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Engineering the Right Consultant for Your Condo

A condominium complex is a complicated sum of many different elements, and that's just the physical building. If your condominium has no major repair or replacement projects coming up, it could be years between visits from your Engineering Consultant (up to six years between your Class 2 Reserve Fund Study updates). So when the roof leaks or the foundation wall cracks, and you are in the market for professional advice, a number of questions arise:

- How does the Board find the right engineering firm to trust?
- With the Corporation's hard-earned money on the line, how can the Board ensure they get the best advice to make their repair projects run smoothly?

Below are our top four recommendations for your Board to consider when hiring a Consultant.

Finding the Right Consultant

Clearly, if the Corporation already has a trusted engineer, there are many benefits to maintaining that relationship – knowing the Board's objectives and familiarity with the site leads to cost efficiency, better design, and simplified accounting, among others. But if it is time for a change, how do you begin the search for a great consultant?

- *Get a Recommendation* - Most of us feel more secure in our decisions if we can rely on the recommendations of others; we ask friends if they would recommend the cars they drive and we sift through the online reviews when choosing a new laptop. Start with people who you trust and are likely to know the best Consultants in town: the Property Manager or colleagues at their firm; the corporation's lawyer; the service contractors. Ask a friend or colleague who lives in a neighboring condominium; strike up a conversation with attendees at the next CCI seminar; go online and crowdsource your fellow Condominium Directors through *CondoSTRENGTH*. Whoever you talk

to, be sure to ask if the Corporation was happy with the service and if they plan to hire the Consultant again.

- *Get Online* – if asking those in the know doesn't work or isn't enough, legwork may be required: refer to listings of license holders from your provincial engineering regulatory body, for example, in Ontario it's www.peo.on.ca or look for ads in trade publications such as *Condo Voice* or *CondoContact*. If taking this route, make sure the Board's objectives are clearly defined, and list the qualifications the Board requires from their Consultant, examples include:
 - *Longevity* – the firm has been in business >20 years so the Board can rely on consistency of quality over the long term;
 - *Capacity* – the consultancy is sufficiently large that big projects can be tackled in a timely way, and that there is backup to staff in the event of unforeseen problems;
 - *Multi-disciplinary* – the company has experts in related fields to ensure the right specialty advice is as close as the next desk over.

Preparing an RFP for Consultants

As mentioned, there are definite advantages to being loyal to an engineering Consultant. There will come the time, however, when choosing a new consulting partner will be required. If the Board is considering a Request for Proposal (RFP) or Request for Quote (RFQ) process, we recommend including the following information to facilitate making an “apples-to-apples” comparison between proposals:

- 1 A well-defined project Scope of Work (more on this below);
- 2 A clear explanation of *why* the project is being undertaken (ie. recommended by another professional, due for lifecycle replacement, to improve aesthetics, to reduce increasing maintenance costs, to confirm condition of an asset and timing for repair etc.);



- 3 A list of necessary and desirable qualifications, such as: professional engineering license for the location of the work; experience with the type of work planned; references for projects of similar scope and size; or ability to communicate in both official languages ;
- 4 A history of performance and repairs on the subject area, including previously prepared documents (ie. drawings, evaluation reports, Owner surveys etc.), or a list of documents that are available;
- 5 A statement of the Corporation's priorities for the project, such as cost, schedule, aesthetics, innovation etc., and a definition of a **positive outcome** for the project. Answer the question "What does "success" mean to the corporation on this project?"; and
- 6 A clear explanation of how the competing proposals will be evaluated. Consider a point scoring evaluation system based on company and project team experience, understanding of the project, ability to meet timelines and fee structure. *Lowest fee should not always be the primary deciding factor.*

Defining the Scope of Work

Whether preparing an RFP for the design of a multi-million dollar garage repair project, or preparing a contract for snow removal, properly defining the scope of work is arguably the single most important step for success. A well-crafted scope of work should do the following:

- 1 Define the project deliverables and timelines;
- 2 Clarify, as much as possible, the where, how, what, when and by whom of the project;
- 3 Quantify as many variables as possible (e.g. number of meetings with the Board, number of draft submissions to the Board, number of suites to review, number of site visits etc.);

- 4 Set the standards and quality expected by the Board.

Remember that there is a direct relationship between the scope of work, cost, and risk management. As the requirements of the evaluation phase increases by increasing the number of destructive openings, for example, the Consultant fees increase, but the risk of unforeseen conditions arising during construction decreases. Property Management can help strike the right balance.

It is imperative that all stakeholders understand the project objectives and scope before agreeing on a price and signing a contract. If the Board is unsure how many site visits should be done during construction, for example, ask the candidate consultants to recommend – and **defend** – the best approach.

Improving Communication to Ensure Success

With any project, the importance of effective communication cannot be overstated. It is important to establish clear lines of communication at the project outset. Here are our top 3 tips for enhancing communication in the consultant/client relationship:

- 1 We recommend one - and only **one** - main point of contact for the Consultant and for the Corporation. These two individuals represent the interests of their party.

For the corporation, the contact may be the Property Manager, Board President or other Board representative who can answer questions and communicate decisions, and who is authorized to provide direction on behalf of the Board. It is important to avoid multiple points of contact between the Board and the Consultant to reduce duplication (and cost), error, misinterpretation or incompleteness. It is good practice to identify alternates in case the original contact points are temporarily away or removed from the project. Ask the Consultant for a transition plan in case there are

staffing changes or to cover for vacations or illness during the course of the work.

- 2 Agree on the number of formal meetings at the proposal stage, but setup a schedule for regular phone calls or emails to clarify or reiterate project status.
- 3 Use third party, web based tools (such as Dropbox, Google Drive, etc.) to create shared documents and folders for custom tracking, notetaking, status updates, or anything else that will allow simple and repeated communication.

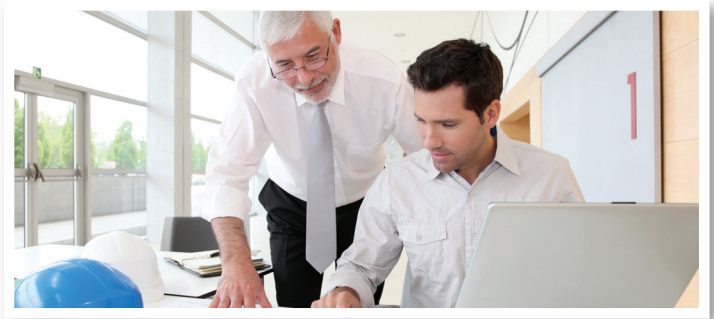
A smart engineering consultant values their position as the Corporation's trusted advisor. Clear goal setting, defining success, and simplifying communication helps ensure the project is a success, and enhances trust. ■

WSP is one of the world's leading engineering consulting firms and has one of Canada's largest building sciences teams with Eastern Ontario offices in Ottawa, Kingston, and Cornwall.

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The ACMO/CCI-EO Regional Conference held in Ottawa on Friday, June 2, 2017 was a great success again this year! ACMO and CCI members shared their knowledge and expertise as speakers with over 200 attendees and coupled with the tremendous support of exhibitors and sponsors alike, it certainly wasn't an event to miss! Special Recognition is extended to both the Conference Diamond Sponsor, Keller Engineering and Conference Platinum Sponsors, Davidson Houle Allen LLP and Elia Associates.

Thank You!



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Arrangements for 2018 are currently underway - stay turned for more details and we look forward to seeing you there!