

# 17 Report Writing

## 17.1 Introduction

Report writing is, perhaps, the most important form of communication between the surveyor and the client. It can form a lasting impression of the surveyor's quality of work in the mind of the client. The majority of building surveys are carried out on behalf of clients who propose to purchase a property or take one on lease. A typical example is given in Appendix VII. Other types of reports are described in Section 1.3. An example of a report on a specific defect with some typical recommendations is given in Appendix VI.

## 17.2 Presentation

When the survey is complete and all information collated the next stage is to prepare a report on the structural condition of the building together with a clear and definite recommendation and assessment of costs. It is suggested that the report be prepared immediately following the inspection while the details are fresh in the mind. If reports are required from electrical and heating engineers or other consultants, they should be included in the surveyor's report.

As previously mentioned in Chapter 1, it is important that the purpose of the report is given careful consideration. Not only should it set out the information the client requires, but must also deal with matters that a technical person notices, but are sometimes overlooked by the layperson. On the other hand, the report must aim at giving concise details to the layperson and not be couched in technical language and long involved sentences that it will be difficult to understand. In certain circumstances technical terms are unavoidable, but in such cases they should be simply defined. As far as the client is concerned, he or she has instructed the surveyor to study and diagnose the structure and prepare a lucid report stating whether or not the building is basically sound. The surveyor should always endeavour to diagnose the cause of a defect and estimate its prognosis, and should also give some consideration to prescribing a remedy and detailing its costs. This

will enable the client to assess how much money will be needed to restore the property to a sound structural condition.

Some clients, such as a large company with a board of directors or an amenity society, may require an inspection of a property for a number of purposes. They may be trying to decide whether the property is suitable for conversion and will require the surveyor to report on the options. In such circumstances the report could be in two parts – firstly, describing the development possibilities and secondly the condition of the building. How much detail should be included will depend on the client's requirements and the skill of the surveyor, and on the surveyor's ability to set down his or her observations in a carefully written report.

## 17.3 Report writing criteria

### 17.3.1 Primary criteria

Apart from good presentation, the primary criteria for the contents of any professionally or scholarly written piece of work are that they must be:

- *Accurate*, i.e. no false/misleading assertions or incorrect figures, and minimal grammatical or spelling mistakes in the script.
- *Coherent*, i.e. they make sense, are not contradictory, and have a clear and unified structure.
- *Critical*, i.e. they provide an analytical or objective view that is balanced or impartial, and any distinct bias or vested interest is clearly stated.
- *Rigorous*, i.e. they do not contain any fallacious arguments, *non sequiturs* or any other errors in logic.
- *Substantiated*, i.e. any assertion or claim must be evidence-based.

### 17.3.2 Secondary criteria

The secondary criteria are, by implication, not as critical but nonetheless are as desirable as the primary ones. Ideally, therefore, the contents must be:

- *Confidential*, i.e. never divulge a client's name or identify a property without prior permission. If necessary use pseudonyms.
- *Concise*, i.e. brief enough to cover the main points and non-repetitive – any padding or excessive detail should be removed.
- *Detached and dispassionate*, i.e. avoid being too subjective.
- *Original*, i.e. wherever possible be innovative or original in your work.
- *Poignant*, i.e. incisive and to the point.
- *Readable*, i.e. short sentences, maximising the use of 'active' verbs rather than 'passive' ones.
- *Scrupulous*, i.e. be scrupulously honest in writing; be prepared to accept the outcome of an experiment or investigation, even if it disagrees with your cherished theory.

## 17.4 Arrangement of information

No matter how experienced surveyors may be they are bound to have some difficulty in preparing a report for a large building containing major faults. As indicated in Chapter 2, it is always advisable on arriving on the site to adopt a definite procedure that can be used as a framework for the main body of the report. It is not an easy matter to prepare a report so that the principal defects are the first items to make an impression on the client's mind. The main items a client will require from a report are as follows:

- A general description of the property.
- Condition of the structure with details of any faults and failures and their cause.
- Condition of the services – electrical, gas, heating, water supply, lifts (if any) and telephones.
- Condition of the fittings and finishes.
- Garages and outbuildings should be dealt with in the same manner as the main building.
- Condition of the boundaries, evidence of ownership and any details of rights-of-way and way-leaves.
- A few paragraphs at the end of the report headed 'Conclusions and recommendations' are of vital importance to a client. It is here that the surveyor must explain the significance of what has been observed and also why it was not possible to examine inaccessible parts of the building. An indication of actions and further investigations needed is important here.
- An approximate cost of the repairs where this is relevant.

