SOCIETY OF CHARTERED SURVEYORS IRELAND

SCSI Professional Guidance

Project Management in Period Buildings

Information Paper

RICS®

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Foreword & Acknowledgements

It is with great pleasure that I introduce to you the *Project Management in Period Buildings* Information Paper. This is a first edition and is prepared to provide advice and tips for chartered project managers that may be undertaking project management of a period building for the first time.

Project management is the management of people, time and costs by an individual or a team to ensure the efficient commencement, progress and conclusion of a project. All these elements apply to construction projects.

Project managers in the construction industry are responsible for planning and managing building projects, such as refurbishing a house or any other building.

Their responsibilities include design, procurement, planning, budget, contractors, clients, the lifecycle of the project, document management and other areas, to ensure that the construction project reaches a desired conclusion.

Project management in the construction industry also has to comply with sustainability, insurance, health and safety, and legal requirements.

This information paper aims to assist the chartered project manager with issues pertaining to period buildings, given the complexities and unique challenges these properties can demand.

I have no doubt that you will find this paper beneficial.

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Editorial – Edward McAuley, Professional Standards Executive, SCSI

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Project Management Surveying Professional Group Chairperson

SCSI/RICS Information Paper

This is an information paper (IP). Information papers are intended to provide information and explanation to SCSI members on specific topics of relevance to the profession. The function of this paper is not to recommend or advise on professional procedure to be followed by members.

It is, however, relevant to professional competence to the extent that members should be up to date and have knowledge of information papers within a reasonable time of their coming into effect.

Members should note that when an allegation of professional negligence is made against a surveyor, a court or tribunal may take account of any relevant information papers published by SCSI in deciding whether or not the member has acted with reasonable competence.

Document status defined

SCSI and RICS produces a range of standards products. These have been defined in the table below. This document is a guidance note.

Document status defined

Type of document	Definition	Status
SCSI practice statement	Document that provides members with mandatory requirements of the Rules of Conduct for members	Mandatory
SCSI code of practice	Standard approved by SCSI that provides users with recommendations for accepted good practice as followed by conscientious surveyors	Mandatory or recommended good practice (will be confirmed in the document itself)
SCSI guidance note	Document that provides users with recommendations for accepted good practice as followed by competent and conscientious surveyors	Recommended good practice
SCSI information paper	Practice based information that provides users with the latest information and/or research	Information and/or explanatory commentary

1. The purpose and application of this information paper

1.1

The purpose of this information paper is to assist the chartered project management surveyor in the delivery of service and highlight the implications of all issues relating to period properties.

1.2

It is assumed that the reader of this information paper is a chartered project management surveyor and is thus addressed as ‘you’.

2. Introduction

2.1 The role of the chartered project manager

The chartered project manager assumes the overall responsibility to deliver a project in which human, material and financial resources are organised in a *novel* way, to undertake a *unique* scope of work, of given specification, within constraints of cost and time, so as to achieve beneficial change defined by quantitative and qualitative objectives. This definition is applicable to all projects whether or not they are involving a historic building. In the case of a historic building, it is just as important to take into account that the work is unique to the building, and that there are constraints of time, and money. The quality of the work is influenced by the requirement to make sure that international standards of best practice in undertaking works to historic buildings are met.

The chartered project manager and his/her team has to take account of a number of additional stakeholders that have an interest in the building particularly if it is a Protected Structure[1] and /or Recorded Monument[2], such as the local authority conservation officer, heritage officer or archaeologist whose job it is to ensure that the provisions of the National Monuments Acts/Part IV of the Planning and Development Act 2000 are adhered to. The building is also a stakeholder in its own right as its architectural and historical interest needs to be protected.

2.2 Why are some buildings protected?

International charters and conventions such as the Granada Convention, and an increasing national awareness have informed and influenced the government's policy and legislation for protecting our architectural heritage.

Buildings can be protected under the Planning Acts (Part IV of the 2000 Act) and/or under the National Monuments Acts. A planning authority is legally obliged to include every structure on the RPS (Record of Protected Structures) which in its opinion is of special architectural, historical, archaeological, artistic, cultural, scientific, social or technical interest.

