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## GENERAL NOTICE

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### NOTICE 1139 OF 2008

#### The South African Council for the Project and Construction Management Professions (SACPCMP)

#### Notice of Registration Rules for Professional Construction Mentors in terms of Section 18(1) (c) of the Act, 2000 (Act No. 48 of 2000)

**Commencement Date: 01 NOVEMBER 2008**

**Applications should be addressed to:**

**Post Address**

The Registrar  
SACPCMP  
P O Box 6286  
Halfway House  
1685

**Physical Address**

89 International Business Gateway  
Corner New and 6<sup>th</sup> Road  
Midrand  
1685

TEL : 011 318 3402/3/4

FAX : 011 318 3405

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## 1. GUIDELINES FOR REGISTRATION OF PROFESSIONAL CONSTRUCTION MENTORS

### PREAMBLE

#### 1.1 INTRODUCTION

The SACPCMP hereby prescribes the registration of Construction Mentors as a specified category in terms of section 18 ( c ) of the Act, 48 of 2000. The registration system described in this document applies to those Built Environment Professionals with suitable experience who will be registered at a professional level, and excludes mentors that operate at other levels in the construction industry. This document provides the requirements that an individual needs to comply with in order to attain recognition by the SACPCMP as a Professional Construction Mentor.

Construction Mentorship is to be controlled and regulated through the implementation of a comprehensive mechanism for evaluating and registering professional construction mentors.

Construction Mentorship requires that certain standard approaches be adopted in order to ensure that the standards set by the SACPCMP are upheld. The SACPCMP has as its objective, the regulation of the Construction Mentorship profession thereby protecting emerging and smaller contractors from unscrupulous actions, and ensuring the progressive development of this vulnerable group.

Construction Mentors can be appointed in three main ways :

- Contractor appoints a Construction Mentor directly to develop his skills
- Financier appoints a Construction Mentor directly to mitigate the risk on a project
- Employer appoints a Construction Mentor directly or through the Contractor to develop the Contractor's skills and to mitigate risk on the project.

The SACPCMP acts as the custodian of the profession of construction mentorship, accordingly it is responsible for:

- 1 Registration of Professional Construction Mentors,
- 2 Prescribe the code of conduct for Professional Construction Mentors,
- 3 Monitoring the continuing professional development of each registered Professional Construction Mentor,
- 4 Determine the conditions for maintaining registration on annual basis, and
- 5 Publishing guidelines professional fees, after consultation with voluntary associations.

## 1.2 DEFINITIONS

**Built Environment Professions:** Those categories of professionals established in terms of the following Acts :

- Act 43 of 2000 Council for the Built Environment Act
- Act 44 of 2000 Architectural Professions Act
- Act 45 of 2000 Landscape Architectural Professions Act
- Act 46 of 2000 Engineering Professions Act
- Act 47 of 2000 Property Valuation Professions Act
- Act 48 of 2000 Project and Construction Management Professions Act
- Act 49 of 2000 Quantity Surveying Professions Act

**"Built Environment Professions Acts"** are :

- Act 43 of 2000 Council for the Built Environment Act
- Act 44 of 2000 Architectural Professions Act
- Act 45 of 2000 Landscape Architectural Professions Act
- Act 46 of 2000 Engineering Professions Act
- Act 47 of 2000 Property Valuation Professions Act
- Act 48 of 2000 Project and Construction Management Professions Act
- Act 49 of 2000 Quantity Surveying Professions Act

**"Built Environment"** refers to the functional area in which registered persons practice. The Built Environment includes all structures that are planned and/or erected above or underground, as well as the land utilized for the purpose and supporting infrastructure.

**"Construction Discipline"** General Building, Civil Engineering, Electrical Engineering, Mechanical Engineering or one of the Specialist categories identified by the CIDB in their Register of Contractors..

**"Construction Management"** is the management of the physical construction process within the built environment and includes the co-ordination, administration, and management of resources. The Construction Manager is the one point of responsibility in this regard.

**"Construction Mentorship"** is the evaluation and assessment of a Contractor's skills, identification of the Contractor's shortcomings and the provision of suitable relevant professional advice to the Contractor to address these shortcomings and thereby to achieve their potential.

**"Construction Programme"** is the programme for the works indicating the logical sequence and duration of all activities to be completed by the contractors, subcontractors, and suppliers, in appropriate detail, for the monitoring of progress of the works.

**"Contract Programme"** is the construction programme for the works agreed between the contractor and the Employer's Agent.

**"Contractor"** means any person or legal entity entering into contract with the client for the execution of the **works** or part thereof.

**"Cost Consultant"** means the person or entity appointed by the client to establish and agree all budgets and implement and manage the necessary cost control on the project.

**"Construction Mentorship Services"** the evaluation and assessment of a Contractor's skills, identification of the Contractor's shortcomings and the provision of suitable relevant professional advice to the Contractor to address these shortcomings and thereby to achieve their potential.

**"Direct Contractors"** are contractors appointed by the client to execute work other than the works.

**"Employer's Agent"** means the person or entity appointed by the client and who has full authority and obligation to act in terms of the construction contracts.

**"Improper Conduct"** as contemplated in section 27(3) of the Project and Construction Management Professions Act, means failure to comply with the code of conduct for registered persons.

**"Professional Construction Mentor"** Built environment professional with at least ten years experience, and who has been assessed by the SACPCMP council as competent to provide mentorship services

**"Principal Consultant"** means the person or entity appointed by the client to manage and administer the services of all other consultants.

**"Project and Construction Management Professions Act"** means the Project and Construction Management Professions Act, 2000 (Act No. 48 of 2000).

**"Project"** means the total development envisaged by the client, including the professional services.

**"Public"** means any person or group of persons who is, or whose environment is, either directly or indirectly affected by any construction project, or by a product, outcome or influence of a construction project, which may impact on the health, safety and interest of such person or group of persons.

**"SACPCMP"** The South African Council for Project and Construction Management Professions.

**"Subcontractors"** are specialists and other contractors executing work or supplying and fixing any goods and who are employed by the contractor.

**"Substantially Practise"** means regularly and consistently carry out construction mentorship work identified in section 4 of this document, and charging professional fee for such work and accruing professional responsibility to a client or an employer for the performance of such functions.

**"Suppliers"** mean a person or entity appointed by the client to supply goods and products for incorporating into the works.

**"The Council"** means the Council for the Built Environment established under section 2 of the Council for the Built Environment Act, 2000 (Act No 43 of 2000)

**"The South African Council for the Project and Construction Management Professions"** means the South African Council for the Project and Construction Management Professions established by section 2 of the Project and Construction Management Professions Act, 2000 (Act No. 48 of 2000), and **"SACPCMP"** has the same meaning.

"Works" means all work executed or intended to be executed in accordance with the construction contracts.

### 1.3 APPLICATION FOR REGISTRATION

1. A person who wishes to be registered as a Professional Construction Mentor must apply for in the prescribed application form in schedule 1 (attached).
2. The application form should be accompanied by the following:
  - an application fee as determined by the Council. (refer to Schedule 2 for current rates)
  - a certified copy of the identification document
  - a certified copy of Professional Registration Certificate with any of the Built Environment Councils.
  - a Curriculum Vitae of the Applicant

### 1.4 CRITERIA FOR CERTIFICATION AS A PROFESSIONAL CONSTRUCTION MENTOR

#### 1.4.1 Categories of Construction Mentor

The SACPCMP will register Professional Construction Mentors in different fields, based on their experience, knowledge and capabilities, as demonstrated in the registration process. A person will be registered as a Professional Construction Mentor if they satisfy the Council that they comply with the registration criteria identified in Section 2.2 below.

Each applicant will be assessed in line with the requirements for registration with regard to expertise, knowledge and capabilities. Under no circumstances will the SACPCMP register an applicant in a category if they have not complied with all of the requirements for that category.

#### 1.4.2 General requirements for registration as a Professional Construction Mentor

An applicant may be registered as a Professional Construction Mentor should they :

1. Be registered in terms of any of the Built Environment Professions Acts, or demonstrate an equivalent level of expertise; and
2. Be able to demonstrate that they have at least ten years experience in the construction industry at a senior management level; and
3. Be able to demonstrate their knowledge, skills and experience to the SACPCMP by means of completing the requisite testing; and
4. Be assessed by the SACPCMP as able to act suitably as a mentor following a psychometric examination; and
5. Be certified as competent in the transfer of skills and knowledge<sup>1</sup>; and
6. Undergo an interview with the SACPCMP Mentor Registration Committee.

