



SCOPE OF SERVICES

Building Surveyor Services

Scotland
May 2022



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Building Surveyor Services

For use with the RICS Standard, RICS Short Form and/or RICS Short Form of Consultant's Appointment for Designated Services

Additional notes

- These Services should be completed by inserting a 'tick' in the box next to the Service to be provided. These Services can be used with the Standard/Short or Designated Form, but care should be taken in the selection of the correct form for the relevant Service. For further information, refer to the explanatory notes for the relevant RICS Form of Consultant's Appointment.
- All other Services that are not ticked shall be deemed to be Additional Services under the terms of this Appointment.
- Any bespoke Additional Services agreed between the Client and the Consultant should be inserted in Section 6.
- A schedule of 'typical' meetings is included with these Services in the Appendix. Completion of this schedule is also recommended.
- Fire Risk Assessments (FRAs) should not be undertaken unless a suitable recognised qualification is held. This is a specialist technical area of work and falls outside the scope of a building surveyor's core competencies, therefore specialist training in FRAs is required prior to undertaking this type of work.

1 Construction

Use with the RICS Standard or Short Form of Consultant's Appointment.

1.1 General

- 1.1.1 Attend Client, design, Project, Site and other meetings as provided under this Appointment.
- 1.1.2 Issue instructions, on behalf of the Client, to the Professional Team and Contractor in accordance with the terms of their appointments/the Building Contract.
- 1.1.3 Agree Project reporting and recording procedures with the Client, the Professional Team and the Contractor. Implement agreed procedures.

- 1.1.4 Monitor the performance of the Professional Team and the Contractor. Report to the Client.
- 1.1.5 Prepare regular/monthly design, quality, cost and programme reports. Advise the Client of any decisions required and obtain authorisation.

1.2 Preparation

- 1.2.1 Liaise with the Client and the Professional Team to determine the Client's initial requirements and to develop the Client's Brief. Establish review, approval, variation and reporting procedures. Prepare recommendations for the Client's approval.
- 1.2.2 Liaise with the Professional Team and advise the Client on structural, building, measured and other surveys and Site investigations including condition reports, soil reports, etc.

- 1.2.3 Prepare a measured survey/condition survey or other report on the Site or any existing buildings on the Site. Produce dimensioned drawings, schedule of condition and other record documents.
- 1.2.4 Visit the Site and carry out initial inspections. Advise the Client on areas of concern.
- 1.2.5 Carry out a desktop study of archive material. Prepare a report and advise the Client.
- 1.2.6 Liaise with the Professional Team and advise the Client on statutory or other approvals required and fees due in respect of the Project. Recommend payments to the Client.
- 1.2.7 Advise on the cost of the Project. Advise on the cost of alternative design and construction options.
- 1.2.8 Advise on the Programme for the design and construction of the Project.
- 1.2.9 Visit the Site and/or the Project and review record drawings and/or other information provided by the Client. Prepare a written feasibility report for the Client on the adequacy of the information supplied.
- 1.2.10 Prepare an initial appraisal for the Project, including advice and recommendations on the technical feasibility of the works required, their approximate costs, their design and construction programme and any statutory or other approvals required.
- 1.2.11 Liaise with the Professional Team and prepare outline proposal(s) for the Project, including advice and recommendations on the technical feasibility of the works required, the quality standards required, their approximate costs, their design and construction programme and any statutory or other approvals required. Prepare recommendations for the Client's approval.
- 1.2.12 Liaise with the Professional Team and prepare detailed design proposal(s) for the Project including advice and recommendations on the technical feasibility of the works required, the quality standards required, their approximate costs, their design and construction programme and any statutory or other approvals required. Prepare recommendations for the Client's approval.
- 1.2.13 Liaise with the Professional Team and establish a structure and procedure for design and quality management. Establish review, approval, variation and reporting procedures. Prepare recommendations for the Client's approval.
- 1.2.14 Establish the roles and responsibilities of the Client, the Professional Team, the Contractor and specialist/design subcontractors.
- 1.2.15 Prepare and submit planning, Building Regulations or other statutory applications. Conduct negotiations on behalf of the Client.
- 1.2.16 Liaise with the Professional Team and prepare a pre-construction report for the Project including advice and recommendations on the technical feasibility of the works required, the quality standards required, their approximate costs, their design and construction programme and any statutory or other approvals required.
- 1.2.17 Advise the Client on any statutory or other consents that may affect the feasibility proposals including planning, legal, Building Regulations, and ownership and neighbourly matters.
- 1.2.18 Liaise with the Client and Professional Team and prepare feasibility proposal(s) for the Project, including advice and recommendations on the technical feasibility of the works required, the quality standards required, their approximate costs, their design and construction programme and any statutory or other approvals required. Prepare recommendations for the Client's approval.

