

ANNEXURE H

SACPMCP STAGE OF SERVICES

(as gazetted by the CBE Gazette Notice 1181 of 20 September 2019)

Stages of Project Work	Professional Construction Manager	Professional Construction Project Manager	Professional Construction Health and Safety Agent	Construction Health and Safety Manager	Construction Health and Safety Officer	Construction Mentor
1. Project Initiation and Briefing	N/A	1.1 Facilitate development of a clear project brief. 1.2 Establish the procurement policy for the project. 1.3 Assist the client in the procurement of necessary and appropriate other consultants including the clear definition of their roles and responsibilities. 1.4 Establish in conjunction with the client, other consultants and all relevant authorities, the site characteristics, rights and constraints for the proper design of the intended project. 1.5 Define the consultant's scope of work and services. 1.6 Conclude the terms of the agreement with the client. 1.7 Facilitate a schedule of the required consents and approvals.	1.1 Demonstrate the Construction Health and Safety Agent competency and resource. 1.2 Assist in developing a clear construction project health and safety brief. 1.3 Attend the construction project initiation meetings. 1.4 Conclude the terms of the agreement with the client. 1.5 Advise on the necessary surveys, analyses, tests and site or other investigations where such information will be required for the next stage of the project. 1.6 Advise the client on the adequacy of health and safety competency and resources of the other consultants. 1.7 Identify construction project health and safety risk profile.	N/A	N/A	N/A
1. Project Initiation and Briefing						

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		1.8 Prepare, co-ordinate and monitor a project initiation programme. 1.9 Facilitate client approval of all Stage 1 documentation.	1.8 Provide necessary information within the agreed scope of the construction project to the other consultants. 1.9 Define the Construction Health and Safety Agent scope of work and services.			
2. Concept and Feasibility	N/A	2.1 Assist the client in procurement of the other consultants. 2.2 Advise the client on the requirement to appoint a health and safety consultant. 2.3 Communicate the project brief to the other consultants and monitor the development of the concept and viability. 2.4 Agree format and procedures for cost control and reporting by the other consultants. 2.5 Prepare a documentation programme and indicative construction programme. 2.6 Co-ordinate concept and viability documentation for	2.1 Agree the documentation programme with the principal consultant and other consultants. 2.2 Attend design and consultants meetings. 2.3 Review and evaluate design concepts and advise on construction project health and safety in conjunction with the other consultants. 2.4 Review, update and agree the construction project health and safety risk profile and prepare the construction health and safety policy for the construction project. 2.5 Advise on preliminary cost estimates/budgets for construction project health and safety.	N/A	N/A	N/A

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2. Concept and Feasibility		presentation to the client for approval. 2.7 Facilitate approval of the concept and viability by the client. 2.8 Facilitate approval of the concept and viability by statutory authorities.	2.6 Prepare draft construction project baseline risk assessment 2.7 Assist the client and principal consultant in the procurement of the necessary and appropriate specialists, including a clear definition of their roles, responsibilities and liabilities 2.8 Advise the client on the adequacy of the health and safety competency and resources of the appropriate specialists. 2.9 Assess and approve the appropriate specialists health and safety plans. 2.10 Monitor the implementation of the appropriate specialists health and safety plans, including periodic audits. 2.11 Prepare the draft construction project health and safety specification. 2.12 Agree the format and procedures for health, safety and hygiene			

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			construction project control. 2.13 Advise and agree with the other consultants regarding their construction project health and safety requirements and related design risk management responsibilities. 2.14 Liaise, co-operate and provide necessary information to the client/principal consultant and the other consultants.			
3. Design Development	N/A	3.1 Agree and implement communication processes and procedures for the design development of the project. 3.2 Assist the client in the procurement of the necessary other consultants including the clear definition of their roles and responsibilities. 3.3 Prepare, co-ordinate, agree and monitor a detailed design and documentation programme. 3.4 Conduct and record consultants'	3.1 Review the documentation programme with the principal consultant and the other consultants. 3.2 Attend design and consultants meetings. 3.3 Finalise the construction project health and safety risk profile. 3.4 Advise designers of their health and safety legal liabilities and responsibilities for constructability, maintainability and operationability of the structure. 3.5 Manage, co-ordinate, integrate and record the design risk	N/A	N/A	N/A

