

APPENDIX 3.13 SAMPLE FEE PROFORMA

RESTRICTED (CONTRACT)
ENGINEERING & ASSOCIATED CONSULTANTS SELECTION BOARD
FEE PROPOSAL
for

(Agreement No. _____)
submitted by

PROPOSED LUMP SUM FEE (L) # HK\$ _____

ALL-INCLUSIVE TIME CHARGE RATES

- &Partners/Directors (P/D) HK\$ _____ / man-hour
- &Chief Professional Staff (CP) HK\$ _____ / man-hour
- &Senior Professional Staff (SP) HK\$ _____ / man-hour
- &Professional Staff (P) HK\$ _____ / man-hour
- &Assistant Professional Staff (AP) HK\$ _____ / man-hour
- &Technical Staff (T) HK\$ _____ / man-hour

*The Resident Site Staff (“RSS”) on-cost rates are:

Collective rank of RSS directly employed by the Consultants or Government staff posted to the Consultants by the Employer	RSS on-cost rate of each collective rank (\$/man-month)
^R1	
^R2	
^R3	
^R4	
^R5	
^R10	

Signed _____
()

Date _____

Technical/ Consultancy Fee/ Fee Quality weighting for this consultancy = %/ %/ 10%

[§]Notional man-hours for additional Services

- &Partners/Directors (P/D) =
- &Chief Professional Staff (CP) =
- &Senior Professional Staff (SP) =
- &Professional Staff (P) =
- &Assistant Professional Staff (AP) =
- &Technical Staff (T) =

* The notional numbers of man-months of collective ranks of RSS directly employed by the Consultants or Government staff posted to the Consultants by the Employer are listed in the table below. The RSS on-cost rates in the Fee Proposal will be applied with the notional numbers of man-months to arrive at the “notional RSS on-cost charges” to be used for purpose of the combined score assessment of Technical and Fee Proposals.

Collective rank of RSS directly employed by the Consultants or Government staff posted to the Consultants by the Employer	[§] Notional number of man-months of each collective rank (man-month)
^ R1	
^ R2	
^ R3	
^ R4	
^ R5	
^! R10	

* The notional RSS establishment is given in **Attachment A**.

* The details of the collective ranks of RSS directly employed by the Consultants or Government staff posted to the Consultants by the Employer are in Clause SCE YY [*Insert the clause no.*] of the Special Conditions of Employment.

Two signed copies of this Fee Proposal must be delivered **by hand** before 12:00 noon on _____ to:

Chairman, EACSB,
 Director of Civil Engineering and Development,
 15/F, Civil Engineering and Development Building,
 101, Princess Margaret Road,
 Ho Man Tin, Kowloon.

The Proposal must be in a sealed envelope marked "EACSB Fee Proposal for Agreement No. _____, submitted by _____".

Notes on the preparation of this Fee Proposal are given on Pages 9 & 10 of this Appendix

Remarks:

- # The Proposed Lump Sum Fee shall be equal to the total fee for the Staff Charges and Non-Staff Charges for all stages in the summary breakdown in Part A.

- & *to be modified as appropriate; other categories for specialist staff as suggested at Appendix 3.13A of the EACSB Handbook may be incorporated as appropriate. [only for reference of the department's staff]*
- * *to be deleted if not relevant. [only for reference of the department's staff]*
- ^ *Add or delete collective ranks as may be necessary to suit the need of the consultancy agreement by the managing department. [only for reference of the department's staff]*
- \$ *To be inserted by managing department before invitation of Technical and Fee Proposals. [only for reference of the department's staff]*
- ! *Please provide the further breakdown of notional number of man-months for Government staff to be posted for "Design Training" and "Site Training" if appropriate. [only for reference of the department's staff]*

**A. SUMMARY BREAKDOWN OF LUMP SUM FEE
AMONG STAGES OF THE AGREEMENT**

1. Staff Charges

Consultancy Stage ⁺	Man-Weeks [#]						Fee (HK\$)*
	P/D	CP	SP	P	AP	T	
Feasibility (F) Stage							
Investigation (I) Stage							
Design (D) Stage							
Construction (C) Stage							
Total							

2. Non-Staff Charges

Consultancy Stage ⁺	Fee (HK\$)*
Feasibility (F) Stage	
Investigation (I) Stage	
Design (D) Stage	
Construction (C) Stage	
Total	

NB # The manpower input in this breakdown shall tally with the manpower input in the technical proposal as well as that in Part D.

* The fees for Staff Charges and Non-Staff Charges for all stages shall be carried forward from Part D.