The Archaeological Survey of Ireland has carried out a survey of sites of archaeological potential and this information has been used as the basis for inclusion on the RMP (Record of Monuments and Places), established under the National Monuments (Amendment) Act 1994, which gives statutory protection to those sites.

A Protected Structure and built fabric within its curtilage[3] is protected by law under Part IV of the Planning and Development Act 2000. The penalties for breaches of this Act are severe.

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[1] **A "protected structure"** is defined as any structure or specified part of a structure, which is included in the Record of Protected Structures. The term "structure" is defined by Section 2 of the 2000 Act to mean 'any building, structure, excavation or other thing constructed, or made on, in or under any land, or any part of a structure so defined, and where the context so admits, includes the lands on, in, or under which the structure is situate'. – Section 2 (1) of the 2000 Act

[2] **Archaeological sites** are legally protected by the provisions of the National Monuments Acts, the National Cultural Institutions Act 1997 and the Planning Acts. **The National Record of Monument & Places (RMP)** is a statutory list of all known archaeological monuments provided for in the National Monuments Acts. It includes known monuments and sites of archaeological importance dating to before 1700AD, and some sites which date from after 1700AD.

[3] Curtilage – the notion of curtilage is not defined by legislation. It is normally taken to be the parcel of land immediately associated with that structure and which is (or was), in use for the purposes of the structure.

2.3 Conservation Philosophy

The topic of Conservation Philosophy can be seen as a bit abstract and may not seem relevant to the chartered project manager. However, bear in mind that the most common reason for preserving old buildings is that they are useful resources and can be adapted to serve a modern purpose, irrespective of their historic interest. In other words while beneficial use can be sustained a building will be cared for. With proper maintenance, the life of most older buildings can be extended almost indefinitely. In fact, at its simplest, preservation is synonymous with prudent maintenance – the slow and continuous replacement of that which has decayed and the protection of that which would otherwise decay[4].

We need to understand that while a building has an economic use, it has a future. The challenge for the chartered project manager and his/her team is to achieve a balance that protects the historic fabric while at the same time allowing the building to continue to have an economic use. This will ensure that the building will move on into a new stage of its history which may extend back many hundreds of years and have involved multiple changes to its fabric under numerous different owners.

To achieve this, the advice of an accredited professional e.g. SCSI Conservation – Accredited Surveyor, should be sought as early as possible in the project.

2.4 Conservation - New and Old

Building technologies and materials changed significantly in the early part of the 20th century. This is important to understand because buildings that pre-date this period are generally built with 'flexible' materials that can expand and contract with changes in their environment and cope with fluctuating moisture levels without the use of waterproof/damp proof courses.

The inappropriate use of modern materials and technologies (which are 'rigid' and prevent water getting into the fabric) in an old building, however well intentioned, can produce serious stresses/incompatibilities into the fabric and lead to long term problems. These can sometimes be regarded as unexpected by the inexperienced.

The chartered project manager needs to understand that traditional materials and methods are a necessary part of a conservation project and they can have resource implications for the project e.g. shortage of appropriately skilled contractors or specialist sub-contractors, lead times for traditional materials, weather restrictions on curing lime mortar, etc.

The introduction of modern mechanical & electrical and fire engineering services can potentially be very destructive to the historic fabric. This does not have to be the case. Compatible solutions can be designed, specified and procured by an appropriately qualified and experienced design team who are given the necessary time and resources.

2.5 Record Keeping

From the outset, the chartered project manager should ensure that a project administration system is in place to support the project team. On larger projects this could take the form of a project support office. Records of contract documents, change orders, minutes of meetings, and emails need to be kept as in any project. This information is extremely important as it is a record of the project that will be referred to during and after the project for purposes such as compliance matters, and in the event of a dispute it will be invaluable.

[4] Building Conservation Philosophy, 3rd Ed., J Earl Donhead 2003, p 11

However, in addition to these types of records, a historic building has an additional requirement in terms of record keeping. Conservation professionals depend on records kept by previous generations to help understand the evolution of an old building. These can take the form of old maps, plans, published articles, books, surveys, and previous planning applications. It is vital that the current changes being undertaken as part of the project are recorded and archived as part of the buildings history for future generations. These may take the form of photographs, record drawings, reports on specific materials e.g. mortar and paint samples. This takes time and is an expense that needs to be allowed for in the project budget.

