

# Surveyor

## Successful projects begin with a quality survey, and that begins with a complete, defined scope of work

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As a professional land surveyor for a firm that has its roots in retail development, one of the tasks I am most often presented with is preparing a scope of work for the permitting of a renovation and/or expansion for a shopping center. "Just go out and survey the area we are working in because that is all we need," is what I often hear from the owner/developer. In my time at RJOC, I've been fortunate to work with several project managers experienced in obtaining various types of permits for shopping centers and large retail developments and who understand the permitting process for these types of projects. We have come to the realization that it often is not as simple as just surveying an area of the site but a process that involves many variables and moving parts.

To properly prepare a scope of work that will benefit the client as well as everyone involved in the permitting process, one must consider many factors including the proposed design documents, the existing conditions, and the requirements of the city or town you will be working in. There are no "off the shelf" scopes prepared for these types of projects, they are always unique and each one presents its own challenges.

One of the most important questions that I like to start with when trying to determine what the scope of survey needed is: does your client already own the property, or will it be changing ownership? The reason this is an important question is because if the property ownership is changing hands, then chances are that there may be an ALTA/ACSM land title survey involved. The benefit of having an ALTA survey is not only will there be a complete boundary survey involved, but a thorough title report will be prepared. The title report will bring to light any restrictions or encumbrances that may exist on the site, including, right-of-ways and easements.

Additionally, beyond the base ALTA requirements there are the optional survey responsibilities presented in the Table A. This is where the knowledge of the permitting process comes into play. The Table A must be property filled out to include what will be needed for the permitting process, topography, wetlands, utilities, and

additional site features, such as parking striping. I like to offer guidance and suggestions to insure the Table A is properly executed, resulting in all of the client's survey needs required for the permitting process being covered.

Should the client already own the property or they don't plan on having an ALTA survey prepared, things tend to become more complicated. I will often be presented with information the client has compiled over the years. Clients will often times be under the misconception that "nothing has changed" and request that I use this information been previously collected. More often than not this is not the case, things change. Although I can't

take someone else's product and put my name on it, there are benefits to having this information on hand as it is often a great starting point. Any information provided from the client is almost always helpful in some way. The documents often include legal references such as deeds, plans, or lease agreements that can be pulled off the Registry of Deeds website.

Something that is often overlooked when permitting without the benefit of a title report is the need for title research at the Registry of Deeds. Even a basic search at the registry could uncover potential hurdles such as a right of way or utility easement

in the area of the expansion. Any plans provided also give you a better idea of what is out there and what you will be up against in terms of field work, along with what property line monumentation has been recovered in the recent past.

One of the most important items that the client and engineers need to cognizant of is that any modification to the building that may change the setback to the property line will trigger a boundary survey. The only way to certify a setback to the property line is to have a proper boundary survey prepared by a registered professional land surveyor.

A benefit to working in the commercial/retail sector is that clients are most often developers that have some experience and understanding of the process and when presented with a properly prepared scope of work they will understand what they need, what they are getting, and why. Successful projects begin with a quality survey, and a quality survey begins with a complete and properly defined scope of work.

**Scott L'Italien, PLS, is the survey manager for RJ O'Connell & Associates, Inc., Stoneham, Mass.**

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