

Appendix II

Sample Extracts of Survey Schedules & Checklists

Appendix IIa: Phase 1 Stock Condition Survey Schedule

Property.....

Surveyor.....

Date..... Ref.....

Item	Property/element	Condition rating			
		A	B	C	D/Dx
A	BUILDING A		✓		
A1	Roof			✓	
A2	Walls			✓	
A3	Windows and doors				✓

Appendix IIb: Phase 2 Stock Condition Survey Schedule

Property.....

Surveyor.....

Date..... Ref.....

Item	Element/condition	Remedy	Qty	Rate	Cost
1.0	ROOFS				
1.1	Coverings				
1.1.1	Missing slates on north roof slope	Patch bare area with recycled slates	20m ²	£10/m ²	£200
1.1.2	Slipped roof slates on south slope	Refix slates	10No.	£5 each	£50
1.2	Chimneys				
1.3	Flashings				

Appendix IIc: Sample extract of Schedule of Condition

Schedule of Condition

describing the state of repair of the domestic premises at
62 Acme Crescent, Anytown, UK

by

J. Bloggs, Chartered Surveyors
33 Acme Terrace, Anytown, UK

recorded on
30 July 2009

Item No.	Element	Description	Condition	Rating U, D, N (a, b)	Approx. Cost (a)
1.0	ROOF				
1.1	Roof Coverings	'Rosemary' clay tiles	Several tiles loose/missing (10 No.); some broken (5 No.)	U	£1000
1.2	Gutters	Cast iron	Clogged in places; some joints leaking (c)	D	£500
1.3	Flashings	Zinc	Some rust pitting noted in places	D	£200
2.0	WALLS				
2.1	Front Elevation	Cavity facing brick	Some organic staining near eaves; generally in good condition otherwise	N	£100
3.0	OTHER etc. (d)				
Subtotal c/f					

Notes:

(a) These columns are optional – but are useful for planned maintenance purposes.

(b) The ratings relate to the urgency of the attention required:

U = urgent (within 1 week or 1 month – depending on the priority required for the facility);

D = desirable (within 1 year – so that further problems or repairs are not triggered); and,

N = non-urgent (within 5 years – or within the current planned maintenance programme cycle).

Other priority ratings that can be used:

(1) Currently critical – attend within 1 week or as soon as possible.

(2) Potentially critical – attend within 1 or 2 months.

(3) Desirable – attend within 12 months.

(4) Non-essential – attend within 5 years (or next planned maintenance cycle).

(c) Note that no attempt is made in a schedule of condition to diagnose the cause of any defects indicated. In other words it is descriptive, not analytical in style.

(d) The remaining elements (such as windows, doors, services etc.) would of course be included within most Schedules of Condition.

Appendix IId: Sample extract of Schedule of Dilapidations

Schedule of Dilapidations

and wants of repair required to make good the commercial premises at
12 Acme Road, Anytown, UK

in accordance with the covenants of the lease dated 1 January 1999

by

J. Bloggs, Chartered Surveyors
33 Acme Terrace, Anytown, UK

recorded on

30 July 2009

Item No.	Covenant(a)	Location	Breach	Remedy	Cost(b)
EXTERNALLY					
1	2.7 To keep in repair	Main roof	Failure to keep watertight owing to roof tiles missing/broken	Take off and renew 10 tiles Refix 5 slipped tiles (c)	£200 £50
2	2.7 To keep in repair	Walls	Failure to repair defective mortar joints	Rake out joints in brickwork and repoint in a 2 m ² area	£200
3	2.8 Redecoration clause	External elevations	Failure to rectify defective paintwork to external windows and doors	Repaint as required during the last year of the occupancy	£5000
INTERNALLY					
4	2.7 To keep in repair	Reception area	Failure to repair defective floor covering	Take up and renew 20 m ² of worn carpeting	£600
5	2.8 Redecoration clause	Reception area	Failure to redecorate internally	Repaint in accordance with the redecoration cycle	£3000
6	2.8 Redecoration clause	Office areas	Failure to redecorate internally	Repaint in accordance with the redecoration cycle	£12000
Subtotal c/f					

Notes:

- As listed in the lease.
- Typical costs can be determined by using the cost data handbook published annually by the Building Cost Information Service run by the RICS's Building Maintenance Information (BMI, 2007).
- Note that a schedule of dilapidations is not a specification. No attempt is made to prescribe the method or standard of work. It is presumed that the repair work will be done on a like for like basis.

Appendix IIe: Sample extract of checklist for Home Condition Report

Section D: External condition			Condition rating			
Item	Element	Description	NI	1	2	3
D1	Roof	Slated hipped roof				
D1.1	Coverings	Scotch slates				
D1.2	Skylights	2No Velux skylights				
D1.2	Chimneys	2No Rendered brick				
D1.3	Flashings etc.	Lead flashings and zinc cappings				
D1.4	Rainwater goods	Cast iron gutters and downpipes				
D2	Walls	Rendered common brickwork				
D2.1	Main areas	Pebble dry dash				
D2.2	Fenestration reveals	Smooth cement render				
D2.3	Junctions	Bell-cast edge above DPC				
D2.4	Windows	Sash and case softwood				
D2.5	Doors	Plywood flush panelled				
D2.6	Grilles/vents	Galvanised mild steel				

Appendix If: Sample extract of HHSRS checklist

	Present Yes/No	Class of harm*	Likelihood**
A PHYSIOLOGICAL REQUIREMENTS			
Hygrothermal conditions			
1			
2			
3			
Pollutants (non-microbial)			
4			
5			
6			
7			
8			
9			
10			
B PSYCHOLOGICAL REQUIREMENTS			
Space, security, light and noise			
11			
12			
13			
14			
C PROTECTION AGAINST INFECTION			
Hygiene, sanitation and water supply			
15			
16			
17			
18			
D PROTECTION AGAINST ACCIDENTS			
Falls			
19			
20			
21			
22			
Electric shocks, fires, burns and scalds			
23			
24			
25			
Collisions, cuts and strains			
26			
27			
28			
29			

* Classes of harm: I = Extreme; II = Severe; III = Serious; and IV = Moderate

** Likelihood: Low (L); Medium (M); High (H)