One of the best ways to understand a historic building is to examine the building itself as it is the 'real record'. The removal/changing of any fabric does change the record and this needs to be fully documented.

The advice of an accredited professional e.g. SCSI Conservation – Accredited Surveyor, is vital to bring the project to a successful conclusion. This advice should be sought from the very earliest stages of the project, particularly when the building is a Protected Structure and/or Recorded Monument.

3. Regulatory and legislative requirements

3.1 General Regulations

The chartered project manager needs to be aware of all relevant regulations and legislation which may be pertinent to development of, or incorporating period properties. Misinterpreting or being unaware of relevant legislation or not providing sufficient due diligence during the management of a project can be a costly error in terms of time and money.

Where a building is a protected structure or a proposed protected structure, works which are normally exempt from the requirements of planning permission are not exempted development where they would materially affect the character of a protected structure or any element of it which contributes to its special interest.

Owners or occupiers of a protected structure may request a 'Declaration[5]' under Section 57 of the 2000 Act, the purpose of which is for planning authorities to clarify in writing the kind of works that would or would not materially affect the character of that structure.

An historic building may not be a protected structure but may be located within an Architectural Conservation Area (ACA)[6]. In an ACA the carrying out of works to the exterior of a structure will be exempted development only if those works would not materially affect the character of the area. The chartered project manager needs to bear in mind that this has an effect on exempted development e.g. the construction of a small house extension within an ACA may require planning permission, although it may be exempted development elsewhere.

A building, protected or otherwise, may also be located within a site of archaeological interest, often termed as a Zone of Archaeological Potential. In such circumstances, works which might usually be regarded as of minor impact, such as ground excavations for drainage and foundations as well as landscaping, may require archaeological monitoring and the procurement of excavation licenses. This can impact on programme and as well as the project budget.

Special Areas of Conservation (SAC) are prime wildlife conservation areas in the country, considered to be important on a European as well as Irish level. Most Special Areas of Conservation are in the countryside, although a few sites reach into town or city landscapes. The legal basis on which SACs are selected and designated is the EU Habitats Directive, transposed into Irish law.

Natural Heritage Area is a basic designation for wildlife and is an area considered important for the habitats present or which holds species of plants and animals whose habitat needs protection.

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[5] **Section 57 Declaration** Owners or occupiers of a protected structure may request a 'declaration' under Section 57 of the 2000 Act. The purpose of which is for planning authorities to clarify in writing the kind of works that would or would not materially affect the character of that structure or any element of that structure which contributes to its special interest. Declarations guide the owner as to what works would and would not require planning permission in the context of the protection of the architectural heritage. This is because the character of a protected structure cannot be altered without first securing planning permission to do so.

[6] **An Architectural Conservation Area** is a place, area, group of structures or townscape that is of special architectural, scientific, social or technical interest, or that contributes to the appreciation of a protected structure, whose character it is the objective of a development plan to preserve - Section 52 (1) (b) of the 2000 Act.

Under the Wildlife Acts, hedgerows may not be cut during the period from 1st March to 31st August each year, coinciding with the bird-nesting season. However, there are some exceptions to this law:

- Removal or cutting of hedgerows during routine agriculture or forestry practices
- Removal or cutting of vegetation for public safety (such as roadside hedges)
- Removal of vegetation for the maintenance of watercourses (for fisheries)
- Removal of vegetation for development of land (such as building houses)

3.2 Bats

Bats and their roosts are protected by Irish and EU law. There are 10 known species of bats in Ireland, each with its own lifestyle and habitat requirements. They use a wide variety of roosts, including buildings of all sorts, trees and underground places. Historic buildings by their very nature are natural roosting sites and the chartered project manager should take this into consideration when planning a project. It is advisable to check for the presence of bats as early as possible so that any planning and licensing issues can be addressed.

A grant of planning permission does not constitute a licence or permit to disturb bats or interfere with their breeding or resting places.

