

Why do we need a surveyor

Julian Davies explains the role of a chartered surveyor on major works projects



"I am an RMC director in a small block that is about to embark on a major external works project. We are having our windows, doors and guttering replaced; external redecoration and some hard landscaping done. We have been told that we could appoint a chartered surveyor to help us plan the work and then manage the project. Won't our building contractor be able to do this for us and how can we justify the additional expense to leaseholders?"

This question from a *Flat Living* reader highlights a common lack of understanding surrounding the role of chartered surveyors on construction and maintenance projects. So let me explain why employing a surveyor could not only keep your project running smoothly but is also likely to save you money in the long run.

Yes, a building contractor could manage the project and do the work; and providing the RMC Directors issue the correct notices, ensure that the initial pricing is self-specifying and satisfy the requirements of the Section 20 procedures, by obtaining quotes from builders on a like-for-like basis, they can go it alone. In this way, a potential layer of management would be removed from the works and the RMC could manage the contractor themselves. However, what this approach would lack is a strategic, long-term view. A surveyor is there to advise you what will be best for you and your block now and into the future. In addition to legal expertise, technical understanding and masses of experience, we're also there to offer objective input.

A surveyor will be able to guarantee that estimates are realistic, that your budget ceiling is safe, and that you are receiving the best value in terms of work and materials. Materials are often the key here. Cheaper in the short-term may prove troublesome further forward. Your gutters, for example, may cause significant problems if they do not work efficiently. Fundamentally, a surveyor is trained to be an expert in building defects and repairs. And, assuming the works are undertaken well, there won't be much of either required in the months after the works take place. In a few weeks time your windows will be renewed, the external paintwork will look great and the roof will not leak.

A strategic approach

However, getting this right and avoiding future defects means addressing a series of important questions. Why did you need to change the windows? Was there any evidence of damp? Were there drafts? Was the cornice deteriorating? If so, it's vital to work out why. If you don't, your new windows and doors will soon suffer identical problems to the old ones.

A surveyor will also identify the potential impact of your landscaping work on your property. Will drainage be affected? Could roots cause issues to your foundations? Where will rainwater gather? Will the landscaping affect future access for maintenance, for example placement of scaffolding? It'll be vital to examine the relationship between the works on your building and the garden to avoid future problems.

This strategic approach looks at the collective impact of work in addition to its causes. It will build-in a realistic time frame for future maintenance to ensure that this is the last major project you need to plan until the next works cycle. A surveyor would usually make an assessment of the life expectancy of components/materials and ensure that any works that may need to be undertaken in the future (before the next planned cycle of major works) is undertaken within the current cycle to minimise on disruption and cost (for example paying for scaffolding).

The different components/materials in the building may also require subtly different treatment. Will alterations have any repercussions for on-going maintenance? For example surveyors may consider/advise on the use of pre-finished materials for high level areas to minimise the frequency/cost of future scaffolding and re-painting?

All that work takes place in advance of the project commencing, but it will provide you with complete reassurance that the project will start with everything in place and to help ensure that the works will be completed on time, on budget, and in a way that fits with your vision for the long-term benefit of the property.

Dealing with the small print

Once the specification and works plan has been finalised, a surveyor will obtain competitive and comparative tenders through a formal process (ensuring no carelessness or collusion). He or she will then be able to assess and review them for you before making

a recommendation for appointing a contractor, for example by checking the tenders have been priced using the same quality and standard of materials, and all health and safety requirements have been included. The surveyor's recommendation will be based on a combination of factors where cost is an important but not exclusive element. They would also be able to call on an approved list of tried and tested contractors who would be guaranteed to give your works the right treatment and approach.

Once a contractor has been chosen a surveyor will then set-up and "administer" a formal building contract between the client (Management Company) and the contractor. The formal contract will provide the RMC directors with protection by ensuring that the obligations on the contractor are clearly laid out and it will provide mechanisms for payments, quality control and what happens in the event that things go wrong (for example the contractor goes into bankruptcy part way through the works).

Getting the job done

There are arguments for only engaging a surveyor up to that point and then signing-off. After all, you now have a project plan in place, a comprehensive specification and an accredited contractor charging an appropriate amount. However, the project is still to begin and the surveyor can continue to take

responsibility moving forward.

Let's start with relationship management. The RMC directors, leaseholders and any tenants may require hand-holding throughout this messy and noisy period. This sort of diplomacy is a fundamental part of the surveyor's role; he or she acts as the lynch pin, liaising with the leaseholders and providing regular updates throughout the course of the works.

Also, the surveyor will usually provide the financial management for the project, assessing the contractor's application(s) for payment and issuing a certificate only up to the value of works properly executed. With most formal building contracts, the contractor is entitled to apply for the first payment four weeks after commencement and it is the surveyor's job to assess and approve the application once it has been made.

Often, the surveyor can save money by ensuring that an accurate specification is drawn up (lessening ambiguity) and measuring the works completed.

The surveyor will also ensure that there is a retention on payments made to the contractor, usually 5% throughout the progress of the works with 50% of the retention being released at completion and the remaining 50% at the end of the Defects Rectification Period

(typically either 6 or 12 months after the completion of the works).

Assessing the quality of the workmanship on a regular basis is a given. The surveyor will be on site regularly to check that the correct materials are being used and to the correct standards. In the event of any unforeseen works (for example following a closer inspection from the scaffolding), a surveyor will ensure that any issues of this sort are understood and costs are assessed and agreed with the Directors before any works are undertaken.

Ultimately, a surveyor can take a project to its close and beyond. He or she will ensure that the works are completed correctly and that payment is made at the right time (and certified), that the work is signed-off beforehand, and that funds are withheld for a period after completion.

Of course when embarking on building work, you always have a choice. There's no obligation to involve a surveyor, but doing so will ensure a degree of certainty and reassurance. Your block is there for the long term - and the surveyor's contribution is to ensure it remains that way. ●

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