



DESKTOP AID

Business Rules – Planned Minor Works

Planned Replacement/Refurbishment Maintenance

What is the Difference?

Planned Minor Works comprises those services involving additions or modifications to existing buildings or upgrading of existing building fabric, plant and equipment or new works at designated locations; and with an **estimated value of \$5,000 (exclusive of GST) or more but less than \$150,000 (exclusive of GST)**; and mostly have a start date that is part of a planned program but can also be requested by the Agency Representative from time.

Planned Replacement/Refurbishment Maintenance comprises those services involving replacement or refurbishment of building fabric and/or plant and equipment specified as part of a planned program. Planned RR comprises work **costing \$5,000 or more (exclusive of GST) but less than \$1,000,000 (exclusive of GST)**; and is deemed necessary as a result of analysis of life cycle information or premature failure of an item of building fabric or plant and equipment.

Initiating Planned Minor Works

The Agency Representative can place an order to proceed with the procurement of a Planned Minor Work, by sending confirmation to the FM through FAMIS.

The Agency Representative can instruct the FM Service Provider to procure and commence a planned Minor Works by raising a job in FAMIS. The job order raised in FAMIS should include:

- a detailed description of the work to be performed, including any design work;
- confirmation of existing drawings and specifications describing the work to be performed;
- confirmation of a fixed budget (i.e. the cost of the required work has been “fixed” in FAMIS); and
- timeframes for completing the required work.

Planned Minor Works valued less than \$20,000 (excl. GST)

As directed by the Agency Representative, the FM Service Provider may procure planned MW with a budget of less than \$20,000 (exclusive of GST) by:

- engaging a subcontractor by applying the Schedule of Rates; or
- undertaking a competitive process as described in Table 13 below.

Agency Representatives are encouraged to direct the FM Service Provider to procure planned MW works with a budget of less than \$20,000 (exclusive of GST) by engaging a subcontractor under the Schedule of Rates.

Planned Minor Works exceeding \$20,000 (excl. GST)

Planned MW with a budget exceeding \$20,000 (exclusive of GST) must be procured through a competitive tender process as described in Table 13 below.

Table 13: Competitive processes for procuring planned minor works

Value of Planned MW	Process to procure
<p>The work is reasonably estimated as \$20,000 (excl. GST) or less.</p> <p><i>(Note that planned MW has a minimum value of \$5,000 (excl. GST).)</i></p>	<p>If directed by the Agency Representative to undertake a competitive quote process the FM Service Provider must:</p> <ol style="list-style-type: none"> 1. obtain three (3) quotes, either: <ul style="list-style-type: none"> • telephone quotes; or • if directed by the Agency Representative, written quotes; <ul style="list-style-type: none"> – telephone quotes are to be properly documented and recorded; and – the Agency Representative is able to nominate subcontractors from whom to request quotes; 2. provide the quotes to the Agency Representative, along with a recommendation as to the quote offering the best value for money; 3. on approval of the recommended quote by the Agency Representative, engage and manage the recommended subcontractor such that works are delivered in line with the accepted quote.
<p>The work is reasonably estimated as exceeding \$20,000 (excl. GST)</p> <p><i>(Note that planned MW has a maximum value of \$150,000 (excl. GST).)</i></p>	<p>A competitive tender process is to be undertaken. The FM Service Provider must:</p> <ol style="list-style-type: none"> 1. compile the tender documentation, including a detailed specification, approved by the Agency Representative, of the work to be performed; 2. call tenders from a minimum of three (3) subcontractors; 3. examine and analyse all tenders received and invite the Agency Representative to participate in the analysis should they desire; 4. recommend to the Agency Representative the tender that should be accepted; and 5. on approval of the recommended tender by the Agency Representative, engage and manage the recommended subcontractor such that works are delivered in line with the accepted tender.

Issuing Variations

A variation order is required when the change to the scope of works results in an increase to the total price to complete the job. Variations can be issued through FAMIS. Variations must be entered via the original main work order number. If the scope of work changes, a variation must be raised along with the fixed variation price. (**Note:** the cost of the variation is added to the project and shown in the updated total fixed price field within FAMIS).

The reason for the variation must be specified from the following list:

- ADDITIONAL WORK
- DESIGN CHANGE
- FUNDING CHANGE
- OMISSIONS BY FM SERVICE PROVIDER

To protect against additional monies being claimed where a variation order results in a lower total price to complete the job, the Total Fixed Price should be reduced in FAMIS. Agency Representatives can request the fixed price to be lowered in FAMIS by emailing the AGFMA Unit (DPTI.BMDFMFax@sa.gov.au) quoting the job number and the revised fixed price.

Planned Minor Works need to be agreed when using the FAMIS agreement screen. This process is necessary to generate a job number. The agreement screen allows clients to enter a year's program of minor works into the system and then release it during the year as required.