- 1.2.19 Liaise with the Client and the Professional Team and advise the Client on alternative development options including redevelopment, refurbishment or alteration.

1.3 Tendering and procurement

- 1.3.1 Liaise with the Professional Team and identify any long delivery building components and systems. Prepare recommendations for the Client's approval.
- 1.3.2 Liaise with the Professional Team and identify any specialist/proprietary building components and systems. Prepare recommendations for the Client's approval.
- 1.3.3 Advise on tendering and contractual procurement options. Prepare recommendations for the Client's approval.
- 1.3.4 Advise on suitable tenderers for the Building Contract. Prepare recommendations for the Client's approval.
- 1.3.5 Prepare, or obtain from the Client/ Professional Team, tender drawings and specifications. Monitor and report to the Client the procurement process.
- 1.3.6 Liaise with the Client and the Professional Team and prepare, or obtain from the Client/Professional Team, the tender documentation.
- 1.3.7 Lead and manage the procurement process with a view to appointing:
 - The Contractor.
 - Major subcontractors or suppliers.
- 1.3.8 Attend pre- and post-tender interviews.
- 1.3.9 Advise on tendering and contractual procurement options. Prepare recommendations for the Client's approval.
- 1.3.10 Advise on suitable tenderers for the Building Contract. Prepare recommendations for the Client's approval.
- 1.3.11 Liaise with the Professional Team and advise on errors, omissions, exclusions, qualifications and inconsistencies between the tender documents and the tenders received. Prepare recommendations for the Client's approval.
- 1.3.12 Advise on the tenderers' design and construction programmes and method statements.
- 1.3.13 Liaise with the Professional Team and prepare, or obtain from the Professional Team, cost and design studies to assess alternative contractors' proposals. Prepare recommendations for the Client's approval.
- 1.3.14 Conduct negotiations with tenderers. Prepare documentation to confirm adjustments to the tender sums. Prepare recommendations for the Client's approval.
- 1.3.15 Provide services for a two-stage tendering process.

1.4 Enabling works

- 1.4.1 Advise the Client on specialist services, including consultants, contractors, subcontractors and suppliers required in connection with the Project.
- 1.4.2 Advise the Client on demolition, strip-out, Site investigation and enabling works contracts required prior to the commencement of the Building Contract.
- 1.4.3 Liaise with the Professional Team and procure demolition, strip-out, Site investigation and enabling works contracts required prior to commencement of the Building Contract.
- 1.4.4 Manage, on behalf of the Client, demolition, strip-out, Site investigation and enabling works as they proceed.

1.5 Health and safety

- 1.5.1 Liaise with the Professional Team and advise the Client of its obligations under the *Construction (Design and Management) Regulations 2015* (CDM Regulations).
- 1.5.2 Comply with the CDM Regulations insofar as they relate to this Appointment.

1.6 Appointing the Professional Team

- 1.6.1 Advise the Client on the selection, the terms of appointment and fee structures for the Professional Team. Conduct negotiations with, and prepare and complete the forms of appointment for, the Professional Team.
- 1.6.2 Advise the Client on the Professional Team's professional indemnity insurance cover. Annually confirm cover remains in place.
- 1.6.3 Advise the Client on the need for staff resident at the Site.

1.7 Executing the Project

- 1.7.1 Administer the terms of the Building Contract and advise on additional works required by third parties.
- 1.7.2 Liaise with the Professional Team and prepare a scheme design, or similar, report for the Project including advice and recommendations on the technical feasibility of the works required, the quality standards required, their approximate costs, their design and construction programme and any statutory or other approvals required.
- 1.7.3 Prepare and maintain a Project execution plan, or similar management tool, identifying the roles and responsibilities of the Client, the Professional Team, the Contractor and specialist subcontractors/suppliers.
- 1.7.4 Establish review, approval, variation and reporting procedures. Prepare recommendations for the Client's approval.

