

# Guidance and Definitions of Surveying Services

## Construction and Built Environment

### Building Control – Advice

Appraisal of plans and details of proposals of all types of buildings in order to comply with the building regulations and associated legislation.

### Building Control – Inspection/Assessment

Carrying out site-inspections and assessments of all types of buildings in order to comply with the building regulations and associated legislation.

### Building Design

Surveying practices who offer architectural and design services within their scope of service to clients.

### Building Pathology

Considers how the structure and materials of a building relate to its environment, its occupants and the way the building is used, so as to develop a better understanding of building failures.

### Building Surveys

- Investigating and assessing the construction and condition of a residential, commercial, or industrial property.
- The extent of the survey is agreed between the client and the surveyor.
- The report includes reference to visible defects and guidance as appropriate on maintenance and remedial measures.

### Infrastructure Cost Management

The management of cost, time, and quality in relation to building and engineering projects.

### Infrastructure Project/Programme Management

- Overall co-ordination of a team involved in construction or development projects.

- Identification of professional resources required at each stage and monitoring of progress.

### Construction Contract Procurement/Management

- Preliminary cost advice and planning.
- Advice on type of contract and obtaining tenders.
- Report on tenders, negotiation with contractors.
- Valuation of works in progress.
- Management of contracts in progress, assessing costs of proposed variations and settlement of final costs with contractors.
- Advice on contractors' claims.

### Construction Cost Management (Excluding Infrastructure)

- Preliminary cost advice and planning.
- Advice on type of contract and obtaining tenders.
- Report on tenders.
- Negotiation with contractors.
- Valuation of works in progress.
- Management of contracts in progress.
- Assessing costs of proposed variations.
- Settlement of final costs with contractors' advice on contractors' claims.
- Project monitoring – An independent project and cost management service for funders and financiers to assess project risks, payments and completion and usually appointed separately to the project team.
- Building cost reinstatement assessments – An independent insurance assessment for the re-building cost usually undertaken for a portfolio of properties.

### Construction Project/Programme Management (Excluding Infrastructure)

Overall co-ordination of a team involved in construction or development projects.

Identification of professional resources required at each stage and monitoring of progress.

## Construction Taxation Advice

Advise clients on the tax allowances available and the requirements of asset segregation to comply with their client's and the taxing authorities' requirements. For construction, the service includes an assessment of potential tax allowances arising out of construction activity and a proposal to minimise the client's tax liabilities. Construction expenditure covers new build, refurbishment, fit out, extension, and demolition including land remediation etc. The role is two-fold – firstly to give strategic advice on the alternatives allowances available, and secondly to quantify the value of the tax allowances. This will often include reaching an agreement with the relevant body such as the tax authorities and their agencies.

## Digital Construction Advice

Covers applying surveying services in project and cost management to building information modelling (BIM), digital twins, common data environments, blockchain, and artificial intelligence, both in terms of advice and the interface with professional workflows and data standards.

## Dilapidations Advice

Preparing, measuring, and pricing schedules of work to be done to the structure of buildings; negotiation and settlement for landlord and tenant; expert evidence in cases of dispute.

## Fire Safety Advice

Surveying practices who offer advice on fire safety, including fire risk assessments, external wall systems assessments, active & passive fire precautions, fire reinstatement costs for insurance purposes, Government grant and loan scheme advice, and other fire related advice within their scope of service to clients.

## Planned Maintenance Advice

- Establishing the condition of such properties, planning their maintenance and improvement, identifying and implementing development opportunities.
- Assessing the state of repair or condition of an organisation's building stock in connection with preparation of a maintenance programme.

## Auctioneering

### Auctioneering - Personal property/Arts and Antiques

The auctioneering of goods, furniture, fine arts, antiques, household effect, fixtures etc for disposal purposes

## Land and Natural Resources

### Compulsory Purchase and Land Acquisition (Advice/Assessment)

Acting for acquiring authority or owner/occupier affected by compulsory purchase proceedings or the carrying out of public works, including:

- Dealing/making objections.
- Conduct of possession/relocation negotiations.
- Agreement of compensation for acquisition or depreciation.

### Environmental Assessment/Management

Auditing the environmental effects of existing or proposed policies or activities. Assessing the anticipated environmental impact of a proposed project as part of the planning process and when seeking planning consent.

### Geospatial Surveying

Encompasses land, measured, engineering, and hydrographic survey activities and technologies such as GIS, GNSS, BIM, bathymetry, laser scanning, drones, and other forms of digital spatial data capture. The measurement, definition, and portrayal, either digitally or graphically of the physical features of, and the structures on the earth's surface (land & marine). Storage and handling of locational information using computerised technology, spatial support of infrastructure and construction development. Also concerned with land registration, administration, and cadastre. Has superseded the previous professional group term "geomatics".

### Land Remediation

The process of cleaning up contaminated land and restoring it to its former state.

### Natural Resources Management

- Administration, management, and development of mineral-bearing land inspections and reports.
- Comprehensive management of mineral development from viability studies through planning and exploitation to reclamation and after-use of land.

### Neighbour Disputes

Help neighbours resolve property disputes and maintain harmony without the need for intervention by legal process, and also forms part of the resolution process when legal proceedings are instigated in a mediation, expert witness, or single joint expert capacity. It often deals with sensitive issues such as:

- Boundary disputes, ownership of land and relocating boundary markings (such as fences).
- Party Walls – advice on the rights and duties of property owners as to the repair, construction, and works to party walls and similar structures, and acting as Party Wall

Surveyors with particular reference to the Party Walls etc. Act 1996.