Upon registration as a Professional Construction Mentor the applicant will be required to sign and adhere to the SACPCMP Code of Conduct, and undertake to submit to the SACPCMP annual declarations of the mentorship services that they have provided. Professional Construction Mentors will be required to maintain a record of all mentorship services provided.

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<sup>1</sup> The applicant will be assessed through a recognized ETQA body against the mentor qualification by means of either a direct assessment or through recognition of prior learning (RPL).



### **1.4.3 Demonstration of knowledge, skills and experience to act as a Professional Construction Mentor**

A Professional Construction Mentor may only provide mentorship in the construction discipline for which they are registered. A Professional Construction Mentor must in addition, be assessed as competent in all of the following five areas in project-related categories<sup>2</sup>. Professional Mentors may only provide mentorship in the construction sector in which they are registered with the SACPCMP.

#### **1.4.3.1 Demonstrate an ability to transfer skills and assess a contractor's capabilities**

The applicant must demonstrate their ability to effectively transfer their knowledge, expertise, experience and skills to the beneficiary. This must be demonstrated by means of a combination of training and on the job coaching.

The applicant must also demonstrate their ability to accurately assess a contractor's knowledge and expertise. This must be quantifiable in order that the specific areas that the contractor requires assistance and advice on in order to reach their full potential.

#### **1.4.3.2 Demonstrate competence in construction contract administration**

The applicant must demonstrate

- that they are competent in setting up efficient systems for contract administration;
- that they have a good working knowledge of the forms of contract approved for use by the CIDB; and
- that they fully comprehend the requirements and workings of the CIDB standard conditions of tender.

#### **1.4.3.3 Demonstrate technical competence in one or more construction disciplines**

The applicant must demonstrate technical competence in at least one of the construction disciplines by:

- interpreting technical specifications;
- describing of suitable construction techniques; and
- demonstrating their understanding of the importance of adherence to statutory requirements including the building regulations.

This competence area deals with the critical issue of **quality** in construction contracting.

#### **1.4.3.4 Demonstrate competence in commercial aspects of contracting**

The applicant must demonstrate

- a comprehensive understanding of how contracting businesses are operated;
- a comprehensive and practical knowledge of employment practices;
- understanding of human resources management on a construction project;
- ability to procure suppliers and subcontractors effectively and efficiently;
- ability to set up practical and appropriate systems to control commercial risks, costs and performance;
- that they can draw up project level financial statements;
- that they can draw up risk management plans for a project; and

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<sup>2</sup> The unit standards that will be drafted for construction mentorship will contain specific outcomes in these five areas. These unit standards may be added onto other recognized professional qualifications or learnerships.

- understand the commitments of all parties under the Construction Health and Safety regulations.

This competence area deals with the critical issue of **cost** in contracting.

#### **1.4.3.5 Demonstrate competence in construction project management**

The applicant must demonstrate

- that they can develop a fully resourced project programme;
- an ability to identify more efficient and effective methods of construction in order to speed up progress; and
- Competence at co-ordinating resources to maximise site production.

This competence area deals with the critical issue of **time** in contracting.

### **1.5 REGISTER OF PROFESSIONAL CONSTRUCTION MENTORS**

The SACPCMP will maintain and regularly update the Register of Professional Construction Mentors and will require that all registered Professional Construction Mentors adhere to the Code of Conduct published by the SACPCMP from time to time. Any registered Mentors that are charged of improper conduct will be deregistered.

The SACPCMP Register of Professional Construction Mentors will be published annually and will be available for inspection by the public.

### **1.6 REGISTRATION OF APPLICANTS ON THE REGISTER OF PROFESSIONAL CONSTRUCTION MENTORS**

#### **1.6.1 Admission to the SACPCMP Register of Professional Construction Mentors**

Once the Applicant has satisfied the SACPCMP Registrar that

- he / she is competent to act as a Professional Construction Mentor,
- has satisfied all requirements detailed in section 2.2 hereof,
- all application fees have been paid, and
- the requisite undertakings have been made,

his/her name will be added to the SACPCMP Register of Professional Construction Mentors.

#### **1.6.2 Continuing Professional Development**

Professional Construction Mentors are required to comply with the Continuing Professional Development requirements as set out by the SACPCMP from time to time. Failure to comply for the second year running will result in the Professional Construction Mentor being de-registered.

#### **1.6.3 Recognition of registration with other Mentorship Programmes**

Where an Applicant has been accredited as a Mentor by other mentorship programmes, the SACPCMP may recognise such accreditation as fulfilling part of the requirements for registration with the SACPCMP. The SACPCMP may register such applicants in line with the requirements for Professional Construction Mentors following such additional examinations which may be required, and an interview with the registration committee. Where applicants are accredited as construction mentors under mentorship programmes that are not listed as recognized, the SACPCMP Registration Committee will determine their eligibility for registration based on the normal application requirements.

The recognized mentorship accreditation programmes<sup>3</sup> that fulfill part of the requirements for registration are:

- 1 The University of Pretoria
- 2 The University of the Free State

In addition to fulfilling the requirements of these recognized mentorship programmes, the applicant will be required to undergo an interview with the SACPCMP Registration Committee.

### **1.7. TITLE AND ABBREVIATION**

A person registered in terms of this rules as a Professional Construction Mentor, may use the title "Professional Construction Mentor" abbreviated as Pr.CMentor.

### **1.8 TRANSITIONAL ARRANGEMENTS**

Until the required mentorship unit standards, qualifications and learnerships have been registered on the NQF, the SACPCMP will operate under the transitional arrangements detailed below.

### **1.9 PROFESSIONAL CONSTRUCTION MENTORS**

The SACPCMP may register applicants as Professional Construction Mentors if they can provide evidence that they are registered Built Environment Professionals, and have at least ten years of senior management experience in the construction industry. The applicant will be required to demonstrate their experience and competence in the construction industry, undergo a psychometric examination, make declarations that they will adhere to the Code of Conduct published by the SACPCMP, and submit annual declarations to the SACPCMP detailing the mentorship services provided. The Applicant may be registered following an interview with the SACPCMP Registration Committee.

## **2. STANDARD SCOPE OF SERVICES FOR CONSTRUCTION MENTORS REGISTERED IN TERMS OF THE PROJECT AND CONSTRUCTION MANAGEMENT PROFESSIONS ACT NO. 48 OF 2000**

### **2.1 GENERAL NOTES**

a. Construction mentorship services cannot be defined only on a project by project basis, since the relationship between Contractor and Construction Mentor can extend far longer than any project. The activities detailed herein can be identified for a single project, or over a period of time and across multiple projects.

b. Construction Mentors are appointed to support Contractors. The entity that appoints and pays for the Construction Mentor is not necessarily the same entity each time. Client bodies, Contractors, finance houses, and development agencies number amongst those entities that might appoint a Construction Mentor to assist a Contractor. Each of these entities would make use of the Construction Mentor to achieve different objectives, depending on their role in the Project, and it is important to take cognisance of these when selecting the activities that the Construction Mentor will be providing.

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<sup>3</sup> Note that other mentor accreditation programmes are welcome at any time to submit their particulars to the SACPCMP for evaluation and recognition.

c. The timing of the Construction Mentor's involvement will depend on who engages the Construction Mentor, on what basis, for what period of time, and the extent of the advice and support required by the Contractor.

## 2.2 STANDARD CONSTRUCTION MENTORSHIP SERVICES

Construction Mentors shall be able to perform the following standard activities:

### 2.21 ACTIVITY 1 – APPOINTMENT OF A CONSTRUCTION MENTOR

#### Definition

Identifying the Contractor to be mentored, who the Construction Mentor will be, what the Construction Mentor's experience should include, identifying the Contractor's needs and options, appointment of additional specialists where required, determination of Construction Mentor's brief, priorities, assumptions and strategies.

#### Standard Services

- 1 Presentation of the possible outcomes resulting from a Construction Mentorship relationship.
- 2 Identification of the skills required by the Construction Mentor in order to address the perceived requirements of the Contractor.
- 3 Documentation of the required Construction Mentorship services and incorporation thereof into an Agreement
4. Establishment of a performance monitoring system for determining the efficacy of  
Construction Mentorship in the development of the Contractor's skills.

#### Deliverables

- Draft agreement for the provision of Construction Mentorship services.
- Construction Mentorship monitoring system incorporated into the Agreement.

### 2.2.2 ACTIVITY 2 - CONTRACTOR SKILLS ASSESSMENT

#### Definition

Compilation of a skills assessment report on the Contractor, identifying the Contractor's strengths, shortcomings and operational systems. Determination of the level of input required for each area where a skills shortage is identified.