- 1.7.5 Liaise with the Professional Team and prepare and maintain a project design strategy identifying the roles and responsibilities of the Client, the Professional Team, the Contractor and specialist subcontractors/suppliers. Establish review, approval, variation and reporting procedures. Prepare recommendations for the Client's approval.
- 1.7.6 Liaise with the Professional Team and prepare a pre-construction report for the Project including advice and recommendations on the technical feasibility of the works required, the quality standards required, their approximate costs, their design and construction programme and any statutory or other approvals required.
- 1.7.7 Liaise with the Client and the Professional Team and advise on methods of progressing design and/or construction works prior to the execution of the Building Contract.
- 1.7.8 Obtain confirmation that required insurances are in place prior to commencement of works on the Site.
- 1.7.9 Prepare, or obtain from the Client and the Professional Team, contract drawings and specifications. Liaise with the Client's legal advisers, prepare the contract documents and deliver to the Client and the Contractor for completion.
- 1.7.10 Prepare, or obtain from the Client/Professional Team/Contractor/subcontractor(s)/supplier(s), production information required to execute the Project.
- 1.7.11 Agree approvals required from the Professional Team under the Building Contract. Administer the Building Contract.
- 1.7.12 Convene and chair regular/monthly Site meetings with the Client, the Professional Team, the Contractor and, where appropriate, subcontractor(s) or supplier(s). Take minutes of the matters discussed and issue copies

of minutes to the Client, the Professional Team, the Contractor and such other persons attending the meeting.

- 1.7.13 Liaise with the Client and the Professional Team and conduct negotiations with the Contractor. Prepare documentation to confirm the agreements reached.
- 1.7.14 Visit the Site periodically and assess the progress of the Project for interim payment purposes. Liaise with the Professional Team and prepare recommendations for interim payments to the Contractor.
- 1.7.15 Advise, or obtain advice from the Professional Team, on the cost and programme effect of variations prior to the issue of instructions under the Building Contract.
- 1.7.16 Agree the cost of instructions, excluding loss and expense claims, issued under the Building Contract.
- 1.7.17 Obtain authorisation from the Client for additional costs where the Consultant's limit of authority is exceeded.
- 1.7.18 Undertake regular Site inspections. Obtain progress and quality reports from Site staff representing the Client, the Professional Team and the Contractor.
- 1.7.19 Carry out off-site inspections of subcontractors' and suppliers' premises.
- 1.7.20 Agree all test certificates and statutory and non-statutory approvals required from the Professional Team and the Contractor. Prepare recommendations for the Client's approval.
- 1.7.21 Liaise with the Client, the Professional Team and the Contractor and prepare and maintain a handover plan, or similar management tool, identifying the roles and responsibilities of the Client, the Professional Team and the Contractor. Establish review, approval, variation and reporting procedures.

Prepare recommendations for the Client's approval.

- 1.7.22 Advise on the rights and obligations of the parties to the Building Contract.

1.8 Contractual services

- 1.8.1 Provide specialist building surveying advice on the interpretation of Building Contracts and the practical impact of terms and conditions.
- 1.8.2 Liaise with the Client's legal advisers and advise on the use and/or amendment of bespoke forms of contract or contribute to the drafting of particular client requirements.
- 1.8.3 Advise on the Contractor's entitlement to extensions of time. Analyse and report on the Contractor's application(s) for extensions of time. Prepare recommendations for the Client's approval.
- 1.8.4 Advise on the cost, contractual and programme consequences arising from an acceleration instruction.
- 1.8.5 Advise on the Contractor's entitlement to loss and expense. Analyse and report on the Contractor's loss and expense claim(s). Prepare recommendations for the Client's approval.
- 1.8.6 Prepare documentation and/or provide advice to support adjudication proceedings. Attend adjudication proceedings.
- 1.8.7 Prepare documentation and/or provide advice to support mediation proceedings. Attend mediation proceedings.
- 1.8.8 Prepare documentation and/or provide advice to support arbitration and/or litigation proceedings. Attend arbitration and/or litigation proceedings.

1.9 Technical services

- 1.9.1 Prepare a maintenance manual for the Project.

