to client on matters of concern and action taken

10.33.4 Stage 4

10.33.4.1 Attending technical and progress meetings as may be deemed necessary

10.33.4.2 Commenting on procurement procedures and documentation prior to calling for tenders or negotiating

10.33.4.3 Commenting on tender reports and recommendations

10.33.4.4 Commenting on contract documentation, including priced **bills of quantities** where applicable, prior to signing of the contract

10.33.4.5 Commenting on the **Stage 4** deliverables provided by the professional consultants

and for which the following deliverables are applicable:

10.33.4.6 Report to client on matters of concern and action taken

10.33.5 Stage 5

10.33.5.1 Attending site, technical and progress meetings as may be deemed necessary

10.33.5.2 Commenting on tender reports and recommendations for subcontracts

10.33.5.3 Commenting on financial control reports and cash flow schedules

10.33.5.4 Advising the client on payment certificates prior to issuing

10.33.5.5 Attending management/financial meetings

10.33.5.6 Commenting on the financial and contractual aspects of claims between the client and the contractor, excluding services related to mediation, arbitration and litigation

10.33.5.7 Commenting on the **Stage 5** deliverables provided by the professional consultants

and for which the following deliverables are applicable:

10.33.5.8 Report to client on matters of concern and action taken

10.33.6 Stage 6

10.33.6.1 Advising the client on the acceptability of the final account

10.33.6.2 Advising the client on the final payment certificate prior to issuing

10.33.6.3 Commenting on the **Stage 6** deliverables provided by the professional consultants

and for which the following deliverables are applicable:

10.33.6.4 Report to client on matters of concern and action taken

10.34 **"QUALITY INSPECTION"** means the inspection of the works at intervals as may be considered appropriate, to assess and report on whether the works are being completed generally in accordance with the drawings and specifications. Quality inspection specifically excludes mechanical and electrical installations, structural works and other specialist installations or works which are to be executed by specialist consultants

Quality inspection does not ensure the performance of the contractor nor does it create a contractual relationship with the contractor

10.35 **"REDECORATION WORKS"** means work associated with the redecoration of existing buildings such as cleaning, painting and paperhanging and shall include associated preparation work but shall exclude **alteration works**

10.36 **"REPLICATION"** means the replication of an individual distinct building or structure within a contract or of a previous contract and shall be applicable only when the total quantities in all trades or the total cost of the prototype can be readily multiplied in the procurement documentation by the number of individual distinct buildings or structures, the intention being that minor differences and work measured provisionally shall, where necessary, be adjusted in the final account

Individual distinct buildings or structures, even though they may not be free standing but may occur on a common podium or separate substructure, shall be regarded as replication

10.37 **"SCOPE OF WORK"** means the portion of the works for which the quantity surveyor is required to provide **services** and which, unless specifically otherwise agreed, shall exclude the work listed in clause 7.2 and the work indicated as exclusions in the **value for fee purposes**

10.38 **"SERVICES"** means the duties and responsibilities of the quantity surveyor in providing professional quantity surveying services

10.39 **"SERVICES AT RISK"** means **services** rendered on the basis that, subject to clause 3.0, no **fee** will be charged for such **services** unless the project proceeds

10.40 **"SIMPLIFIED BILLS OF QUANTITIES"** means **bills of quantities**, provisional bills of quantities or schedule of rates documented in accordance with the Standard System of Measuring Building Work for Small or Simple Buildings published by the Association of South African Quantity Surveyors or in accordance with any other similar simplified standard system of measuring building work

10.41 **"STAGE 1"** means the inception stage, which is to 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

10.42 **"STAGE 2"** means the concept and viability stage, which is to 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

10.43 **"STAGE 3"** means the design development stage, which is to develop the approved concept to finalise the design, outline specifications, cost plan, financial viability and programme for the project

10.44 **"STAGE 4"** means the documentation and procurement stage, which is to prepare the construction and procurement documentation, confirm and implement the procurement strategies and procedures for effective and timeous procurement of necessary resources for the execution of the project

10.45 **"STAGE 5"** means the construction stage, which is to manage, administer and monitor the construction contracts and processes, including the preparation and co-ordination of the procedures and documentation to facilitate practical completion of the works

10.46 **"STAGE 6"** means the close-out stage, which is to fulfil and complete the project close-out including the preparation of the necessary documentation to facilitate effective completion, handover and operation of the project

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10.47 **"TARGETED PROCUREMENT"** means incorporating the participation of targeted enterprises into a contract, the setting of participation targets for the contract, the measurement of key participation indicators to be used in the evaluation of tenders and the audit of compliance with the tendered participation target during the execution of the contract, all in accordance with the provisions of the client's targeted procurement documentation

10.48 **"TENANT REQUIREMENTS"** means the evaluation of tenant requirements involving separate accounting for each tenant

10.49 **"VALUE FOR FEE PURPOSES"** means the final value of the contract, or a fair estimate where no final value is available, which shall include clauses 10.49.1 to 10.49.5:

