

# TECHNICAL BULLETIN

FOR RESIDENTIAL SURVEYORS

## THE GREAT DAMP ILLUSION

THE GREAT DAMP ILLUSION

USING THE RIGHTMOVE  
SCT AND GOOD VALUATION  
PRACTICE

JAPANESE KNOTWEED AND  
RESIDENTIAL PROPERTY

GROUND SCREWS

DIGITAL DATA COLLECTION

THE SAVA PROTOCOL



# THE TECHNICAL BULLETIN

FOR RESIDENTIAL SURVEYORS

---

Welcome to the Technical Bulletin. This Bulletin is designed primarily for residential surveyors who are members of RICS and other professional bodies working across all housing sectors. Other professionals may also find the content useful.

Produced by Sava, you will find technical articles, regulation updates and interpretation and best practice. We hope you find this useful in your day-to-day work and we welcome any feedback you may have and suggestions for future publications.

## Who we are

We are a team of building physicists and engineers, statisticians, software developers, residential surveyors, gas engineers and business management specialists.

## CONTACT

### Head office

4 Mill Square Featherstone Road,  
Wolverton Mill,  
Milton Keynes,  
MK12 5ZD



01908 672787



[bulletins@sava.co.uk](mailto:bulletins@sava.co.uk)



[www.sava.co.uk](http://www.sava.co.uk)  
<https://resources.sava.co.uk>

# CONTENTS

---

04

## THE GREAT DAMP ILLUSION

RUSSELL RAFTON, DIRECTOR, DRYFIX PRESERVATION LTD

08

## USING THE RIGHTMOVE SCT AND GOOD VALUATION PRACTICE

ANNE HINDS BSC(HONS) FRICS, LEAD INTERNAL QUALITY ASSURER, SAVA

13

## JAPANESE KNOTWEED AND RESIDENTIAL PROPERTY

PUNIL SHAH MRICS, E.SURV CHARTERED SURVEYORS

16

## GROUND SCREWS

ANDY GABEL, DIRECTOR OF OPERATIONS, GS4U

19

## DIGITAL DATA COLLECTION

GAVIN O'NEILL, CEO, GOREPORT

22

## THE SAVA PROTOCOL

INGS BETTER



# THE GREAT DAMP ILLUSION

## A CASE STUDY

**RUSSELL RAFTON, DIRECTOR, DRYFIX PRESERVATION LTD**

In this article, Russell Rafton provides a case study that demonstrates why moisture meters shouldn't be relied upon alone when inspecting property and assessing the levels of moisture in walls.

Surveying properties for damp related problems is a far more complicated subject than many appreciate and that's probably due to the huge variety of potential causes, the complex routes that water/moisture takes through a building, and potential masking effects. There's no doubt that buildings are complex and rarely are two ever the same. Construction practices have evolved over time, as well as the materials we choose to build with. Most people would look at a wall and consider it just a wall, however, when you break it down it's far more than just a wall, it's a foundation, a damp proof course, facing bricks, mortar, plaster, paint and skirtings. They all have different relationships to the surrounding structure and they're all materials that react differently to moisture.

Every good building surveyor should have a decent understanding of material science and the various construction methods both above and below ground level. The role of most building surveyors is generally observational, however in our industry, diagnosis is very rarely provided through observation alone. Very little can be understood from just observing the surface of a wall and accurate diagnosis generally requires some investigative work and

testing of materials for moisture and contamination. The problem is that many of the instruments we use for assessing damp are not always fit for purpose; they can be very misleading and difficult to interpret.

Over the years I've read many building reports which include disclaimers such as *"Dear Mrs Smith, thank you for inviting me to survey your property for damp. During your survey, I used an electronic moisture meter which when used on masonry takes readings which aren't quantitative, therefore, it cannot accurately measure damp in walls. My assessment is therefore merely an interpretation of instrumental readings and visual observations made during the survey"*.

If a client is paying you to investigate a potential damp problem, then surely for it to be accurate this should be conducted quantitatively? (Although I appreciate that for a purchaser the inspection and report usually has to be done quickly as part of the property transfer process and often there is not the luxury of time to do a full quantitative investigation)

I often read people's comments online on how finding rising

damp is rare and how establishing the root cause is so important to provide accurate diagnosis, but in reality, most diagnoses are made via the interpretation of an electronic moisture meter. So just how accurate are they?

This case study demonstrates just how easily electronic moisture meters can be misinterpreted, even when combined with what most would consider clear and obvious symptoms of rising damp. Ask yourself, in this situation, how accurate do you think your diagnosis would be?

**The Property**

Our client purchased a period farmhouse on the outskirts of York which required extensive refurbishment.



Figure 1: Front and side elevation of property

They employed a trusted family friend and local interior designer to assist with the refurbishment and help recruit a team of contractors to undertake the work. In addition to the refurbishment, a new extension was constructed. As part of the renovation works the building contractor installed a new damp proof course and re-plastered the entire property with what the client believed to be a lime plaster. Shortly after completion, however, the property started to display symptoms of a developing problem. The recently finished interior decorations started to spoil as the paintwork blemished and flaked from the ground up - see image below.



Figure 2: Distressed internal decorations which started to spoil shortly after the renovation was completed

Naturally, this caused a lot of heartache and distress for the homeowners. The immediate concerns were towards the builder, the person responsible for the renovation and damp proof course installation, however, they discovered the builder wasn't a damp specialist and there was no paper trail of an initial damp assessment, no written specification and of course, no guarantee.

The client did what most homeowners would do in this situation, and they brought in a specialist to assess the building and provide a diagnosis. The specialist's survey, as is all too often the case, was conducted in a non-destructive manner, merely a visual inspection and appraisal of the property's condition interpreted by readings taken from the walls with an electronic moisture meter. The results of their investigation disclosed that the property was suffering with rising damp due to poor building practices during the renovation.

Visually you'd be forgiven for coming to this conclusion because there's evidence of distress to the internal decorations which appears to be migrating from the ground, symptoms you'd normally associate with rising damp. The electronic moisture meter when used in this region also screams aloud, alluding to the likelihood of moisture within the plaster and a problem with rising damp. But on its own and particularly from a specialist's standpoint, is this evidence sufficient to diagnose rising damp, particularly when there's a likelihood of future litigation?



