

The Role and Responsibilities of the Property Professional

Building works in schools will normally be commissioned either by the LEA, Diocesan body or the school themselves. Where the LEA/Diocesan body manages the project, we will appoint an appropriate lead consultant who will liaise with schools in order to deliver the project safely, on budget and on time. When schools undertake work themselves, we strongly recommend that you also should appoint a property professional to manage the works.

A Property Professional may be a project manager, architect, building surveyor, or a quantity surveyor. S/he will be experienced in providing buildings and be able to advise you how to proceed with a project. Each specialism has different skills and will approach the process from a slightly different angle:

Building Surveyor: Able to procure modest new build/refurbishment work and will advise on which other consultants you need to appoint. Can also co-ordinate these other consultants to deliver the project on budget and on time. Surveyors will often lead re: repair/maintenance issues and manage statutory testing/inspection issues.

Project Manager: Employed to give general advice on how to procure the building and advise on other consultants you need to appoint. Also can co-ordinate these other consultants to deliver the project on budget and on time. Generally only economic to employ a project manager on large schemes (i.e. in excess of £100000 in value). Although a trained specialist, the project manager would act as the co-ordinator rather than be employed for a specific professional background.

Architect: Designs the building and can give general advice on how to procure it and advise on other consultants you need to appoint. S/he can also co-ordinate these other consultants acting as lead consultant on small/medium schemes to deliver the project on budget and on time.

Quantity Surveyor: Advises on and manages the building construction cost. Can also act as lead consultant and give general advice on how to procure the building.

The range of property professionals required for a particular scheme will normally vary according to the scale of the works required – the larger the scheme, the more property professionals will need to be employed. As can be seen from the details above, there is a certain amount of overlap between the functions of different property professionals, although each will tend to specialise within their core areas (i.e. architects will look only at design and quantity surveyors only at the budget) if all are employed for larger schemes.

What commitment should you seek from property professionals you employ?

We strongly advise that you appoint property professionals with a proven track record of working on Education schemes. The Corporate Procurement Section, based at Lancaster Circus, can advise you how to judge whether a particular property professional has the right technical expertise and experience to lead your scheme successfully. (Contact Clive Belcher on: 0121 303 7727, or e-mail him at: clive_belcher@birmingham.gov.uk).

There is also useful guidance available via professional bodies such as RIBA, who publish *A Guide for School Governors – Developing School Buildings*, available online at: <http://site.yahoo.net/client-forums/ag.html>, or the School Works organisation, whose publication “School Works Tool Kit” is available free to schools (a copy has been issued to all Secondary Schools). Their website www.school-works.org is also well worth a visit.

The formal commitments you should gain from any property professional you employ are as follows:

- **The level of fees that they intend to charge**, expressed as a percentage of the total cost of the scheme. If your consultant is undertaking the full range of services (architect, quantity surveyor, electrical engineer, mechanical engineer, etc.) then expect to pay 10-15% fees. Other fees may also be payable, such as Building Regulations, site surveys, site investigation, asbestos surveys and/or testing, planning fees, etc.
- **Their experience of similar schemes**: any property professional with a record of achievement in the education sector should be able to provide examples of work done at other schools to which you can refer.
- **The personnel they are committing to your scheme**: how many people of what level of experience. You may have met Architect A while a firm was pitching for the job, only to find that Architect B attends the subsequent meetings. This may not be a problem if they are of comparable experience and ability.
- **The time they are able to commit to your scheme**: a large consultancy practice may appear to offer a better service in prospect than a smaller firm, but the relevant factor is rather the level of work that an individual firm has on its books and the commitment they are able to give to your project. Your scheme may mean more to a smaller firm than a larger one; alternatively a smaller firm may find itself stretched to the limit by a few jobs, compared to a larger one. It is important to question the consultants' commitment to your individual project, compared to their wider workload.
- **What they expect of the client**: it can be all too easy to employ a consultant who proceeds to tell *you* what you want, especially if you have not supplied sufficient detail about your requirements. A good consultant should automatically request a detailed specification, and inquire about any local factors that will influence the scheme. The client should not be expected to have a complete understanding of all the technical factors that affect a scheme, but you should be prepared to provide as full an account as possible of your aspirations and intentions in embarking on the project. If, at your initial meeting, the potential consultant does not ask relevant questions about the site, etc., it may be that s/he is unlikely to take sufficient heed of your needs over their views in the future.
- **Public liability insurance**: any property professional and/or contractor should be able to show you evidence of their public liability insurance, which must be at an appropriate level. It is not exceptional for a minimum level of cover of £5 million to be required although this will increase for larger more complex projects. Consultants must also have **professional indemnity insurance**, which will normally be a requirement of the Consultants own professional body.
- **Benchmarking/ KPI data**: in relation to LEA funded schemes, the *EaM* Team will be insisting that DTLR benchmarking data is provided by the Property Professional regarding time and cost predictability in respect of any scheme with a value of £100 000 or more. In addition, a customer satisfaction form must be completed as a service quality measurement, regarding all new schemes with a value of £10 000 or more. It is suggested that regarding any significant school commissioned project you adopt the same approach.