⁺ *Departments' staff should only include the relevant stage(s) in these tables.*

D. BREAKDOWN OF FEE FOR _____ STAGE*

1. Staff Charges for Project Disciplines

Discipline	Man-Weeks [@]						Fees (HK\$)						
	P/D	CP	SP	P	AP	T	P/D	CP	SP	P	AP	T	
Total													

2. Non-Staff Charges

Item	Charge (HK\$)
Other Charges (please specify, if any):	
Total	

* N.B. *A separate sheet must be included in the Fee Proforma issued to the shortlisted consultants for each of the Feasibility, Investigation, Design and Construction Stages of the consultancy.*

@N.B. *A conversion factor of 40.00 hours/week shall be adopted throughout the calculation.*

E. MANNING SCHEDULE AND CHARGE RATES

No	Name	Position	Category of Staff (P/D, CP, SP, P, AP and T)	Weekly Charge Rate (HK\$)	Manpower Input (Man-Weeks)	Fee (HK\$)
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						
11						
12						
13						
14						
15						
16						
17						
18						
19						
20						
Total						

- N.B. (a) Charge rates must be all-inclusive rates.
 (b) Key staff such as partners/directors, professional and technical staff (of relevant disciplines) should be shown.

***Attachment A – Notional RSS Establishment**

(I) Rank	(II) Posts in notional RSS establishment	(III) Number in notional RSS establishment	(IV) Notional number of man-months	(V) Collective rank of RSS directly employed by the Consultants or Government staff posted to the Consultants by the Employer
				^R1
			(sub-total =)	
				^R2
			(sub-total =)	
				^R3
			(sub-total =)	
				^R4
			(sub-total =)	
				^R5
			(sub-total =)	
				^R10
			(sub-total =)	

Remarks:

^ Add or delete collective ranks as may be necessary to suit the need of the consultancy agreement by the managing department. [only for reference of the department's staff]

ENGINEERING & ASSOCIATED CONSULTANTS SELECTION BOARD

NOTES ON THE PREPARATION OF FEE PROPOSALS

Client Department [These notes in italics are only for reference of the department's staff]

- i. *Before the Fee Proposal forms are sent to the shortlisted consultants, the Client Department must enter the Agreement title and number, the technical/ consultancy fee/ fee quality weighting, the notional man-hours for additional Services, and the date on which the completed proposal must be delivered. Where applicable, the notional number of man-months of RSS and the notional number of man-months of Government staff to be posted on site should also be entered.*
- ii. *The disciplines into which the fee should be broken down (e.g. civil engineering, E&M engineering, environmental, planning) must be entered in Part D.*
- iii. *When the Fee Proposal forms for an Agreement are sent to shortlisted consultants, a copy of Pages 1 and 2 must be sent to the EACSB Chairman.*
- iv. *The Client Department must also predetermine the payment schedule and provide this to the shortlisted consultants along with the Fee Proposal forms. The payment schedule should be expressed as a proportion of the fee against time (e.g. monthly) or against progress (e.g. milestones).*

Consultant

1. The Fee Proposal should be completed in all respects appropriate to the consultancy using the Proforma provided. Two sets of the Fee Proposal should be submitted to the Chairman, EACSB.
2. If the Fee Proposal is submitted by a Joint Venture, all participants in the Joint Venture must sign the Fee Proposal.
3. The time charge rates entered in the Fee Proposal will be used for payment for additional Services not covered by the Brief. In addition, these rates will be applied with the notional man-hours for additional Services to arrive at the 'adjusted notional value for additional Services' to be used for fee assessment purposes. Please refer to the Schedule of Fees for details.
4. The Proposed Lump Sum Fee on Page 1 of the Fee Proposal shall be equal to the total of the Staff Charges and Non-Staff Charges for all stages in Part A.
5. Part C will not be taken into account in assessing fees for the award of this consultancy.

6. Part D should be completed for each stage covered by this consultancy.
7. The details required in Part E should be provided by using as many sheets as necessary if the consultancy lasts longer than 12 months or if more than 20 personnel are involved. It should be noted that the charge rates quoted must be all-inclusive rates. This information is for checking that the consultant has fully accounted for the Services and has not made arithmetical errors. The rates shown will not be used for calculating payment for additional Services.
8. Combined score assessment of Technical and Fee Proposals will be carried out in accordance with the EACSB Handbook on Selection, Appointment and Administration of Engineering and Associated Consultants and any subsequent related Circulars, DEVB TC(W) No. 2/2016 and No. 5/2018 and its subsequent updates (if any).
9. Questions regarding the completion of this Fee Proposal should be made to *[the Client Department]*.