

# Guidelines to Survey Report Writing

It has long been the concern of the Association that Survey Reports submitted by its members should measure up to the high standards we set ourselves for all our activities. After all, it is often the first document passing between the specialist contractor and his client and it should therefore indicate the level of competence and efficiency that can be expected from the specialist contractor throughout his contract. It is for this reason that both modules two and three of the CSRT examinations have survey writing questions that must be answered and passed by all candidates

Whilst it is accepted that no two surveys, even on the same property can ever be exactly identical, nevertheless, there are certain essential elements which the Survey Report should contain, remembering that it is at once

- a) A legal document which is binding on the company or person submitting it and which may subsequently become the basis of a contract.
- b) A record of the defects found in the property, relating to dampness and any restrictions of survey,
- c) An instruction to the client, and / or his builder,
- d) An instruction to the operative, who eventually does the work,
- e) A permanent record, to be kept for up to 30 years, of the work recommended and carried out - or sometimes more importantly not recommended or carried out,
- f) A sales instrument.

It should be seen, therefore, that to satisfy these criteria, the report must be factual in observations and clear cut in its recommendations. Whether the Survey Report is offered free or for a fee, the same legal obligation is imposed on the company to assume responsibility for the information, or misinformation, it may contain. Ultimately it could lead to liability for consequential costs resulting from misdirection omissions and recommendations.

The company's liability for the report obviously extends to its clients. However in some situations such as an inspection

carried out for a vendor or estate agent, others may be expected to rely on it. Indeed there is a legal provision for this in the Contracts (Rights of 3<sup>rd</sup> Parties) Act 1999. If it is intended that reports should be for the stated client's benefit only, then a statement that the provisions of the Contracts (Rights of 3<sup>rd</sup> Parties) Act 1999 are expressly excluded must be made in the report, preferably at the beginning of it. The Association suggests that survey reports should follow the guidelines listed below (not necessarily in the same order):

## Invitation to Tender:

The clients instructions must be accurately quoted in the report and it is usual to state whether the invitation was written or verbal. Quote the relevant dates and reference.

## Observations

It is reasonable to expect the survey report to offer a brief description of the property, e.g. terraced, semi-detached or detached house, warehouse, school, church, church hall, etc., built of brick, stone, rubble walling, or whatever materials, perhaps faced with stucco rendering, etc.

The age of the property or its architectural style, (Tudor, Georgian, Victorian) is important to mention. This sort of detail can enhance the professional image the company wishes to display, apart from other considerations.

## Observations

Properties must be looked at closely from outside as well as inside. The survey report should draw attention to any source, or possible source, of dampness. Faults, defects and their location should be identified. Even stating the obvious is just as important as the not so obvious. Leaking roofs, rainwater goods, cracked rendering, defective cills and absence of a conventional damp course etc., (ref DP5) should be highlighted and the overall effect on the property stated, such as, the risk of timber decay. These items should be specific to the property in question and not as a "cover all" standardised statement. When it is recommended that a builder is to be instructed to correct faults and defects it is important that the specialist takes the necessary steps to make it clear that the client must act to instruct the builder. From within the property the survey should record any incidence of damp or condensation. It

is important that the process of observations is seen to have been carried out.

## Specification

Having diagnosed rising damp and its location the survey report will recommend the installation of a chemical DPC to those rooms and walls indicated in the report. It is recommended that the survey report includes a drawing that can be used to show very clearly, the areas where work is to be undertaken. The particular type of DPC should be mentioned. Similarly, timber defects and the preservatives that are to be used should be specified in the report and where appropriate indicated on a drawing. Specialist contractors may consider that this is the appropriate place to offer their guarantee and, indeed, any restrictions they may place on it. A specimen guarantee must be included as this would be material to the contract.

## Replastering (DP2)

Of all the problems that can arise following the installation of a DPC, those relating to plastering are by far the most common. Special attention, therefore, should be paid in the report to explain this part of the treatment. In addition to explaining why it is necessary, a surveyor should also specify:-

- a) The preparation (DP 2)
- b) The height, or heights to which the new plaster should be applied (remembering that all replastering heights may not be the same, wall by wall),
- c) The omission of certain areas of replastering giving the reason, e.g. in the case of dry lining, existing good quality plasters, etc.
- d) Any option which the client may have in this matter,
- e) Detail of any areas below the level of the DPC which may require other forms of waterproofing, as for instance in soil retaining or part-retaining wall areas (ref DP 5 and DP 8).

### Builders and Associated Works:

Any special preparation which is required of the client or his builder needs to be clarified. Too often operatives arrive on site to find that the owner has not arranged for the removal of furniture, fixtures, fittings, carpeting, etc., from the areas to be treated. Be sure to mention that flower beds or garden paths are to be permanently lowered where appropriate. All of these details should be specific in the body of the report and not in small print in "Conditions of Contract".

Where associated works are to be carried out by others, it should be made clear in the report which items must be carried out before the dpc works commence, and which may be carried out at the same time or subsequently, in which case a time period should be stated. For instance, lowering of external ground levels must be carried out prior to dpc works, but repointing may be carried out later in the project, within a specified time period which may be stated or defined by season.

If it is known that a builder is to be engaged it may alter the concept of associated works. It may be more convenient and cost effective to allow the builder to carry out certain items, removing and replacing skirting boards, replastering or making-good for example. However, in either case the full range of builder's work, irrespective of who does it, should be detailed. It must be stated whether the costs are inclusive or exclusive to the estimated price – be specific.

### General Conditions

There is always a conflict between that which can be put into the pre-printed literature appended to or presented with the report and that which is especially part of the report. On the one hand the former can lead to the accusation of "small print". On the other hand the report can be too long. You should judge, however, which would be the lesser of the two evils.

### Standard Paragraphs:

Word processors and standard paragraphs are now part of everyday routine and must be relevant and accurate whenever they are used.

Surveyors must be encouraged to choose them carefully and to ensure that each paragraph is put into a proper sequence so as to give "flow" and proper meaning to the text. Arrangements are usually made for special paragraphs to be inserted by a surveyor if a non-standard provision is required.

### Drawing:

The drawing is an essential part of the survey report for DPC works, and is often most useful in timber reports. It is at a glance the most informative contract document. Whilst it need not be over elaborate the important features of the property should be shown, and whilst not necessarily being to scale it should portray the approximate proportions of the building. Essential details would be: the extent of the DPC (showing from which side of the wall it is to be inserted); high ground or floor levels, raised paths etc., which would influence the height at which the insertion is made. Be careful not to omit the verticals and the heights to which they should each go. New plastering should be clearly indicated and identified.

Finally, the legal standing of the survey report must be stressed. It is intended to offer protection for both Contractor and Client. An omission or a misformed statement could prove very costly.



*The information contained in this leaflet is given in good faith and believed to be correct. However, it must be stressed that of necessity it is of a general nature. The precise condition may alter in each individual case and the Association is therefore unable to accept responsibility for any loss howsoever arising from the use of the information contained herein.*

### DP9/1107

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