Figure 3: Electronic moisture meter revealing high readings when the spoiling plaster is tested

If you've ever wanted to know just how accurate electronic moisture meters can be at interpreting damp profiles, you may find [this article](#) useful. When compared to disruptive gravimetric sampling, electronic moisture meters are highly accurate, however, they can be misinterpreted even when all the symptoms suggest they are right.

We were contracted to undertake an intrusive survey to investigate the apparent claims and to accurately establish the condition of the walls. The British Research Establishment (BRE) guidance document 245 "Rising damp

in walls - Diagnosis and Treatment” suggests that whilst electrical moisture meters do have a valuable role to play as preliminary surveying instruments, to obtain conclusive proof regarding the condition of the wall the most satisfactory approach is to take samples of masonry and plaster for analysis. As such, in addition to our general survey, I was granted permission to extract samples of masonry from the problematic walls for moisture and contamination analysis.

In addition to our visual inspection of the property both externally and internally, skirting boards were removed from the most problematic walls, plaster was removed vertically exposing the brickwork and mortar joints, and samples were methodically removed from the walls. These samples were then removed from site and processed over the following days in our in-house laboratory using the gravimetric process breaking down the sum components of each samples’ total moisture content. Each sample was then tested for mineral salt contamination.

For those interested, this [article](#) explains the process of methodically extracting samples for analysis whether that be onsite analysis using a speedy/carbide meter or offsite laboratory analysis.



Figure 4: Samples extracted from the problematic walls for offsite moisture and salt analysis

The results of our lab analysis revealed that despite the wall’s visual appearance, the reaction of an electronic moisture meter and the prior diagnosis, these walls were in fact dry. Moreover, the walls weren’t just dry, they were bone dry with moisture levels that varied between only 0-1.1% free moisture content. This was a very dry building.

The distress caused to the plaster was the result of hygroscopic contamination and efflorescent surface salting. Our analysis revealed low but traceable levels of chloride salts in the samples, but high levels of

groundwater nitrate salts were deposited throughout the walls. Hygroscopic contamination is, in theory, a form of dampness, however, the moisture present isn’t the result of groundwater or penetrating damp, but from moisture within the air which is attracted to the surface of the wall due to contamination. Whilst hygroscopic contamination is clearly damaging to the plaster and internal decorations, there’s very little risk of decay or severe damage to the structure as would normally be associated with other forms of dampness.

	TMC(%)	HMC(%)	FMC(%)	FMC(%)
100mm	4.1	3.0	1.1	1.1
200mm	1.6	1.5	0.1	0.1
300mm	2.6	2.2	0.4	0.4
400mm	1.9	1.9	0	0
500mm	2.3	3.2	-0.9	0
600mm	2.0	2.7	-0.7	0
700mm	1.9	2.4	-0.5	0
800mm	1.3	2.1	-0.8	0
900mm	1.6	2.7	-1.1	0
1000mm	1.2	2.0	-0.8	0

**Key**  
 TMC = Total Moisture Content  
 HMC = Hygroscopic Moisture Content  
 FMC = Free Moisture Content

Figure 5: Laboratory results from one profile taken within the building highlighting the absence of free moisture within the walls.

It’s clear that at some point throughout the building’s history, this property has been affected by moisture from the ground, hence the deposits of nitrate salts, however, the cause has clearly subsided. This doesn’t necessarily mean that an effective damp proof course was installed by the builder, in fact, quite the opposite. The reality is the cause is more likely to be the result of an escape of water such as a burst water service or failed drain historically that’s been attended to.

In addition to the above, despite understanding the walls had been plastered with lime, upon further investigation, we discovered that they hadn’t. In fact, the walls had been plastered with a combination of modern cement-based renovating plasters and some gypsum materials. Unfortunately, the renovating plaster used is notorious for salting after application as the water mixed within the plaster starts to leave the surface of the wall. As such, there is a likelihood that distress to the decorations had also been attributed to early redecoration before the plaster fully dried after application. The gypsum plasters simply should never have been used.





Figure 6: Inappropriate use of gypsum and cement renovating plasters during refurbishment

Unfortunately for the client, the likelihood is the spoilt plaster and decorations will probably need to be replaced, however, a replacement damp proof course isn't necessary, saving a considerable expense. Furthermore, they no longer have the worry that their property is rapidly deteriorating due to damp. The next time you're on a survey and your electronic moisture meter starts screaming, just remember in reality that damp meters are best used to disclose when a material is dry rather than when it is damp. Therefore, my advice is, whenever there is ambiguity, I'd always recommend you advise an intrusive survey with quantitative analysis from a credible contractor.



**Russell Rafton, Director, Dryfix**

Russell is the owner, director, and senior surveyor for Dryfix Preservation Ltd. Dryfix specialise in the diagnosis and repair of damp and timber-related problems, also including trace and locate of leaking water pipes and water damage repairs. Established for over 10 years, Dryfix are a PCA (Property Care Association) Accredited firm.

<https://www.dryfix.net/>

**We are looking for experienced Residential Surveyors and Valuers to join our team of Assessors to support the new generation of Surveyors completing the Level 6 Diploma in Residential Surveying and Valuation**

- This is a role where you can choose the hours you work to fit in around your existing commitments.
- We need you to have at least 3 years of experience for both Surveying and Valuation, and hold up to date RICS membership (assessment experience is not necessary).
- Sava will provide full training and ongoing support to help you develop within the role.
- Please send your CV to [training@sava.co.uk](mailto:training@sava.co.uk) for more information.

**[training@sava.co.uk](mailto:training@sava.co.uk) | 01908 442158**

# USING THE RIGHTMOVE SCT AND GOOD VALUATION PRACTICE



**ANNE HINDS BSC(HONS) FRICS, LEAD INTERNAL QUALITY ASSURER, SAVA**

Rightmove's Surveyor Comparable Tool (the SCT) is used by surveyors over 200,000 times each month. It is an instant-access, 24/7 tool that supports residential valuations by checking against comparable property data from the Rightmove database. Users can create and share reports to support your expert valuations and as such, it has become an essential tool for residential valuations and is the primary tool in the valuation industry for the sourcing of comparable evidence and the recording of the valuer's process in arriving at his/her valuation figure.

In this article, we will look at the Rightmove SCT and explore best practice in its use.

