

# ANNEXURE A

## Service Matrix

As defined in the SACAP Framework for the Professional Fees Guideline (Board Notice 121 of 2015), a standard architectural service comprises appointment as architectural professional, principal consultant and principal agent and includes all 6 work stages. It is this service on which the recommended fees are based, with the following allocation of fees per work stage:

	<u>Work Stages</u>	<u>Portion of Fee</u>	<u>Cumulative Total</u>
1	Inception	5%	5%
2	Concept & Viability	15%	20%
3	Design Development	20%	40%
4,1	Local Authority Submission	20%	60%
4,2	Construction Documentation & Procurement	10%	70%
5	Construction	27%	97%
6	Close-out	3%	100%

The simplified and summarised breakdown of duties carried out by the professional as part of this standard architectural service is as follows:

### A. Standard Architectural Services

#### A1 Stage 1: Inception

##### A1.1 *Architectural Professional:*

Receive, appraise and report on your requirements and preferences, assess user needs and options, including project objectives, priorities, constraints, assumptions, aspirations & strategies by way of:

- a) developing a clear project brief
- b) attending initiation meetings
- c) advise on rights, constraints, consent and approvals
- d) advise you on your obligations to provide copies of the title deeds, diagrams, lease conditions and details of other pertinent constraints related to the project, including the establishment of site boundaries, beacons, datum levels and such features as may be relevant
- e) advise on project programme and methods of contracting
- f) In-loco evaluation and as-built measuring for relevant existing structures

##### A1.2 *Principal Consultant:*

- a) advise on the other consultants required
- b) define other consultants' scope of work and services
- c) conduct, chair and record any necessary consultants' meetings

## A2 Stage 2: Concept & Viability

### A2.1 *Architectural Professional:*

Prepare an initial concept in accordance with the brief, including the scope, scale, character, form, function and viability of the project by way of:

- a) attend design meetings
- b) draw up simple base sheets if required for any existing structures
- b) prepare concept design based on the brief
- c) discuss design concept with local authorities and homeowners association
- d) clarify and confirm the project space norms to optimise functional and operational efficiency in terms of scale and relationships of areas
- e) select general construction materials and intended finishes
- f) provide suitable estimates of envisaged construction costs
- g) prepare and submit presentation of design concept for your approval

### A2.2 *Principal Consultant:*

- a) set up meetings and/or quotes between client and other consultants
- b) liaise, co-operate and provide necessary information to yourself and the other consultants
- c) conduct, chair and record any necessary consultants' meetings

## A3 Stage 3: Design Development

### A3.1 *Architectural Professional:*

Develop the approved concept to finalise the design, outline specifications, by way of:

- a) attend design meetings
- b) refine and ensure accuracy of base sheets if required for any existing structures
- c) incorporate your detailed requirements into building design
- d) prepare design development drawings including draft technical details and outline specifications
- e) review budget in conjunction with yourself
- f) obtain project specific requirements from the homeowners association and local authority in order to ensure conformity with building plan approval requirements
- g) liaise, co-operate and provide necessary information to yourself and the other consultants

### A3.2 *Principal Consultant:*

- a) facilitate timeous appointment of other consultants
- b) conduct, chair and record any necessary consultants' meetings
- c) review the design, costing and programme with the consultants
- d) incorporate and co-ordinate all services and work of consultants

#### A4.1 Stage 4.1: Local Authority Submission

##### A4.1.1 *Architectural Professional:*

Prepare documentation sufficient for local authority submission, by way of:

- a) prepare & compile all necessary documentation
- c) prepare specifications for the works with the other consultants
- d) obtain your authority (power of attorney) to submit drawings to local authority for approval
- e) complete construction documentation necessary to construct the project.

