Management and the Quantity Surveyor

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There has been a marked upsurge of interest in management among the professions associated with construction and this is reflected in the current examination syllabuses of the professional institutions and in the curricula of higher education courses for the industry.

What is perhaps surprising is that this trend was not in evidence earlier, but it must be remembered that there was formerly a widespread conviction that management was not a proper area of study at undergraduate level. This position was overcome at Leeds Polytechnic when, in 1975, the Council for National Academic Awards gave approval for the inclusion of Construction Management as a core subject in a new BSc and BSc (Hons) Building degree course, which replaced the former Ordinary degree course.

In a further pioneering development a year later, the Council ratified the inclusion of a subject entitled Organisational Behaviour and Management in the Polytechnic's new BSc and BSc (Hons) Quantity Surveying course.

Similar developments have been occurring elsewhere and, of course, the RICS and the IQS have included management studies in their revised examinations syllabuses. What is perhaps most important about this change is the recognition that there is some value in pursuing management studies at a very early stage in an individual's career—bearing in mind that many trainee quantity surveyors, preparing for first degree or professional qualifications, will have had little practical experience.

Operating management courses for young quantity surveyors has so far produced encouraging results. At Leeds, students are introduced to organizational and management concepts at an intermediate stage in their studies and, by the final year, are producing some valuable work, displaying good insights into organizational problems and the role of management. Our approach has been to emphasise the nature of industrial organization and the resulting relationships involved in the construction process. Management is introduced as a kind of *regulating mechanism*, which integrates diverse tasks and copes with the routines and breakdowns which occur at various levels and stages of a construction project.

This demands an approach to management which is problem-centred and flexible, with emphasis on the skills managers use and the techniques that may help them. Rigid formulations of management processes, which dominated much earlier thinking on the subject, are played down. They are used only in a contextual way, contrasting them with more modern and dynamic ideas about how organizations work.

Barry Fryer

An approach which we have found useful and have pioneered in construction courses at Leeds is systems analysis. Systems thinking has sharpened up our own perceptions of the building process, highlighting the importance of such things as information flow, conflicting objectives and the manager as *linking pin* between the numerous individuals and groups involved. One of the strengths of the systems approach is that it encourages a more rigorous analysis of how organizations function and the role of management within them.

We have also found that it is important to identify the various levels at which management operates and have come to differentiate separate areas for consideration rather than viewing management in a vague, generalised way. There are some important distinctions between the jobs of project manager, manager in a quantity surveying office and contractor's site manager. Certainly there are similarities between these roles, but there are significant differences in the tasks these managers perform and the mix of skills they use.

To understand these differences, it is helpful to shift the focus from management to organization, for the purpose of management lies in the reasons for having organizations in the first place. If we examine the reasons critically, it emerges that strictly speaking organizations do not have objectives as such. Rather, organizations are best conceived as groups of people who cooperate with one another towards implementing some *strategy*, in order to satisfy their individual objectives. Often these objectives bear little resemblance to the business's overall strategy and, indeed, may conflict with it. It is, perhaps, this conflict more than anything else which is at the root of industry's biggest problem today—labour relations.[1]

The study of management for the quantity surveyor can usefully start by examining how the work of a quantity surveying office or practice is organized. This reveals that certain managerial processes are going on to regulate the tasks of the business, typically:

- identifying objectives, updating them and devising strategies for achieving them.
- coping with the changing demands of clients, employees, other members of the building team and government agencies.
- organizing and reviewing the tasks through which the enterprise implements its strategies.
- passing on patterns of behaviour and skills to ensure the continued survival of the business.

Usually, these processes involve a number of people in the quantity surveying office. There is a degree of specialisation operating both vertically and horizontally. The former refers to the division of tasks according to their strategic importance, whilst the latter recognises that tasks of equal importance to the firm are undertaken by different specialists.

Petit[2] devised a useful classification which helps with part of the analysis. He was not looking specifically at the building industry or at quantity surveying, but he recognised that in any business enterprise there exist several distinct management levels. Petit's analysis is broadly applicable to quantity surveying, except that in a small practice or department, one person may perform the tasks associated with two or more levels.

If we examine a larger office, the different levels Petit has described are more apparent. At the centre of the quantity surveying 'system' is the technical core, the province of the technical manager. The latter leads a team engaged on the regular duties of the office—the tasks which constitute the organization's business. Many competent quantity surveyors fit this description, when they organize others in preparing bills of

quantities, valuations, variations, final accounts and so on. Often their decisions are quantifiable in terms of time deadlines, cost targets, quantities and so on.

At the other extreme, on the boundary of the organization so to speak, is the general manager—the chief quantity surveyor, partner or proprietor—whose job is to monitor the overall progress of the enterprises and see that it survives, by adapting to pressures and constraints, many of which are outside the firm and beyond its control.

Petit called this the level of the institutional manager and there are often several such managers in a quantity surveying business. Their decisions are often more qualitative than those of the technical managers and rely on judgement and experience, sifting through a large volume of data coming in from the world outside, weighing up probabilities and opportunities.

Petit explains that there is a third group of managers who mediate between the other two. He calls these the organizational managers. Theirs is often a strategy of compromise, trying to resolve conflicts between the short term, operational needs of the technical managers and the longer term, strategic activities of the general managers. In many quantity surveying offices, the organizational level may not exist as a separate group of managers, because technical and institutional roles may overlap. For instance, section leaders and partners may perform much of this mediation process through direct contact with one another.