**Standard Services**

1. Completion of a skills audit questionnaire with the Contractor.
2. Determination of the level of skills that the Contractor currently has.
3. Determination of areas for the Construction Mentor to provide advice.
4. Determination of the provisional estimate of time required by Construction Mentor to bring the Contractor up to the required level of skill.
5. Define and agree preliminary scope of Construction Mentorship services.
6. Prepare Preliminary Construction Mentorship Programme and schedule.

**Deliverables**

- Preliminary scope of Construction Mentorship services
- Preliminary Construction Mentorship programme and schedule

**2.2.3 ACTIVITY 3 - MENTOR ADVISES CONTRACTOR AND BUILDS SKILLS****Definition**

Advise the Contractor on how best to manage, co-ordinate and integrate advice given and skills transfer required within the agreed scope, time, cost and quality parameters.

**Standard Services**

1. Review and recommend practical and cost effective alternative construction methods which will comply with the project specifications.
2. Review tender documentation together with Contractor to establish any cost effective alternative solutions.
3. Provide advice to the Contractor on the Health and Safety requirements during construction.
4. Provide advice on cost control systems as may be required by the Contractor for estimating, budgeting and cost reporting purposes.
5. Attend the appropriate planning, co-ordination and management meetings as an observer.
6. Monitor skills development progress of the Contractor throughout the Construction Mentorship programme.
7. Provide advice and contact particulars of relevant training courses provided others that are appropriate for the Contractor's level of expertise.

7. Advise the Contractor on site establishment including the provision of all Necessary temporary services, storage facilities, security requirements and other site requirements
9. Advise Contractor on all matters relating to the project.

#### **Deliverables**

- Proposed Construction Method Statements drawn up by the Contractor
- Appropriate cost control systems implemented within the Contractor's organisation
- Efficient utilisation of personnel, materials and resources in the delivery of the construction works project
- Personnel employed with the requisite competencies and skills for a Contractor of that size.

### **2.2.4 ACTIVITY 4 – MONITORING OF CONTRACTOR SKILLS ASSESSMENT**

#### **Definition**

The process of establishing and implementing effective and appropriate monitoring systems to measure the development of the Contractor's skills and capabilities.

#### **Standard Services**

1. Select, recommend and agree the monitoring strategy for the Contractor.
2. Monitor the preparation and implementation of the Health and Safety requirements the project
3. Monitor the ability of the Contractor to manage the preparation and submission of a Tender
4. Monitor the ability of the Contractor to prepare and agree the Project Programme including the scheduling of sub-contractors.
5. Monitor the Contractor's ability to effectively manage the process for procurement of sub-contractors and suppliers in accordance with agreed procedures, including calling for tenders, evaluation of tenders, and award of sub-contracts and supplier agreements.

#### **Deliverables**

- Monitoring strategy
- List of properly appointed sub-contractors and suppliers
- Schedule of Health and Safety requirements
- Project programme

## 2.2.5 ACTIVITY 5 – FINANCIAL CONTROLS AND MANAGEMENT

### Definition

The process of establishing and implementing effective and appropriate financial controls in order that the Contractor can efficiently manage project-level as well as company-level finances.

### Standard Services

1. Analyse project risks and finalise tender submissions
2. Calculate and determine project cashflow requirements
3. Identify and implement appropriate project cost control measures for different site Operations
4. Project financial reporting on a regular basis
4. Composite control of multiple project cashflow requirements from a company perspective.
6. Financial controls required to balance project cashflow requirements on a continuous basis
7. Preparation of annual financial statements

### Deliverables

- Project cash flow that relates to the construction programme, costs and revenue
- Risk matrix identifying the financial impacts of a project prior to tender submission
- Project cost control systems appropriate to the nature of the project
- Regular project cost reports indicating costs, profits and reasons for any variation from the projected cash flow.
- Annual financial statements for the company

## 2.2.6 ACTIVITY 6 - CONSTRUCTION DOCUMENTATION AND MANAGEMENT

### Definition

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

**Standard Services**

1. Assist the Contractor to plan, price, estimate and submit tender proposals.
2. Advise the Contractor on appropriate industry associations that they should join, along with the advantages of membership.
3. Facilitate the Contractor's compliance with statutory requirements.
4. Facilitate the management of the preparation and agreement of the Health and Safety Plan with the Client's Health and Safety Consultants and sub-contractors.
5. Facilitate the establishment and maintenance of regular monitoring of all line, level and datum of the works.
6. Facilitate the continuous monitoring the compliance by the site management of the Health and Safety Plan.
7. Advise the Contractor on the provision of the necessary documentation as Required by Health and Safety Consultant for the Health and Safety File.
8. Advise the Contractor on the implementation of the requirements of the Environmental Management Plan.
9. Advise the Contractor on how to appoint subcontractors and suppliers including the finalization of all agreements.
10. Facilitate the receipt, co-ordination, review and approval of all contract Documentation provided by the sub-contractors and suppliers for Compliance with all of the contract requirements.
11. Advise the Contractor on how best to monitor the ongoing projects Insurance requirements.
12. Advise the Contractor on how to facilitate and manage the establishment of sub-contractors on the site.
13. Advise the Contractor on how to finalize and agree the Quality Assurance Plan with the design consultants and sub-contractors
14. Advise the Contractor on how to continuously monitor the compliance of the quality of the works in accordance with the agreed Quality Assurance Plan.
15. Advise the Contractor on how to establish and co-ordinate the formal and Informal communication structure and procedures for the construction process
16. Advise the Contractor on how to regularly facilitate and record the necessary construction management meetings including sub-contractors, suppliers, programme, progress and cost meetings



17. Advise the Contractor on how to finalize and agree the contract programme and revisions thereof as necessary.
18. Advise the Contractor on how to prepare and finalize the detailed Construction Programme including resources planning
19. Advise the Contractor on how to prepare and agree an Information Schedule for timely implementation of construction.
20. Advise the Contractor on how to continuously manage the review of construction documentation and information for clarity of construction requirements.
21. Advise the Contractor on how to manage and administer the distribution of Construction information to all relevant parties.
22. Advise the Contractor on how to continuously monitor the construction progress
23. Advise the Contractor on how to manage the review and approval of all necessary shop details and product proprietary information by the design sub-contractors.
24. Advise the Contractor on how to review and substantiate circumstances and Entitlements that may arise from any changes required to the Contract Programme
25. Advise the Contractor on how to establish procedures for, and monitor all scope and cost variations
26. Advise the Contractor on how to manage the preparation of monthly progress claims for Payment
27. Advise the Contractor on how to receive, review and substantiate any contractual claims within the prescribed period
28. Advise the Contractor on how to regularly prepare and submit a Construction Status Report, including construction financial status report
29. Advise the Contractor on how to manage, co-ordinate and supervise all work on and off site.
30. Advise the Contractor on how to manage and co-ordinate the requirements of the direct contractors if required to do so.
31. Advise the Contractor on how to manage, co-ordinate and monitor all necessary testing and commissioning.
32. Advise the Contractor on how to co-ordinate, monitor and expedite the timely rectification of all defects for the achievement of Practical Completion.

**Deliverables**

- Health and Safety Plan
- Site establishment Plan
- Signed Sub-contract Agreements
- Quality Assurance Plan
- Construction Communication Organogram
- Record of Construction Meetings
- Agreed Contract Programme
- Agreed Construction Documentation Schedule
- Detailed Construction Programme including Resource Plan
- Design drawings, shop details and proprietary product information
- Monthly progress payment claims
- Construction Status Reports

**2.2.7 ACTIVITY 7 - 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**

1. Co-ordinate, monitor and expedite the timeous rectification of all defects for the achievement of Works Completion.
2. Manage, co-ordinate and expedite the preparation by the relevant sub-contractors of all as-built drawings and construction documentation
3. Manage and expedite the procurement of all operating and maintenance manuals as well as all warranties and guarantees
4. Manage and expedite the procurement of applicable statutory compliance certificates and documentation
5. Manage the finalization of the Health and Safety File for submission to the Health and Safety Consultant.
6. Co-ordinate, monitor and manage the rectification of defects during the Defects Liability Period.
8. Manage, co-ordinate and expedite the preparation and agreement of the final accounts with the cost consultants and all subcontractors
9. Co-ordinate, monitor and expedite the timeous rectification of all defects for The achievement of Final Completion.
10. Prepare and present Contract Closeout Report
11. Advise the Contractor on how to upgrade their CIDB Contractor Grading Designation.

