



**ACCÉC** Association Canadienne  
des Consultants en  
Économie de Construction  
The Canadian Association  
of Consulting  
Quantity Surveyors **CACQS**

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# **GUIDE FOR PROCURING CONSULTING QUANTITY SURVEYING SERVICES**

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**CACQS.CA**



JANUARY 1, 2022

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**CONTENTS**

1.0 INTRODUCTION ..... 2  
2.0 THE INDEPENDENT CONSULTING QUANTITY SURVEYOR ..... 2  
3.0 CONSULTING QUANTITY SURVEYING SERVICES ..... 3  
    3.1 DESIGN ..... 3  
    3.2 CONTRACT ..... 3  
    3.3 TENDER ..... 3  
    3.4 CONSTRUCTION ..... 3  
    3.5 RELATED COST CONTROL ..... 3  
4.0 ESSENTIAL ELEMENTS IN AN RFP REQUESTING CONSULTING QUANTITY SURVEYOR SERVICES ..... 4  
    4.1 SIZE AND/OR BUDGET ..... 4  
    4.2 TRANSPARENCY OF INFORMATION ..... 4  
    4.3 DESCRIPTION OF PROJECT ..... 4  
    4.4 TYPE AND LEVEL OF SERVICE(S) ..... 4  
    4.5 NUMBER AND CLASS OF ESTIMATE(S) ..... 4  
    4.6 ADDITIONAL SERVICES ..... 5  
5.0 CONSIDERATIONS FOR THE SELECTION OF THE CONSULTING QUANTITY SURVEYOR ..... 6  
    5.1 INDEPENDENCE ..... 6  
    5.2 UNDERSTANDING OF THE PROJECT ..... 6  
    5.3 PROJECT APPROACH AND METHODOLOGY ..... 6  
    5.4 CAPACITY ..... 6  
    5.5 PROJECT LEAD ..... 7  
    5.6 EXPERIENCE ..... 7  
    5.7 FEE STRUCTURE ..... 7  
    5.8 REFERENCES ..... 7

## 1.0 INTRODUCTION

The Canadian Association of Consulting Quantity Surveyors (CACQS/ACCÉC) was launched as a national trade association in July 2012. It has grown from nine member firms then to currently eighteen firms across Canada with members varying in size from sole proprietor to large corporations. The common vision of promoting awareness of the consulting Quantity Surveying industry has driven several initiatives, including this Guide for Procuring Consulting Quantity Surveying Services.

Every construction project is laden with varying risks. The purpose of this Guide is primarily to assist owners in reducing those risks, whether the project is small or large. As such, this Guide offers explicit recommendations for the writing of a Request for Proposal (RFP) for consulting Quantity Surveyor Services (sometimes called Cost Management services). In addition, it is hoped that this guide will provide consistency in vendor selection to ensure that Owners are receiving the independent Quantity Surveying services they require.

Senior representatives from most member firms in the CACQS/ACCÉC have contributed to the authorship of this publication.

## 2.0 THE INDEPENDENT CONSULTING QUANTITY SURVEYOR

Consulting Quantity Surveyors play a critical role in ensuring the financial success of building and infrastructure capital development projects, through applying their skillset in a disciplined manner that seeks to contain costs of construction throughout the life cycle of a project.

When retained as independent third-party advisors, ideally directly for the owner, or as key members of the project design team, they contribute a range of sophisticated cost planning and control methodologies from concept through design and during the construction stage, that help owners establish realistic budgets at the predesign stage, ensure that the design evolves within predetermined cost limits, and plan for the control, maintenance and competitiveness of the costs of their work.

Consulting Quantity Surveying firms have Professional Quantity Surveyors (PQS) as both Principals and employees. Member firms of the CACQS/ACCÉC are required to have a Senior Officer with a PQS designation from the Canadian Institute of Quantity Surveyors (CIQS) or hold the MRICS designation offered by the Royal Institution of Chartered Surveyors (RICS). Qualifications are regulated by CIQS and RICS respectively, who hold members to a high level of technical and professional standards. Member firms are also required to offer completely independent services when consulting. This means that they commit to offering an objective, independent opinion on cost, looking out only for the interests of the Client.