- 1.9.2 Prepare records or as-built drawings for the Project.
 - 1.9.3 Provide records of specialist details through drawings, photography and other documentation.
 - 1.9.4 Provide on-site supervision for the Building Contract.
 - 1.9.5 Provide quality management services for the Building Contract.
 - 1.9.6 Liaise with the Client and Professional Team and prepare outline and detailed design proposal(s) for the interior design and/or fit out of the Project including advice and recommendations on the technical feasibility of the works required, the quality standards required, their approximate costs, their design and construction programme and any statutory or other approvals required. Prepare recommendations for the Client's approval.
 - 1.9.7 Carry out exceptional negotiations with planning, building control and other statutory authorities.
 - 1.9.8 Construct, or obtain, marketing and other specialist models and presentation materials.
 - 1.9.9 Liaise with the Client's legal advisers and the Professional Team and advise the Client on matters concerning ownership of the Site, including title matters, boundaries, rights to light, rights of way, restrictive covenants, sale and purchase agreements to lease, funding agreements, etc.
 - 1.9.10 Liaise with the Professional Team and provide the Client with information required for the acquisition of the Site or for the funding of the Project.
 - 1.9.11 Liaise with the Professional Team and provide the Client with information required for leasing, sale or other disposal of whole or part of the Site and/or the Project. Provide the Client with responses to Tenant, Purchaser, Funder and other third party enquiries.
 - 1.9.12 Liaise as necessary with Tenant, Purchaser, Funder or other third parties with an interest in the Project.
 - 1.9.13 Advise on grants and other financial assistance applicable to the Project.
 - 1.9.14 Make applications for grants, liaise with grant bodies and provide documentation and submit and complete payment applications.
 - 1.9.15 Make applications to the appropriate bodies or persons for licences or other consents, liaise with third parties, provide and submit documentation and complete licence agreements.
 - 1.9.16 Provide specialist Services in connection with conservation works including historical and/or archaeological research and specialist recording. Carry out exceptional negotiations with statutory and non-statutory bodies.
 - 1.9.17 Provide specialist Services in connection with asbestos works, including the appointment of specialist survey consultants and removal treatment contractors. Carry out exceptional negotiations with statutory and non-statutory bodies.
 - 1.9.18 Provide specialist advice on the application of the *Building Regulations 2010*.
 - 1.9.19 Provide specialist advice on project-related accessibility.
 - 1.9.20 Provide fire reinstatement valuations.
- ## 1.10 Building information modelling (BIM)
- 1.10.1 Prepare the Client's EIR and describe the Client's BIM requirements for the Project. Prepare recommendations for the Client's approval and secure the confirmed Client's EIR.
 - 1.10.2 Facilitate the preparation of the BIM Protocol.
 - 1.10.3 Facilitate execution of the BIM Protocol by all relevant parties prior to their participation in the Project.

- 1.10.4 Establish a common data environment.
- 1.10.5 Act as the BIM manager with responsibility for managing the BIM models produced during the life of the Project and:
 - 1.10.5.1 Manage stakeholder engagement in relation to BIM.
 - 1.10.5.2 Prepare the EIR.
 - 1.10.5.3 Prepare the BIM execution plan.
 - 1.10.5.4 Prepare the information delivery plan.
 - 1.10.5.5 Facilitate the preparation of the BIM asset information model.
 - 1.10.5.6 Manage the Professional Team in preparation of the COBie schema.
- 1.10.6 Prepare and implement a BIM collaboration framework.

1.11 Supplementary services

- 1.11.1 Provide services for the Client's/third party's organisational move to new premises.
- 1.11.2 Provide services for the Client's/third party's fitting-out or direct works contracts.
- 1.11.3 Provide estimates of replacement costs for insurance purposes.
- 1.11.4 Provide services in connection with insurance claims.
- 1.11.5 Facilitate, set-up and manage an electronic document management system.
- 1.11.6 Facilitate, set-up and manage early warning and risk reduction meetings.
- 1.11.7 Facilitate, set-up and manage 'lessons learned' or other workshops.
- 1.11.8 Provide services for partnering and/or collaborative working contracts.
- 1.11.9 Act as the Client's partnering adviser.
- 1.11.10 Provide specialist procedural advice

to comply with EU Regulations and/or other statutory legislation.

2 Building and measured surveys

Use with the RICS Standard or Short Form of Consultant's Appointment.