**Deliverables**

- Health and Safety File
- Contract Closeout Report

**3. PROPOSED FEE SCALE PRINCIPLES FOR PROFESSIONAL CONSTRUCTION MENTORS****3.1 PRINCIPLES UPON WHICH THE FEE SCALES ARE BASED**

Construction Mentorship is a different service to that provided by Construction Managers or Construction Project Managers. Whilst a Construction Mentor should have experience and expertise similar to the Construction Project Manager, they are not responsible for the delivery of the project works, but rather to support improved contractor performance.

It is proposed that the fee scale be adjusted to a level that reflects the responsibility of the Construction Mentor in delivery of the works. Since the Construction Mentor is responsible for the provision of advice only, the payment of a fee in relation to the value of the works constructed is non-sensical. The amount of effort in providing advice has a relation more to the learner contractor's level of skill than the size of project.

It should also be noted that Construction Mentors will be appointed by contractors as well as public and private sector employer bodies. Where the public sector bodies appoint a Construction Mentor, they will typically do so in terms of a development programme where there is budget specifically allocated for mentorship services. This scenario requires a guideline to identify whether the Mentorship Services are at a reasonable level.

Construction Mentorship services are measured by the time spent on advising and assisting the learner contractor. The fee scale should therefore only be a time based, maximum hourly rate.

**3.2 COMPARISON WITH TIME RELATED FEE SCALE FOR CONSTRUCTION MANAGERS**

The levels indicated in the Guideline Scope of Services and Tariff of Fees For Persons Registered in terms of the Project and Construction Management Professions Act, 2000, the following categories are identified for time-based fees :

1. To determine the time based fee rates the persons concerned are divided into:-
2. Category A, in respect of a private consulting practice in construction project management, shall mean a top practitioner whose expertise and relevant experience is nationally or internationally recognized and who provides advice at a level of specialization where such advice is recognized as that of an expert

3. Category B, in respect of a private consulting practice in construction project management, shall mean a partner, a sole proprietor, a director, or a member who, jointly or severally with other partners, co-directors or co-members, bears the risks of the business, takes full responsibility for the liabilities of such practice, where level of expertise and relevant experience is commensurate with the position, performs work of a conceptual nature in project management

4. Category C, in respect of a private consulting practice in construction project management, shall mean all salaried professional staff with adequate expertise and relevant experience performing project management work and who carry the direct responsibility for one or more specific activities related to a project

5. Category D, in respect of a private consulting practice in construction project management, shall mean all other salaried technical staff with adequate expertise and relevant experience performing project management work with direction and control provided by any person contemplated in categories A, B or C

These categories are similar to those defined for other Built Environment professionals by other councils.

The rates stipulated for Construction Management Professionals are as follows:

The scale of fees on a time basis, on which Value Added Tax is excluded, shall be at the following rates per hour, rounded of to the nearest rand:

i. for a person in category A and B: 18,75 cents for each R100,00 of the total annual remuneration package (lowest notch) attached to a Director's grading (level 13) in the Public Service

ii. for a person in category C: 17,5 cents for each R100,00 of the total annual remuneration package (lowest notch) attached to a Deputy Director's grading (level 12) in the Public Service;

iii. for a person in category D: 16,5 cents for each R100,00 of his/her total annual cost of employment; provided that this hourly rate shall not exceed 16,5 cents for each R100,00 of the total annual remuneration package (lowest notch) attached to a Assistant Director's grading (level 11) in the Public Service;

iv. hourly rates calculated in terms of (i), (ii) and (iii) above shall be deemed to include overheads and charges in respect of time expended by clerical personnel which shall, therefore, not be chargeable separately;

v. unless otherwise specifically agreed in writing, remuneration for the time expended by principals in terms of (i) above on a project shall be limited to 5 percent of the total time expended on the project. Any time expended by principals in excess of the 5 per cent limit shall be remunerated at the rates determined in (ii) or (iii) above

This translates to the following Rand value rates, based on the currently used Government salary levels :

Category	Rate of fee (cents per hundred rands of salary)	Public Service Level	Annual salary (2008)	Max Hourly Rate	Recommended Rate for Construction Mentors
				<i>70% of the current published rate</i>	
A	18.75	Director	R 540 429	R 1 013	R 709
B	18.75	Director	R 540 429	R 1 013	R 709
C	17.5	Deputy Director	R 369 000	R 646	R 452
D	16.5	Assistant Director	R 196 815	R 325	R 228

### 3.3 EXPENSES AND COSTS

For disbursements and for reasonable traveling and subsistence expenses additional payment shall be claimed over and above the fee payable under any other provision of this Tariff of Fees.

Recoverable expenses include:

- Traveling expenses for the conveyance of the construction mentor by means of :
  - private motor transport, including any parking charges, toll fees and related expenses;
  - a scheduled air line or a train, bus, taxi or hired car; or
  - non-scheduled or privately owned air transport.
- Traveling time on the basis of the rate set out in Clause 10, for all time spent in traveling by the construction mentor shall be as follows :
  - when fees are paid on a time basis, all hours spent on traveling are reimbursable.
  - when fees are paid on a percentage basis, reimbursement for traveling time shall be for all time spent in traveling minus the first hour per return journey.
- Accommodation and subsistence expenses incurred by the construction mentor;
- Agreed costs of typing, production, copying and binding of contract documents, pre qualification documents, feasibility reports, preliminary design reports, final reports and manuals, excluding general correspondence, minor reports, contractual reports, progress reports, etc.
- Expenses on special reproductions, copying, printing, artwork, binding and photography, etc. requested by the client.

Alternatively, a lump sum or percentage of the total fees payable to the construction mentor may be determined and agreed between the construction mentor and the client to cater for all or any of the above.

**SCHEDULE 1**

To be published with the new registrations policy soon.

**SCHEDULE 2****THE SOUTH AFRICAN COUNCIL FOR THE PROJECT AND CONSTRUCTION  
MANAGEMENT PROFESSIONS****FEES**

	<b>PROFESSIONAL</b>
APPLICATION FEE (non-refundable)	R 342.00
REGISTRATION FEE	R 228.00
ANNUAL FEE	R1 456.92
APPEAL FEE	R 342.00
EXAMINATION FEE	R 855.00* <b>per module</b>

**Assessment of professional competency by interview R 456.00\***

**All costs are inclusive of VAT.**

**\* If determined by Registration Committee to be necessary.**

**SCHEDULE 3**

**SACPCMP**  
THE SOUTH AFRICAN COUNCIL FOR THE PROJECT AND  
CONSTRUCTION MANAGEMENT PROFESSIONS

THIS IS TO CERTIFY THAT

\_\_\_\_\_

IS REGISTERED AS

\_\_\_\_\_

*IN TERMS OF THE PROJECT AND CONSTRUCTION MANAGEMENT  
PROFESSIONS ACT (ACT No. 48 OF 2000)*

DATE OF FIRST REGISTRATION

\_\_\_\_\_

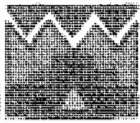
REGISTRATION NUMBER

\_\_\_\_\_

*This certificate remains the property of the SACPCMP and is subject to verification with the SACPCMP.  
If the name of the holder of this certificate is removed from the Register, this certificate will, in terms of section 20.1 (b),  
be deemed to be cancelled as from the date of deletion.*

\_\_\_\_\_

PRESIDENT



\_\_\_\_\_

REGISTRAR



# BOARD NOTICE

## BOARD NOTICE 87 OF 2008

**The South African Council for the Project and Construction Management Professions  
(SACPCMP)**

**Recommended identification of work for the Construction Project Managers and the  
Construction Managers in terms of section 26(1) of the Project and Construction  
Management Professions Act, 2000  
(Act No. 48 of 2000)**

Written comments and inputs are invited by the SACPCMP from all Voluntary Associations, any person, a body and/or an industry that will be affected by the recommended identification of work for the two Professions. Submissions should be made to:

Via Post:

The Registrar  
SACPCMP  
P.O. Box 6286  
Halfway House  
1685

Hand delivery address:

B9 International Business Gateway  
Corner New and 6<sup>th</sup> Road  
Midrand  
1685

TEL: 011 318 3402/3/4

FAX: 011 318 3405

**CLOSING DATE: BEFORE OR ON 23 OCTOBER 2008**

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## 1 Definitions

“**Built Environment**” refers to the functional area in which registered persons practice. The Built Environment includes all structures that are planned and/or erected above or underground, as well as the land utilized for the purpose and supporting infrastructure.

