



By James D. Nadeau, PS, CFM

Jim Nadeau has been a licensed surveyor for more than 20 years, owns his own business, and provides services in southern and central Maine. He is also a realtor and a certified floodplain manager, and frequently makes presentations before insurance agents, mortgage brokers, lenders and realtors.

Municipalities and Clients, You are the Guide



Tom Blake, PS, represents a client at a planning board meeting.

Envision yourself sitting quietly in the corner of a municipal meeting where a large manila envelope rests on a conference table. Inside the envelope is your firm's recent submission for a construction project, building permit, site plan, or subdivision. In another office across town sits your client, a local contractor eager to receive permits, finalize financing, and get the word out to all of his/her sub-contractors that they can begin the project.

Many would believe the most critical piece of information is contained within the envelope, but perhaps it's the return address of the land surveyor who has

prepared the submission. Can you predict the reaction of the officials upon their realization that you are the professional consultant involved with the submittal? We all want them to be overwhelmed with joy when they realize the consultant and see our work, but to achieve this you must deliver a quality product with the intention of obtaining a municipal sigh of relief, not a groan. Doing so creates an opportunity to build reputation and marketing, as well as diversify your product.

Though our contracts to perform professional services and deliver products are with a client, it is the municipal engineers, code enforcement officers, and planners who determine if our work

has merit. An unsatisfied municipal official immediately alters the client relationship and erodes trust. This can be compounded with an invoice to your client that is higher than expected. After all, the preparation of a contract assumes capability of rendering the required service on time and within the estimate. This complicated dynamic regarding who is contracted and paying for the service, and who is evaluating the product, requires special attention as both parties will have an effect on your success and future referrals.

One way to manage the relationship of the municipality, the client, and the consultants is to maintain standards that exceed the expectations of all parties involved. Maureen O'Meara, Town Planner of Cape Elizabeth, Maine, states, "Whenever a municipality decides to establish minimum standards, it is much more helpful if the affiliated profession has already agreed to a standard set of products with descriptions."

Take a moment to reflect upon the mindset that currently surrounds standards and ethics. Often, these guidelines are perceived to protect land surveyors from lawsuits and unjustified complaints. But implementation of higher standards and ethics will promote growth and respect of our qualifications and services. Professionals should hold themselves to the highest standards and as a result, deliver quality products, trustworthy recommendations, supported opinions, and then be compensated accordingly.

Zoning Administrator for the City of Portland, Maine, Marge Schmuckal, states, "Zoning is very prescriptive. I

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cannot give or take a couple of feet, or even inches, here and there. When the Land Use Ordinance states that a minimum setback is ten (10) feet, then I must require 10 feet, not 9 feet 6 inches. I can appreciate that other professionals, such as surveyors, also have very prescriptive professions.”

When working with municipalities, town officials have specific checklists and

guidelines that must be satisfied in order to obtain approvals. Beyond the checklist is the required narrative. Although it is written within an outline, it is nonetheless an assertion of the consultant’s professional opinion. The narrative must be qualified, substantiated, and from a source that has demonstrated integrity and established trust. Holding to the highest professional standards when producing work will insure that it does.

O’Meara makes it clear that “we need the product requested, of good quality because everything we do is subject to public scrutiny.”

Where does the process begin with a municipality? Establish open and honest communications with the town office who will review your work. Do not let professional insecurities deter you from initiating a conversation that can help you prioritize the steps you will take to meet your client’s needs and, equally important, satisfy the reviewing municipal official. The client, the consultant or representative, and at times, the municipal official, may not have a full grasp on the requirements for a specific approval. Schmuckal knows this all too well, “I cringe when I receive plans from home owners who apparently have no idea what they purchased and where it may be located on the face of the earth. Too many times I have totaled up the dimensions of what a home owner shows me on a simple plan. Based on the dimensions shown on their plans, I am adding up 125 feet where the actual dimension on their deed is 100 feet! And I totally worry when a home owner tells me that they don’t have a survey but they do know where their property line is located because they believe that a fence on their property is the property line. Red flags immediately go up.”

By creating solid communications with the town officers prior to and during the project, the execution of services will be more efficient and your quality of work will be superior. Municipal officers will welcome the initiative and professional integrity conveyed by such a communication. If a problem does surface, the established line of communication allows for a painless discussion of the issue at hand with the correct municipal official. This clarity and communication with municipal officers will allow you to produce quality work for building permits, site plans, subdivisions, etc. But keep in mind, it shouldn’t matter who is contracting you or who is evaluating your work; your own expectations should be the highest bar. In other words, be your toughest critic.