It will all depend on the size of the business and how it is organized. In general, the larger the enterprise, the more readily the third level of managers can be differentiated.

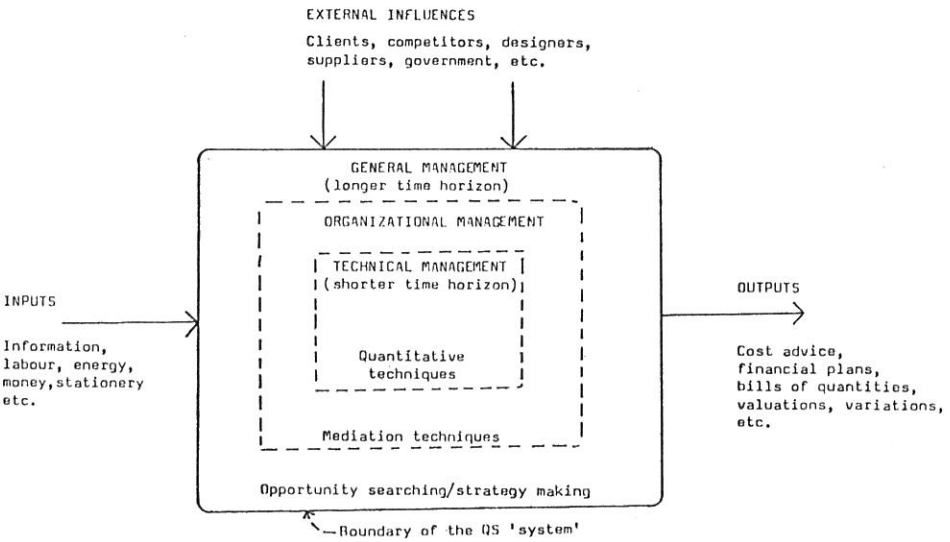
This model is only one of several which demonstrate that managers' jobs are more variable than was suggested by earlier management thinking. Managers perform differing tasks, demanding various combinations of social, technical and conceptual skills.[3]

There have been comparatively few studies of managerial skills in the construction industry, but one piece of research by the author, involving managers in building and civil engineering firms, indicated that they attach a great deal of importance to *social* skills. These were ranked the most important of five skill groups by a sample of thirty managers who took part in an interview survey.[4]

These managers emphasised the importance of effective leadership and communication, of keeping people involved and informed and of fostering a sense of teamwork and commitment. It is the exercise of such skills which creates the kind of work relationships that result in a network of contracts, bringing about action and the exchange of information and instructions, so necessary for organizational success.

Studies have repeatedly shown that many managers spend a large proportion of their time with other people and are therefore exercising social skills during much of their working day.[5] Again, one must resist the temptation to generalise, as individual managers' jobs vary widely.

THE MANAGEMENT OF QUANTITY SURVEYING WORK (Developed from Petit, 1967)



Indeed, there is a comparatively new approach in organizational studies which centres around this notion that there are no universal prescriptions of managerial work. This is contingency theory or situational management. Its main tenet is that the best way of organizing and managing a business depends on a whole range of variables, such as the firm's size, location, type of work, the technology it uses and the people in it. Moreover, the best way of organizing a particular business will depend on the environment in which it operates, in terms of its markets, clients, susceptibility to government influence and other factors.

This is basically a common sense approach to running a firm or department, but it is clearly at variance with some of the more traditional ideas about management, which were often very prescriptive. It is for this reason that management education nowadays tends to play down the importance of principles and is increasingly adopting a more dynamic, problem-centred approach, in which participants are encouraged to examine and seek solutions to the problems that organizations are currently facing.

Thus, quantity surveyors can learn a great deal about management by looking more deeply at their own jobs and at how their organization copes with crises and changes.[6] But today the quantity surveyor may need to look beyond the problems of managing the financial aspects of projects. The development of project management—concerned with the overall planning and co-ordination of a project to meet the client's cost, time and quality requirements—has meant that individuals from various specialisms within the construction process have been called upon to provide an overall management service for the client.

Whilst there has been some debate about which profession is best able to provide this service, there is now some consensus that architects, engineers, quantity surveyors and contractors' managers may all make good project managers, providing they have a good overall knowledge and experience of the industry and that they possess the ability to lead and co-ordinate. Thus, a small but growing number of quantity surveyors are being called upon to provide not just a financial service but complete project management from inception to completion.

In such a role the quantity surveyor may have to deal with such diverse problems as designer-contractor relations, industrial relations, communication failures, integration of services design and co-ordination of engineering subcontractors.

As in the management of a quantity surveying office, the project manager requires not only technical, financial and information handling skills, but the personal skills necessary for pulling together into an effective unit, a heterogeneous collection of individuals and groups who make up the 'project team'. Project management is most often applied in situations where the building or structure is large or technically complex, or where the client has stringent objectives, such as a tight deadline for completion.

There is still comparatively little provision for training in project management, although management games of the type used by Jagger and Wilson[7] in the education of quantity surveyors, are very promising as a prelude to relevant practical experience. One major problem is that many project managers have considerable experience of either design or construction, but seldom both.

Conclusion

There seems little doubt that the emphasis on management studies for quantity surveyors will remain and will probably grow, for our industrial society has created larger and larger organizations, which are becoming more complex and difficult to manage. Whilst there is an abundance of equipment and techniques to help resolve these complexities and handle the vastly increased flow of information, the effective co-ordination of quantity surveying work still relies a lot on the personality and social skills of individual managers—although

Continued on p. 52