

## **Annex B5 - Definition of specific general planning services**

**in the**

**Goethe-Institut Melbourne**

**CONTRACT**

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### **Definition of specific general planning services:**

In particular the general planner is expected to deliver the following performance for the project. Hereafter, we have compiled a project-related catalogue of services describing the special performance specification, to be delivered by the commissioned general planner:

### **Services pertaining to the project management:**

- Creation, adapting and updating of an organisation chart including the presentation of decision stages
- Determination of the required scope of the projected work including definition of the planning objectives and planning details
- Creation and updating a project and organisational manual describing the appropriate distribution of tasks and competences among the client, its project management, the general planner and its specialist planners as well as the services of the other specialists commissioned by the client, such as advisers, independent experts, site manager, etc.)
- Selection, nomination and compiling the other technical planners appointed by the general planner, composition of the project and planning team as well as interface definition for the essential planning areas
- Developing, creating, supporting, adapting and updating a time schedule as a time frame for general planning concerning the individual specialist planners as well as the performance of the other specialists involved with the planning (planning of planning)
- Preparation, arrangement, negotiation, conclusion and management of the sub-planner contracts
- Preparation and support in the client's contract negotiations with the other specialists involved with the project and planning
- Managing the central project contact point (organisation and processing lists of criteria and measures)
- Acquisition of documents that are relevant for the site
- Clarification of planning law conditions

### **Consulting services**

Contract on planning services (general planning)

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Definition specific general planning services

- Advising and assisting in the selection of planning/project development by the client with further parties involved/contractors (for example independent experts, advisers and specialists outside of the general planner's services)
- Support of the client in his decision for the appropriate tender procedure, the execution, the alternative construction options, the technical and constructive systems, in particular evaluation of the selected solutions regarding economic efficiency, including comparison of costs and cost evaluations
- Advising and assisting the client in creating and formulating the building programme and execution standards
- Consultation pertaining to all security and health rules and regulations on the building site

### **Reporting system/ IT documentation/ other documentation**

- Determination of a reporting and documentation system
- Continuous information to the client on the status and progress of work and planning process, by way of monthly status reports on the execution of the contract, and crisis report, if applicable, by reporting on performance defects and delay of dates
- Special reporting in client committees or other bodies, organisation and participation in all necessary project, coordination, planning or process reviews including documentation of key audit findings
- Documenting negotiation status with authorities and other specialists involved in the planning pertaining to the approval capability of the project with particular emphasis on all relevant regulations under public law
- Documenting planning results in the respective deadline-relevant planning and performance phases determined by the general planner
- Control and inspection of the offers developed by the executing company
- Trade-oriented summary of the tender documents in terms of features of the project or in consideration of special client interests
- Preparing and assisting with documentation for contract negotiations with the executing companies and other specialists involved with the project
- Compiling all contractual documents and annexes for tender specifications concerning project, planning and participating parties appointed by the client
- Acquiring, checking and evaluating as well as documenting project-related correspondence to specialist planners, project participants (including technical specialists determined by the client) and to third parties (authorities etc.)
- Checking and analysing the minutes from project and construction meetings for technically-relevant requirements and statements
- Special documentation for monitoring construction progress (detailed construction diary about the performed construction work and the monitoring services rendered)
- Project conclusion with summary and documentation of all documents and dates of the project
- Creating inventory plans and records for documentation of actually performed construction work (project)
- Creating inventory plans and records for documentation of actually installed building technology and technical equipment
- Systematic compilation of graphic representations and mathematical results of the project

## **Coordination/Controlling**

- Timing coordination of all summarised technical plans by the general planner by setting up, coordinating, adapting, updating and monitoring time schedules, control time schedule plans and detailed work schedules for planning
- Timing coordination of participating project and planning parties appointed by the client by setting up, coordinating, adapting, updating and monitoring detailed work schedules outside of the general planner services
- Coordination, controlling and supervision (monitoring) planning and other sequences of events of the project in close cooperation and coordination with the client
- Technical and content-related coordination and checking of all planner services and planning results for bringing about coordinated plan delivery and complete fulfilment of services by the specialist planners appointed by the general planner
- Coordination and (plausibility) check of participating specialist parties appointed by the client (specialists outside of the general planner services, e.g. expert on technical building services, structural engineer, independent expert and other advisers etc.)
- Checking and countersigning the specialist engineer's planning documents for technical accuracy, for adherence to the client's planning interests and for conformity with planning and project aims
- Classifying and incorporating all contributions into the overall planning through to implementation
- Coordinating the planning results with planning partners before final approval by the client
- Participating in introductory talks with executing companies to explain the organisational structure, to explain and handover planning documents, for scheduling and for any other questions including documenting the results
- Coordinating and controlling the processing of approval procedures
- Coordinating and controlling official approvals including compiling and appraising documents for special test procedures, e.g. for approval on an individual basis
- Taking over control functions for all specialist disciplines
- Checking costing of specialist planners
- Notice of default to the specialist planners in cases of missed deadlines
- Assisting with default notifications to advisers, independent experts and other specialist planners appointed by the client
- Assisting with default notifications to executing company

## **Contract management**

- Negotiating, coordinating and closing contracts with specialist planners (including describing service content as well as designing legal framework agreements and contractual features)
- Monitoring contract fulfilment (including enforcing contractual claims and defending against claims made by the specialist planners respectively in the interest of the client)
- Representing the client in his own interests on a technical scale and in terms of scheduling in relations with specialist planners, advisers, independent experts and

other project participants (enforcing arrangements, encouraging contract fulfilment and explaining service and contract contents to be delivered)

- Receiving, analysing, distributing and processing defect and notify notices as well as notifications of service disruptions by specialist planners and other project participants
- Detecting conflicts and assisting with conflict resolution by clarifying goal conflicts and submitting suggestions for defensive or replacement measures in coordination with the effective project participant (conflict management)
- Documenting contracts, modifications and amendments

### **Claim management**

- Recording, preparing and evaluating amendments, additional charge requests and additional services from the specialist planners appointed by the general planner based on the merits and in terms of amount
- Recording, preparing and documenting amendments, additional charge requests and additional services or reduced output by the executing company in accordance with the contract and reasonableness on a technical scale
- Inspecting and evaluating amendments, additional charge requests and additional services or reduced output by the executing company in accordance with the contract and reasonableness with the amount
- Inspecting effects of amendments and additional charge requests as well as additional services or reduced output by the companies in terms of costs and deadlines
- Cost monitoring of price changes resulting from amendments
- Recording, preparing and documenting contractually-relevant additional procedures from the specialist planners appointed by the client based on the merits (including preparing facts and evaluations from a technical perspective)
- Inspecting and evaluating amendments, additional charge requests and additional services or reduced output by the technical planners appointed by the client in accordance with the contract and reasonableness on a technical scale
- Supporting of the client in case of supplementary negotiations
- Preparing amended orders

### **Further, optional services**

- Representing the interests of the client to external authorities and the general public
- Minute keeping / internal communication
- Introducing and checking optimised tendering procedures for all service ranges (service profiles)
- Comparing technical tender documents for all service ranges (service profiles) on a technical scale
- Compiling all inventory, operational and approval documents (e.g. operating instructions, test reports, etc. for the user)
- Assisting with handing over the project

- Technical preparation and support during independent procedures of taking evidence, arbitration proceedings and legal proceedings