3.3 Building Regulations

With regard to building regulation compliance and older buildings, it should be noted that each Technical Guidance Document recognises that the routine adoption of regulations intended for application to new work is often not appropriate and 'may be unduly restrictive or impracticable.'[7] Consequently, alternative approaches should always be considered where un-modified application of the regulations would result in alteration or loss of historic fabric or features and a negative impact on the character of a period building.

3.4 Fire Safety

Fire is one of the greatest threats to historic fabric and the contents of historic houses. Additional consideration needs to be given to minimising damage to the historic fabric and contents in the event of fire. Historic buildings may be more vulnerable to fire because of traditional construction techniques which included the extensive use of timber in concealed spaces or the creation of undocumented service routes that are not fire protected.

Compromise from all sides will often be needed to resolve conflicting requirements of fire safety and architectural conservation. In the interests of good conservation, consultation at a pre-planning stage should take place between the chartered project manager and his/her conservation consultant, the planning authority and the fire authority.

Fire safety design solutions should impact as little as possible on the important elements and fabric of a protected structure and alterations which impact on important fabric should be readily reversible.

[7] Building Regulations 2012 Technical Guidance Document A p. 3.

3.5 Accessibility

The chartered project manager needs to be aware that one of the key requirements for an inclusive and sustainable society is that everyone should be able to participate in and enjoy the social, economic and cultural assets of that society.

There are different requirements for accessibility depending on whether the period building is a public building or a private home. For private homes the legal requirements are less demanding, and solutions can be customised to the specific needs of the owner/occupier.

In the case of public buildings that come under the requirements of the Disability Act 2005, access solutions to serve all types of needs and abilities will need to be found. Buildings which cater for public use but are not in public ownership should also be accessible if the services provided are to meet with equality legislation.

It is very important to remember that if works are required, which affect the architectural or archaeological significance of the period building, the statutory requirements under the Planning Act 2000 and National Monuments Acts will need to be met.

In making the period building more accessible, it is important to be aware that people's different needs can be met in a number of different ways. Sometimes the most appropriate solution may be a management solution which would have little or no impact on the historic fabric. A well thought out access strategy can be both cost effective and can avoid major interventions on the historic fabric. It is vital that the relevant stakeholders are consulted as early as possible.

The chartered project manager must take into account the requirements of the Building Control Acts, the Building Control Regulations particularly Part M, and the requirements for a Disability Access Certificate (DAC). If it is considered impractical for a period building to comply with the different aspects of Part M, it is vital to communicate this to the Building Control Authority when applying for a DAC, setting out the reasons and including any proposals to mitigate the restriction on access or use.

4. Budgeting & Cost Control

One of the many challenges facing the chartered project manager, whilst engaged on period buildings, is that of matching the budget with the unforeseen elements. The limitations and unsuitability of many of the current day forms of contract, in recognising and facilitating the special needs of these particular projects, can be challenging.

It is important to recognise that the potential for costs to escalate due to a combination of unforeseen and specialised works is a reality on projects relating to period buildings, therefore due consideration should be afforded to the following:

- It is vital that all consultants procured are equally experienced in the specialist requirements of working on period buildings. The experience of the design team combined with their joint understanding of the uniqueness of period building projects has a significant impact on how the chartered project manager sets about managing the client's expectations.
- Ensuring that an initial reasonable sum of money is set aside to allow for proper surveying and "opening up" of key areas of the building to allow a more accurate assessment be made with regards to the condition of certain elements. e.g. floor boards / joists, roof timbers, ground or basement floor compositions. This is important so that an accurate scope schedule can be created and subsequently matched with a proper and realistic budget. Such "opening up" type work could take the form of an Enabling Works Contract, therefore it is important that the selection of the main form of contract makes provision for such enabling type works.
- Allowance for and the use of prime cost sums to allow for specialist contractors or products to be individually selected by the design team for the purpose of addressing a specific need of the project.
- Allowance for the inclusion of reasonable Provisional Sums to include monetary provision for unforeseen issues that are likely to arise during the project that cannot be foreseen at the outset of the project.
- Ensuring that the design team have set a realistic budget for the project.
- Ensuring that the Client understands how the budget has been determined and to appreciate going forward what factors may further impact on the budget.
- Understanding the limitations of the many forms of contract used in practise in particular the GCCC forms and working to overcome these limitations for the benefit of the project.
- Ensuring that the pricing element of the tender documents is developed and extended to encompass as far as possible any likely potential scope items not immediately obvious through initial surveys and to include control elements such as:
    a) Schedule of rates for measured works
    b) Schedule of day work rates
    c) Provisional quantities for possible unforeseen scope items
    d) Attendance items such as scaffold, hoisting, protection
    e) Time related preliminary items, e.g. supervision, storage, security
    f) Percentage mark-up required on the prime cost of plant and materials deployed
    g) Percentage mark-up required on specialist subcontractors engaged