## History

The Rightmove website and SCT are operated by Rightmove plc, a UK-based company listed on the London Stock Exchange, and is a constituent of the FTSE 100 Index. The company was created in 2000 as a joint venture between four of the UK's then-largest property agents: Halifax, Countrywide plc, Royal & Sun Alliance, and Connells. At that time, it was called Rightmove.co.uk Limited. It was listed on the London Stock Exchange on 15 March 2006, at which time it became Rightmove plc.

Of course, for the public, it is known as the UK's largest online real estate portal and property website. According

to the [Homeowners Alliance](#), in 2021, Rightmove had 208 million visits per month across its platforms compared to Zoopla who had over 120 million visits per month.

But, there is more to Rightmove than just a portal. For 20 years, it has been collating property data and is now a very large data repository. It is this data that is used to populate the SCT.

## The SCT

The SCT has been around a while now, having been introduced by Rightmove in the first decade of the twenty-first century.



SCT was introduced to provide:

- A durable electronic record of a valuer's evidence, thought processes, and justification for a valuation
- A consistent methodology and verifiable approach to valuation in line with professional expectations
- Immediate access to case notes allowing early resolution of Post Valuation Queries (PVQ's), valuation appeals and audit queries
- A 'defence' in the case of query, appeal, complaint or claim. (It must be correctly completed for this. Conversely, an incorrectly completed SCT will make defending such situations difficult or impossible, affecting the reputation of the valuer and their company.)

SCT is now the prime risk management tool for residential valuations using the comparable method to protect the valuer and the firm. It holds data on the physical attributes of a property, transaction data from HMLR, and surveyor valuation data.

The actual valuation process can be summarised as follows (this assumes that the property inspection and pertinent investigations have been completed):

- Researching comparables
- Analysing comparables (identifying those that actually are comparable and those that can be discounted)
- Producing the valuation report

Before Rightmove, this was a manual process depending on local contacts, paper files and local knowledge. Rightmove has given the industry the tools to make the whole process more robust.

The SCT sits alongside two other Rightmove data products, the 'Automated Valuation Model' and the 'Property Risks Alert.' Built-in Rightcheck automatically checks a valuation against the Automated Valuation Model to help the valuer identify any potential price discrepancies. It can be paired with the Property Risk Tool to further increase efficiency and decision making by identifying potential risks early.

The SCT must contain sufficient information for a layman to understand the comparable evidence and valuer's thought patterns and, based upon the information provided, to enable the layman to reach similar conclusions to the valuer.

A lawyer practicing in the field of negligence summarises the purpose of the SCT:

'The concluding notes at the end of the report are crucially important in recording the rationale for the valuer's conclusion on the valuation. When defending a valuation in Court, we have to show not only that the surveyor chose appropriate comparables, but also that the surveyor analysed them appropriately and reached a reasonable conclusion.'

### The SCT and RICS Valuation Standards

The following statements are contained within RICS Valuation – Professional Standards (July 2017):

- VPS2, 3.2; The notes... should include a record of the key inputs and all calculations, investigations and analyses considered when arriving at the valuation
- UK Appendix 10; the file notes must contain meaningful comments comparing one property with another and

a rigorous note of how the analysed information on file has been quantified and factored into the valuation.

(Note the word 'must'. This is an instruction from RICS which will be considered in the event of an RICS complaint or audit.)

A good SCT report should therefore show the selection of good comparable evidence, proper analysis and the link between that evidence and the valuation given.

**The SCT report is time and date stamped when it is completed (or 'submitted' – in essence the valuer saying that it is complete) therefore the completion/submission of the SCT must occur before signing off of the actual valuation report.**

### Quality Control

In recent years, audit/quality assurance procedures have been implemented by lenders, panel managers and the RICS Valuer Registration Scheme (VRS). Many firms also have their own internal Quality Management Framework. With the advent of electronic site notes, quality assurance is increasingly focusing on the accuracy of the SCT. A poorly completed SCT is a risk to both a firm and the individual valuer. Both firms and individual valuers can be suspended from lender operated panels, and some lenders are or will be controlling workflow based upon the results of audits.

The completion of SCT is integral to the valuation process. It is not acceptable to provide a partially completed SCT and/or to say, "I know the area, so I don't need to justify my valuation" or "the comparables speak for themselves". To do so will guarantee audit failure.

Property valuation is becoming increasingly complex and specialised, and therefore, a standardised approach to properly recording process is essential.

### Recommendations/Advice

#### Prepare ahead

It is best practice to partially prepare the SCT ahead of visiting the property. This allows a valuer to assess, in advance, the difficulty or potential risks involved in valuing the property in question. It highlights past property information on the 'log button' which might prove useful on-site (e.g. floorplans) and reduces the possibility of surprises and identifies potential comparables which can be verified on inspection.

#### Don't make assumptions

While the SCT dataset is huge, do not assume the contents of SCT records are accurate. It is not at all unusual for 'under offer' figures and/or floor areas or other data to be incorrect. A valuer must use their professional experience and judgement and verify data where necessary and record the source.

#### Do not use incorrect data

It is unacceptable to add comparable information to SCT which is incorrect. Not only is the valuation compromised, so are the valuations of other valuers who may subsequently rely on the data that has been added – you are potentially skewing the data.

Particularly with converted flats, it is sometimes the case that incomplete address matching leads to HMLR data being attributed to the wrong flat within a building. Best practice is to sense check the information using the property log button and cross reference with Rightmove/best price guide/HMLR – and verify with local agents.

#### Beware of floor areas

The floor areas provided in the property details for comparables cannot be relied upon and may not be consistent – they might be gross internal area or gross external area. Using the agents floor plan can be helpful where available, but even measurements there might not be completely accurate. If there are no floor areas then the EPC Register can be used. If you do use the EPC floor area, you should note that this is the source of your floor area as EPC floor areas are not derived in the same way as an estate agent would.

#### Check the HMLR date

Ensure that particular attention is paid to the HMLR date. Older HMLR figures may appear as a comparable, and the system will generate it as such if it 'believes' it to be a good match based on the location and property attributes. As wonderful as the database and the algorithm that generates the comparables is, it still needs a valuer's skill to sense check what it generates.

