

THE PLANNING PROCESS

PREPARED BY

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THE PLANNING PROCESS

PRE-TENDER PLANNING

- DECISION TO TENDER
- PRE-TENDER REPORT
- SITE VISIT REPORT
- ENQUIRIES TO SUBCONTRACTORS AND SUPPLIERS
- STATEMENT OF METHODS
- ESTIMATE BUILD-UP
- PRE-TENDER PROGRAMME
- PRELIMINARIES BUILD-UP
- ESTIMATE ADJUDICATION
- ANALYSIS OF RESULTS

PRE-CONTRACT PLANNING

- PRE-CONTRACT MEETING
- PRE-CONTRACT CHECK LIST
- SUBCONTRACT ORDERS
- SITE LAYOUT PLANNING
- REQUIREMENT SCHEDULES
- MASTER PROGRAMME
- COMMENCEMENT ARRANGEMENTS
- PREPARATION OF CONTRACT
- BUDGETS

CONTRACT PLANNING

- MONTHLY AND SIX-WEEKLY PLANNING
- WEEKLY PLANNING
- DAILY PLANNING
- PROGRESS REPORTING
- UPDATING OF PROGRESS

PRE-TENDER PLANNING

TENDERING POLICY - THE DECISION TO TENDER

- (a) Information required to enable a decision to be made whether or not to tender

- (1) Location of site
- (2) Name of client, architect and quantity surveyor
- (3) Other consultants
- (4) Description of project
- (5) Requirements: commencement and completion dates
- (6) Principal trades to be nominated
- (7) Proposed contractual basis
- (8) Details of documents and information provided
- (9) Key dates for return of tender
- (10) Tender particulars
- (11) Latest date for receipt of acceptance of invitation
- (12) Number of tenders invited

- (b) Additional information which should be taken into account by management

- (1) Financial resources
- (2) Market conditions
- (3) Construction problems
- (4) Previous experience of similar types of project
- (5) Previous experience with consultants
- (6) Adequacy of tender information
- (7) Resources necessary to carry out project
- (8) Construction workload
- (9) Estimating workload
- (10) Seasonal risks
- (11) Risks imposed by conditions of contract
- (12) Time available in which to tender

PRE-TENDER CHECK LIST			
CONTRACT DATE DOCUMENTS RECEIVED		DATE DATE TENDER RETURNED	
REF.	PRE-TENDER ACTIVITY	LATEST DATE INFORM- ATION REQUIRED	ACTUAL DATE INFORM- ATION RECEIVED
1	DECISION TO TENDER		
2	ARCHITECT/ENGINEER VISITED		
3	MATERIAL SCHEDULES PREPARED		
4	ENQUIRIES SENT OUT		
5	SITE VISIT REPORT		
6	STATEMENT OF CONSTRUCTION METHOD		
7	ESTIMATE STAGE 1 BUILD-UP		
8	FINAL QUOTATIONS RECEIVED		
9	ESTIMATE STAGE 2 BUILD-UP		
10	PRE-TENDER PROGRAMME		
11	PRELIMINARIES ASSESSMENT		
12	ESTIMATE COMPLETE		
13	ESTIMATE CHECKED		
14	FINAL SUMMARIES		
15	TENDER ADJUDICATION		
16	PRICE MARK UP AGREED		
17	TENDER SUBMITTED		
TENDER NO.		PREPARED BY:	

SITE VISIT REPORT

TENDER NO.

PREPARED BY

CONTRACT

DATE

INFORMATION AVAILABLE

- 1 LOCATION OF SITE
- 2 TRANSPORT SERVICES TO SITE
- 3 ADDRESS OF JOB CENTRE
- 4 OTHER CONTRACTS IN AREA
- 5 ACCESS TO SITE
- 6 GROUND CONDITIONS ON SITE
TOPOGRAPHY
SURFACE WATER CONDITIONS
- 7 DETAILS OF TRIAL PITS AND
WATER TABLE LEVELS
- 8 EXTENT OF TEMPORARY WORKS
- 9 AVAILABILITY OF LOCAL LABOUR
- 10 EXTENT OF SITE FENCING
- 11 SITE SECURITY AND LIGHTING
- 12 AVAILABILITY OF SUBCONTRACTORS
- 13 EXTENT OF WELFARE FACILITIES
REQUIRED
- 14 TEMPORARY SERVICES TO BE
PROVIDED
- 15 ANY SPECIAL REQUIREMENTS