## 3.0 CONSULTING QUANTITY SURVEYING SERVICES

When engaging in the procurement of consulting Quantity Surveyor services, it is useful to have an understanding of the range of services offered by the industry.

The consulting Quantity Surveyor can be engaged as early as the Project Inception Stage and their involvement can span the entire project life cycle, including the post-construction period.

The following is a comprehensive list of services that can be asked for in an RFP:

### 3.1 DESIGN

- Feasibility Studies and Viability Analysis
- Budget Development and Cost Planning (includes estimates at various design levels including Class D, C, B and A Estimates)
- Cash Flow Development
- Cost Modelling
- Risk Analysis
- Contract and Procurement Advice
- Value Engineering
- Parallel Estimating

### 3.2 CONTRACT

- Procurement and Contract Strategy Advice
- Contract Preparation

### 3.3 TENDER

- Tender Management
- Tender Addendum Management
- Tender Analysis and Budget Comparison Report
- Contractor Recommendation

### 3.4 CONSTRUCTION

- Project Monitoring/Payment Certification
- Change Order Review
- Claims Review
- Claims Avoidance/Mitigation
- Technical Advisor
- Independent Certification

### 3.5 RELATED COST CONTROL

- Life Cycle Costing/Whole Life Costing
- Property Conditions Assessments
- Expert Witness
- Insurance Valuations & Building Reinstatement Costing
- Research Studies

For more information on these services please download the *CACQS/ACCÉC Cost Management Best Practices Guide* at <http://cacqs.ca/resources/>

## 4.0 ESSENTIAL ELEMENTS IN AN RFP REQUESTING CONSULTING QUANTITY SURVEYOR SERVICES

When procuring the services of a consulting Quantity Surveyor, there is some basic information that is required to permit the consulting Quantity Surveyor to establish an approach and methodology for delivering the work, determine who should be assigned to the work, and develop a corresponding fee.

The following is a list that as a minimum should be provided in an RFP or request for services:

### 4.1 SIZE AND/OR BUDGET

The approximate size and/or budget and type of a project is critical for the consulting Quantity Surveyor to consider the number of hours and staff required at any given milestone.

### 4.2 TRANSPARENCY OF INFORMATION

All consulting Quantity Surveyors responding to a Request for Proposal (RFP) should have access to the same level of required information and available documentation as is appropriate.

### 4.3 DESCRIPTION OF PROJECT

A brief description will outline if the work is to be new construction, renovation, or a mixture of both. The description should indicate if there are any requirements for special conditions (i.e., soils, heritage, etc.), demolition, phasing, or any other logistical considerations.

### 4.4 TYPE AND LEVEL OF SERVICE(S)

The RFP should be clear on the type of service and at what stage(s) of the project they are required (Design, Tender, Construction & Related Cost Control – see page 3 for list).

### 4.5 NUMBER AND CLASS OF ESTIMATE(S)

The RFP should be clear on the number of estimates required and at what level of design and/or construction. If a schedule is available, it should be provided in the RFP or summarized.

The number of estimates should be appropriate for the size and complexity of the project.

- Smaller projects may only realistically permit 2 estimates, one at a design concept level and one prior to tender release when detailed Contract Documents are available.
- Large projects (>\$50M in construction value) will require multiple design estimates (3 to 5) from concept to Contract Document completion to monitor and control scope and budget.