#### Utilise the Search Criteria facility

Utilise the Search Criteria facility, especially where the property is unusual, and a wider database needs to be interrogated. This is also useful when SCT returns a high number of "on market" comparables rather than completed HMLR sales. Searching on different bedroom count can often find additional relevant evidence as can changing the search radius.

#### Add notes for late information

Where information is received following the final submission of the report, a valuer should use the add note and save facility. They cannot change the contents of the original report. The add note feature must be used to comment on and justify any alteration to a valuation following appeal/PVQ.

#### Double-check address where postcode only

When a property is address-matched only by postcode, the house number and address must be confirmed with the agent (or searched online) and confirmed in the 'Build Report Stage'. Confirming the address and house number allows the record to attach to any recent marketing and/or HMLR data overnight, which can be used next time.

#### Record conversations with agents

SCT is a very useful tool on comparable gathering, however, it is not a replacement for local knowledge and valuers must consult with agents to determine sales/letting figures, but also to discuss market direction and demand. Recording the results of these discussions is important including the name of the person with whom the discussion has taken place with.

### Comparable Evidence

*Select the best comparables for the property, not the expected value. Do not be led by the purchase price or estimated value.*

A valuer is not auditing the purchase price/estimated value (PP/EV), rather, he/she is providing their own opinion of market value based upon the evidence available.

The selection of the most appropriate comparables is integral to creating an accurate valuation, and valuers are directed to RICS information Paper '**Comparable evidence in real estate valuation' 1st edition: October 2019**. Comparable evidence should be:

- Comprehensive – a number of comparables rather than a single transaction
- Very similar – ideally identical to the property being valued
- Recent
- The result of an arm's length transaction in the open market
- Verifiable
- Consistent with local market practice

The best comparable is the one that needs the least adjustment and comparables must, therefore, be relevant in terms of:

- Locality
- Type
- Style
- Size
- Condition
- Age

The SCT provides comparable evidence based upon its own assumptions and it may be that the most directly relevant comparables can be found further down the list supplied. If insufficient comparable results are supplied on the initial screen, please ensure you use the search facility.

It should be remembered that whilst the SCT does contain the majority of properties sold through estate agents, like every database, it is not perfect and therefore, if a valuer is aware of a relevant comparable not on the database they should incorporate that information within their SCT. Where a comparable is 'imported', the information required is the same as it would be for an SCT-supplied property.

### Comparable Requirements

There can be a wide variety of scenarios when valuing property, however, in most standard cases the following requirements apply.

- Each SCT report/valuation should comprise a minimum of three comparables and should include reference to date of sale, amount achieved and status (under offer, exchanged/completed). Ideally, two of the comparables must be sold/exchanged.
- In turbulent or rapidly rising/falling markets, any 'under offer' comparables must be verified with the agent and recorded, including the name of the person supplying the information and the current progress of the sale.
- The comparables should be in the same locale. For example, in urban areas the locale is different from rural areas. Comparables in an urban area should generally be from a smaller radius, depending on the nature of the local market. SCT is generally set up with a 500m radius, which in an urban area should provide a

reasonable amount of evidence. If widening a search in an urban area, it is expected that a comment is added as to why evidence has been used from a wider radius.

- Comparables should be of similar style/type and age.
- Comparable data should include full address and postcode.
- The source of comparables should be noted i.e. name of Estate Agent and the person spoken to, if not already apparent on SCT data.
- Comparables should be within approximately six months of your valuation date.
- Comparables should be from more than one source i.e. not all from the same Agent.
- Comparables should be within 10% of your valuation.
- **Where deviation is necessary, a full explanation must be given in the rationale and common sense applied.**

### Comparable Analysis and recording

Adjustment of comparable evidence is required, and the elements of comparison include;

- Location and amenities
- Size / bedroom count
- Age
- Specification
- Condition
- Tenure
- Transaction date
- Energy efficiency
- Aspect
- Parking / garages
- Size of plot, outbuildings, leisure facilities

### Complete the drop-down boxes

Each comparable must have the drop-down boxes completed to the best of the surveyor's knowledge and with the information available. Size, condition, and fittings can be subjective, but it is not expected to see a comparable that is 100sqm be classed the same size as a subject that is 130sqm. As detailed above, use best endeavours to discover size, condition etc. of comparable. Only where this is unavailable leave the drop down as N/A but provide suitable comment as to the reason in the 'comp notes' box.

### Use the 'comp notes' function

Beneath each comparable is 'comp notes' space to add additional information. This should be utilised to record the factual features of the property and its positive and negative attributes against that of the property being valued. This space should not be left blank.

### Record bid or other offer information

Ensure that conversations with the agent and any information regarding other bids/multiple offers are recorded within the 'comp notes' section.

### Add psm/psf rate to comp notes, if applicable

Where a valuer chooses to adopt a rate psm/psf basis of valuation the rate for each comparable should be included within the 'comp notes' box.

### Rank comparables

Each comparable must be ranked in order of relevance with

the best and most relevant comparable being number one. The relevance of the comparable is down to the valuer's judgement i.e. they may choose to rank a HMLR comp as number 1 as this provides robust evidence or conversely, the surveyor may choose to rank a recent SSTC comparable as number 1 as this represents the best and most recent market evidence. It is possible to have ranking of 123 or 113 or 133 etc. depending on the weighting applicable.

### Establish data for SSTC/under offer comps

If the comparable is SSTC/under offer and there is no completed HMLR data, the agent must be contacted, and the relevant details obtained and entered into the system. The information required includes:

- The agreed sale price
- The status of the sale i.e. under offer, completed, exchanged etc.
- The date of the sale, not the date the information was obtained
- Any other features i.e. rear conservatory
- Note the name of the person you spoke to

### Check the HMLR data

It may be that the postcode can be checked with HMLR (Rightmove, Net Houseprices, and Zoopla) as it is sometimes the case that the sale has completed but not cross referenced with Rightmove data. There is a link to HMLR data within the SCT page.

### Additional comps must be relevant

Where the valuation is being provided in volatile market conditions, is difficult to value, is being 'down valued', is of high value, or the comparables supplied vary significantly from the subject, the valuer must consider whether additional comparables should be supplied. Three comparables is a minimum, however, please ensure that where additional comparables are necessary all must be relevant.