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3. Design Development		and management meetings. 3.5 Facilitate input required by health and safety consultant. 3.6 Facilitate design reviews for compliance and cost control. 3.7 Facilitate timeous technical co-ordination. 3.8 Facilitate client approval of all Stage 3 documentation.	management process with the other consultants in a sequence to suit the documentation programme. 3.6 Monitor the integration of health and safety aspects for constructability, maintainability and operationability of the structure during the design process and finalise the construction project baseline risk assessment. 3.7 Identify and implement precautions necessary for construction project health and safety control and update the construction project tender health and safety specifications. 3.8 Agree on a format for the health and safety file. 3.9 Assess and approve necessary construction project health and safety plans for early works. 3.10 Monitor the implementation of necessary construction health and safety plans, including periodic			

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			audits for early works. 3.11 Assist the cost consultant with detailed information for initial construction project health and safety cost estimates/budgets. 3.12 Liaise, co-operate and provide necessary construction project health and safety information to the client, principal consultant and the other consultants.			
4. Tender Documentation and Procurement	4.1 Review and confirm the Construction Strategy and method for submission of the Tender. 4.2 Prepare the Construction Management Organogram and obtain commitment from appropriate staff as required. 4.3 Select, recommend and agree the procurement strategy for subcontractors and suppliers with the Principal Agent and consultants.	4.1 Recommend and agree procurement strategy for contractors, subcontractors and suppliers with the client and the other consultants. 4.2 Prepare and agree the procurement programme. 4.3 Advise the client, in conjunction with the other consultants on the appropriate insurances. 4.4 Co-ordinate and monitor preparation of procurement documentation by consultants in	4.1 Attend design and consultants meetings. 4.2 Assist in developing a clear construction project health and safety procurement process. 4.3 Finalise construction project tender health and safety specifications and integrate with procurement documentation. 4.4 Provide and record construction project health, safety, hygiene and design risk information to the principal consultant and other consultants. 4.5 Prepare	4.1 Attend and participate in tender clarification meetings. 4.2 Review the documentation programme with the client's principal consultant/agent 4.3 Finalise baseline risk assessment. 4.4 Identify and implement precautions necessary for health and safety control and develop health and safety plans from information obtained from the health and	4.1 Attend site tender clarification meetings with contractors. 4.2 Assist in the preparation of project specific health and safety documentation for distribution to contractors for inclusion into their tender submissions. 4.3 Assist with the evaluation of the contractor(s) competencies, knowledge and resources to carry out the works safely. 4.4 Assist with the preparation of contract	4.1 Assist the Contractor to plan, price, estimate and submit tender proposals. 4.2 Review tender documentation together with Contractor to establish any cost effective alternative solutions. 4.3 Advise the Contractor on appropriate industry associations that they should join, along with the advantages of membership. 4.4 Facilitate the Contractor's

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4. Tender Documentation and Procurement	4.4 Manage and co-ordinate the preparation and implementation of the Health and Safety requirements for inclusion in the tender. 4.5 Manage and procure proposals for the appropriate contract insurances and guarantees required for the works. 4.6 Review tender documentation to establish any cost- effective alternative solutions. 4.7 Manage the preparation and submission of the tender. 4.8 Prepare and agree the Procurement Programme for subcontractors and suppliers. 4.9 Agree list of subcontractors and suppliers with the Principal Agent 4.10 Manage the tender process in accordance with	accordance with the project procurement programme. 4.5 Manage procurement process and recommended contractors for approval by the client. 4.6 Agree the format and procedures for monitoring and control by the quantity surveyor of the cost of the works. 4.7 Co-ordinate the assembly of the contract documentation for signature.	construction project health and safety documentation for submission to authorities. 4.6 Participate in construction project tender clarification meetings 4.7 Assist with the evaluation of tenders and verify the contractors competencies, knowledge and resources to carry out the construction works in a safe and healthy manner. 4.8 Assist the cost consultant in the finalisation of the construction project health and safety cost estimate/budget. 4.9 Assist with the preparation of contract documentation for signature. 4.10 Prepare construction project health and safety mobilisation and access plans for the construction work. 4.11 Assess samples, mock-ups: and products for construction project, structural maintainability and operability health and safety	safety specification. 4.5 Agree on a format for the health and safety file for the project. 4.6 Assist the project team with detailed information for health and safety cost estimates/budgets. 4.7 Liaise, co-operate and provide necessary health and safety information to the client, principal consultant and the other consultants. 4.8 Manage the preparation of health and safety documentation for distribution to contractors for inclusion into their tender submissions. 4.9 Facilitate the evaluation of the contractor(s) competencies, knowledge and resources to carry out the works safely. 4.10 Facilitate the preparation	documentation related to health and safety requirements for approval and signature.	compliance with statutory requirements. 4.5 Advise the Contractor on site establishment including the provision of all Necessary temporary services, storage facilities, security requirements and other site requirements as well as for all sub-contractors. 4.6 Advise the Contractor on the appointment of subcontractors and suppliers.