“**Construction Management Work**” means the work identified under section 4 of this document.

“**Construction Management**” is the management of the *physical construction process* within the built environment and includes the co-ordination, administration, and management of resources. The Construction Manager is the one point of responsibility in this regard.

“**Construction Programme**” is the programme for the works indicating the logic sequence and duration of all activities to be completed by the contractors, subcontractors, and suppliers, in appropriate detail, for the monitoring of progress of the works.

“**Construction Project Management Work**” means the work identified under section 4 of the Identification of Work document for Construction Project Managers

“**Construction Project Management**” is the management of projects within the built environment *from conception to completion, including management of related professional services*. The Construction Project Manager is the one point of responsibility in this regard.

“**Contract programme**” is the construction programme for the works agreed between the contractor and the Principal Agent.

“**Contractor**” means any person or legal entity entering into contract with the client for the execution of the **works** or part thereof.

“**Cost Consultant**” means the person or entity appointed by the client to establish and agree all budgets and implement and manage the necessary cost control on the project.

“**Direct Contractors**” are contractors appointed by the client to execute work other than the works.

“**Documentation programme**” is schedule prepared by the Principal Consultant and agreed to by other consultants indicating the timeous provision of all necessary design documentation required by the contractors and subcontractors for the construction of the works.

“**Domestic Subcontractors**” are specialists and other subcontractors executing work or supplying and fixing any goods and who are selected by the contractor.

“**Improper Conduct**” as contemplated in section 27(3) of the Project and Construction Management Professions Act, means failure to comply with the code of conduct for registered persons.

“**Nominated Subcontractors**” are specialists and other subcontractors executing work or supplying and fixing any goods who may be nominated by the Principal Consultant.

“**Principal Consultant**” means the person or entity appointed by the client to manage and administer the services of all other consultants.

**“Principal Agent”** means the person or entity appointed by the client and who has full authority and obligation to act in terms of the construction contracts.

**“Procurement Programme”** is the programme indicating the timeous purchasing requirements for the project, including, but not limited to, the services of consultants, contractors, subcontractors, and suppliers required for the execution of the project programme.

**“Project and Construction Management Professions Act”** means the Project and Construction Management Professions Act, 2000 (Act No. 48 of 2000).

**“Project Initiation programme”** is the programme devised by the Principal Consultant in consultation with the client and other consultants for all the work necessary to be completed prior to commencement of work by the contractors.

**“Project”** means the total development envisaged by the client, including the professional services.

**“Public”** means any person or group of persons who is, or whose environment is, either directly or indirectly affected by any project and construction management activity, or by a product, outcome or influence of a project and construction management activity, which may impact on the health, safety and interest of such person or group of persons.

**“Selected Subcontractors”** are specialists and other subcontractors executing work or supplying and fixing any goods and who are selected by the contractor in consultation with the Principal Consultant.

**“Substantially Practise”** means regularly and consistently carry out project and construction management work identified in section 4 of this document, and charging professional fee for such work and accruing professional responsibility to a client or an employer for the performance of such functions.

**“Suppliers”** mean a person or entity appointed by the client to supply goods and products for incorporating into the works.

**“The Council”** means the Council for the Built Environment established under section 2 of the Council for the Built Environment Act, 2000 (Act No 43 of 2000)

**“The South African Council for the Project and Construction Management Professions’** means the South African Council for the Project and Construction Management Professions established by section 2 of the Project and Construction Management Professions Act, 2000 (Act No. 48 of 2000), and **“SACPCMP”** has the same meaning.

**“Works”** means all work executed or intended to be executed in accordance with the construction contracts.

## **1 BACKGROUND INFORMATION TO THE IDENTIFICATION OF WORK**

### **1.1 Description of the profession**

***“Describe the professions role within the generic built environment process”***

The role played by both the Professional Construction Manager and the Professional Construction Project Manager is to provide leadership and management of the construction process from conception to commissioning. The profession seeks to co-ordinate the activities of the professional team, construction team and all role players in an integrated manner to maximise resources. The Professions lead by planning, scheduling, communicating and motivating all team members to achieve a common set of objectives whilst leading and building team work.

### **1.2 Description of the services offered by the Professions**

#### **2.2.1 The Professional Construction Project Manager offers the following services :**

- A. 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.
- B. Finalization of the project concept and feasibility
- C. Manage, co-ordinate and integrate the detail design development process within the project scope, time, cost and quality parameters.
- D. The process of establishing and implementing procurement strategies and procedures, including the preparation of necessary documentation, for effective and timeous execution of the project
- E. 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
- F. 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

#### **2.2.2. The Professional Construction Manager offers the following services :**

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

- B. *The process of establishing and implementing procurement strategies and procedures, including the preparation of necessary documentation, for effective and timeous execution of the project*
- C. *The management and administration of the construction contracts and process, including the preparation and co-ordination of the necessary documentation to facilitate effective execution of the works*
- D. *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.*

#### **2.2.3. Candidate Construction Project Manager**

Perform work as detailed under 2.2.1 under the guidance of the Professional Construction Project Manager as stipulated in section 26(4) of the Act.

#### **2.2.4. Candidate Construction Manager**

Perform work as detailed under 2.2.2 under the guidance of the Professional Construction Project Manager as stipulated in section 26(4) of the Act.

## 2 NATURE OF WORK, DUTIES, SKILLS AND COMPETENCIES FOR THE PROFESSIONS

*"Describe the categories of professions recognised by the BEC, the nature of work performed by each category and the duties and responsibilities involved; and the minimum skills and competencies required to carry out such work"*

### 3.1. Categories of Professionals

- A. Professional Construction Project Manager
- B. Professional Construction Manager
- C. Candidate Construction Project Manager
- D. Candidate Construction Manager

### 3.2. Entry requirements for each category

Category	Entry requirement	Nature of work performed by the categories
Professional Construction Project Manager	A relevant four year qualification in the Built Environment with three years experience in the field of Construction Project Management field.	All work identified under 7 below in combination as the Professional manages the total Project life cycle from conception to completion including management of related Professional services.
Professional Construction Manager	A relevant four year qualification in the Built Environment with three years experience in the field of Construction Management field.	All work identified under 8 below in combination to manage the physical construction process including the co-ordination, administration and management of resources:
Candidate Construction Project Manager	A relevant four qualification in the Built Environment	All work identified under 7 below in combination under the supervision and control of the Professional Construction Manager from conception to completion including management of related Professional services.
Candidate	A relevant four qualification in the Built	All work identified under 8 below under the supervision and control of

Construction Manager	Environment	the Professional Construction Manager in combination to manage the physical construction process including the co-ordination, administration and management of resources:
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### 3.3. Duties and responsibilities involved for each category

Refer to 7 and 8, below for the standard services offered by the Professions.

### 3.4 Specific Skills and competencies required for the Professions

#### 3.4.1 Professional Construction Project Manager

##### Technical Competencies

- Knowledge of Construction Science
  - Understanding Structures
  - Understanding Construction and Building Sciences
  - Understanding Construction and Building Finishes
  - Knowledge of Building Materials
- Knowledge of Construction Processes
  - Site, Plant and Equipment
  - Formwork Systems
  - Quality Management
  - Health and Safety Management
  - Environmental Management
  - Organisational / Management Structures
  - General Building Sequences
  - General Output and Production Factors
  - Basic Knowledge of Building Trades
- Knowledge of the Design Processes
  - Sequence of Design Processes



- Time Required for Design Processes
- Knowledge of Financial and Cost Factors
  - Financial Processes
  - Cost of Construction

#### **Project Management Competencies**

##### **As Principal Consultants the CPM should have the Knowledge and Ability to:**

- Facilitate the development of a Clear Brief
- Clearly Define the Roles and Responsibilities of the Consulting Team
- Prepare Letters of Appointment for the procurement of Consulting Team.
- Establish and implement Time Management Processes on Projects with respect to and not limited to the following;
  - Prepare, Co-ordinate and Monitor a Project Initiation Programme
  - Prepare Indicative Construction Programme
  - Prepare Documentation Programme/Schedule
  - Prepare Procurement Programme/Schedule
  - Agreed Contract Programme
  - Co-ordinate Documentation Programme with Contract Programme
- Establish and recommend Professional Indemnity requirements
- Monitor and co-ordinate quality management of the design processes
- Establish and implement Communication Management Processes including the preparation of agenda, chairing and preparing minutes of all necessary meetings on the project.
- Co-ordinate and monitor cost control by the Cost Consultant
- Co-ordinate and monitor the preparation of Procurement documentation
- Facilitate and Monitor the preparation of the Health and Safety specifications
- Facilitate the preparation of all conditions of contracts
- Manage the pre-qualification, tendering, adjudication, recommendation and appointment processes