It should always be remembered that if insufficient information is obtained on site a second visit may be needed. This makes the surveyor appear incompetent and makes explanations to the client difficult. Recommendations should be listed in order of importance, particularly with regard to urgent work such as a dangerous parapet wall or badly leaning chimney stack.

Distinguish clearly between structural defects and normal maintenance work, which could be deferred, together with an approximate estimate of costs. Reports describing extensive repairs or reconstruction work should be illustrated and any sketches or photographs attached to the report.

Many clients seem to believe that their surveyor has a duty to remove floorboards, bath panels and roof insulation without authority. No reasonable vendor will object to a surveyor using a ladder in order to examine roofs and gutters etc., but rarely will they agree to floorboards or roof tiles being removed which may result in damage to their property. The surveyor's report should state precisely the permissible limits and his or her inability to comment upon any part of the structure which is inaccessible or concealed (see Chapter 18 'Legal Aspects').

On the other hand, the report should not contain a large number of ‘escape clauses’ which will reduce the value of the survey. Moreover, it must be clearly understood that the onus is on the surveyor if he or she fails to investigate any suspicious areas. Escape clauses will not exonerate the surveyor if he or she has been negligent. Some of the legal pitfalls are dealt with in Chapter 18. It is wise to remember that an aggrieved client will certainly study the report for evidence of any omissions in order to claim against the surveyor. The surveyor’s safety is obviously important and he or she cannot be expected to risk life and limb. The final decision whether or not to climb on to a pitched roof must lie with the surveyor. The surveyor must, therefore, report which parts of a building were not examined on the grounds of safety.

## 17.5 Format

Every technical report should have a clear beginning, middle and end – in that order! Most ‘good’ reports contain at the very least three main well structured sections: introduction, investigation and analysis (main body – in big reports this is often more than one section), and conclusions and recommendations. For example, the following structure should be used when compiling a diagnostic survey report on a specific building defect (e.g. dampness problem):

- 1.0        **INTRODUCTION** (*main headings should be in upper case*)
- 1.1        **Instructions/Remit** (*consider bold headings and subheadings for emphasis*)
- 1.2        **Description of property**
- 1.3        **Survey/investigation details**
- 2.0        **INVESTIGATION & ANALYSIS**
- 2.1        **Condition** (*use lower case for sub-headings*)
  - 2.1.1      History of defect/s
  - 2.1.2      Anomalies/symptoms
- 2.2        **Diagnosis**
  - 2.2.1      Hypothesis (e.g. condensation dampness)
  - 2.2.2      Evidence (e.g. moisture meter readings, salts analysis, etc.)
  - 2.2.3      Cause (i.e. confirm/confute hypothesis)
- 2.3        **Prognosis**
  - 2.3.1      Significance
  - 2.3.2      Likely consequences
- 3.0        **CONCLUSIONS & RECOMMENDATIONS**  
(or if no recommendations are needed: **SUMMARY & CONCLUSIONS**)
- 3.1        **Conclusions**
  - 3.1.1      Main findings
  - 3.1.2      Prognosis

- 3.1.3 Approximate repair costs
- 3.2 **Recommendations**
- 3.2.1 Further investigations
- 3.2.2 Repair method/s required
- 3.2.3 Timing of works

APPENDICES (containing supporting material, e.g. graphics, etc.)

- Appendix 1: Location plan of property
- Appendix 2: Photographs of defects\*
- Appendix 3: Schedule of costs

\* *These may be inserted within the body of the report if recorded on a digital camera.*

## 17.6 Valuations

As regards the value of the property the client may express a wish that the surveyor includes at the end of the report a few comments on whether or not the purchase price is considered fair. This obviously amounts to a valuation and unless the surveyor is sufficiently knowledgeable to give a valuation it would be unwise to attempt to do so. Today many factors have to be considered when assessing the value of property, such as rising values in a particular locality, the position of local shops and schools, the proximity of transport and the future development of the area. A valuer must make searching enquiries before he or she can express an opinion, especially when dealing with commercial or industrial properties.

Naturally, the client will hold the surveyor responsible for such advice, so unless they are qualified to carry out this service they should suggest to the client that he or she obtains the services of a competent valuer, preferably one who has some knowledge of the district.