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	agreed procedures, including calling for tenders, adjudication of tenders, and recommendation of appropriate domestic subcontractors and suppliers. 4.11 Manage, co-ordinate and finalize negotiations on all contractual commitments.		compliance.	of contract documentation related to health and safety requirements for approval and signature.		
5. Construction Documentation & Management	5.1 Manage the preparation and agreement of the Health and Safety Plan with the Client's Health and Safety Consultants and subcontractors. 5.2 Manage the site establishment including the provision of all necessary temporary services, storage facilities, security requirements and other site requirements. 5.3 Establish and maintain regular monitoring of all line, level and	5.1 Arrange site handover to the contractor. 5.2 Establish the construction documentation issue process. 5.3 Agree and monitor issue and distribution of construction documentation. 5.4 Instruct the contractor on behalf of the client to appoint subcontractors. 5.5 Conduct and record regular site meetings. 5.6 Monitor, review and approve the preparation of the construction programme by the contractor.	5.1 Assess, discuss, negotiate and approve the contractor(s) construction project health and safety plans. 5.2 Submit necessary construction health and safety documentation to authorities and facilitate permits that may be required to commence the construction work. 5.3 Attend site handover meetings and lead construction project health and safety mobilisation and access plans. 5.4 Attend regular site, technical and progress meetings.	5.1 Attend the site handover meeting and clarification of project specific requirements. 5.2 Facilitate and coordinate the preparation of a site specific construction health and safety plan. 5.3 Ensure necessary documentation is submitted to the relevant authorities. 5.4 Attend and participate in all project meetings. 5.5 Manage the process for the assessments and approval of other	5.1 Assist with the preparation of a construction health and safety plan. 5.2 Confirm necessary documentation was submitted to the relevant authorities. 5.3 Attend project planning meetings. 5.4 Assessments and approval of contractor(s) health and safety plans. 5.5 Attend the contractors site handover 5.6 Attend regular site, technical and progress meetings.	5.1 Facilitate the preparation, agreement, documentation and the management of compliance of the Health and Safety Plan with the Client's Health and Safety Consultants for the Health and Safety file. 5.2 Facilitate the establishment and maintenance of regular monitoring of all line, level and datum of the works. 5.3 Advise the Contractor on the implementation of the requirements of

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5. Construction Documentation & Management	datum of the works. 5.4 Continuously monitor the compliance by the site management of the Health and Safety Plan. 5.5 Provide the necessary documentation as required by the Health and Safety Consultant for the Health and Safety File. 5.6 Manage the implementation of the requirements of the Environmental Management Plan. 5.7 Appoint subcontractors and suppliers including the finalization of all agreements. 5.8 Receive, co-ordinate, review and obtain approval of all contract documentation provided by the subcontractors and suppliers for compliance with all of the contract requirements.	5.7 Regularly monitor performance of the contractor against the construction programme. 5.8 Adjudicate entitlements that arise from changes required to the construction programme. 5.9 Receive, co-ordinate and monitor approval of all contract documentation provided by contractor(s). 5.10 Agree quality assurance procedures and monitor implementation thereof by the other consultants and the contractors. 5.11 Monitor preparation and auditing of the contractor's health and safety plan and approval thereof by the health and safety consultant. 5.12 Monitor preparation of the environmental management plan by the environmental consultant. 5.13 Establish procedures for	5.5 Prepare revised construction project health and safety risk profile, specifications and cost estimates/budgets where there is scope of work changes 5.6 Monitor the implementation of the construction project health and safety plans in accordance with the construction project health and safety specification and further scope of work changes and recommend stop work orders where necessary. 5.7 Monitor design risk management. 5.8 Perform incident and accident investigations where necessary. 5.9 Audit compliance with the construction project health and safety plans and brief the project management team and contractor(s) following site audits. 5.10 Conduct construction health and safety management system audits.	contractor(s) health and safety plans. 5.6 Facilitate health and safety site meetings. 5.7 Ensure identification of the hazards and risks relevant to the construction project through regular coordinated site inspections. 5.8 Manage and maintain health and safety and communication structures and systems, distribution of health and safety specific documents to contractors. 5.9 Evaluate project specific emergency response and preparedness plans 5.10 Monitor, measure and report on health and safety system performance through facilitating compliance health and safety audits. 5.11 Evaluate the levels of	5.7 Facilitate site health and safety meetings. 5.8 Identification of the hazards and risks relevant to the construction project through regular coordinated site inspections. 5.9 Establish and maintain health and safety communication structures and systems, distribution of health and safety specific documents to sub-contractors. 5.10 Compiling project specific emergency response and preparedness plans. 5.11 Testing the effectiveness of the emergency response plans. 5.12 Conduct site safety inductions. 5.13 Evaluate the levels of compliance of subcontractors to the project specific health and safety plan and client specifications through	the Environmental Management Plan. 5.4 Facilitate the receipt, co-ordination, review and approval of all contract Documentation provided by the sub-contractors and suppliers. 5.5 Advise the Contractor on how best to manage the projects Insurance requirements. 5.6 Advise the Contractor on how to prepare, agree and monitor the Quality Assurance Plan with the design consultants and sub-contractors. 5.7 Advise the Contractor on how to establish and co-ordinate the formal and Informal communication structure and procedures including the necessary construction management meetings for the construction process with

