

3. SCOPE OF SERVICE

3.1. QUANTITY SURVEYOR

3.1.1. NORMAL SERVICES – PHASE 1:

The Professional Quantity Surveyor will be required to perform in full the Standard /Normal (Stages 1 and 2) and Additional Quantity Surveyor services delivered in accordance with the gazetted Guideline Scope of Services and Recommended Guideline Tariff of Fees in respect of services rendered by Persons registered in terms of the South African Council for the Quantity Surveying Profession Act, 2000 (Act No. 49 of 2000). The standard and additional services to be performed for the Quantity Surveyor shall be priced accordingly as per the pricing instruction.

In the execution of the normal and additional scope service, the Quantity Surveying services shall be delivered as described in the Scope of Service document and to include but not be limited to the following towards implementation of the project scope:

- Produce cost estimates and costing options for Client approval.
- Project financial risk assessment, management and reporting.
- Pro-active project budget management and reporting.
- Implement project cost saving solutions on behalf of Client.
- Diligent and proactive project cash-flow management and reporting.
- Project Capitalisation at completion stages of the project.
- Preparation of Capex application documents and supporting cost information as and when required.

Refer to the Extent of Services (section 4) for the description of additional services to be carried out under the Quantity Surveyor as part of the appointment on this project.

3.1.2. JOINT MONITORING SERVICES – PHASE 2

3.1.2.1. DOCUMENTATION & PROCUREMENT

Once ACSA has made the investment decision, the procurement process for Contractors required to undertake the Design and Build will be required. The procurement will be a multiple-procurement process that the **Quantity Surveyor** will need to undertake along with the other Consultants appointed on the project. The Quantity Surveyor will thus be responsible for the following deliverables under the Documentation & Procurement scope of service:

- Full normal services Documentation & Procurement (Stage 4) services as per described in the Standard /Normal Quantity Surveying services delivered in accordance with the gazetted Guideline Scope of Services rendered by Persons registered in terms of the South African Council for the Quantity Surveying Profession Act, 2000 (Act No. 49 of 2000).
- Undertake multiple procurement processes for Contractors (including OEM's, direct contractors, etc) required on the project
- Participate in putting together a comprehensive Tender Document for the Design & Build Contractor in compliance with ACSA Procurement Procedures and Policies.
- Participate in the evaluation of tender documents (RFP / RFQ) received from Bidders,
- Produce reports on the specific areas of evaluation that they are required to undertake.
- Sign non-disclosure agreements for participation in the evaluation of tender documents.

3.1.2.2. CONTRACT MANAGEMENT SERVICES:

Once ACSA has appointed the Design & Build contractor, as part of the Phase 2 of contracted services, the Quantity Surveyor will be required to undertake the following deliverables in fulfilment of the Contract Management Services during the Design & Build contract period:

- Participate in the handover of the site to the contractor where required.
- Participate in the review and costs approvals for site surveys, studies and investigations that are proposed and required to be undertaken by the Design & Building Contractor,
- Participate in the site inspections where required for the purposes of costs verification.
- Review costs relating to approval of specifications, designs and pertinent site information,
- Participate in contract management and contract administration where pertinent to the discipline,
- Project Financial administration and reporting,
- Financial Risk Management and Reporting,
- Review Cost estimates in the Stage Gate Reports prior to Client approval and provide review feedback to Contractor/s.
- Detail review and approval of proposed Design & Build Contractors budget and construction costs,
- Directly receive and review all contract claims correspondences between Design & Build Contractor and ACSA and issue responses to all correspondences on behalf of the Client,
- Review and approve all contract variations in consultation with the Client,
- Compile project reports as stated on section 17 (Project Reporting Requirements)
- Establish and co-ordinate the formal and informal communication structure and procedures for the construction process and cost reporting.
- Review cost of materials samples and specifications on behalf of Client and advise on cost of materials / specification selection.
- Monitor, review, approve and certify monthly progress payments.
- Review and adjudicate circumstances and entitlements that may arise from any changes required to the Contract Price.
- Regularly attend site meetings and record all cost matters,
- Prepare monthly project expenditure reports including submission to the client.
- Review and approve cost estimates for construction and operations interface and construction phasing plans on behalf of the Client.

3.1.2.3. CONSTRUCTION MONITORING SERVICES:

Once ACSA has appointed the Design & Build contractor, as part of the Phase 2 of contracted services, the Quantity Surveyor will be required to undertake the following deliverables in fulfilment of the Construction Monitoring Services during the design & build contract period:

- Facilitate the handover of the site to the contractor.
- Establishing and maintaining a financial control system
- Project Financial management, administration and reporting,
- Cost Risk Management and Reporting,
- Review the Stage Gate Cost Reports prior to Client approval and provide review feedback to Contractor/s.
- Construction progress monitoring and evaluation,
- Detail review and approval of proposed Design & Build Contractors cost estimates,
- Review estimates for proposed variations for client decision-making
- Directly receive and review all contract claims correspondences between Design & Build Contractor and ACSA and issue responses to all correspondences on behalf of the Client,
- Review, adjudicate and recommend for approval / disapproval of all contract variations in consultation with the Client.

- Compile project cost reports as stated on section 17 (Project Reporting Requirements)
- Establish and co-ordinate the formal and informal communication structure and procedures for the construction process and cost reporting.
- Monitor, review, approve and certify monthly progress payments.
- Review and adjudicate circumstances and cost entitlements that may arise from any changes required to the Contract Programme.
- Regularly attend site meetings and record all cost matters,
- Prepare monthly project Cost/ Budget expenditure progress reports including submission to the client.

