



## Client advice for arranging a roof survey

The Construction and Design Management Regulations (CDM) 2015 define a client as *'anyone for whom a construction project is carried out'*. A commercial client is an *'organisation, tenant or individual for whom a construction project is carried out in connection with a business, whether the business operates for profit or not'*. Examples of commercial clients are schools, retailers and landlords.

The Work at Height Regulations apply to anyone who controls work at height (*for example a factory owner*). Commercial clients should refer to the HSE guidance leaflet **INDG4011**<sup>1</sup> for further information on these Regulations.

As the client, you will be responsible for checking and ensuring that any individual you appoint to carry out a survey on your roof is competent to undertake the survey safely. A physical roof survey at height will contain additional risks over a survey being undertaken from ground level via camera or drone and therefore you will need to make comprehensive checks to ensure that the individual carrying out the survey has the necessary skills, knowledge and experience to work safely at height.

### Exchanging information with the surveyor

Make sure you talk to and co-operate with your surveyor so that the following points are covered if they are relevant to your survey:

- Your site rules/induction.
- Fire/emergency procedures.
- Signing in and out procedures and any permit-to-work procedure.
- Segregation arrangements.
- Specific site hazards that the surveyor needs to be aware of, such as fragile roof materials; live electrics; location of asbestos containing materials; vehicle movements and process hazards; like fumes and extraction.
- Welfare facilities including first aid procedures.

### Agree the surveying methods

The method of work should be in writing and the amount of detail included should reflect the complexity of the survey. A good method of work will:

- Be clear and concise.
- Be relevant to the survey being carried out on your premises and not generic.
- Identify the potential dangers.
- Specify the method of work and precautions to be taken to remove or minimise the risk.
- Identify how the survey will be supervised and managed.
- Specify the type of access equipment to be used, such as ladders, powered access and scaffold towers.
- Specify how the suitability and safety of the access equipment will be checked.
- Make arrangements for dealing with specific site risks, such as whether a hot work permit is required for any repair work following an invasive survey.



#### Note

*Hot works should be avoided during the survey, and where possible, repairs should be undertaken by using cold-applied methods. If hot works cannot be avoided, then it's important that you check the surveyor's public/professional liability insurance regarding the extent of cover and any stipulations noted with regards to the use of heat/naked flames to ensure that the correct level of cover is in place and the policy is not invalidated by any non-compliance.*

The level of supervision that a surveyor may need from a client during the survey will depend on the degree of risk involved. For example, an experienced individual carrying out a roof survey which is routine for them will need less supervision than those who are less experienced or unfamiliar with the site.

### Monitor the survey

When the survey is being undertaken this will need to be monitored by the client (or their appointed representative) to make sure that the agreed arrangements and precautions are carried out. The level of monitoring needed will depend on the risk level of the work and the extent to which the survey may impact your employees, visitors and any other people for whom you are responsible. Prior to the survey commencing the following steps should be taken:

- Check that the equipment they said would be used is being used and that the agreed supervisory and segregation arrangements are in place.
- During the survey, use the agreed method of work to monitor the survey as it progresses. Is the surveyor using the work equipment and surveying methods that was agreed? If not, ask why and ensure corrective action is taken.

If you require any further information, advice or guidance regarding carrying out a roof survey, contact the NFRC Helpdesk ([helpdesk@nfrc.co.uk](mailto:helpdesk@nfrc.co.uk)) to speak to a member of the NFRC Technical Team.



#### Further information

<sup>1</sup> HSE guidance leaflet INDG4011:  
<https://www.hse.gov.uk/pubns/indg401.pdf>

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