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5. Construction Documentation & Management	5.9 Monitor the ongoing projects insurance requirements. 5.10 Facilitate and manage the establishment of subcontractors on the site. 5.11 Finalize and agree the Quality Assurance Plan with the design consultants and subcontractors 5.12 Continuously monitor the compliance of the quality of the works in accordance with the agreed Quality Assurance Plan. 5.13 Establish and co-ordinate the formal and informal communication structure and procedures for the construction process. 5.14 Regularly conduct and record the necessary construction management meetings including	monitoring scope and cost variations. 5.14 Monitor, review, approve and issue certificates. 5.15 Receive, review and adjudicate any contractual claims 5.16 Monitor preparation of financial control reports by the other consultants. 5.17 Prepare and submit progress reports. 5.18 Co-ordinate, monitor and issue practical completion lists and the certificate of practical completion. 5.19 Facilitate and expedite receipt of occupation certificate.	5.11 Facilitate construction health and safety system and plans reviews for continual improvement. 5.12 Monitor the compilation of the construction project health and safety file by the contractor(s). 5.13 Prepare and maintain the consolidated health and safety file. 5.14 Prepare the structure commissioning health and safety plans.	compliance of contractors to the project specific health and safety plan and client specifications. 5.12 Manage the reporting and investigation of project related incidents. 5.13 Evaluate processes for reporting of non-compliance issues and implementation of identified appropriate corrective and preventative action. 5.14 Participate and coordinate in reviews and incorporate changes of the health and safety management systems. 5.15 Use of trends analysis to identify system deficiencies and incident trends, outline relevant improvements. 5.16 Manage the necessary changes to the health and safety plans	inspections and audits. 5.14 Oversee the reporting and investigation of project related incidents. 5.15 Oversee the maintenance of all records 5.16 Participation in management reviews of the health and safety systems. 5.17 Use of trends analysis to identify system deficiencies and incident trends, outline relevant improvements 5.18 Incorporation of changes into a health and safety management system. 5.19 Review and update the health and safety plan. 5.20 Development of technical reports in relation to health and safety issues and communicate through presentations to diverse groups of decision makers.	sub-contractors and suppliers. 5.8 Advise the Contractor on how to finalize and agree the contract programme, monitoring and revisions thereof as necessary including resources planning. 5.9 Advise the Contractor on how to prepare and agree an Information. Schedule for timeous implementation of construction. 5.10 Advise the Contractor on how to continuously manage and review construction documentation, shop details and product propriety information by the design sub-contractors for clarity of construction requirements. 5.11 Advise the Contractor on how to manage and administer the distribution of Construction

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5. Construction Documentation & Management	subcontractors, suppliers, programme, progress and cost meetings. 5.15 Finalize and agree the contract programme and revisions thereof as necessary. 5.16 Prepare and finalize the detailed Construction Programme including resources planning. 5.17 Prepare and agree Information Schedule for timeous implementation of construction. 5.18 Continuously manage the review of construction documentation and information for clarity of construction requirements. 5.19 Manage and administer the distribution of construction information to all relevant parties. 5.20 Continuously			5.17 Facilitate the development and submission of technical reports in relation to health and safety issues and communicate through presentations to diverse groups of decision makers.		information to all relevant parties. 5.12 Advise the Contractor on how to review and substantiate circumstances and Entitlements that may arise from any changes required to the Contract Programme including all scope and cost variations in relation to contractual claims. 5.13 Advise the Contractor on how to manage the preparation of monthly progress claims for Payment. 5.14 Advise the Contractor on how to regularly prepare and submit a Construction Status Report, including construction financial status report. 5.15 Advise the Contractor on how to manage, co-ordinate and supervise all work on and off site including sub-contractors