2.1 General

- 2.1.1 Attend Client, design, Project, Site and other meetings as provided under this Appointment.
- 2.1.2 Liaise with the Client and the Professional Team to determine the Client's initial requirements and to develop the Client's Brief. Establish review, approval, variation and reporting procedures. Prepare recommendations for the Client's approval.
- 2.1.3 Advise the Client on specialist Services, including consultants, conservators, contractors, subcontractors and suppliers required in connection with the Project.

2.2 Health and safety

- 2.2.1 Liaise with the Professional Team and advise the Client of its obligations under the CDM Regulations.
- 2.2.2 Comply with the CDM Regulations insofar as they relate to this Appointment.

2.3 Building surveys and building defects management

Note: The building will be inspected from ground level or by using accessible means of entry. The roof will be accessed if safe to do so. No opening up of concealed parts will be undertaken.

- 2.3.1 Inspect the Site and/or the Project, arrange for specialist investigations and tests as may be agreed with the Client, and prepare a written report for the Client.

- 2.3.2 Prepare a written report for the Client describing the existing condition of the Site and/or the Project and identifying any particular features that may affect the Client's future interest in the Site and/or the Project.
- 2.3.3 Inspect and investigate specific problems on the Site and/or the Project, arrange for specialist investigations and tests as may be agreed with the Client, and prepare a written report for the Client.
- 2.3.4 Carry out further investigations and tests as may be required. Monitor investigation and test results and prepare a written report for the Client.
- 2.3.5 Assess the cause of any defects and prepare a written report for the Client with recommendations for rectification work.
- 2.3.6 Advise on the employment of consultants or contractors to carry out rectification work. Inspect rectification work on behalf of the Client. On completion of rectification work prepare a written report for the Client

2.4 Measured surveys

- 2.4.1 Carry out, or obtain, a measured survey of the Site and/or the Project and prepare survey drawings and other documents to include as required:
 - floor plans
 - sections
 - elevations
 - site layout
 - levels
 - services and drainage
 - trees and other features and
 - land topography.
- 2.4.2 Undertake fire audits and surveys. Prepare recommendations for the Client's approval.

- 2.4.3 Undertake asbestos inspections and surveys. Prepare recommendations for the Client's approval.
- 2.4.4 Carry out specialist investigations using alternative means of temporary access – scaffolding, ladders, craneage, etc. Prepare a written report for the Client.
- 2.4.5 Carry out, or obtain, specialist investigations into contaminants. Undertake specialist testing and prepare a written report for the Client.
- 2.4.6 Carry out, or obtain, specialist investigations into mechanical and electrical, drainage or other building services. Undertake specialist testing and prepare a written report for the Client.
- 2.4.7 Prepare energy performance certificates.

3 Asset management

3.1 General

- 3.1.1 Attend Client, design, Project, Site and other meetings as provided under this Appointment.
- 3.1.2 Liaise with the Client and the Professional Team to determine the Client's initial requirements and to develop the Client's Brief. Establish review, approval, variation and reporting procedures. Prepare recommendations for the Client's approval.
- 3.1.3 Advise the Client on specialist Services, including consultants, conservators, contractors, subcontractors and suppliers required in connection with the Project.
- 3.1.4 Prepare regular/monthly reports. Advise the Client of any decisions required and obtain authorisation.

3.2 Health and safety

- 3.2.1 Liaise with the Professional Team and advise the Client of its obligations under the CDM Regulations.
- 3.2.2 Comply with the CDM Regulations insofar as they relate to this Appointment.

3.3 Programmed maintenance

- 3.3.1 Prepare, and agree with the Client, a survey and/or sampling strategy for managing the Client's property portfolio.
- 3.3.2 Review the Client's existing reporting and maintenance systems including, where appropriate, computerised records. Liaise with the Client's computer consultants. Prepare recommendations and a written report for the Client.
- 3.3.3 Inspect the Client's property portfolio, or sample of the Client's property portfolio, to determine the current condition and extent of repair and maintenance required.
- 3.3.4 Prepare a programmed maintenance plan compatible with the data recording systems agreed with the Client.
- 3.3.5 Advise on the life expectancy of building components and/or elements.
- 3.3.6 Implement and manage the programmed maintenance plan on behalf of the Client.
- 3.3.7 Advise on the employment of consultants or contractors to carry out maintenance work. Inspect maintenance work on behalf of the Client. On completion of maintenance work prepare a written report for the Client.
- 3.3.8 Undertake condition surveys. Prepare an assessment of the existing condition with recommendations in respect of future maintenance (See also Technical Due Diligence Services).

