**PLANNING STUDY**

**SCHEDULES 1 – 3**

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# SERVICES – GENERAL

## Terminology

This document is intended for use in conjunction with the Conditions of contract for provision of minor professional services. Terminology defined in the Conditions has the same meaning in this Schedule 1.

## General

A Planning Study is an evaluation of the name of asset site and facilities with a view to providing a report on its capacity, condition and suitability; and a costed proposal to redress identified deficiencies.

It is a strategic assessment of the site and the existing asset compared with current design standards and technical benchmarks.

It is not intended to be a complex study involving detailed investigations or design but rather development of sufficient detail on the issues and associated costing to inform the business case for a proposed future construction project.

## Services

The Contractor shall carry out the services in accordance with the Contract, the Schedules and the project brief.

## Contract Price – Fees and Disbursements

The fixed or indicative fee component of the contract price shall include GST and shall include Contractor time (including hours spent in country, interstate and international travel) and all general administration costs including telephone calls, facsimiles, courier services, photocopying, presentation material, printing (except tender/contract documentation) interstate and/or international travel costs for attendance in Adelaide as part of the Contractor’s provision of the services and travel costs in the metropolitan area (within 32 km of the Adelaide GPO). No additional fee payment will be made for these items.

The fixed or indicative disbursement component of the contract price shall include GST and may include country, interstate and international travel and accommodation costs, (except where incurred for attendance in Adelaide as part of the Contractor’s provision of the services), costs for the preparation of perspectives and models, costs for soils testing, survey, statutory fees, dilapidation reports, printing (tender/contract documentation) and other costs as agreed. Payment of disbursements will be made as the expenditure is incurred and for actual amounts incurred.

The Contractor shall provide the following disbursements and shall be responsible for arranging and coordinating services associated with disbursements and for making payment.

| **Disbursement** |
| --- |
| Accommodation (cost per night) |
| Travel – country (cost per trip per person) |
| Geotechnical testing |
| Surveying – boundary |
| Surveying – engineering |

Payment of disbursements will be made as the expenditure is incurred and for actual amounts incurred.

If after execution of the Contract there is a requirement for the Contractor to undertake additional work, the Contractor must if required submit a revised fee on the basis of the fixed fees and disbursements. Revised fees which are not consistent with the contract price or with DPTI market data on fees and disbursements for similar projects may be rejected.

## Contract Material

The Contractor shall prepare any contract material as required by the Brief and necessary for the execution of the project and review it for completeness and correctness and with a view to omitting any ambiguity and inconsistency.

## DPTI Publications, Policies and Guidenotes

Any contract material must be consistent with published Department of Planning, Transport and Infrastructure (DPTI) and lead agency policies and standards relevant to the project and in particular with the 5-step Infrastructure Planning and Delivery Framework, PC028 Construction Procurement Policy: Project Implementation Process and the Urban Design Charter.

DPTI Guide notes can be found in the BPIMS Project Library at http://www.bpims.sa.gov.au/bpims/library/library\_frameset\_1.htm.

## Site Investigation

The Contractor shall carry out an assessment of the impact of the proposed project on any aboriginal land or sacred site, any listed (or proposed) heritage site or building and any significant trees.

The Contractor shall arrange all necessary surveys during the Services. The fees associated with these surveys will be reimbursed by the Client as a disbursement.

The Contractor shall check in the DPTI plan room for the availability of surveys required as part of any proposed redevelopment.

## Planning Study Services

The services are for the preparation of a Planning Study only and not for any subsequent phase or services part as may be described in the Construction Procurement Policy: Project Implementation Process related to the proposed project.

The services should investigate and provide information covering the following areas:

### Background

Provide an overview of the background information taken into account and the lead agency name brief of requirements for the Planning Study including any pre-determined building works and priorities. Also provide an overview of the contacts made and the process implemented in preparation of the planning study.

### Capacity

The Contractor shall:

1. provide an analysis of the brief of requirements;
2. consider the implications of the brief of requirements and identify any excess land, buildings that could be removed from the site, or accommodation that could be decommissioned in particular relocatable buildings;
3. prepare a plan for addressing the brief of requirements through the most effective use of the site assets.

### Condition

The Contractor shall:

1. consider the general condition of existing buildings, services and site works and any significant deficiencies that should be addressed. It is not necessary to do a detailed condition audit of the facilities;
2. identify the Strategic Asset Management Information System (SAMIS) life-cycle costing information and highlight any particular areas of need;
3. consult with the DPTI Facilities Management Service Provider (BMFS Spotless) managing the site for information on local maintenance issues;
4. prepare a plan for addressing all condition issues such that upgraded facilities will meet current lead agency name standards.

### Suitability

The Contractor shall:

1. consider the appropriateness of existing facilities and services to deliver the brief of requirements;
2. consider any reconfiguring of spaces to make better use of the accommodation;
3. consider any key issues relating to vehicle traffic, pedestrian and bicycle access, disability access, heritage issues and community use of facilities.

The Planning Study generally should aim at making the best use of existing facilities, not providing new facilities to replace existing ones.