METHOD STATEMENT

CONTRACT:

SHEET NO:

TENDER NO:

PREPARED BY:

Operation No.	Operation	Quantity	Method	Sequence of Operations	Plant & Labour	Output	Drawings

Method 1 - Hydraulic power shovel loading wagons direct



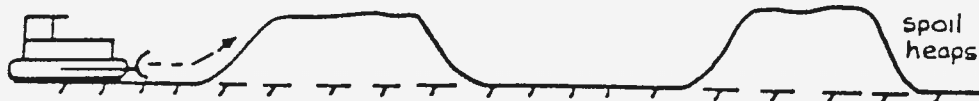
Figure 2.5

Method 2 - Hydraulic backactor loading wagons direct



Figure 2.6

Method 3 - Bulldozer pushing material into spoil heaps



Re-excavate at spoil heaps with dragline and load wagons

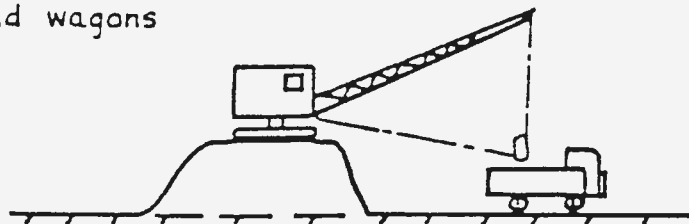


Figure 2.7

METHOD STATEMENT

CONTRACT: HIGHER HILLGATE

SHEET NO: 1

TENDER NO: 79/46

PREPARED BY: B.C.

OPERATION NO.	OPERATION	QUANTITY	METHOD	SEQUENCE OF OPERATIONS	PLANT & LABOUR	OUTPUT	DURATION
1	Excavate to reduced levels (0.500 m deep)	200 x 150 x 0.5 = 15000 m ³	2 D6 Bulldozers to excavate and push the material into spoil heaps adjacent to the access roads. 2 Draglines fitted with 2 m ³ buckets to be located on top of each spoil heap. Lorries to use existing roads for access for loading.	Level grid to be established prior to excavation	2 D6 Dozers 1 Banksman 2 Draglines 4 Lorries per machine	120 m ³ /h per machine = 2 x 120 = 240 m ³ /h 75 m ³ /h = 75 x 2 = 150 m ³ /h	$\frac{15000}{240}$ = $\frac{62.5}{8}$ h = 8 machine days $\frac{15000}{150}$ = $\frac{100}{8}$ h = 12 machine days

Subcontractors' Enquiries

information to be given in enquiries to subcontractors and indicates that the enquiry should state