##### **As Principal Agent the CPM should have :-**

- The ability to take responsibility for and perform the role of Principal Agent on construction contracts.
- Knowledge and understanding of the Basic Principles of Law of Contracts
- Knowledge and understanding of Construction Contracts.
- The ability to build good relationships between client, consulting and construction teams.
- The ability to establish and implement Time Management Processes on contracts with respect to and not limited to the following;
  - Agree and monitor contract programme and working programmes.
  - Monitor and review construction progress and programme updates.
- The ability to establish and implement Quality Management Processes on contracts including quality control by the consulting and contracting teams.
- The ability to establish and implement Cost Management Processes on contracts including the issuing, costing and implementation of site instructions and variations.
- The ability to co-ordinate and monitor interface between all contractors.
- The ability to facilitate and monitor implementation of Health and Safety Plan.
- The ability to facilitate and co-ordinate the production of the Health and Safety File.
- The ability to manage, resolve and certify progress and contractual claims.
- The ability to co-ordinate and monitor completion and handover processes including and not limited to :
  - Oversee and co-ordinate preparation and issue of defects lists.
  - Monitor implementation of remedial work by contractors
  - Oversee and facilitate the agreement of final accounts
  - Expedite and co-ordinate project close out

### **3.4.2 Professional Construction Manager**

#### **Technical Competencies**

- Knowledge of Construction Science
  - Understanding Structures
  - Understanding Construction and Building Sciences

- Understanding Construction and Building Finishes
- Knowledge of Building Materials
- Knowledge of Construction Processes
  - Site, Plant and Equipment
  - Formwork Systems
  - Quality Management
  - Health and Safety Management
  - Environmental Management
  - Organisational / Management Structures
  - General Building Sequences
  - General Output and Production Factors
  - Basic Knowledge of Building Trades
- Knowledge of the Design Processes
  - Sequence of Design Processes
  - Time Required for Design Processes
- Knowledge of Financial and Cost Factors
  - Financial Processes
  - Cost of Construction

#### **Construction Management Competences**

- Knowledge and understanding of the Basic Principles of Law of Contracts
- Knowledge and understanding of Construction Contracts.
- The ability to build good relationships between the consulting team and construction teams.
- The ability to establish and implement Time Management Processes on contracts with respect to and not limited to the following :
  - Agree and monitor contract programme and working programmes.
  - Monitor and review construction progress and programme updates.
- The ability to establish and implement Quality Management Processes on contracts including quality control by the contracting teams.

- The ability to establish and implement Cost Management Processes on contracts including the costing and implementation of site instructions and variations.
- The ability to co-ordinate and monitor interface between all contractors and subcontractors.
- The ability to facilitate and monitor implementation of Health and Safety Plan.
- The ability to facilitate and co-ordinate the production of the Health and Safety File.
- The ability to manage the preparation and submission of progress and contractual claims.
- The ability to co-ordinate and monitor completion and handover processes including and not limited to :
  - Monitor implementation of remedial work by contractors and subcontractors
  - Facilitate the agreement of final accounts
  - Expedite and co-ordinate contract close out
- Knowledge of regulations relating to the Built Environment industry.

#### **3.4.3 Candidate Construction Project Manager**

Refer to 3.4.1

#### **3.4.4 Candidate Construction Manager**

Refer to 3.4.2

### **3 LEGISLATIVE PROVISIONS**

#### **3.1 *The legislation that governs the Professions***

The Project and Construction Management Professions Act, 48 of 2000 regulates the two professions Construction Project Management and the Construction Manager.

#### **3.2 *Provisions of the Act***

In terms of the process, the Act provides that (i) the Council must consult with the Voluntary Associations, any person, body or industry to identify the type of work performed by the Construction Project Manager, the Construction Manager and any specified categories as prescribed by the Council from time to time and that (ii) the Council should submit recommendations to CBE for consideration after the process of consultation.

Fundamentally, the Act 48 of 2000 provides that a person who is not registered may not do the following:

- Perform any kind of work identified for any category of registered persons,
- Pretend to be, or in any manner hold or allow himself or herself to be held out as a person registered in terms of the Act, 48 of 2000.
- Use the name of any registered person or any name or title referred to in section 18 or 21.
- Perform any act indicating or calculated to lead persons to believe, that he or she is registered in terms of the Act.

There is a further provision that seems to counter the foregoing in that it should not be construed as prohibiting any person from performing work identified for the Construction Manager and Construction Project Manager, provided that the person performs the work in the service of, or by order of, and under the direction, control, supervision of, or in association with a registered person entitled to perform the work identified and who must assume responsibility for any work so performed.

#### **5. PROFESSIONS THAT CARRY OUT WORK SIMILAR IN NATURE TO THAT IDENTIFIED IN (2) ABOVE**

There is no other Profession that performs work identified for the two Professions except that in most cases the Engineering Professions, Quantity surveying Professions and the Architectural Professions carry out part of the work similar to that identified for the Construction Project Manager and the Construction Manager as part of work performed in their Professions.

#### **6. TYPICAL CLIENTS FOR THE PROFESSIONS**

The typical clients for the Construction Project Manager and the Construction Manager ranges from private clients, public sector and private sector clients depending on the need.

## **7. IDENTIFIED WORK TO BE RESERVED FOR PROFESSIONAL CONSTRUCTION PROJECT MANAGER**

### **7.1. As a Principal Consultant**

7.1.1 Facilitate the development of a Clear Project Brief

7.1.2. Establish the client's Procurement Policy for the Project

7.1.3 Assist the client in the procurement of the necessary and appropriate consultants including the clear definition of their roles, responsibilities and liabilities.

7.1.4 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

7.1.5 Manage the integration of the preliminary design to form the basis for the initial viability assessment of the project

7.1.6 Prepare, co-ordinate and monitor a Project Initiation Programme

7.1.7 Facilitate the preparation of the Preliminary Viability Assessment of the project

7.1.8 Facilitate client approval of all Stage 1 documentation

7.1.9 Assist the client in the procurement of the necessary and appropriate consultants including the clear definition of their roles, responsibilities and liabilities

7.1.10 Advise the client on the requirement to appoint a Health and Safety Consultant

7.1.11 Communicate the project brief to the consultants and monitor the development of the Concept and Feasibility within the agreed brief

7.1.12 Co-ordinate and integrate the income stream requirements of the client into the concept design and feasibility

7.1.13 Agree the format and procedures for cost control and reporting by the cost consultants on the project

7.1.14 Manage and monitor the preparation of the project costing by other consultants

7.1.15 Prepare and co-ordinate an Indicative Project Documentation and Construction Programme

7.1.16 Manage and integrate the concept and feasibility documentation for presentation to the client for approval

7.1.17 Facilitate client approval of all Stage 2 documentation

7.1.18 Assist the client in the procurement of the balance of the consultants including the clear definition of their roles, responsibilities and liabilities

7.1.19 Establish and co-ordinate the formal and informal communication structure, processes and procedures for the design development of the project

- 7.1.20 Prepare, co-ordinate and agree a detailed Design and Documentation Programme, based on an updated Indicative Construction Programme, with all consultants
- 7.1.21 Manage, co-ordinate and integrate the design by the consultants in a sequence to suit the project design, documentation programme and quality requirements
- 7.1.22 Conduct and record the appropriate planning, co-ordination and management meetings
- 7.1.23 Facilitate any input from the design consultants required by Construction Manager on constructability.
- 7.1.24 Facilitate any input from the design consultants required by Health and Safety consultant
- 7.1.25 Manage and monitor the timeous submission by the design team of all plans and documentation to obtain the necessary statutory approvals
- 7.1.26 Establish responsibilities and monitor the information flow between the design team, including the cost consultants.
- 7.1.27 Monitor the preparation by the cost consultants of cost estimates, budgets, and cost reports
- 7.1.28 Monitor the cost control by the cost consultants to verify progressive design compliance with approved budget, including necessary design reviews to achieve budget compliance
- 7.1.29 Facilitate and monitor the timeous technical co-ordination of the design by the design team
- 7.1.30 Facilitate client approval of all Stage 3 documentation