### Standard Phrase

For most cases the following phrases are appropriate:

*'The property comprises ( ). There is (reasonable/good/limited) demand for a property of this type. The property is generally surrounded by (provide general locality). The positive attributes of the property are (list features). The negative factors which affect value include (list features). (Some comparables are over 6 months old but still relevant because...)' Taking these matters into account and based on the comparable data available provides a range of £x to £x. The PP/EV is £x and my valuation is £x which sits at ( ) point in the range due to...'*

The phrase should be adapted as appropriate.

If the valuation is above or below the range, provide additional rationale. Furthermore, in a rapidly rising or indeed rapidly falling market, where under offer evidence has been used, a full reasoning must be entered describing local market conditions and explaining why HMLR completed figures are not necessarily reflective of current market value. Similarly, where competitive/sealed bidding has led to high prices

being obtained, full details/explanation should be given.

- Where a rate PSM/PSF methodology has been used, this should be shown in the rationale and expressed within this range.
- It is permissible to round up by a small margin (say, up to 5%) to value at the purchase price on a sale (but not on a re-mortgage) if it is an arm's length sale and the marketing history indicates that the price is a true market figure.
- The detail given in the rationale for BTL/rental assessments must be the same as for capital valuations.
- Don't add informal, jokey or personal comments. The SCT may be shared with clients and the document must be professional.
- Do not add a statement which indicates that your valuation has been influenced by the estimated value in re-mortgage cases. This is not a market-tested figure.
- In changing market conditions, it is permissible to refer to indices, however, many of the indices are regionally based and/or based upon historic or limited data. It is not wise to make statements such as "prices increased by 10%" unless a reliable index can be cited. It's better to keep it simple and say that the market is increasing/falling.

**The valuation range**

The rationale must indicate the range being used and where the valuation sits in relation to the range.

There are two approaches to adjusting comparable evidence to provide a range and valuation figure. Some valuers adopt the Adjusted Comparable Range (ACR), whereby adjustments are made relative to the subject property and the comparable evidence to arrive at a narrow range within which the valuation lies. Alternatively, other valuers use a wider range reflecting the comparables used and then explain where the valuation lies relative to that range.

Either approach is permissible, but it is important to note that it is **not recommended** to use adjustments in terms of percentages or actual figures which cannot be clearly explained or properly evidenced. Examples include 'deduct 10% for condition'; 'add, say, £10K for conservatory'. It is recommended to sum up the differences between the comparables and the subject property and record thought process with 'more valuable', 'similar value' or 'less valuable'. Remember, putting precise figures on adjustments will be challenged if the valuation ever has to be defended in court, and a valuer will be asked to justify the source of those adjustments, whereas a statement such as 'more valuable' is an opinion.

**Completion**

Prior to sign off, complete the market direction radio button, including rental figure, where relevant.

On completion of the SCT, sense check/re-read the contents. Ensure all boxes are completed, any adjustments made between comparables are explained, the comparables are ranked and probably most importantly, the rationale links the comparables with the valuation, reflects the thought processes, and can be easily followed by an informed layperson.



**Anne Hinds BSc(Hons) FRICS**

Having been involved with Sava since its inception, Anne Hinds is now employed by Sava as the Lead Internal Quality Assurer, as well as an assessor. Qualifying as a Chartered Surveyor in 1986, she originally worked in the industrial and commercial sector followed by a period in the Valuation Office

before moving into the residential sector, dealing with technical advice and guidance on mortgage valuations, expert witness reports and other survey and valuation matters. With over 30 years' experience in surveying, primarily in the investigation, management and handling of negligence claims against surveyors, she is particularly interested in the prevention of fraud involving surveyors. Given her experience with claims, Anne is well aware of the measures that should be taken to ensure good risk management within firms. Anne is chair of the RICS Assigned Risks Panel, she has sat on the RICS Residential Survey and Valuation Group and has been involved with several information papers including the 'Valuation of individual new build homes' paper.

**Mentors required**

Would you like an extra pair of hands on site visits?

- RICS counts mentoring as informal continuous professional development
- May present you with an employment opportunity
- PL insurance provided by Sava
- Mentors needed across England, Scotland and Wales

✉ [training@sava.co.uk](mailto:training@sava.co.uk) | ☎ 01908 442240



# JAPANESE KNOTWEED AND RESIDENTIAL PROPERTY

## INTRODUCTION TO THE JANUARY 2022 RICS GUIDANCE NOTE

**PUNIL SHAH MRICS, E.SURV CHARTERED SURVEYORS**

Japanese Knotweed is a hardy perennial bamboo-like plant. It is now present throughout most of the UK. A piece of root the size of a little fingernail can grow into a new plant. It has caused serious problems to areas including roadsides, riverbanks and derelict land by displacing native plants and even causing structural damage. It is an offence under the Wildlife and Countryside Act 1981 to ‘plant or otherwise cause Japanese Knotweed to grow in the Wild’, and the Environmental Protection Act 1990 designates Japanese Knotweed-contaminated soil as ‘controlled’ waste.

The 2012 RICS Information Paper “Japanese Knotweed and Residential Property” has been superseded by the publication of the January 2022 RICS Guidance Note “Japanese knotweed and residential property”.

The guidance note has been live since March 2022 and the purpose of this article is to assess the main changes from a lender perspective. We have also provided an update on lender adoption to date along with our concerns on implementation.

### Does Japanese Knotweed damage buildings?

The guidance indicates different views on the extent of the growth and damage caused, with recent studies showing:

- The plant can grow up to 2 metres in height, and the spread is more likely to be 3 metres instead of 7 metres.
- The root system extends to a distance of 3 metres underground.
- Japanese knotweed rarely causes structural damage to substantial buildings such as dwellings.
- Even within immediate proximity to significant structures, Japanese knotweed is not typically associated with major issues such as subsidence, heave or impact damage.
- Large stands or growths of Japanese knotweed, if left uncontrolled, have been known to damage external residential features. These include lightweight structures, freestanding walls, retaining walls, paths, hardstandings, drains and other ancillary features.

Most buildings insurance policies don't cover damage caused by knotweed, and it is generally not covered by new build warranty cover. Previously, several lenders claimed they could not obtain buildings insurance cover for properties affected by Japanese knotweed. The latest RICS guidance may change the views of insurers, as structural damage to substantial buildings is rare.