### Brief of Requirements/Draft Schedule of Accommodation

The Contractor shall prepare a draft Brief of Requirements and Schedule of Accommodation in consultation with the Lead Agency which shall include a description of the proposed scope of a construction project to address the functional, operational and asset management requirements of the building/site.

### Preliminary Floor Plan

The Contractor shall prepare an initial design response to the brief of requirements and develop a preliminary floor plan indicating the proposed layout and a proposal to resolve functional requirements.

### Delivery Strategy

The Contractor shall prepare a draft staging plan and preliminary program for the proposed project.

### Proposed Budget

The Contractor shall prepare a current order of cost estimate for the proposed construction project and for each identified stage (if applicable). The budget will be used for planning purposes and will provide a start point to any future Concept phase. Ensure that exclusions from the current order of cost are clearly articulated in the report.

## Planning Study Deliverables

1. Background and overview
2. Draft Brief of Requirements
3. Draft schedule of accommodation. (Need not be a detailed room listing)
4. Comparison of existing accommodation with brief of requirements
5. Site plan indicating existing site layout (and building plans). (These can be based on the SAMIS plan.)
6. Floor plan proposal.
7. Draft staging plan (if applicable) and identification of issues that could be addressed as part of an asset management plan.
8. Order of cost estimate for the proposal broken down into stages (where these have been identified).
9. Identification of any areas where further investigations are considered appropriate to clarify important issues such as a traffic study, heritage assessment, disability access requirements, soil contamination, capacity and suitability of existing engineering services to the site.

## Subcontractors

There is a requirement for the following subcontractors to be engaged by the Contractor. The subcontractor is eligible if prequalified in one of the disciplines nominated.

| **Discipline** | **Prequalification category** |
| --- | --- |
| Civil Engineering |  |
| Cost Management |  |
| Disability Access |  |
| Electrical Engineering |  |
| Energy Management |  |
| Environmental Protection |  |
| Geotechnical Engineering |  |
| Health Planning |  |
| Hydraulics Engineering |  |
| Mechanical Engineering |  |
| Structural Engineering |  |
| Surveying |  |
| Other |  |

## Cost Management

The Contractor shall select and engage a DPTI prequalified Category 3 3M Cost Manager as a subcontractor. The Contractor shall be responsible for engaging appropriate resources and managing that the services allocated to the Cost Manager in Schedule 5: Services Matrix are provided. A list of the currently registered cost managers is available in the BPIMS Library at <http://www.bpims.sa.gov.au/bpims/login/submitPSCSearch.do>.

The format for presentation of estimates shall be in accordance with the standard provided by DPTI - refer to the guide notes in the BPIMS Library at http://www.bpims.sa.gov.au/bpims/library/library\_frameset\_1.htm. The relevant subcontractors shall estimate both the capital cost and life cycle cost of the engineering components in coordination with the cost manager.

## Services Program

The Contractor shall provide the Services in accordance with the program set out in Schedule 2. If the Contractor fails to comply with the program without the approval of the Client for any reason other than a default by the Client, the Contractor shall accelerate the execution of the Services at the Contractor’s expense until the Program requirements have been complied with.

# PROJECT DETAILS

## Terminology

This document is intended for use in conjunction with the Conditions of contract for provision of minor professional services. Terminology defined in the Conditions has the same meaning in this Schedule 2.

## Project Description and Scope

The asset that is the subject of this planning study is Name of asset at Address of asset.

Document general description of project scope

Any proposed project arising from this planning study must comply with all statutory and Government of South Australia policy requirements relevant to it with particular focus on ESD initiatives including the Government Buildings Energy Strategy and other energy management policy documents. Details are provided in the guide note “Government Buildings Energy Strategy Compliance (G46)”.

## Project Objectives

General description of the objectives and aspirations of the project both in terms of the product and the related improvements in service delivery or its design excellence and the process in terms of its timeliness or cost or relationships.

## Current Status

General description of current status.

## Project Organisation

A Project Control Group will be established including the:

* DPTI Project Risk Manager
* DECD Representative
* DECD Site Leader
* appointed Contractor.

Key stakeholders/contacts at the site are:

* Name Phone Number: XXXXXX
* Name Phone Number: XXXXXX

## Budget

The planning study will determine the required scope and associated budget for proposed redevelopment works.

## Program

|  |  |  |
| --- | --- | --- |
| **Key Task** | **Time Frame** | **Key Dates** |
| Tender Call Close |  |  |
| Evaluate and Award |  |  |
| Prepare Draft Planning Study |  |  |
| Cost and Design Review (DPTI) |  |  |
| Submit Final Planning Study |  |  |

## Role of DPTI

Refer to the guide notes in the BPIMS Project Library at <http://www.bpims.sa.gov.au/bpims/library/library_frameset_1.htm> for a detailed description of the role of DPTI.

The DPTI role, coordinated by the project risk manager, will include project overview, support and advice to the project team on government policy and procedures and facilitation of project approvals and engagements.

# NOT USED