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5. Construction Documentation & Management	monitor the construction progress. 5.21 Manage the review and approval of all necessary shop details and product proprietary information by the design subcontractors. 5.22 Review and substantiate circumstances and entitlements that may arise from any changes required to the Contract Programme. 5.23 Establish procedures for and monitor all scope and cost variations. 5.24 Manage the preparation of monthly progress claims for payment. 5.25 Receive, review and substantiate any contractual claims within the prescribed period. 5.26 Regularly prepare and submit a construction					and direct contractors. 5.16 Advise the Contractor on how to manage, co-ordinate and monitor all necessary testing and commissioning. 5.17 Review and recommend practical and cost- effective alternative construction methods, which will comply with the project specifications. 5.18 Provide advice to the Contractor on the Health and Safety requirements during construction. 5.19 Provide advice on cost control systems as may be required by the Contractor for estimating, budgeting and cost reporting purposes. 5.20 Attend the appropriate planning, co-ordination and management meetings as an observer.

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	status report, including construction financial status report. 5.27 Manage, co-ordinate and supervise all work on and off site. 5.28 Manage and co-ordinate the requirements of the direct contractors if required to do so. 5.29 Manage, co-ordinate and monitor all necessary testing and commissioning. 5.30 Coordinate, monitor and expedite the timeous rectification of all defects for the achievement of practical completion.					5.21 Monitor skills development progress of the Contractor throughout the Construction Mentorship programme. 5.22 Provide advice on relevant training provided by others that are appropriate for the Contractor's level of expertise.
6. Project Close Out	6.1 Co-ordinate, monitor and expedite the timeous rectification of all defects for the achievement of Works	6.1 Co-ordinate and monitor rectification of defects. 6.2 Manage procurement of operations and maintenance manuals,	6.1 Review, discuss and approve the health and safety file with the contractor(s) and manage the construction project health and safety during the defects	6.1 Review, discuss and approve the contractors' consolidated health and safety file with the contractor(s).	6.1 Review, discuss and approve contractors' consolidated health and safety file with the contractor(s). 6.2 Monitor site	6.1 Advise the Contractor on how to co-ordinate, monitor and expedite the timeous rectification of all defects for the achievement of all Contractual Completion

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6. Project Close Out	Completion. 6.2 Manage, co-ordinate and expedite the preparation by the relevant subcontractors of all as-built drawings and construction 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 applicable statutory compliance certificates and documentation. 6.5 Manage the finalization of the Health and Safety File for submission to the Health and Safety Consultant. 6.6 Co-ordinate, monitor and manage the rectification of	guarantees and warranties. 6.3 Manage preparation of as-built drawings and documentation. 6.4 Manage procurement of outstanding statutory certificates. 6.5 Monitor, review and issue payment certificates. 6.6 Issue completion certificates. 6.7 Manage agreement of final account(s). 6.8 Prepare and present the project close-out report.	liability period. 6.2 Cancel all construction project health and safety legal appointments. 6.3 Prepare the health and safety operations and maintenance report. 6.4 Prepare the consolidated construction project health and safety close - out report	6.2 Manage site health and safety during the defects liability period. 6.3 Prepare the consolidated project health and safety file for the client.	health and safety during the defects liability period. 6.3 Prepare the consolidated project health and safety file for the client.	requirements. 6.2 Advise the Contractor on how to manage, co-ordinate and expedite the preparation by the relevant subcontractors of all as-built drawings and construction documentation. 6.3 Advise the Contractor on how to manage and expedite the procurement of all operating and maintenance manuals as well as all warranties and guarantees. 6.4 Advise the Contractor on how to manage and expedite the procurement of applicable statutory compliance certificates and documentation. 6.5 Advise the Contractor on how to manage the finalization of the Health and Safety File for submission to the Health and Safety Consultant. 6.6 Advise the

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6. Project Close Out	defects during the Defects Liability Period. 6.7 Manage, co-ordinate and expedite the preparation and agreement of the final accounts with the cost consultants and all subcontractors. 6.8 Co-ordinate, monitor and expedite the timeous rectification of all defects for the achievement of Final Completion. 6.9 Prepare and present Contract Closeout Report.					Contractor on how to manage, co-ordinate and expedite the preparation and agreement of the final accounts with the cost consultants and all subcontractors. 6.7 Advise the Contractor on how to prepare and present Contract Closeout Report. 6.8 Advise the Contractor on how to upgrade their CIDB Contractor Grading.