- 3.3.9 Prepare recommendations in respect of planned maintenance.
- 3.3.10 Advise on the life expectancy of building components and/or elements and prepare a written report for the Client.
- 3.3.11 Advise on the life cycle costs of building components and/or elements and prepare a written report for the Client.

4 Insurance

Use with the RICS Short Form of Consultant's Appointment for Designated Services.

Note: Insurance assessments and insurance claims support provided under this Agreement are not regulated activities as defined in the *Financial Services and Markets Act 2000*. Should investment advice be required the Client will be advised to discuss their investment requirements with Financial Conduct Authority (FCA) authorised specialists.

4.1 General

- 4.1.1 Attend Client, design, Project, Site and other meetings as provided under this Appointment.
- 4.1.2 Liaise with the Client and the Professional Team to determine the Client's initial requirements and to develop the Client's Brief. Establish review, approval, variation and reporting procedures. Prepare recommendations for the Client's approval.
- 4.1.3 Advise the Client on specialist Services, including Consultants, conservators, Contractors, subcontractors and Suppliers required in connection with the Project.
- 4.1.4 Prepare regular/monthly reports. Advise the Client of any decisions required and obtain authorisation.

4.2 Insurance claims

- 4.2.1 Notify the Loss Adjuster and/or other interested parties of the Appointment.
- 4.2.2 Check the policy details and advise the Client on the extent of cover in place.
- 4.2.3 Inspect the Site and/or the Project and record the extent of damage. Identify the need for any temporary works and/or emergency repairs. Prepare a written report for the Client.
- 4.2.4 Prepare documentation to support the claim.
- 4.2.5 Advise on statutory and other consents required.
- 4.2.6 Prepare estimates of the costs of repairs. Prepare recommendations for the Client's approval.
- 4.2.7 Prepare, submit, administer and negotiate insurance claims.

4.3 Insurance assessments

- 4.3.1 Review the proposed policy details and advise the Client on the appropriate level of cover required.
- 4.3.2 Review existing policy details and advise the Client on the level of cover in place.
- 4.3.3 Visit the Site and/or the Project, take measurements as appropriate and review record drawings or other information provided by the Client. Prepare a written report for the Client on the adequacy of the information supplied.

4.4 Supplementary services

- 4.4.1 Replacement cost calculations in accordance with the RICS Reinstatement Cost Assessment Services.

5 Miscellaneous

Use with the RICS Short Form of Consultant's Appointment for Designated Services.

5.1 Grants

- 5.1.1 Advise the Client on the types of grant that can be obtained from central or local government or other body for development, alterations or repair of the Site and/or the Project.
- 5.1.2 Liaise with the Client and the Professional Team, prepare and/or obtain supporting documentation to support grant applications. Prepare and submit grant applications and conduct negotiations on behalf of the Client.
- 5.1.3 Monitor actual expenditure against forecasts included in grant applications. Submit claims for payment. Prepare a written report for the Client.

5.2 Approved inspector services

- 5.2.1 Examine feasibility and/or outline proposals, report on their likelihood of compliance with the Building Regulations and/or other statutory regulations.
- 5.2.2 Examine plans and report on compliance with the Building Regulations and/or other statutory regulations.
- 5.2.3 Conduct consultations with statutory authorities, the Professional Team and the Contractor.
- 5.2.4 Certify compliance of design with the Building Regulations and/or other statutory regulations.
- 5.2.5 Submit initial notices and plan certificates as appropriate.
- 5.2.6 Inspect the Site and/or the Project and report on compliance with the Building Regulations and/or other statutory regulations. Conduct consultations with

statutory authorities, the Professional Team and the Contractor. Certify compliance with the Building Regulations at completion and prepare a final certificate.

6 Bespoke Additional Services

- 6.1 Enter or attach bespoke Additional Services agreed with the Client.