Understanding the practical application and restrictions of the many forms of contract is vital to ensuring that there is an element of flexibility afforded to cover the unforeseen combined with a framework that enables control of any associated costs be maintained thus ensuring that the client is getting value for any extra expenditure paralleled with avoiding contentious claims.

5. On-site Project Management

During the course of building works, there is serious potential for accidental damage to the building fabric, theft of historic features and vandalism. Therefore it is wise to put certain protection measures in place before works commence. These can include: erecting temporary steel fences, encasing decorative doorcases, joinery features and stair handrails, with plywood to prevent impact damage, boxing-in decorative and valuable chimneypieces and covering stone and timber floors to prevent scraping and spillage.

Where the subject building site forms part of, or is attached to, another building, it is a good idea to undertake a schedule of condition of these buildings before the works commence. Heavy building works such as demolitions or excavations can cause cracking and damage in adjoining buildings. A schedule of condition will allow pre-existing defects to be identified and any deterioration to be accurately quantified and can avoid or mitigate against legal actions.

It is now widely recognised that an old building is at most risk from fire damage during the course of building works, particularly where soldering work is being undertaken and smoke detectors have been disconnected. Appropriate measures should always be put in place including the provision of fire extinguishers and temporary smoke detectors, and the use of ‘hot-works permits’.

The team and the builder should be made aware of the potential for finding hidden features, such as cornices above suspended ceilings, decorative paintwork or wallpaper, and blocked openings during building works. Where these are uncovered, the professional advisor should be notified immediately. No further work should be undertaken in the vicinity of uncovered features until instructions are issued and, where appropriate, agreement is reached with the local conservation officer.

6. Summary

The chartered project manager should at the earliest possible opportunity ensure that the advice of an accredited conservation professional e.g. SCSI Conservation-Accredited Surveyor is sought. This may involve a simple consultation or involve the conservation professional being part of the design team for the complete project. Period buildings may or may not be protected structures but in all cases they do require specialist input.

The client/owner of the building should be fully informed of the additional requirements that a period building will have in terms of the legislation and the fabric of the building and its potential future use.

Where a period building forms only a small part of a much larger redevelopment project, the client and the team will need to be aware from the outset that issues relating to the period building may consume disproportionate resources both in terms of time and cost to deal appropriately with the various issues and challenges that may arise in connection with the proposed redevelopment/project.

Useful information sources

Additional professional guidance documents produced by the SCSI, available for free member downloading at www.scsi.ie;

Managing the design delivery, guidance note, 2013

Appointing a Project Manager, guidance note, 2014

Conditions of Engagement for Chartered Project Management Surveyors, 2013

SOCIETY OF CHARTERED SURVEYORS IRELAND

Dating back to 1895, the Society of Chartered Surveyors Ireland is the independent professional body for Chartered Surveyors working and practicing in Ireland.

Working in **partnership with RICS**, the pre-eminent Chartered professional body for the **construction, land** and **property** sectors around the world, the Society and RICS act in the public interest: setting and maintaining the **highest standards of competence and integrity** among the profession; and providing **impartial, authoritative** advice on key issues for business, society and governments worldwide.

Advancing standards in construction, land and property, the Chartered Surveyor professional qualification is the **world's leading qualification** when it comes to professional standards. In a world where more and more people, governments, banks and commercial organisations demand greater certainty of professional standards and ethics, attaining the Chartered Surveyor qualification is the recognised mark of **property professionalism.**

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