- Rights of Light.
- Daylighting and sunlighting.
- Access rights.

### Planning, Development and Regeneration Advice

- All aspects of planning and development for land use.
- Includes development plans and development control, transport and other infrastructure, compulsory purchase and compensation, and marine and inland water resource management.
- Preparation of planning applications.
- Presentation of evidence by written representation at hearings and Public Inquiries.

### Rural Estate Management and Sales

- Collection of rent, arranging repairs and insurance, and advising on the development and long-term planning for estates owned by private individuals, institutions, and others.
- Acting as agents for clients wishing to acquire, sell, or let rural property, including residential, agricultural, and forestry property.
- Sale of agricultural stock (including livestock) and land (including auctioneering).

### Waste Management

Design, advise on, and/or manage waste management schemes, their implementation, and/or property interests therein.

### Telecommunications

Advising, negotiating, and finalising the siting, rental, and maintenance of telecommunications infrastructure and sites on behalf of operators, infrastructure providers, and land/property owners within the context of the Electronic Communications Code 2017 (ECC) and other relevant legislation.

## Commercial Real Estate

### Facilities Management Services

The required development, co-ordination, and management of an organisation's non-core specialist

services and buildings (including their systems, plant, IT equipment, fittings, and furniture) to assist the achievement of the organisation's strategic objectives.

### Commercial Real Estate Letting

Acting as agents for clients wishing to let commercial property.

### Commercial Real Estate Management

The management of commercial property, including collection of rents and the calculation and collection of service charges (the specific duties are agreed with the client).

### Commercial Real Estate Purchase/Sales

Acting as agents for clients wishing to acquire or sell commercial property.

### Strategic Corporate Real Estate (Occupier) Advisory

Provide advice on how to finance, occupy, and develop real estate to maximise use suited to business needs.

## Residential Real Estate

### Home Condition Reporting and Certification

Provides a concise report to enable the client to decide if a property is a reasonable purchase at the agreed price and to assess significant considerations before exchanging contracts.

### Leasehold Advisory

Valuation, advice, and negotiations on behalf of landlords, occupying leaseholders, and tenants in respect of such occupiers' legal rights to buy the freehold interest or a new lease in their dwellings.

### Residential Real Estate Letting

Marketing or allocation (as appropriate) and agreement of terms on behalf of landlords for the letting of residential property. The ongoing service can include collection of rent, arranging maintenance, inspection of property, and negotiation of rent.

### Residential Real Estate Management

The management of residential property, including collection of rents and the calculation and collection of service charges (the specific duties are agreed with the client).

## Residential Real Estate Sales

Acting as agents for clients wishing to acquire or sell residential property.

## Valuation and Investment Advisory

### Insolvency and Recovery

- Providing property advice to insolvency practitioners.
- Acting as insolvency practitioners and receivers.

### Property Finance and Funding Advice

The assessment and giving of advice to investors in property as to the terms upon which acquisitions and disposals should be affected in order to meet the client's objectives.

### Property Investment and Fund Management

Providing advice for clients on where and how to invest and/or working to improve the value of a property or properties.

### Property Taxation (Advice/Assessment)

- Valuations for all purposes.
- Checking tax demands, advising on assessments, preparing returns and conducting appeals.

### Valuation – Agricultural

Valuation of rural land and buildings, livestock and farm machinery, and tenants' rights. This includes Farm Stock-taking valuations.

### Valuation – Business and Intangible Assets

Produce valuations of businesses and intangible assets for varying uses such as:

- Sale and purchase.
- Corporate finance.
- Taxation.
- Compulsory purchase and compensation.
- Insolvency and recovery.

The asset types can include:

- Trading businesses.



- Business assets including share classes/rights.
- Options.
- Intellectual property.
- R&D.
- Instruments or liabilities.
- Other securities or intangible asset rights.

### Valuation – Commercial Real Estate (including Other Non-Residential Infrastructure)

The assessment of the value on a defined basis and stated assumptions of an interest in commercial property. Valuations are required for many purposes.

### Valuation – Machinery and Business Assets Valuation

for all purposes:

- Expert evidence as to value.
- For rating and other purposes.
- Sales.

### Valuation – Natural Resources

Valuation of mines, minerals, and mineral estates.

### Valuation – Personal Property/Arts and Antiques

Valuation of goods, furniture, fine art, antiques, household effects, fixtures, etc. for acquisition, sale, tax, insurance, and other purposes.

### Valuation – Residential Real Estate

The inspection, reporting on, and valuation of residential property as security for a loan or for other purposes.

## Cross-Sector

### Dispute Resolution (including Expert Witness)

Assisting in the resolution of disputes relating to land, property, and construction.

Could involve acting as:

- Arbitrator.

- Adjudicator.
- Independent Expert.
- Mediator.

### Retrofit Services

Providing advice, management or monitoring services for retrofit projects associated with improving energy efficiency, reducing carbon emissions, protecting the building's fabric and contributing to occupants' well-being in the dwelling.

Could involve acting in the following roles (defined in the Residential Retrofit Standard):

Lead Professional or project manager

Assessor

Designer

Contract administrator or retrofit coordinator

Evaluator or post retrofit inspector.