Adding a Consultancy

Consultancies can only be created and appear on planned work (e.g replacement/refurbishment work or minor work).

Entering Fixed Price Details

Fixed Pricing is only available on planned work (e.g. planned replacement/refurbishment work or planned minor work). Fixed Pricing is **mandatory** on all planned work. The FM is unable to make progress claims for work until a Fixed Price is entered.

Initiating Planned Replacement/Refurbishment Maintenance

The Agency Representative can instruct the FM Service Provider to procure and commence a planned Replacement/Refurbishment work by raising a job in FAMIS. The job order raised in FAMIS should include:

- a detailed description of the work to be performed (including any design work required, raised as a consultancy under the original work order);
- confirmation of existing drawings and specifications describing the work to be performed;
- confirmation of a fixed budget (i.e. the cost of the required work has been “fixed” in FAMIS); and
- timeframes for completing the required work.

Planned Replacement/Refurbishment Maintenance work valued less than \$20,000 (excl. GST)

As directed by the Agency Representative, the FM Service Provider may procure planned Replacement/Refurbishment with a budget of less than \$20,000 (exclusive of GST) by:

- engaging a subcontractor by applying the Schedule of Rates; or
- undertaking a competitive process as described in Table 12.

Agency Representatives are encouraged to direct the FM Service Provider to procure planned RR works with a budget of less than \$20,000 (exclusive of GST) by engaging a subcontractor under the Schedule of Rates

Planned Replacement/Refurbishment Maintenance work exceeding \$20,000 (excl. GST)

Planned Replacement Refurbishment with a budget exceeding \$20,000 (exclusive of GST) must be procured through a competitive tender process as described in Table 12 below.

Table 12: Competitive processes for procuring planned replacement/refurbishment maintenance

Value of Planned RR	Process to procure
<p>The work is reasonably estimated as \$20,000 (excl. GST) or less.</p> <p><i>(Note that Planned RR has a minimum value of \$5,000 (excl. GST).)</i></p>	<p>If directed by the Agency Representative to undertake a competitive quote process the FM Service Provider must:</p> <ol style="list-style-type: none"> 1. obtain three (3) quotes, either: <ul style="list-style-type: none"> • telephone quotes; or • if directed by the Agency Representative, written quotes; <ul style="list-style-type: none"> - telephone quotes are to be properly documented and recorded; and - the Agency Representative is able to nominate subcontractors from whom to request quotes; 2. provide the quotes to the Agency Representative, along with a recommendation as to the quote offering the best value for money; 3. on approval of the recommended quote by the Agency Representative, engage and manage the recommended subcontractor such that works are delivered in line with the accepted quote.
<p>The work is reasonably estimated as exceeding \$20,000 (excl. GST)</p> <p><i>(Note that Planned RR has a maximum value of \$1,000,000 (excl. GST).)</i></p>	<p>A competitive tender process is to be undertaken. The FM Service Provider must:</p> <ol style="list-style-type: none"> 1. compile the tender documentation, including a detailed specification, approved by the Agency Representative, of the work to be performed; 2. call tenders from a minimum of three (3) subcontractors; 3. examine and analyse all tenders received and invite the Agency Representative to participate in the analysis should they desire; 4. recommend to the Agency Representative the tender that should be accepted; and 5. on approval of the recommended tender by the Agency Representative, engage and manage the recommended subcontractor such that works are delivered in line with the accepted tender.

Issuing Variations

A variation order is required when the change to the scope of works results in an increase to the total price to complete the job. Variations can be issued through FAMIS. Variations must be entered via the original main work order number. If the scope of work changes, a variation must be raised along with the fixed variation price. (**Note:** the cost of the variation is added to the project and shown in the updated total fixed price field within FAMIS).

The reason for the variation must be specified from the following list:

- ADDITIONAL WORK
- DESIGN CHANGE
- FUNDING CHANGE
- OMISSIONS BY FM SERVICE PROVIDER

To protect against additional monies being claimed where a variation order results in a lower total price to complete the job, the Total Fixed Price should be reduced in FAMIS. Agency Representatives can request the fixed price to be lowered in FAMIS by emailing the AGFMA Unit (DPTI.BMDFMFax@sa.gov.au) quoting the job number and the revised fixed price.

Planned Replacement/Refurbishment Maintenance works need to be agreed to using the FAMIS agreement screen. This process is necessary to generate a job number. The agreement screen allows clients to enter a year's program of minor works into the system and then release it during the year as required.

Adding a Consultancy

Consultancies can only be created and appear on planned work (eg. replacement/refurbishment work or minor work).

Entering Fixed Price Details

Fixed Pricing is only available on planned work. (e.g. planned replacement/refurbishment work or planned minor work). Fixed Pricing is **mandatory** on all planned work. The FM is unable to make progress claims for work until a Fixed Price is entered.