

THE ETHICS OF ESTIMATING

by L.T. Lane, O.L.S., P. Eng.

Editor's Note: Mr. Lane advises he has prepared this article at the request of Council. "Council has read it," he says, and suggested it be published in "The Ontario Land Surveyor".

Estimating the cost of survey work is becoming a consideration of increasing importance. As this article will endeavour to show, proper estimating can help our public relations both as individuals and as a professional group whereas improper or misleading estimates are damaging to the profession and are, in fact, unethical.

Land surveyors are frequently asked to submit estimates, or bids, to prospective clients for surveys of various kinds. It is obvious that any prudent person contemplating the authorization of survey work which will be an expense to him would want, and be entitled to, an estimate of such expense.

It should be noted however that in the great majority of cases the cost of the survey is not a critical factor in the property transaction taking place. However where there is a valid need for a survey then such survey is an essential service which is an enabling factor in the transaction taking place. It is suggested that we would do well to keep this point constantly in mind.

To anyone familiar with work of our Committees on Complaints and Discipline, it is quite clear that where too low an estimate of survey fee is given either the surveyor suffers financially or the survey suffers in quality - and in either case, the land surveying profession suffers.

A proper approach to the matter of indicating or estimating surveying costs to the client would do a great deal to eliminate a vexing problem which is harming the professional status of land surveying.

It is suggested here that a major part of the problem stems from a myth. The myth would have it that a land surveyor has nothing to sell but his time and the time of his assistants. Let us examine this carefully for if this is true, we are not just fighting a losing battle in the matter of professional status, we have lost out. In fact, however, it is not true and cannot be held to be so if the land surveyor thinks and acts as a professional man. We render a service which is rarely a simple function of the time we put in but which can and should always be an exercise in professional judgement. But only if there is such professional content to our work may we be justified in regarding ourselves as professional.

"Professional" has been defined as "making a business of something not properly to be regarded as a business". This would seem to imply that the true professional man does not sell time, or service, as a straight commodity.

The fact is that improper estimating is unethical, firstly because it is misleading to the client and secondly because it tends to be restrictive on the amount of effort that will go into making the survey. Any attempt to give clients assurances regarding survey costs should be deliberately and carefully qualified so

as to leave the surveyor free to exercise judgement during the conduct of his work. The one assurance the surveyor can give ethically should relate to the quality and acceptability of his work, - that it will be fully satisfactory for the client's purpose. This implies, of course, that the land surveyor is fully aware of the client's purpose as well as all aspects of his responsibility in that regard.

Finally then let us face the hard facts of life and discuss an appropriate professional approach to the matter of fees, such that will (ideally) enable the land surveyor to deal in good faith with the client and enable the client to have a realistic appraisal of his costs for land surveying services.

The following suggestions are made toward this problem and are also intended to provoke further discussion on it:

1. Bids and tenders (or estimates which can be interpreted as such) shall be prohibited by our Association by By-Law.
2. The manner in which "estimates" (or some preferable expression such as "Indicated Fee") may be submitted to prospective clients shall be restricted by By-Law. Among other things, any submission should include a statement by the land surveyor, which undertakes to provide a valid survey which is fully acceptable for the intended purpose.
3. Land surveyors should prepare standard forms for estimating costs for general use. Such forms should cover all possible phases of a survey. Since any type of estimate will benefit from attention to detail, that a formal approach be taken to estimating appears justifiable. This could well serve to improve the efficiency with which the work is ultimately done.

In conclusion it must be admitted that in land surveying we have a problem in fees that is dissimilar from most of the other professions. This is so because the clients motive is generally profit and the minimizing of his costs is a legitimate objective for him. In this situation, we land surveyors have a serious need for clear thinking about our own legitimate objectives within our profession.

THE INTERCHANGE OF SURVEYORS' NOTES

by Andrew Gibson, O.L.S.

Clearly, surveyor's opinions on this subject depend entirely upon the size of their own stock of notes. An old-established firm will inveigh against the upstart new surveyors, (who, it is rumored in hushed tones, operate from a recreation room and whose wives answer the telephone) who will take everything but can give nothing-while the latter firms are resentful about the lack of co-operation on the part of their less "progressive" confreres. Then there is a large group of middle sized firms, neither too young nor too old, but just right, who get about as much information as they give, and are friends to all without getting ulcers about the vexing subject.

Certainly it merits attention, because the anomalous position in Ontario of private surveyors, who must perform all the impartial functions of public servants while acting in a private capacity, will not survive much impairment of