### Does the previous 7-metre rule apply for mortgage purposes?

The latest RICS guidance no longer adopts the previous category 1-4 approach based on the 7-metre distance from boundaries, habitable space, conservatories and garages. Instead, a new assessment framework now applies based on management categories. This now includes the impact on amenity as well as any damage to structures. This aspect is the key difference from the 2012 guidance and also ensures that the valuation surveyor uses professional judgement rather than a binary decision.

### Amenity space and assessing if it is impacted

Amenity space is regarded primarily as open areas intended for recreation, leisure or convenience within the boundaries of a property. Typically, lawns, patios, paths, driveways, hardstandings, etc. are included in this definition. The valuer will need to decide if the Japanese knotweed is impacting the amenity space. This is where it is likely to prevent the use of, or restrict access, to amenity space with the following factors taken into consideration:

- Size of the plot – growth within a small plot is more likely to impact amenity space even if it is some distance from the main dwelling.
- Considering the number and sizes of individual stands of Japanese knotweed and their relation to the size of the plot.
- The location of the growth including potential areas where the property could be extended, on side pathways, driveways and patio areas.
- The remediation process required.

### What are the management categories that now apply for mortgage valuations?

Where valuers identify Japanese Knotweed, the infestation

must be divided into four categories A-D:

- **Category A** – the growth is causing visible damage to the subject property.
- **Category B** – the growth is impacting the amenity space of the subject property.
- **Category C** – the growth is within the boundaries but not impacting the amenity space of the subject property.
- **Category D** – the growth is on a neighbouring property or land.

If “**category A**” then a valuation should not be provided pending a further investigation report. A further investigation report will be required from a specialist firm to investigate the full extent of the infestation and to confirm costs for the necessary treatment work. The report must be from a remediation specialist who is a member of a recognised trade body and the completion of any recommended works will need to be under a Japanese Knotweed Management Plan, with the benefit of an insurance-backed guarantee.

If “**category B**” then a valuation should not be provided pending a further investigation report. A further investigation report will be required from a specialist firm to investigate the full extent of the infestation and to confirm costs for the necessary treatment work. The report must be from a remediation specialist who is a member of a recognised trade body and the completion of any recommended works will need to be under a Japanese Knotweed Management Plan, with the benefit of an insurance-backed guarantee.

If “**category C**” then a present condition valuation can be provided with no further action required subject to checking individual lender guidance. Nonetheless, the valuation must reflect any blight that still may apply.

If “**category D**” then a present condition valuation can be provided with no further action required subject to checking individual lender guidance. Nonetheless, the valuation must reflect any blight that still may apply.

### Will the new guidance note reduce the stigma associated with Japanese knotweed?

The new guidance attempts to consider the current perception of the plant in terms of the impact on saleability and values being disproportionate in relation to the cost of management/treatment. The paper, however, does go on to acknowledge that the stigma of Japanese knotweed must be reflected in the valuation. Any reduction in the stigma will depend upon the forthcoming market evidence following the longer-term implementation of the new guidance.

When providing a market valuation, valuers are likely to be faced with a dearth of comparable evidence however applying a diminution based purely on the cost of management/treatment is unlikely to fully reflect the level of blight and disruption. The supporting rationale for the valuation should include:

- The wider market context – factors such as supply and demand, current open market conditions and the type of property will need to be considered.
- An infestation on adjoining land which would be outside

the control of a prospective purchaser – this may deter many potential purchasers or lead to higher diminution due to the need for expensive remedial measures such as root barriers.

- The disruption likely during and before remediation – an example may be where the property cannot be extended without eradication involving significant excavation.
- Restrictions on use of the property and impact during remediation – smaller plots may have significantly reduced amenity space that will have to be reflected in value and not just the cost of treatment works.
- Post-remediation impact on future saleability – previous treatments will have to be declared to new purchasers who may negotiate a lower sale price as a result.

**Areas of concern and lender adoption so far**

Most lenders have adopted the guidance in terms of the management categories, however, subsequent actions do vary. Most are adhering to the new guidance in terms of actions needed, however, some are introducing their own policy such as:

- Declining category A and B cases altogether.
- Requiring declines for category C and D cases pending further review.

Our discussions with lenders have resulted in further debate around the subject of when amenity space would be impacted. It has generally been agreed that this is the most subjective area of the new guidance and open to interpretation. Long-term problems could be inconsistencies in terms of how individual surveyors apply the guidance.

The guidance intends to lower the stigma and public perception and allow more dwellings to transact with a more proportionate view based on scientific evidence and professional judgement.

**Punil Shah, Technical Surveying Manager, e.surv**

Punil Shah, Technical Surveying Manager, e.surv  
 Punil Shah is a Chartered Surveyor who was part of the working group for the RICS Guidance Note: Japanese Knotweed and Residential Property dated January 2022. His current role is as a Technical Surveying Manager at e.surv.

He has many years of previous experience in residential valuation and survey work. In addition, he also has experience working as a building surveyor and a subsidence project manager with several large loss adjusters.

# RESIDENTIAL SURVEYING CAREERS FAIR 2023

29th March 2023 - Save the date



Whether you have already completed your qualification with Sava or are currently in training and want to see what opportunities are available, the Careers Fair is a great chance to meet with a wide range of employers, attend the conference and network.



**Why Attend?**

- Over 40 exhibitors including firms looking to recruit and professional services
- Full Conference Programme
- Presentations from leading employers
- Networking opportunities



[www.sava.co.uk](http://www.sava.co.uk)  
[hello@sava.co.uk](mailto:hello@sava.co.uk)  
 01908 442158



# GROUND SCREWS

## WHAT ARE THEY AND HOW DO THEY WORK?

**ANDY GABEL, DIRECTOR OF OPERATIONS, GS4U**

How we build is constantly evolving, both in the UK and around the world. In the UK, we have relied for many years on bricks, mortar, and concrete. These are tried and tested technologies, after all, concrete has been around for hundreds of years, but increasingly there are demands on us to change the way we build. When we visit other countries it is fascinating to see so many alternatives with the use of native materials to build structures, from timber and metal to mud and palm leaves, all without the use of concrete.

Whilst concrete is a very popular construction material choice in the UK and is the primary solution for building foundations, it is also a major CO<sub>2</sub> contributor, and it is estimated that around 10% of global carbon dioxide is from cement/concrete production. With this in mind, innovative alternatives to concrete are becoming more popular. Ground screws, being an alternative to strip foundations, are one such alternative.