##### A4.1.2 *Principal Consultant:*

- a) liaise, co-operate and provide necessary information to yourself and the other consultants
- b) facilitate the signing of and compile all relevant documentation from various consultants for local authority submission
- c) conduct, chair and record any necessary consultants' meetings

#### A4.2 Stage 4.2: Construction Documentation & Procurement

##### A4.2.1 *Architectural Professional:*

Complete construction documentation and proceed to call for tenders, by way of:

- a) prepare documents to procure offers for the execution of the works
- b) assist with the obtaining of offers
- c) assist in the evaluation of offers and recommendation on the award of the building contract

##### A4.2.2 *Principal Consultant:*

- a) liaise, co-operate and provide necessary information to yourself and the other consultants
- b) coordinate and monitor preparation of procurement documentations by other consultants
- c) conduct, chair and record any necessary consultants' meetings

##### A4.2.3 *Principal Agent:*

- a) recommend and agree on procurement strategies for contractors, subcontractors & suppliers
- b) prepare and agree on the procurement programme
- c) advise the client in conjunction with the other consultants on appropriate insurances
- c) assist with preparation of contract documentation & arrange signing of the building contract

#### A5 Stage 5: Construction

##### A5.1 *Architectural Professional:*

Assist with interpretation of design intention with respect to the following:

- a) issue of construction documentation
- b) check and approve sub-contract shop drawings for design intent compliance
- c) inspection of the works for conformity to contract documentation on a fortnightly basis
- d) attend regular site, technical and progress meetings

- e) clarify details and descriptions during construction as required
- f) inspect the works and issue practical completion and defects lists

A5.2 *Principal Consultant:*

- a) liaise, co-operate and provide necessary information to yourself and the other consultants
- b) attend, chair and record regular meetings with the other consultants
- c) agree on quality assurance procedures and monitor implementation thereof
- d) review the design, costing and programme with the consultants
- e) incorporate and co-ordinate all services and work of consultants

A5.3 *Principal Agent:*

- a) administer the building contract
- b) arrange site handover to the contractor
- c) administer & perform the duties and obligations assigned to the principal agent in the JBCC or other relevant building contract used
- d) conduct and record regular site meetings
- e) receive, review and approve interim payment valuations
- f) issue contract instructions as and when required
- g) receive, review and adjudicate any contractual claims
- h) coordinate, monitor and issue practical completion lists and certificates
- i) assist the client in obtaining the occupation certificate

A6 Stage 6: Close-Out

A6.1 *Architectural Professional:*

Fulfil and complete the project close-out, by way of:

- a) inspect and verify rectification of defects
- b) prepare the necessary documentation to facilitate the effective completion, handover and operation of the project
- c) provide you with as-built drawings accurate to the built structure.

A6.2 *Principal Agent:*

- a) issue certificates related to contract completion when the contractor's obligations with respect to the building contract have been fulfilled
- b) compile and hand over relevant technical and contractual undertakings by the contractor and sub-contractors
- c) monitor, review and issue payment certificates
- d) issue completion certificates

## **B. Service Packages**

Archland Design Studios offers 6 different standardised packages to suit the unique needs and budgets of all our clients:

<u>Package</u>	<u>Roles Undertaken</u>	<u>% Recommended Fees Applicable</u>
Full Services A	Architectural Professional, Principal Consultant & Principal Agent	100%
Full Services B	Architectural Professional & Principal Consultant	90%
Full Services C	Architectural Professional Only	85%
Partial Services A	Design Architectural Professional & Design Consultant	60%
Partial Services B	Architectural Professional & Principal Consultant	65%
Partial Services C	Architectural Professional Only	55%
Additional Services	Non-standard services added on	Variable

### **B1 Full Services A: Architectural Professional, Principal Consultant & Principal Agent**

#### ***B1.1 Inclusions:***

This package includes all standard architectural services as listed in section A. It comprises all duties of the Architectural Professional, the Principal Consultant and the Principal agent for stages 1 through 6.

#### ***B1.2 Project Suitability:***

This package provides the most complete architectural service to integrate the multiple disciplines most effectively with respect to the architectural vision for the project.

#### ***B1.3 Applicable Fees:***

As this package includes all standard services, 100% of the recommended fee applies.

### **B2 Full Services B: Architectural Professional & Principal Consultant**

#### ***B2.1 Inclusions:***

This package includes the standard architectural services as listed in section A, which are applicable to the duties of the Architectural Professional and the Principal Consultant for stages 1 through 6. It excludes all duties assigned to the role of Principal Agent.