10.49.1 Subject to clause 10.49.9, all labour and materials, whether supplied free of charge or not, provided that where materials are "free issue" and the value of such materials is not known or disclosed, such value shall be estimated at market rates current at the date of tender

10.49.2 Any credit for materials from the existing structures which are to become the property of the contractor, which credit shall be treated as an addition and not as a credit

10.49.3 All specialist services and installations which form an integral part of the contract, including services covered by provisional amounts for subcontracts and/or prime cost amounts

10.49.4 Any amount of adjustment under any applicable contract price adjustment provisions when certified for payment to the contractor

10.49.5 Subject to clause 10.49.6, taxes and duties

and which final value of the contract shall exclude clauses 10.49.6 to 10.49.10:

10.49.6 **VAT**

10.49.7 Any amount set aside for contingencies

10.49.8 Work generally outside the scope of the work carried out by the contractor and excluded from the contract, in respect of which the quantity surveyor is not required to perform a service

10.49.9 All supply costs on engineering contracts for major items of permanent plant, equipment and machinery

10.49.10 For **building work** the final value of any **mechanical and electrical installations ancillary to building works** and of any **civil engineering works ancillary to building works** in respect of which the quantity surveyor is required only to incorporate into the relevant documentation such information furnished by others, which final value shall include any amounts arising from contract price adjustment provisions and shall exclude any amounts for profit and attendance to the principal contractor and any apportionment of the value of preliminaries

10.50 **"VALUE MANAGEMENT"** means the facilitation of a systematic multi-disciplinary creative process to generate alternatives with the object of maximising the functional and economic value of a project and, in the case of a commercial development, to enhance the return on the investment

10.51 "VAT" means Value-Added Tax in terms of the Value-Added Tax Act, 1991 (Act 89 of 1991)

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This page does not form part of the 2015 Guideline Tariff of Professional Fees

SCHEDULE OF CHANGES TO PREVIOUS EDITIONS
SINCE PUBLICATION OF THE 2001 TARIFF OF FEES

Tariff of Fees	Item	Clause changed	Revision
2003 Tariff of Fees	Basic fee	2.2	amended
	Time charge	8.1.2	amended
2005 Tariff of Fees	Time charge	8.3	amended
2007 Tariff of Fees	Appropriate percentage for building work	2.3	amended
	Apportionment of fee to services	2.7	amended
	Time charge	8.3.5	amended
	Definition: Multiple procurement contracts	11.26	amended
	Definition: Service B	11.37.1	amended
2009 Tariff of Fees	Basic fee	2.2	amended
	Appropriate percentage for building work	2.3	amended
	Appropriate percentage for engineering work	2.4	amended
	Appropriate percentage for management services	2.5	amended
	Appropriate percentage for supplementary services	2.6	amended
	Apportionment of fee to stages	2.7	amended
	Affordable housing	was 3	deleted
	Clauses 4 to 11	4 to 10	renumbered
	Excessive variation	was 5.3 now 4.3	amended
	Disbursements	was 9 and 9.1 now 8 and 8.1	amended
	Payment	was 10 now 9	amended
	Definitions and interpretation	was 11 now 10	amended and renumbered
2010 Tariff of Fees	Appropriate percentage for management services	2.5	amended
	Apportionment of fee to stages	2.7	amended
	Excessive variation	4.1 and 4.2	amended
	Payment	9.1 and 9.3	amended
	Payment	9.2.3	new
	Definitions and interpretation: Stages	10.39 to 10.44 now 10.6 and 10.41 to 10.46	amended
	Definitions and interpretation: Disbursements	10.13 now 10.14	amended
	Definitions and interpretation: Principal agency	10.26 now 10.27	amended
	Definitions and interpretation: Principal consultancy	10.28 now 10.29	amended
	Definitions and interpretation: Project monitor	10.32	new
	Definitions and interpretation: Project monitoring	10.31 now 10.33	amended
Definitions and interpretation: renumbered as necessary	10.0	renumbered	
2013 Tariff of Fees	Heading: "Guideline"	heading	amended
	General	1.4	new
	Time charge: Experience	7.1.1	amended
	Time charge: Life cycle costing	7.2	new
	Definitions and interpretation: Alteration works	10.1	amended
	Definitions and interpretation: Building and engineering works services: Stage 5	10.6.5.9	amended
	Definitions and interpretation: Building works	10.7	amended
Definitions and interpretation: Disbursements	10.14.2	amended	

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2015 Tariff of Fees	"Guideline"	all clauses	inserted
	Table of Contents	first page	new
	Preamble	second page	new
	Fee calculation	2.2	new
	Basic fee	2.2.1	renumbered and amended
	Adjustment factor	2.2.2	new
	Examples of calculations	2.2.3	new
	Time charge	7.1.1	amended
	Time charge	7.1.2	amended
	Engineering bills of quantities	10.7.1	amended
	Engineering bills of quantities	10.7.2	amended

Inconsequential wording and typographical corrections have not been listed

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