### **What are ground screws?**

A ground screw is like a large version of an ordinary wood

screw. Ground screws are based on the principle of pile foundations – one of the oldest and most reliable types



of foundation. Ground screws are made from galvanised steel. They are a steel pipe with the thread welded on. This means they support horizontal and vertical loads in the ground and are installed with the help of a ground screw driver.

In the UK, ground screws are used for structures such as garden buildings (including garden rooms and offices), decking, fences, carports and larger constructions such as annexes, noise barriers and commercial solar panel arrays.



Figure 1: Ground screws placed in position

**How are they installed and what are the benefits?**

The installation process is very simple. A team of trained installers will attend the site and using calculations provided by a structural engineer, position and install the ground screws.

They provide the following benefits:

- They can be installed all year round and in any weather – installers claim that ground screws can be installed any time of the year, during spring, summer, autumn or winter, and in the sun, rain or snow.
- Overcome tricky locations – one of the key benefits of ground screws over conventional strip foundations is that they can be used where concrete can't, capable of providing a strong, level base in
  - hard-to-access and off-grid areas
  - sloping and uneven ground
  - Environmentally and archaeologically sensitive areas where minimal ground disturbance is essential
- They save time and money - ground screws take a fraction of the time to install, there is limited waste saving on costs of skips and sending materials to landfill, no necessity for waiting for concrete to set, preventing construction delays.
- They can be removed and recycled.

**What is the future for Ground Screws?**

In the UK, ground screws are beginning to change the way people think about concrete. While their use here is still

limited, and domestically really only for garden buildings, the concept has been tried and tested around the world for some time, in particular in New Zealand where they use ground screws for the foundations of homes, replacing the use of concrete altogether.

Our business has witnessed a real boom over the last couple of years and we have found that since COVID-19 many more people are constructing a garden room/office. Once the humble upgraded garden shed, such structures can now be architecturally quite stunning and very well appointed. One such firm is [Slope Spaces](#), a sister company to GS4u. Generally, these modern garden rooms are constructed using SIPs (structurally insulated panels) and are sometimes clad with a decorative finish. They provide extra space for working or recreation use. Using ground screws with these structures works perfectly instead of a concrete base.

Figure 2: Example of structure using ground screws



**Will ground screws replace concrete in the construction of whole houses?**

This is a difficult one to answer. In theory why not, since pile foundations are an accepted alternative to strip foundations.

However, if we consider ground screws in the context of alternative forms of construction perhaps the question is not so extreme. In the UK market, the use of SIPs is gathering momentum in mainstream construction as well as in extensions and garden rooms. They save on on-site construction costs and time, but SIP buildings are also generally more energy-efficient, stronger, quieter and more airtight. The benefits of lower energy bills and a significantly more comfortable and controllable indoor environment could not be more relevant as we see energy costs increasing. Therefore, it is our view that we will see increased use of SIPs over the coming years.

SIPs work perfectly with the ground screws, and it saves digging the footings and using concrete for foundations.

The installation process does require calculations for loads etc. and is now accepted by forward-thinking architects and some Building Control officers up and down the country.

We are in talks with a company proposing complete modular homes using SIPs and we hope will be on-site to start the development of 30 homes in the autumn of 2022. By installing ground screws and replacing concrete foundations there will be quicker construction times with the associated cost savings as well as having less impact on the environment.

In summary, when inspecting properties with garden rooms now, do not assume concrete bases. In the very near future, we may need to look out for this type of foundation in whole homes.

Don't get caught out.



**Andy Gabel**

Andy is one of the most experienced ground screw installers and has worked on thousands of projects over the past ten years. He now oversees his team of professional installers with his company GroundScrews4u Ltd (GS4U). For any professional advice or enquiries, he can be contacted on [andy@gs4u.co.uk](mailto:andy@gs4u.co.uk). You can find the website here: <https://www.gs4u.co.uk/>

As mentioned in the article, Slope Spaces is a sister company to GS4U, and Andy is the Founder and Director. Slope Spaces manufacturer, deliver, and install garden rooms. You can find the website here: <https://slopespaces.com/>



## Law and Management of Invasive Non-Native Plants

- An online CPD qualification to develop your skills in the law and management of invasive non-native plant species, including Japanese Knotweed and Giant Hogweed
- Understand the impact of high profile Invasive Non-Native Plants (INNPs)
- The legal implications in England and Wales relevant to UK INNPs
- Understand management solutions and what they achieve for treating INNPs
- Training material delivered by leading authority on non-native plant species
- Provides in-depth training with assessment to demonstrate knowledge attained

[www.sava.co.uk/education/identifying-invasive-non-native-plants](http://www.sava.co.uk/education/identifying-invasive-non-native-plants)



# DIGITAL DATA COLLECTION

## THE IMPORTANCE OF DIGITAL DATA COLLECTION IN SUPPORTING A GROWING SURVEYING BUSINESS

**GAVIN O'NEILL, CEO, GOREPORT**

“Digital data collection and reporting in surveying”: This article outlines the true benefits of digital data collection, what it means in practice and how can it be used to accelerate growth through effective implementation.

**The problem**

Whether specialising in the residential or commercial sectors, building surveyors have one of the most interesting, exciting, and varied professions in the built environment. However, in keeping with any vitally important profession, they also face significant challenges to maintain the highest levels of quality and stay up to date with the latest standards and regulations, all while striving to deliver their services in the most efficient and timely manner as possible. The successful adoption of technology is critical to support the modern building surveyor in meeting these challenges and staying ahead of the competition.

Digital data collection and reporting is a vital toolset designed to support the role of the surveyor to alleviate such pressures and to promote quality, consistency and efficiency. However, in a typical catch-22, it can be difficult for surveyors to make the time to fully understand the benefits or develop the knowledge on how to successfully transition to utilising digital tools.

**The solution**

The successful adoption of digital surveying tools requires a level of focus, leadership and commitment to quickly see a return on your initial investment. The good news is that through working with knowledgeable and experienced partners with proven technology, the time commitment is minimised and the benefits are readily attainable.

**What are the benefits of digital data collection?**

Digital data collection supports the full cycle of activity from preparation and planning, through to the physical survey, editing and review, reporting and analysis.