#### ***B2.2 Project Suitability:***

This package is best suited to projects where a Project Manager is involved or where one of the other consultants has agreed to take on the role of Principle Agent.

#### ***B2.3 Applicable Fees:***

The reduction of fees for this package amounts to 10% of the recommended fees as directed by SACAP Board Notice 121 of 2015.

### B3 Full Services C: Architectural Professional Only

#### B3.1 *Inclusions:*

This package includes the standard architectural services as listed in section A, which are applicable to the duties of the Architectural Professional only, for stages 1 through 6. It excludes all duties assigned to the roles of Principal Consultant and Principal Agent.

#### B3.2 *Project Suitability:*

This package is best suited to projects where one of the other consultants have taken on the role of Principal Agent and Principal Consultant. It generally results in less control and co-ordination by the architect which can cause the architectural vision to be compromised. This package should be considered only if the client has confidence that the parties taking on these roles will perform competently and with respect for the architectural vision.

#### B3.3 *Applicable Fees:*

A fee reduction of 15% of the recommended fee applies to this package. This is made up of the 10% for the principal agent's fee and an additional 5% for the principal consultant's service across all work stages.

### B4 Partial Services A: Design Architectural Professional & Design Consultant

#### B4.1 *Inclusions:*

This package includes the standard architectural services as listed in section A, which are applicable to the duties of the Architectural Professional only, for stages 1 through 4,1 but excluding direct involvement with the local authority. Thereafter (stages 4,2 through 6), involvement will be limited to an advisory role as design consultant with more direct work only taken on by mutual agreement as needed.

#### B4.2 *Project Suitability:*

This package is best suited for projects located in areas where Archland does not normally work and is the norm for projects outside the borders of South Africa. This package serves to let Archland do the entire design of a project, but makes provision for an Architectural Professional of Record, who is registered and practices in the locality of the project. The Architectural Professional of Record affects local authority submission and may be Principal Agent and Principal Consultant.

#### B4.3 *Applicable Fees:*

The fees applicable to this package are calculated at 60% of the recommended fee. Any involvement beyond work stage 4,1 which exceeds that of an advisory design consultant shall be charged at hourly rates by mutual agreement.

## B5 Partial Services B: Architectural Professional & Principal Consultant

### B5.1 *Inclusions:*

This package includes the standard architectural services as listed in section A, which are applicable to the duties of the Architectural Professional and the Principal Consultant, for stages 1 through 4,1 only.

### B5.2 *Project Suitability:*

This package includes only all necessary architectural involvement prior to the start of construction. It is suited for very small projects or projects where a project manager is involved.

### B5.3 *Applicable Fees:*

The applicable fee for stages 1 through 4,1 is 60%. Due to the constantly changing requirements of local authorities, which now demand work that falls outside the aforementioned scope, an additional 5% fee is required. The total applicable fee is therefore 65%.

## B6 Partial Services C: Architectural Professional Only

### B6.1 *Inclusions:*

This package includes the standard architectural services as listed in section A, which are applicable to the duties of the Architectural Professional for stages 1 through 4,1 only. It excludes all other work stages and all the duties assigned to the roles of Principal Consultant and Principal Agent.

### B6.2 *Project Suitability:*

This package is designed to accommodate a tight budget and provides the design and local authority submission with all other duties falling back onto the client.

### B6.3 *Applicable Fees:*

The applicable fee is reduced by 10% compared to the Partial Services 2 package, based on the omission of principal consultant's services for stages 1 through 4,1. The fee is thus calculated at 55% of the total standard fees.

## C. Additional Services

These services are not covered by the traditional scope of architectural works but are offered at an additional cost. They can be recommended by ourselves or requested by the client, but must be provided by mutual agreement. Alternatively, these services could be provided by third party consultants, in which case we can liaise & co-operate with such consultants as needed for an agreed upon hourly surcharge. Archland Design Studios (Pty) Ltd, however, will bear no responsibility or liability for the cost or quality of work produced by such third parties.