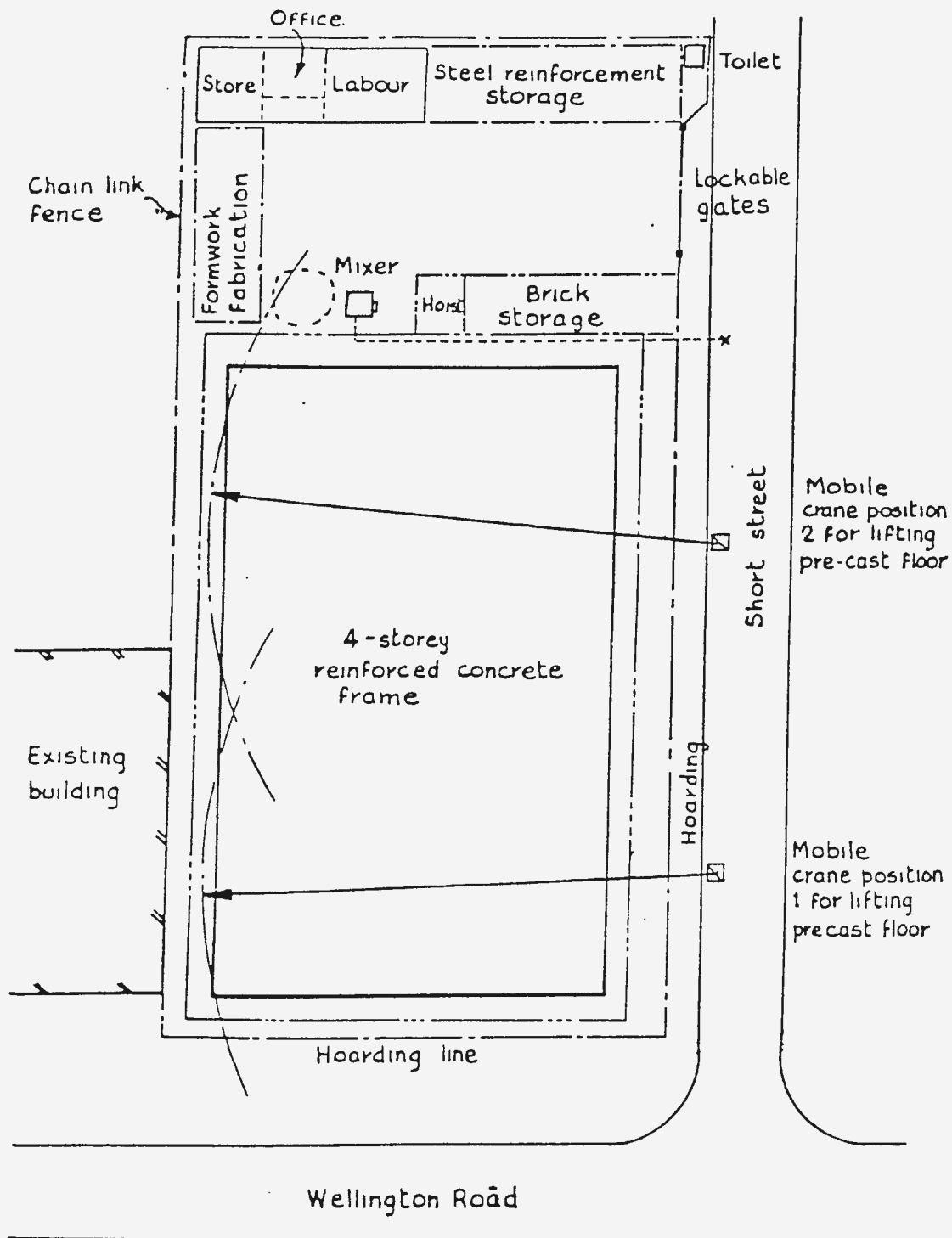
- (1) Quantity of work extracted from the bills and any relevant specification clauses
- (2) Whether the quotation is to be for labour only or for labour and material
- (3) Plant and equipment to be provided by the main contractor and what the subcontractor will have to supply for himself
- (4) Anticipated commencement and completion dates for the subcontract work, work programme and sequences
- (5) Brief description of the proposed structure
- (6) Address of site
- (7) Name of client
- (8) Names and addresses of architect, quantity surveyor, and, when applicable, consulting engineers
- (9) Form of contract under which the sub-contract would be executed
- (10) Relevant information from the Appendix to the main contract
- (11) Any general conditions, specification or drawings to which the subcontractor would be required to adhere
- (12) Address and times at which all documents could be inspected
- (13) Whether a fixed or variable price sub-contract
- (14) Terms of payment to the subcontractor
- (15) A statement that the conditions of the enquiry would automatically form part of any sub-contract entered into
- (16) Period for which the quotation is required to remain open for acceptance
- (17) Date by which quotation should be submitted
- (18) The person in the main contractor's organisation to whom reference concerning the enquiry should be made

CONTRACT: Highgrove Office Block TENDER REF: 80/24
 CONTRACT PERIOD: May 1980 to Feb 1981 NO. OF WEEKS: 45 weeks
 TENDER RATE - TRADESMEN: £3.20 LABOURER: £2.92
 DATE OF SUBMISSION: 9 February 1980

SUMMARY OF PRELIMINARIES

FROM FORM	LABOUR	MATERIALS	PLANT	TOTAL
T1 Hutting and welfare Clerk of Works/Architect Telephones Watching, hoardings, fences				
T2 Schedule of plant				
T3 Transport Pumping Temporary roads				
T4 Scaffolding Testing samples				
T5 Temporary light, heat and power Temporary power Rates, local authority fees				
T6 Winter working - drying out Site clearance, protection Sign boards				
T7 Defects liability Insurances - Bonds Included in Preliminary Estimate				
T8 Site Administration Expenses				
T9 Excess overtime Fluctuations				
	£			
ADD: Overheads and Profit				
ADD: Provisional Sums				

TOTAL PRELIMINARIES



Site Layout Plan — 4-storey Reinforced Concrete Frame