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HOW TO INSTRUCT YOUR BUILDING SURVEYOR



Daniel Legg examines the importance of a clear brief and instructions

THE IMPORTANCE OF A CLEAR AND DEFINITIVE BRIEF at the start of any major works project should never be underestimated.

Briefs that are lacking in detail can lead to implications later on and subsequent changes can often lead to delays, increased costs and unhappy clients/leaseholders. All of this can be avoided by having a clear brief that all parties are signed up to from the start.

What makes a good brief?

By way of an example, if a programme of external repairs and redecorations are required to a managed block, the building surveyor should be given as much information and detail about the property as possible to assist in the preparation of the specification. This should include:

Detailed scope of works:

Clear direction of what elements of the building and/or estate to be included within the works are required, and this should correlate with the information included within the managing

agent's notice of intention under the Section 20 process.

Background/historic information:

Any information relating to previous works, temporary repairs undertaken, damp and water ingress problems and any other issues that may have a bearing on the scope of works currently being instructed. Reports previously prepared by other surveyors/engineers, should be passed over for consideration.

Health and safety file:

This should be held for the property under the CDM Regulations 2007 to detail previous major works undertaken, materials used, and any inherent health and safety issues within the building, and should be passed to the surveyor.

Asbestos report and other health and safety reports:

So any hazardous materials/issues can be identified at an early stage. These may need to be dealt with prior to works commencing.

Lease:

One fundamental piece of information which is often overlooked is that of a typical lease. It is especially important as it allows the surveyor to denote areas of demise such as balconies, roof terraces but most importantly the demise of windows and the repairing obligations of the freeholder.

Timescales:

Realistic timescales should be set out at the initial stages of any project, taking into consideration consultation periods, collection of funds etc, so neither party has unrealistic expectations.

How is this achieved?

There should be open communication channels between the surveyor, property manager/freeholder and board members by way of a meeting on site to discuss issues relating to the building, which can then be followed up by issuing a written brief/instruction and confirmation of instructions.

Once the brief has been issued, the final step is for the surveyor to confirm their

instructions and terms of business in writing, detailing the services to be provided together with those that are not, specifically identifying:

- The fee that has been agreed for this role and the basis of how the fee is to be charged, including any stage payments;
- The terms and conditions and confirmation on how the appointment may be terminated;
- The complaints/dispute resolution procedure;
- The level of professional indemnity insurance cover;
- The extent of the surveyor's authority as contract administrator with regard to expenditure of contingency/provisional sums and advice on additional/unforeseen works;
- Level of inspections and frequency of site meetings.

The property manager/freeholder should then acknowledge receipt and agreement before the surveyor undertakes any works.

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