A CHECKLIST FOR COMMISSIONING AND READING A PROPERTY CONDITION ASSESSMENT

Most of what makes an assessment useful is settled before the assessor arrives: what you supply, what the scope says, who walks the roof, and what the report is required to contain. This is that list, in order.

This is a checklist for commissioning a property condition assessment and for reading the one that comes back. It covers the scope, the documents, the site work and the report, with the roof treated as its own item because it is routinely the largest number in the whole exercise.

Use it in that order. Almost every disappointing assessment was scoped loosely, and no amount of careful reading afterwards recovers a visit that never looked at the right things.

BEFORE YOU COMMISSION

SETTLE	WHY
☐ Who will read the report	A lender, a committee and an owner want different depth
☐ Which standard applies	Lenders often name one, and scoping below it means paying twice
☐ The cost table term	Ten or twelve years is common, and it has to be stated
☐ Who walks the roof	By name and background, not by job title
☐ Whether testing is included	Moisture survey, cores, infrared, and who pays for access
☐ Access and timing	Tenant notice, hatches, keys, and the diligence window
☐ Who owns the report	And whether a lender may rely on it later

DOCUMENTS TO SUPPLY OR REQUEST

- [ ] As built drawings, and any roof plan that exists.
- [ ] Age of each major system, with the basis for the figure.
- [ ] Maintenance and repair records, going back as far as they exist.
- [ ] Warranties in full, with their conditions rather than only the certificates.
- [ ] Permits, and any record of work carried out without one.
- [ ] Any prior assessment, reserve study or roof report.
- [ ] Rooftop equipment agreements, including antenna and solar leases.
- [ ] A list of known problems from whoever manages the building.

What comes back is itself evidence. A building with no records is a building whose condition cannot be verified from paper, which raises the value of testing and lowers the value of anybody's opinion.

ON SITE

AREA	WHAT HAS TO BE COVERED
☐ Site	Paving, drainage, retaining structures, lighting, signage
☐ Structure	Visible movement, cracking, deflection, water staining
☐ Envelope	Walls, windows, sealants, parapets, flashings
☐ Roof	Walked, area by area, with photographs and locations
☐ Mechanical and electrical	Age, condition, capacity, remaining life
☐ Vertical transport	Equipment age, service record, outstanding orders
☐ Life safety	Alarms, suppression, egress, documented testing
☐ Accessibility and code	Observed conditions, with the basis stated
☐ Interiors	Representative units, common areas, back of house

The roof is where scopes most often quietly narrow. A roof viewed from a hatch, or from an adjacent building, is not a roof that has been inspected, and the report should say which of the two happened. The roof due diligence checklist covers the roof portion in full.

WHAT THE REPORT MUST CONTAIN

1. **A purpose statement.** Who it was written for and what it supports.
2. **The method.** What was walked, what was tested, who attended.
3. **Findings by system**, each located, photographed and rated.
4. **Immediate repairs**, separated from longer term capital items.
5. **A cost table** over the agreed term, with the basis for each figure.
6. **Remaining life per system**, with a stated basis rather than a bare number.
7. **Limitations**, written as instructions: what was not seen, why, and what would resolve it.

READING THE DRAFT

Read it once for structure and once for substance. The first pass checks that every section above is present and that none of them is a paragraph of boilerplate. The second checks whether the findings are about this building or about buildings in general, which is usually obvious within a page.

Then correct facts, not conclusions. Supply any document that arrived late. Question any finding whose basis is not stated, and any limitation written as a generic disclaimer rather than as a specific gap.

Then check the roof line against reality. Assessment cost tables carry allowances rather than bids, and an allowance for a roof is usually built from area and a unit rate rather than from the condition of this particular assembly. Why the roof cost in a report rarely matches a contractor's bid covers where that gap comes from, and whether it matters depends entirely on what the number is being used for.

> Walked by _____ Date _____ Roof _____