## **7.2 As Principal Agent**

- 7.2.1 Select, recommend and agree the Procurement Strategy for contractors, sub-contractors and suppliers with the client and consultants
- 7.2.2 Prepare and agree the Project Procurement Programme.
- 7.2.3 Co-ordinate and monitor the preparation of the tender documentation by the consultants in accordance with the Project Procurement Programme
- 7.2.4. Facilitate and monitor the preparation by the Health and Safety Consultant of the Health and Safety Specification for the project
- 7.2.5. 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
- 7.2.6 Advise the client, in conjunction with other consultants on the appropriate insurances required for the implementation of the project
- 7.2.7 Monitor the reconciliation by the cost consultants of the tender prices with the project budget
- 7.2.8 Agree the format and procedures for monitoring and control by the cost consultants of the cost of the works
- 7.2.9 Facilitate client approval of the tender recommendation(s)

- 7.2.10 Appoint contractor(s) on behalf of the client including the finalization of all agreements
- 7.2.11 Instruct the contractor on behalf of the client to appoint subcontractors
- 7.2.12 Receive, co-ordinate, review and obtain approval of all contract documentation provided by the contractor, sub-contractors, and suppliers for compliance with all of the contract requirements
- 7.2.13 Monitor the ongoing projects insurance requirements
- 7.2.14 Facilitate the handover of the site to the contractor
- 7.2.15 Establish and co-ordinate the formal and informal communication structure and procedures for the construction process
- 7.2.16 Regularly conduct and record the necessary site meetings
- 7.2.17 Monitor, review and approve the preparation of the Contract Programme by the contractor
- 7.2.18 Regularly monitor the performance of the contractor against the Contract Programme
- 7.2.19 Review and adjudicate circumstances and entitlements that may arise from any changes required to the Contract Programme
- 7.2.20 Monitor the preparation of the Contractor's Health and Safety Plan and approval thereof by the Health and Safety Consultant.
- 7.2.21 Monitor the auditing of the Contractors' Health and Safety Plan by the Health and Safety Consultant
- 7.2.22 Monitor the compliance by the Contractors of the requirements of the Health and Safety Consultant
- 7.2.23. Monitor the production of the Health and Safety File by the Health and Safety Consultant and contractors
- 7.2.24 Monitor the preparation by the Environmental Consultants of the Environmental Management Plan
- 7.2.25 Establish the construction information distribution procedures
- 7.2.26 Agree and monitor the Construction Documentation Schedule for timeous delivery of required information to the contractors
- 7.2.27 Expedite, review and monitor the timeous issue of construction information to the contractors
- 7.2.28 Manage the review and approval of all necessary shop details and product propriety information by the design consultants
- 7.2.29 Establish procedures for monitoring, controlling and agreeing all scope and cost variations
- 7.2.30 Agree the quality assurance procedures and monitor the implementation thereof by the consultants and contractors
- 7.2.31 Monitor, review, approve and certify monthly progress payments
- 7.2.32 Receive, review and adjudicate any contractual claims
- 7.2.33 Monitor the preparation the preparation of monthly cost reports by the cost consultants



- 7.2.34 Monitor long lead items and off-site production by the contractors and suppliers
- 7.2.35 Prepare monthly project reports including submission to the client
- 7.2.36 Manage, co-ordinate and monitor all necessary testing and commissioning by consultants and contractors
- 7.2.37 Co-ordinate, monitor and issue the Practical Completion Lists and the Certificate of Practical Completion
- 7.2.38 Co-ordinate and monitor the preparation and issue of the Works Completion List by the consultants to the contractors
- 7.2.39 Monitor the execution by the contractors of the defect items to achieve Works Completion
- 7.2.40 Facilitate and co-ordinate adequate access with the occupant for the rectification of defects by the contractors

### **7.3 As Consultant**

- 7.3.1 Issue the Works Completion Certificate
- 7.3.2 Manage, co-ordinate and expedite the preparation by the design consultants of all as-built drawings and design documentation
- 7.3.3 Manage and expedite the procurement of all operating and maintenance manuals as well as all warranties and guarantees
- 7.3.4 Manage and expedite the procurement of all statutory compliance certificates and documentation
- 7.3.5 Manage the finalization of the Health and Safety File for submission to the Client
- 7.3.6 Co-ordinate, monitor and manage the rectification of defects during the Defects Liability Period
- 7.3.7 Manage, co-ordinate and expedite the preparation and agreement of the final account by the cost consultants with the relevant contractors
- 7.3.8 Co-ordinate, monitor and issue the Final Completion Defects list and Certificate of Final Completion
- 7.3.9 Prepare and present Project Closeout Report

## **8. IDENTIFIED WORK TO BE RESERVED FOR PROFESSIONAL CONSTRUCTION MANAGER**

- 8.1 Define and agree preliminary scope of construction works.
- 8.2 Prepare Preliminary Construction Programme
- 8.3 Provide the necessary lead times required to prepare a detailed Design and Documentation Programme.

- 8.4 Review and recommend practical and cost effective construction alternatives to consultants' designs
- 8.5 Attend the appropriate planning, co-ordination and management meetings as required.
- 8.6 Review designs by consultants in relation to constructability requirements
- 8.7 Review designs by consultants in relation to Health and Safety requirements during construction and provide input if required on related practical and cost issues
- 8.8 Provide detailed cost information as required by the cost consultant for estimating, budgeting and cost reporting purposes
- 8.9 Prepare and submit a proposed method statement for the construction of the works
- 8.10 Review and confirm the Construction Strategy and method for submission of the Tender
- 8.11 Prepare the Construction Management organogram and obtain commitment from appropriate staff as required
- 8.12 Select, recommend and agree the procurement strategy for subcontractors and suppliers with the Principal Agent and consultants
- 8.13 Manage and co-ordinate the preparation and implementation of the Health and Safety requirements for inclusion in the tender
- 8.14 Manage and procure proposals for the appropriate contract insurances and guarantees required for the works
- 8.15 Review tender documentation to establish any cost effective alternative solutions
- 8.16 Manage the preparation and submission of the tender
- 8.17 Prepare and agree the Procurement Programme for sub-contractors and suppliers
- 8.18 Agree list of subcontractors and suppliers with the Principal Agent
- 8.19 Manage the tender process in accordance with agreed procedures, including calling for tenders, adjudication of tenders, and recommendation of appropriate domestic subcontractors and suppliers
- 8.20 Manage, co-ordinate and finalize negotiations on all contractual commitments
- 8.21 Manage the preparation and agreement of the Health and Safety Plan with the Client's Health and Safety Consultants and sub-contractors
- 8.22 Manage the site establishment including the provision of all necessary temporary services, storage facilities, security requirements and other site requirements
- 8.23 Establish and maintain regular monitoring of all line, level and datum of the works
- 8.24 Continuously monitor the compliance by the site management of the Health and Safety Plan
- 8.25 Provide the necessary documentation as required by the Health and Safety Consultant for the Health and Safety File
- 8.26 Manage the implementation of the requirements of the Environmental Management Plan

- 8.27 Appoint sub-contractors and suppliers including the finalization of all agreements
- 8.28 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
- 8.29 Monitor the ongoing projects insurance requirements
- 8.30 Facilitate and manage the establishment of subcontractors on the site
- 8.31 Finalize and agree the Quality Assurance Plan with the design consultants and sub-contractors
- 8.32 Continuously monitor the compliance of the quality of the works in accordance with the agreed Quality Assurance Plan
- 8.33 Establish and co-ordinate the formal and informal communication structure and procedures for the construction process
- 8.34 Regularly conduct and record the necessary construction management meetings including sub-contractors, suppliers, programme, progress and cost meetings
- 8.35. Finalize and agree the contract programme and revisions thereof as necessary.
- 8.36 Prepare and finalize the detailed Construction Programme including resources planning
- 8.37 Prepare and agree Information Schedule for timeous implementation of construction.
- 8.38 Continuously manage the review of construction documentation and information for clarity of construction requirements.
- 8.39 Manage and administer the distribution of construction information to all relevant parties.
- 8.40 Continuously monitor the construction progress
- 8.41 Manage the review and approval of all necessary shop details and product proprietary information by the design sub-contractors.
- 8.42 Review and substantiate circumstances and entitlements that may arise from any changes required to the Contract Programme
- 8.43 Establish procedures for, and monitor all scope and cost variations
- 8.44 Manage the preparation of monthly progress claims for payment
- 8.45 Receive, review and substantiate any contractual claims within the prescribed period
- 8.46 Regularly prepare and submit a Construction Status Report, including construction financial status report
- 8.47 Manage, co-ordinate and supervise all work on and off site
- 8.48 Manage and co-ordinate the requirements of the direct contractors if required to do so
- 8.49 Manage, co-ordinate and monitor all necessary testing and commissioning
- 8.50 Co-ordinate, monitor and expedite the timeous rectification of all defects for the achievement of Practical Completion

