SAMPLE SERVICE SCOPE

# A clear first step

A Focused Property Review helps you decide what needs attention before committing to a wider programme. This fictional example shows how we keep the first appointment contained.

## The question we are answering

For a single leased office, what do the available maintenance records show, which responsibilities need confirming, and what should the operations lead address first?

## A manageable brief

One office. Up to 20 documents or 150 pages, whichever limit is reached first. One 30-minute fact-finding call, one consolidated clarification round and a 45-minute management briefing. Desktop review only. The document list is agreed before work begins.

## What you receive

A written findings report, an evidence-gap list and an editable action register. Each action has a reason, suggested owner, priority and proposed next date. The briefing explains the decisions needed and where competent specialist advice is required.

## Price and completion

A fixed fee is confirmed in your proposal before you appoint us. The timetable starts once the agreed records and client inputs are available. Completion means delivery of the agreed report, register and briefing, with a defined opportunity to correct factual inaccuracies.

## What we need from you

One nominated contact, the agreed records and the authority to share them. Your team confirms action owners and approves any expenditure. Send property information only, without customer, employee or other personal records unless specifically required and agreed.

## The limits are clear

No site inspection, testing, certification, legal lease interpretation or specialist assessment is included in this example. A missing record is an evidence gap, not a finding of non-compliance. Extra records, visits or work need a separately agreed scope and fee.

**You choose what happens next.** Use the findings with your own team or another provider. There is no obligation to appoint EDR for further work.

SAMPLE PROGRESS AND ACTION REPORT

# Know what needs your decision

Fictional office review at the point of briefing. This example distinguishes information received from work completed, so that an open question cannot disappear into a green status.

## Management summary

Two matters remain open: inspection evidence and confirmation of a landlord-managed service. No remedial expenditure has been authorised.

| Item and evidence | Next action and proposed owner | Status and next date |
|---|---|---|
| 01 Inspection evidence<br>The supplied asset list refers to a lift. The inspection report was not in the agreed record set. | Operations lead to request the report from the existing provider. EDR to record its receipt and flag any matters for specialist review. | Open evidence request<br>Within 2 working days of briefing |
| 02 Landlord responsibility<br>Shared ventilation is listed in the service-charge schedule. Maintenance responsibility remains unconfirmed. | Property contact to obtain the landlord's written position. Refer any disputed lease interpretation to the client's legal adviser. | Awaiting confirmation<br>Within 5 working days |
| 03 Maintenance register<br>The client supplied the approved asset list and maintenance schedule. Document references have been matched. | Operations lead to confirm the proposed internal owner and next review date. | Records reconciled<br>Client acceptance pending |

## Decisions for the client

Confirm who owns the two open requests and whether further specialist advice is needed when the documents arrive. Decide whether your team will manage the follow-up or ask for a separate delivery proposal.

## Costs and changes

Review fee: as agreed in the signed proposal. Additional work: none authorised in this example. Contractor costs: not included. Any proposed change must show the fee and timing impact before approval.

ILLUSTRATIVE FIRST MONTH

# See what you receive and when

Example sequence for the desktop review on page 1. Dates are agreed for your appointment after checking the records, access and delivery availability. These are not guaranteed turnaround times.

Before the start

### Your decision

You receive the scope, fixed fee, terms and delivery dates. You choose whether to proceed. We confirm the contact, information-sharing arrangements and relevant insurance requirements.

Week 1

### A clear information baseline

You receive a short request for the agreed records and a list of any missing items. We hold the fact-finding call and confirm the questions the review will answer.

Week 2

### Findings you can act on

You receive the written findings and editable action register. The briefing explains the priorities, unresolved questions and decisions, followed by the agreed factual correction window.

Weeks 3 and 4

### Your choice of next step

Your team or another provider can take the findings forward. If you want EDR to help, we propose a separate project or ongoing service. No further work or fee starts automatically.

## If ongoing management is the right next step

We agree a reporting rhythm and a service review after 60–90 days. You see completed work, remaining risks, decisions, costs and the next priorities. Scope or fee changes need your agreement.

**If information is delayed:** we identify what is missing, explain what it prevents us from concluding, and agree a revised date. We do not fill gaps with assumptions presented as facts.

HOW WE WORK

# Support without losing control

You should be able to see who is dealing with the work, what needs your attention and what you are paying for. These are the working arrangements we agree before an appointment.

## One accountable contact

Your proposal names the EDR lead and the client decision-maker. Routine updates and concerns come through that lead. Escalation is to EDR's director, with the response arrangements and any external specialist route agreed for the assignment.

## Information handled with care

We agree the records needed, who may access them, how they will be shared and the retention arrangements. We do not need client case files, account-holder details or unrelated personal information for a property records review. Client material is not used in samples or marketing without permission.

## Practical contractor and safety checks

For an agreed delivery scope, we check relevant competence evidence and insurance, coordinate risk assessments and method statements, and establish access, induction and permit arrangements with the client and contractor before work starts. Technical matters outside our competence go to an appropriate specialist. Concerns are escalated through the agreed route.

## Evidence you can follow

Reports distinguish records received, matters reviewed, actions assigned and work accepted. Remaining concerns stay visible. Your team can follow the record from the original finding to the evidence used to close it.

## Insurance and responsibilities agreed before work

We confirm the insurance applicable to the appointment and provide evidence of cover before commencement. The proposal identifies what EDR will manage, what the client approves and what remains with landlords, contractors and appointed specialists.

**Talk to EDR**
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