

# PREAMBLES

## Introduction

|                          |  |
|--------------------------|--|
| Purpose of this document | The purpose of this document is to provide a 5 yearly inspection report and log book to fulfil the requirements of the Tenement Act [Name & Date of Act to be Confirmed].  |
| Scope of instructions    | The Competent person, noted below was instructed to survey and report on the Property outlined below to provide a 5 yearly tenement report. Exclusions and limitations set out below apply to the scope of the exercise. |
| Property Address         | [insert street number, name, town, post code]  |
| Client                   | [insert client name]   |
| Client Representative    | [insert client representative name]  |
| Stairwell community      | The Common owners of [insert street number, name, town, post code]   |

## The Author

|                                  |  |
|----------------------------------|--|
| Competent person (BS 7913: 2013) | [competent person name], [state professional qualifications] |
| Other surveyors/architect        | [assistant name], [state professional qualifications]        |
| Competent person's PII reference | [policy number]  |

## The Property

|  |                                     |
|--|-------------------------------------|
| Number of properties in the block                  | [number]                            |
| Number of properties that are tenanted             | [number]                            |
| Commercial units                                   | [number]                            |
| Orientation of front elevation                     | West                                |
| Schedule of Regular inspection                     | 5 yearly                            |
| Date of last inspection                            | [year]                              |
| Date of next inspection                            | [year + 5 years]                    |
| Previous exercises and historic documents reviewed | [state previous reports]            |
| Compliance Documents reviewed                      | [state previous compliance reports] |

## Survey Particulars

|  |                     |
|--|---------------------|
| Date of Survey                           | [date]              |
| Survey health and safety risk assessment | [describe H&S RAMS] |
| Weather                                  |                     |
| Surveyor(s)/Architect(s)                 |                     |
| Extent of access                         |                     |

## Quality information

|                         |  |
|-------------------------|--|
| Author/Competent Person | [competent person name], [state professional qualifications] |
| Checker                 | [reviewer person name], [state professional qualifications]  |
| Revision                | Draft  |
| Date of issue           | [date]   |

# SUMMARY

## The Report

The Report includes an individual schedule by building (each building is treated independently), which comprise a tabulated schedule covering all the major elements of the external fabric and the internal areas. Each element has been given a description, condition, priority rating, recommended action. A total cost estimate for undertaking the recommended work is also included. Refer to the Definitions later in this document.

## Description of the building

## Summary of Condition

## Summary of Recommendations

- 1
- 2
- 3
- 4
- 5

## Cost Summary

Following this survey we advise that the following amount needs to be spent on the property in question over the next five years:

- 1 Reserve fund £xxx,xxx
- 2 Maintenance fund £xx,xxx
- 3 Float £x,xxx

This should be divided between the owners as set out in the title deeds and paid in regular instalments into the communal bank account.

These figures are based on a high level assessment and have been rounded. They do not include for inflation and should be taken as a guide only.

Should more detail regarding budgeting be required the author of this report should be asked to complete the elemental costing section of the tabulated report below.

## Important Notes

This Report is formed of the findings of the Competent Person on areas which they were able to access or visually inspect during the site visits. Covered, unexposed or inaccessible parts of the building structure have not been inspected and therefore not included within this Report. Below ground drains have not been inspected.

Where included, costs within the report are not a formal quotation and do not represent an offer to undertake the recommended work. They are a cost estimate based on recently completed works of a similar nature or from cost indices where relevant and appropriately adjusted.

This report does not take into account inflation or any other economic factor that may cause fluctuations to the costs.

This Report records the condition of the property at the time of inspection but does not state the cause of defect or prescribe remedial work.

# DEFINITIONS USED IN THE SCHEDULE

Codes are used in the report to denote different aspects of each element. The text below explains the coding.

## Condition Codes (based on the RICS Planned preventative maintenance Professional Standard 2022)

- A Good: Item currently in good condition and with no outstanding repair or maintenance requirements. Works of a cyclical nature may be applicable, for example periodic cleaning or decoration.
- B Fair: Item is in serviceable and generally acceptable condition, but may exhibit signs of age-related wear and tear, weathering or superficial damage. Repair or renewal may be required.
- C Poor: Item is reaching the end of its designed or intended service life, or is excessively weathered or damaged. Repair or renewal will be necessary within the timescales of this schedule
- D Hazardous: Item is in a dangerous condition and imminent works are required to rectify the problem, or to comply with health and safety or other statutory regulations
- NI Not inspected

## Priority Codes (based on (BS7913:2013))

- 5 Priority 5 Urgent Repairs – Work that should commence without delay for public safety or health and safety reasons, to prevent imminent damage or to arrest rapid deterioration. This can include immediate further investigation. Defects in this section are serious and require prompt action or further investigation in order to prevent the problem from escalating.
- 4 Priority 4 Significant Repairs – Work that should be carried out within weeks or months, and within 18 months at most. Failure to do so would be likely to result in significant further damage or deterioration and increased cost. The property must be maintained in the normal way.
- 3 Priority 3 Necessary Repairs – Work that should be carried out before the next 5 year inspection, for which there is time to plan, and which can be integrated with other work. This is work that is due in order to keep the building in a state of good repair and to maintain its value and usefulness. Most repair work falls within this category. The property must be maintained in the normal way.
- 2 Priority 2 Desirable – Work that is desirable, if not strictly necessary, but that might improve the functioning or performance of the building or enhance its architectural or aesthetic qualities. Alternatively, work that is not due, but is likely to become so before the next 5 year inspection and can sensibly be incorporated with other work. Much minor conservation work, and energy efficiency work, should fall within this category. The property must be maintained in the normal way.
- 1 Priority 1 No reportable defects - Considered to be in an acceptable state of repair and condition with no significant or urgent repairs or works required or anticipated taking into account the age, type and general quality of the property. The property must be maintained in the normal way for a building of this age and type.
- NI Not inspected

# DEFINITIONS USED IN THE SCHEDULE

## Accounts (Under One Roof)

### 1 Reserve fund (R)

Key points about Building Reserve Funds:

- all owners pay in on a regular basis
- they are usually for major repairs
- a clause must be inserted in the title deeds to ensure that the funds are 'hereditary' – i.e. the fund stays with the building, so when an owner sells, they do not get 'their' money back
- new owners can't choose to opt-out of contributing

<https://underoneroof.scot/building-reserve-funds/>

### 2 Maintenance fund (M)

Maintenance accounts

A maintenance account is used to hold money for specific upcoming repairs. The default rules in the Tenements (Scotland) Act 2004 sets out the rules for setting up and managing maintenance accounts.

They must:

- be held in a bank or building society
  - be interest-bearing accounts
  - require at least two owner signatures or the property manager's authorisation for making payments
- refund arrangements if the work does not go ahead

<https://underoneroof.scot/keeping-accounts/>

### 3 Float

A float is a small advance payment kept in your maintenance account or by your property manager/factor. A float is usually a few hundred pounds per flat and is used to ensure that money is available to deal with minor repairs quickly, without having to take time to contact each owner.

<https://underoneroof.scot/keeping-accounts/>





# APPENDICES

**A Roof plan**

*Plan/Aerial view must be included (identify north point, identify front elevation, locate within context of neighbouring properties)*

**B Elevations**

**C Photographic Schedule**

**D Glossary of Technical Terms**

## APPENDIX A - Roof Plan

## APPENDIX B - Elevations

## APPENDIX C - Photographic Schedule

## APPENDIX D - Glossary of Technical Terms