Another avenue to consider is to diversify your product offerings and make sure each of the municipalities you desire to work with have been notified of your capabilities. Adding certifications and licenses such as Certified Floodplain Manager, Certified Floodplain Surveyor, Certified Underground Utility Locator,

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The majority of documents prepared by land surveyors will pass through the front doors of town hall.

and Realtor creates a nice flow of additional work. Schmuckal uses additional services often, “As a Zoning Administrator, I also greatly value the shore land and floodplain delineations performed by surveyors.” Remember that the majority of documents created by professional land surveyors will pass through the front doors of town hall. It is a great source for the creation of additional work.


Extend an offer to pertinent municipal officials letting them know that they are always welcome to call should they have any questions about our profession or services. Of course, this concept works best if the desire to provide help when needed is sincere. O’Meara mentioned that “Most recently I have been seeking standardized definitions of survey products so that I can put the definition in an ordinance.” Schmuckal also adds, “I understand why the current mortgage inspection plans are not a true survey. Too many homeowners assume they are much more than what they really are.” Such requests for information and managing client expectations are the perfect opportunity to step in and become a resource and be at the ready to provide the needed support. This gesture of assistance will aid in building relationships, as each municipal official will be comforted in knowing they have someone to answer a question or lend a hand.

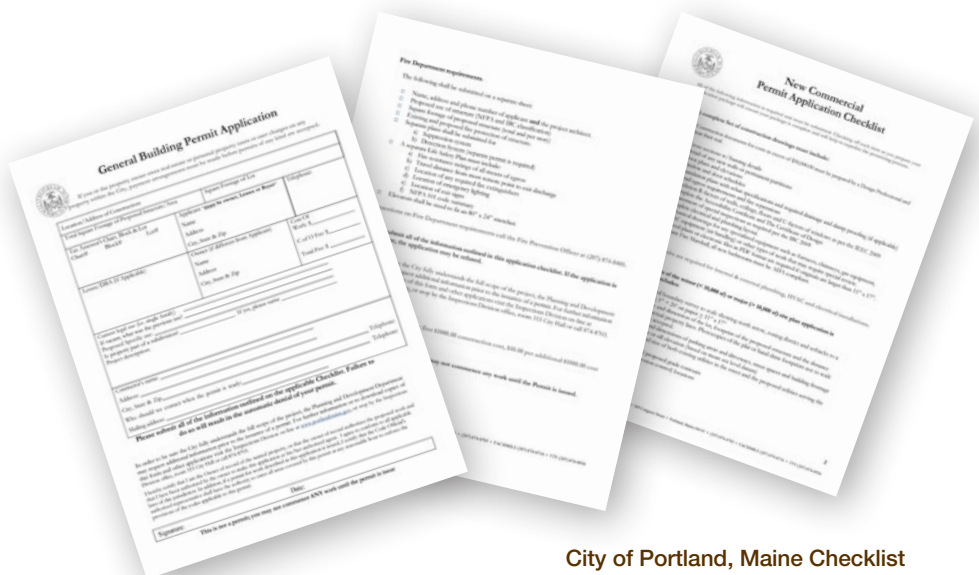
Which brings us to the other party involved – the client. Clients that will engage the services of a land surveyor in order to be granted approvals from town offices include private home owners, developers, contractors, and other

consultants. These clients rarely have time on their side. It is said in jest, but it is true nonetheless, in Maine there are two seasons: winter and construction. Similar geographic areas see a large boost in business during the warmer months purely out of necessity. The number of months that a contractor can build is finite, and the permitting process only serves to inhibit actual construction from beginning. Whether or not you live in a climate that restricts the building season, being cognizant of the time-sensitive nature of any construction project will set you apart.

Take that notion a step further. What if instead of being a part of the process that could potentially inhibit the work, you were a part of the process that facilitated the work? What if

clients knew that when they came to you, things were going to be executed efficiently and to a quality standard that was actually going to get them on their job site sooner rather than later? As we all know, the typical permit process is riddled with frustration and acrimony between the applicant and the town. Permits hold up financing issues, cause cost overruns, and can lead projects into a black hole. Growth and profitability will be possible when value is delivered to the client. Become a guide through the approval process for your clients with proper information, resources, and relationships and establish a business reputation as the person who can get clients the green light necessary to start their project. Appreciative clients will adjust to higher costs when a product of higher value is being delivered.

Whether it is an individual or a business entity, when construction has to take place, there are many dominoes that need to fall: from the initiation to the completion of the project. As a land surveyor you are uniquely positioned to modify this experience from being a large puzzle with many confusing pieces, to creating a dynamic where all parties are partners working together to see the project through to completion. “When I am working on a project, I really appreciate having some hard data. Surveyors provide that data. It’s a good fit,” says O’Meara. Confidently convey your abilities to municipalities and then deliver on the promise with a high standard of care, ethics, and an accurately delivered product. When you accomplish this, everyone can feel good about the return address on the large manila envelope. 



City of Portland, Maine Checklist