3.1.2.4. HANDOVER & CLOSE OUT

- Review all **Cost related handover** documents issued by Contractor to ensure compliance with Clients Handover Requirements.
- Review and comment on tender reports and recommendations for all Contractors.
- **Participate in applicable ORAT processes to ensure compliance with Client ORAT requirements.**
- **Manage and co-ordinate the preparation and agreement of the final account by the cost consultants with the relevant contractors.**
- Preparing final account(s) including remeasurement(s) as required for the works.
- **Prepare and present Project Close Out Report.**

3.2. ADDITIONAL SERVICES

3.2.1. QUANTITY SURVEYOR

The additional services under Quantity Surveyor services are as follows and to be priced accordingly:

3.2.1.1. Transformation Agent services

This will be an additional service where the Quantity Surveyor must be resourced to carry out the responsibility of implementing ACSA's Transformation Imperatives / Strategy for the project and incorporation of relevant Policies and Legislative requirements that aims to generate growth and facilitates empowerment and opportunities for targeted enterprises. The strategy will be tailor made and is required to be project specific considering the particular set of requirements that the locality presents. It is not necessarily limited to any or all of the following:

- a) Implement ACSA's Transformation Strategy and other relevant Policies and Legislative requirements for the identified Project. The project aims to generate growth and facilitates empowerment and opportunity. The strategy is required to be Location or Site Specific to the George Airport and the local community within the Airport Precinct, where feasible.
- b) Submission of a Transformation Proposal (Contract Participation Goals of minimum 51%) for the contract in line with following BBB-EE pillars:
 - i. Equity
 - ii. Management control and employment equity
 - iii. Skills development
 - iv. Enterprise and supplier development

- v. Socio economic development
- c) Set Targets for local labour work opportunities, local supplier development and training and maximize specific contract participation targets in line with (but not limited to):
 - vi. ACSA Transformation policy.
 - vii. Other available ACSA procedures.
 - viii. Stated targets.
 - ix. CIBD guidelines
 - x. BBBEE Act 53, As amended by BBBEE Amendment Act 46 of 2013.
 - xi. BBBEE codes of good practice (May 2015).
 - xii. PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT,2000.
 - xiii. PROCUREMENT REGULATIONS, 2017.
 - xiv. ISO 10845.
- d) The Transformation Agent will prioritise local content in specification with a 100% premium margin (subject to the Treasury, Department of Trade and Industry and SABS Standards Division guidelines/ practice notes in relation to local production and content) and local labour per following prioritisation order:
 - i. 5km radius of the George airport.
 - ii. Western Cape.
 - iii. South Africa.
 - iv. SADC Region.
 - v. Africa.
 - vi. Other
- e) Rationalise packaging of construction contracts to create more opportunities for lower CIDB level contractors.
- f) Develop opportunities for designated groups to access contract participation by breaking the contract down into the full value chain and give specific weighting to priority elements.
- g) Provide full analysis that identifies the transformation needs, skill levels, local resource capacity, appropriate use of local technology and supplier capacity.
- h) Auditing, monitoring, evaluating and reporting on achievement targets through the various stages of construction.

The transformation agent is expected to play an active role throughout the lifecycle of the project as follows:

Stage 1: Inception

- Assist in developing a clear project specific transformation strategy as part of the project brief in line with ACSA transformation approach and policy.
- Attend Client and Consultants' meetings.
- Advise on the procurement strategy for the appointment of the contractor to ensure that transformation targets are achievable.
- Concluding the terms of the client/transformation agent professional services agreement with the client.

Stage 2: Concept

- Attending fortnightly design and consultants' meetings
- Receiving relevant data and cost estimates from the other professional consultants in order to ensure that the transformation strategy is a key driver for the project.
- Attending Client and consultants' meetings.
- Liaising, co-operating and providing necessary information to the client, principal consultant and other professional consultants in order to determine the contract participation goals (CPG) for emerging contractors.
- Preparing draft transformation strategy with reference to preliminary and elemental or equivalent estimates of construction cost.
- Reviewing the documentation programme/ cost estimates/ design specifications with the principal consultant and other professional consultants.
- Receiving relevant data and cost estimates from the other professional consultants.
- Preparing detailed project specific CPG strategy.
- Attending Client and consultants' meetings.
- Liaising, co-operating and providing necessary information to the client, principal consultant and other professional consultants and for which the following deliverables are applicable:
- Prepare and Submit Detailed transformation strategy/ proposal with CPG targets for approval in line with the following BBB-EE pillars:
 - xv. Equity
 - xvi. Management control and employment equity
 - xvii. Skills development
 - xviii. Enterprise and supplier development

xix. Socio economic development

- Mutually agreed additional services.

Documentation and procurement

- Attending Client and consultants' meetings.
- Assisting the principal consultant in reviewing working drawing, specifications, estimates etc. to ensure compliance with approved transformation strategy.
- Preparing documentation for both principal and subcontract procurement to comply with transformation targets.
- Assisting with preparation of contract documentation for sign off.
- Outline scope of service of a Community Liaison Officer (CLO) to be appointed within the Main Contractor.

Construction

- Establishing and maintaining a financial control system to ensure appointed contractors adherence to transformation strategy/ deliverables.
- Conduct monthly audits throughout the construction period for both work packages / construction phases.
- Attending Client, consultants' and Contractor meetings.
- Preparing detailed reports/ schedules/ forecasts/ status reports of cash flow/ spend to ensure CPG targets are met in line with the following BBB-EE pillars.
- Implement corrective action in consultation with the consultant team, the contractor/s, the client and other stakeholders (i.e. local community, tenants and general public if necessary) in the event of non-performance.

Close out

- Work with the project Quantity Surveyor in concluding final account(s), identifying and confirming transformation targets have been met.
- Attending Client and consultants' meetings.
- Preparing detailed concluding transformation report including lessons learnt.
- Prepare handover pack for approval by client.
- Mutually agreed additional services.