- 8.51 Co-ordinate, monitor and expedite the timeous rectification of all defects for the achievement of Works Completion
- 8.52 Manage, co-ordinate and expedite the preparation by the relevant subcontractors of all as-built drawings and construction documentation
- 8.53 Manage and expedite the procurement of all operating and maintenance manuals as well as all warranties and guarantees
- 8.54 Manage and expedite the procurement of applicable statutory compliance certificates and documentation
- 8.55 Manage the finalization of the Health and Safety File for submission to the Health and Safety Consultant.
- 8.56 Co-ordinate, monitor and manage the rectification of defects during the Defects Liability Period.
- 8.57 Manage, co-ordinate and expedite the preparation and agreement of the final accounts with the cost consultants and all subcontractors
- 8.58 Co-ordinate, monitor and expedite the timeous rectification of all defects for the achievement of Final Completion.
- 8.59 Prepare and present Contract Closeout Report

Type of work requiring identification	Reasons for the identification of the Work	Conditions for Identification of Work	Minimum competencies required to carry out the work	Lowest level of competency or category of professional eligible to carry out work	Any other profession carrying out the work?
<p><b>Construction Project Manager:</b></p> <p>All work identified under 7 above in combination as the Professional manages the total Project life cycle from conception to completion including management of related Professional services.</p>	<p>Work need to be identified and be reserved as</p> <p>(i) Some clients and the public have little understanding of the Professional's scope of services. The lack of understanding of the parameters on the part of the clients has an enormous adverse impact on the economy of the country. Reservation of work will ensure that unnecessary wastage is avoided.</p> <p>(ii) To minimise or completely circumvent vulnerability of clients. There is a likelihood of a high degree of unequal bargaining power between the consumers and the Professionals</p> <p>(iii) Sustainability on various dimensions will be addressed in particular, the environment so that the wellbeing of the future generations is not compromised.</p>	<ul style="list-style-type: none"> <li>• Where a multi-disciplinary team is involved in the construction process.</li> <li>• Where the cost is significantly high. The Council would not determine the threshold in terms of costs as there are other intricate factors such as complexity that poses as a threat if cost is considered in isolation.</li> <li>• and all projects that are highly complex.</li> </ul>	<p>A minimum of four years recognised qualification in the Built Environment and three years relevant experience.</p>	<p>A candidate Construction Project Manager needs to have four years qualifications with no experience. RPL may be considered within the approved SACPCMP RPL policy which is under development.</p>	<p>No any other Profession carries out the identified work in combination. The other Professions carry out parts of the type of work identified for the Construction Project Management.</p>

	(iv) Ensure that the constructed building adds value to the quality of life for the general public and not serve as a "white elephant".				
<p><b>Construction Manager:</b></p> <p>All work identified under 8 in combination to manage the physical construction process including the co-ordination, administration and management of resources:</p>	<p>Work need to be identified work and probably reserved due to</p> <p>(i) High impact on the part of the public as the health and safety of the general public is dependent on the proper execution of the work,</p> <p>(ii) Wastage on the construction processes may be avoided and directly contribute to a healthy state economy.</p> <p>(iii) Health and Safety of the construction workers. A healthy state will reduce state costs on social spending</p> <p>(iv) a likelihood of a high degree of unequal bargaining power between the consumers and the Professionals</p>	<ul style="list-style-type: none"> <li>• Where a multi-disciplinary team is involved in the construction process.</li> <li>• Where the cost is significantly high.</li> <li>• and in all projects that are highly complex.</li> </ul>	A minimum of four years recognised qualification in the Built Environment and three years relevant experience.	A candidate Construction Manager needs to have four years qualifications with no experience. RPL may be considered within the approved SACPCMP RPL policy which is under development.	No any other Profession carries out the identified work in combination. The other Professions carry out parts of the type of work identified for the Construction Management.

## 9. DEMARCATION OF WORK :

Which categories of professionals and/or levels of competency are eligible to carry out reserved work?

Lowest level of competency or category of professional eligible to carry out work	Certification/Qualification of category	Basis for demarcating work to that competency level/category (e.g., the complexity of the work, risk impact, cost, etc)	Nature of Work to be performed by the Professional	Specific skills and competencies required
Professional Construction Project Manager	A relevant Four years qualification in the Built Environment with three years experience in the field of Construction Project Management.	<ul style="list-style-type: none"> <li>• Complex construction works where a multi-disciplinary team is involved.</li> <li>• Significant costs</li> </ul>	Refer to 7 above	Refer to 3.4.1 above
Professional Construction Manager	A relevant Four years qualification in the Built Environment with three experiences in the field of Construction Management.	<ul style="list-style-type: none"> <li>• Complex construction works where a multi-disciplinary team is involved. The Construction Manager.</li> <li>• Risk impact and</li> <li>• Significant costs.</li> </ul>	Refer to 8 above	Refer to 3.4.2 above
Candidate Construction Project Manager	A relevant Four years qualification in the Built	<ul style="list-style-type: none"> <li>• Complex construction works where a multi-</li> </ul>	Refer to 7 above; Work is performed under the guidance,	Refer to 3.4.1 above

	Environment.	disciplinary team is involved. • Significant costs	control, direction and supervision of the Professional Construction Project Manager.	
Candidate Construction Manager	A relevant Four years qualification in the Built Environment.	• Complex construction works where a multi-disciplinary team is involved. The Construction Manager. • Risk impact and • Significant costs.	Refer to 8 above; work is performed under the guidance, control, direction and supervision of the Professional Construction Manager.	Refer to 3.4.2 above



## 10. BENEFITS FOR RESERVATION OF WORK

The identification of work and its reservation is necessary for benefit of the public as indicated below :

<b>Type of work requiring reservation :</b>
As described in the identification of work document. (All identified work in combination must be reserved)
<b>The qualitative and/or quantitative costs or risks of not reserving the work :</b>
<ul style="list-style-type: none"> <li>• Huge losses due to wastage and duplicates in the construction process</li> <li>• Significant down time due to unco-ordinated schedules and processes</li> <li>• High risk impact associated with non-performance or poor performance and the direct impact on the health and safety of the general public</li> <li>• Uncertainty of expected standards from professional service providers</li> </ul>
<b>The likely qualitative and/or quantitative costs of the proposed reservation of work, including the impact on the market for services and on competition</b>
<ul style="list-style-type: none"> <li>• Abortive services by unregistered persons</li> <li>• No accountability</li> <li>• Uniform and standard costs for fees</li> </ul>
<b>The parties who will bear these costs</b>
Mainly clients and a direct impact on the general economy of the Country
<b>The likely benefits of reserving the work</b>
<ul style="list-style-type: none"> <li>• To impact positively on the economy of the nation.</li> <li>• Improved processes</li> <li>• Providing guidance in standardisation of costs. The model will seek to find a balance between giving guidance on Professional fees and allowing market forces in response to a developing economy</li> <li>• Avoid wastage and duplicates</li> <li>• Minimised health and safety risks</li> </ul>
<b>The parties who will reap these benefits</b>
<ul style="list-style-type: none"> <li>• The clients</li> <li>• Industry and</li> <li>• The public</li> </ul>
<b>Any alternative approaches to reserving the work, including non-regulatory action</b>
<ul style="list-style-type: none"> <li>• Not any that we can think of at this stage. The Council will review the situation on bi-annual basis</li> </ul>
<b>The feedback from public consultation on the points above</b>
<p><b>There has been a considerable amount of consensus</b></p> <p>The main concern was that the Council has not defined the Project threshold in terms of costs as it has a direct negative impact on contractors that manage small projects/contracts. The Council's position currently is that project cost is not the only determining factor for complexity. The Council recommendation is that all construction projects should have a professional involved mainly a</p>

Professional Construction Manager for non-complex projects.

## 11. FURTHER EXPLANATORY NOTES

None

## 12. IMPLEMENTATION DETAILS

<b>Policy Owner</b>	CBE
<b>Implementation Date</b>	On promulgation by the Minister /CBE
<b>Review Date</b>	The first review of the identification of work should commence between six months to one year of its implementation, jointly done by the CBE and the SACPCMP. Thereafter reviews should be carried out every two years.
<b>Related Information</b>	<ul style="list-style-type: none"> <li>• CBE and the BE Acts</li> <li>• Competition Acts</li> <li>• The Promotions of Administrative Justice Act, Act 3 of 2000</li> </ul>