## C1 Recommended Additional Services

### C1.1 *Energy Efficiency Calculations & Submission:*

We offer the following services at a fixed fee per project as indicated in the project quote. This service is necessary to comply with new energy efficiency regulations.

Prepare documentation sufficient for local authority submission, by way of:

- a) obtain project specific requirements from local authority ensuring conformity with approval requirements
- b) calculate & specify SANS10400-XA compliance for local council requirements including walls, fenestration, roofs, floors, energy consumption and hot water reticulation
- c) liaise, co-operate and provide necessary information to yourself and the other consultants
- d) compile, certify and submit relevant energy efficiency documentation to local authority

### C1.2 *Energy Efficiency Inspection & Certification:*

We offer the following services only in combination with energy efficiency calculations & submission, at a fixed fee as indicated in the project quote. This service is necessary to comply with new energy efficiency regulations and obtain an occupation certificate.

Inspect & Certify application of energy efficiency specifications, by way of:

- a) come out to site and perform an in-loco evaluation of the built work
- b) liaise, co-operate and provide necessary information to yourself and the other consultants
- c) issue certificate of SANS10400-XA compliance

### C1.3 *Site Development Plan:*

This service is necessary for developments of certain classifications, above certain sizes, as per Town Planning Schemes, and whenever properties must be rezoned or a Township must be established. Where applicable, we offer this service at a fixed fee as indicated in the project quote.

Prepare documentation sufficient for local authority submission, by way of:

- a) obtain project specific requirements from local authority ensuring conformity with approval requirements
- b) design, draw and calculate all aspects necessary to meet the above requirements
- c) compile, certify and submit relevant documentation to local authority

### C1.4 *Landscape Development Plan*

This service is necessary as an addition to a Site Development Plan, but can be done separately for any project requiring landscape design. Where applicable, we offer this service at a fixed fee as indicated in the project quote.



Prepare documentation sufficient for local authority submission and construction, by way of:

- a) obtain project specific requirements from local authority ensuring conformity with approval requirements
- b) design, draw and calculate all aspects necessary to meet the above requirements
- c) compile, certify and submit relevant documentation to local authority

## C2 Exclusions

The following optional additional services are not included in the quoted price and may be quoted separately and added in future at the request of the client:

### C2.1 *Special Illustration Services:*

These services include but are not limited to: Promotional Material, Production Quality Rendering (basic and sketchy perspectives are included as standard services), 3D Video Animations and Architectural & Development Presentations.

### C2.2 *Special Design Services:*

These services include but are not limited to: Specialist Services (Third Party fees will be directly payable to them), Participation in Rational Design, Town Planning & Urban Design, Master Planning, Detailed Landscape Design, including Landscape Development Plans & Planting Plans, Interior Design, Liaison with Specialists, Purpose-made Item Design, Signage Design, Art Work Design, Plant Operation & Production Layouts, Event & Exhibition Design, Energy Efficiency Standards Compliance, Detailed Paving Layouts, Detailed Tiling Layouts and Detailed Paint Layouts.

### C2.3 *Special Management Services:*

These services include but are not limited to: Preparation of Project Parameters, Preparation of Project Scope Statements, Budget & Cash Flow Forecasts, Tender Enquiry Documentation, Contractor & Supplier Selection, Adjudication & Tender Awards, Progress Status Monitoring, Variation Management, Abnormal Quality Management, Communication Management, Payment Processing, Final Account Close-outs, Project Costing & Valuation Services, Special Inspections.

### C2.4 *Special Studies:*

These services include but are not limited to: Project Brief Creation, Site Selection, Feasibility Studies, Environmental Studies, Energy analysis & Planning, Energy studies, Market Surveys and Traffic Studies.

### C2.5 *Work on Existing Premises:*

These services include but are not limited to: As-Built Drawings, Council Facilitation to Obtain Council-Approved Drawings, Municipal 'As-Built' Approval Application, Surveys & Inspections, Restorations & Renovations, Work on Heritage Buildings and Services related to Demolition Permits.

### C2.6 *Other Services:*

These services include but are not limited to: Participation in Litigation & Dispute Resolution, Council Facilitation to Obtain Site-Specific Initial Data, Record Drawing, Etc.