Appendix A: Schedule of meetings to be attended by the Consultant

1 Client meetings

Attendance: Partner Director Associate Project surveyor
 Other (please specify) _____

Frequency: Daily Weekly Monthly Quarterly
 No attendance required Other

Please specify requirements: _____

2 Design team meetings

Attendance: Partner Director Associate Project surveyor
 Other (please specify) _____

Frequency: Daily Weekly Monthly Quarterly
 No attendance required Other

Please specify requirements: _____

3 Project team meetings

Attendance: Partner Director Associate Project surveyor
 Other (please specify) _____

Frequency: Daily Weekly Monthly Quarterly
 No attendance required Other

Please specify requirements: _____

4 Site meetings

Attendance: Partner Director Associate Project surveyor
 Other (please specify) _____

Frequency: Daily Weekly Monthly Quarterly
 No attendance required Other

Please specify requirements: _____

5 (Other) meetings

Attendance: Partner Director Associate Project surveyor
 Other (please specify) _____

Frequency: Daily Weekly Monthly Quarterly
 No attendance required Other

Please specify requirements: _____

Appendix B: Glossary of terms

BIM	Building information modelling.
BIM Protocol	Written procedural method for the implementation of BIM on the Project.
COBie	Construction Operations Building Information Exchange.
EIR	Employer's Information Requirements. A document setting out the information to be delivered by consultants/suppliers as part of the Project delivery process to the Client.
FRA	Fire Risk Assessment.

The following additional definitions shall apply where the RICS Short Form of Consultant's Appointment is used:

Building Contract	The contract or contracts between the Client and the Contractor for the construction of the Project, a copy of which (or a copy of relevant extracts of which) the Client provides to the Consultant.
Client's Brief	The brief provided by the Client identifying the Client's requirements in relation to the Project as such requirements may, in accordance with the Client's instructions, be amended from time to time with the Consultant's agreement (which agreement is not to be unreasonably withheld or delayed).
Client Group Company	Any holding company of the Client or any subsidiary of the Client or of any holding company of the Client (within the meaning of Section 1159 of the <i>Companies Act 2006</i>).
Contractor	The contractor or contractors that the Client appoints under the Building Contract.
Funder	A person providing finance or re-finance to the Client in connection with the acquisition of the Site and/or the carrying out of the Project.
Programme	The programme agreed by the Professional Team and approved by the Client identifying key completion and other dates and time periods for the completion of key activities and the issue of Documents and information in relation to the Project and which may from time to time be adjusted by agreement between the Client and the Professional Team.
Purchaser	A person first acquiring from the Client or a Client Group Company a non-residential freehold interest in the Project or any part of it, and includes for this purpose a purchaser for capital consideration of a non-residential leasehold interest in the Project or any part of it.
Site	The site on which the Project is being undertaken.

Tenant	Any person to whom the Client grants or agrees to grant a leasehold interest in all or part of the Project
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The following additional definitions shall apply where the RICS Short Form of Consultant's Appointment for Designated Services is used:

Building Contract	The contract or contracts between the Client and the Contractor for the construction of the Project, a copy of which (or a copy of relevant extracts of which) the Client provides to the Consultant.
Client's Brief	The brief provided by the Client identifying the Client's requirements in relation to the Project as such requirements may, in accordance with the Client's instructions, be amended from time to time with the Consultant's agreement (which agreement is not to be unreasonably withheld or delayed).
Client Group Company	Any holding company of the Client or any subsidiary of the Client or of any holding company of the Client (within the meaning of Section 1159 of the <i>Companies Act 2006</i>).
Contractor	The contractor or contractors which the Client appoints under the Building Contract.
Funder	A person providing finance or re-finance to the Client in connection with the acquisition of the Site and/or the carrying out of the Project.
Professional Team	The Client Team.
Programme	The programme agreed by the Professional Team and approved by the Client identifying key completion and other dates and time periods for the completion of key activities and information in relation to the Project and which may from time to time be adjusted by agreement between the Client and the Professional Team.
Purchaser	A person first acquiring from the Client or a Client Group Company a non-residential freehold interest in the Project or any part of it, and includes for this purpose a purchaser for capital consideration of a non-residential leasehold interest in the Project or any part of it.
Site	The site on which the Project is being undertaken.
Tenant	Any person to whom the Client grants or agrees to grant a leasehold interest in all or part of the Project

Delivering confidence

We are RICS. Everything we do is designed to effect positive change in the built and natural environments. Through our respected global standards, leading professional progression and our trusted data and insight, we promote and enforce the highest professional standards in the development and management of land, real estate, construction and infrastructure. Our work with others provides a foundation for confident markets, pioneers better places to live and work and is a force for positive social impact.

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