From concept to Pre-Tender, the major estimate classifications systems during design are as follows:

- |  |               |
|--|---------------|
| • Government of Canada (GOC)                                 | Class D to A  |
| • Association for the Advancement of Cost Engineering (AACE) | Class 5 to 1  |
| • International Cost Management Standard (ICMS)              | Levels 1 to 4 |

For information on GOC Classes of Estimates D to A, please refer to Appendix A of the CACQS/ACCÉC Cost Management Best Practices Guide at <http://cacqs.ca/resources/>

For information on AACE check [https://web.aacei.org/docs/default-source/toc/toc\\_18r-97.pdf](https://web.aacei.org/docs/default-source/toc/toc_18r-97.pdf) and for ICMS check <https://icms-coalition.org/the-standard/>

#### 4.6 ADDITIONAL SERVICES

The RFP should be specific as to what additional services are required during the construction and post construction phases of the project. This may range in services such as:

- Full loan monitoring
- Schedule reviews
- Payment reviews
- Claims evaluations
- Change Order reviews

As the number of claims and change orders and level of effort are unknowns at the time of the RFP, we recommend that these services are paid on a per diem basis, in which case, an hourly rate is required for these services.

## 5.0 CONSIDERATIONS FOR THE SELECTION OF THE CONSULTING QUANTITY SURVEYOR

The consulting Quantity Surveyor's ability to control costs is relative to the amount of involvement that the owner allows a consulting Quantity Surveyor and is enhanced when they have independence and report **directly to the owner**.

Reporting "directly to the owner" means that a **stand-alone Request for Proposals will be issued for consulting Quantity Surveyor (QS) services**. This will be separate from the RFP for design services (Architecture and Engineering).

The following are a list of items for consideration in writing RFP's for consulting QS services.

### 5.1 INDEPENDENCE

The selected proponent should be an independent consulting Quantity Surveyor that is not engaged in the delivery of the project in terms of design, construction or any other role that might place them in conflict with providing an independent opinion on cost. All members of the CACQS/ACCÉC are mandated to meet this requirement.

### 5.2 UNDERSTANDING OF THE PROJECT

The bidder may be required to provide an understanding of the project. For many projects, this may be a simple paragraph summarizing the project scope and objectives. For complex projects, this may require a more detailed description that highlights challenges and opportunities for the project and role of the Quantity Surveyor. The owner should tailor the request to suit the size and complexity of the project.

### 5.3 PROJECT APPROACH AND METHODOLOGY

The bidder may be required to provide a description of the approach to be used to complete the assignment. For some projects, this may be a simple description of the scope of services to meet the project mandate. For more complex or larger projects, this may require a detailed work-plan and methodology for delivering the services.

### 5.4 CAPACITY

The client may request confirmation that the bidder has current and future capacity to manage and deliver the services on the project throughout the duration of the project.

## 5.5 PROJECT LEAD

The bidder should demonstrate that the proposed Project Lead is a PQS in good standing with the CIQS or holds a current designation of MRICS. The Project Lead presented should be the Quantity Surveyor that performs the work as described upon award of the assignment and for the duration of the project.

## 5.6 EXPERIENCE

The bidder may be requested to demonstrate experience in the areas of expertise as outlined in the Terms of Reference / Statement of Work by providing the following:

- Examples of representative work, including lessons learned, on similar projects with similar requirements. Typically, a time frame is provided to limit older less relevant projects but consideration for the limit should be made based on sector and project type; or
- Examples of other work, including lessons learned, and providing a demonstrated approach and methodology for transferring knowledge and experience from that work to the proposed scope of work.

## 5.7 FEE STRUCTURE

The fees for Quantity Surveying Services may be requested based on one of the following structures:

- On a lump sum price basis for a defined scope of work;
- On an hourly or per diem basis based on the Quantity Surveyor's rates for different levels of staff; or
- On an hourly or per diem basis based on the Quantity Surveyor's rates for different levels of staff limited by a maximum upset value; or
- On a percentage basis of the total construction cost, which can be based on the estimate/cost plan, hard cost budget or adjusted accordingly on the final account cost of the project. This arrangement is suitable for large projects when Quantity Surveying services include both pre-contract (all stages of estimates) and post contract services (tendering, cost reporting, change order control and monthly progress claim reviews). The scope of services should be clearly defined to allow for competitive pricing on an equal basis.

## 5.8 REFERENCES

The client may request references for similar experience or services on a project. References should include name, title, phone number and email.