In order to understand the benefits that can be driven by digital adoption, it is important to consider the context and detail of the surveyor, their sector or surveying specialism and to fully understand how a particular service is delivered. Common scenarios include;

### Digitisation supporting high volume

For a surveyor who is delivering a large volume of similar outputs, the efficiency of data collection and speed of production of the output report are key. The ability to collect accurate data at source and to publish into a high quality, professional and consistent report ready for distribution will be a primary driver for digital adoption.

A prominent example of this will be in the world of the residential surveyor, where several surveys may be conducted in one day with an incentive to complete and distribute the final report as quickly as possible. Residential surveyors have looked to digital adoption having faced difficulty in either delivering sufficient volume or suffering from a poor work/life balance due to the time required to “write up” reports following the survey by more traditional means such as pen and paper, and merging photographs from other devices etc.

The drive for efficiency in producing volume, which has an obvious direct financial benefit, is applicable to all aspects of residential surveying from the sole trader to the large enterprise and from the Homebuyer market to other specialisms such as timber and damp specialists, structural specialists etc.

### Integration with other systems driving efficiency

As the size of a business increases, other considerations increase in their importance when considering digital adoption. The ability for data to flow from other sources and systems (such as booking or practice management tools) into the surveying application, and for output data and reports to flow back for quality assurance, distribution, or to trigger financial workflows, becomes much more important due to the volume and number of different stakeholders involved including operational, administrative and financial staff as well as the surveyor.

Therefore, it is vital to consider how each of your solutions or systems interact with each other to ensure your business can drive efficiency across the management of the surveying process, as well as deliver the survey itself. There are many different systems and requirements that vary from business to business, such as the ability to share data via Application Programming Interface (API) or import and export mechanisms to ensure that you realise the advantages of data flow across your business.



### Project Capability and Flexibility

All the advantages above are also applicable in the commercial sector. However, in addition, commercial surveying will often involve a large element of project-to-project variation of service. Consistency across a portfolio of assets is vital but the overall requirements and scope may vary from client to client.

For example, a particular client may require a full schedule of condition, but also seek to understand priority health and safety issues, or they may have different data requirements for the assets they own. Having the ability to configure bespoke data collection, standard phrases or responses and tailored outputs ensure that your need is driving the benefits as opposed to technology constraining the service being delivered. In these cases, digital adoption drives accuracy at source and consistency across individual surveyors as well as efficiency across the portfolio of assets.

Most importantly though, as legal, strategic and compliance requirements become more complex, the benefits of digital adoption are not just a luxury but essential to be able to deliver the service in the timeline demanded by clients. Without digital data collection, it can be impossible to deliver the subsequent analysis and data-driven guidance that clients increasingly expect.

### What does Digital Data Collection in surveying mean in practice and how can it be used to accelerate growth?

#### Case Study

Novello Chartered Surveyors were established to challenge the traditional role of surveyors in the house buying process. They view themselves as property partners in the whole process rather than just giving snapshot advice.

Having previously worked for a variety of mortgage valuers and independent surveying firms, James Brook and co-founder Jack Pye, understood that nothing frustrates clients more than an unresponsive, slow surveyor who issues a low-quality report with little follow-up advice and care.

By avoiding ‘volume’ work, they focus on guiding their clients through their property related matters. When forming the business, they looked for technology partners who understood their desire to focus on quality and consistency and allow their brand and methodology to stand out against the competition. Novello wanted to get the balance between the number of surveys and quality of service right.

A multi-discipline practice consisting of building surveys, HomeLevels, lender valuations, HMO valuations, private valuations, lease extensions, party walls, roof surveys, new-build snagging lists and much more, Novello needed a technology partner to be able to deliver bespoke data capture and templates while ensuring the survey production process matched their service offering in the most efficient and quality way.

### How did Novello successfully implement digital data collection to support their growth?

- Recognised the competitive advantage of quality, consistency and efficiency in their strategy
- Early engagement gave an early payback of investment
- Embedded in their company culture and understanding of service

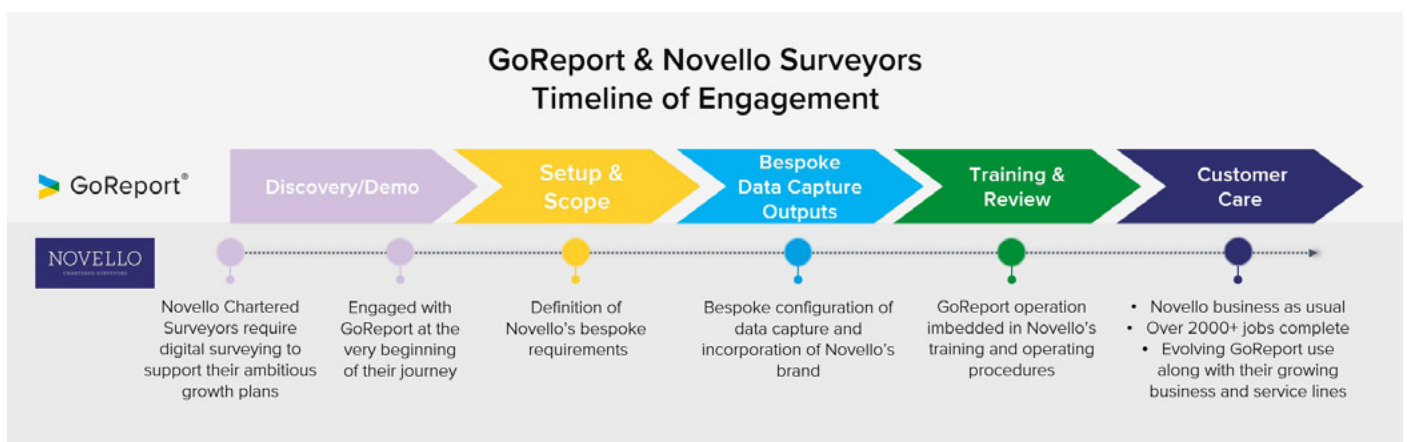
- Recognition of the Recruitment Incentive (latest tools dedicated to improving the surveyor’s experience attracts the best surveyors)
- Regularly engage early in discussion with their technology partner as they evolve their business and the solutions they offer

*solution is a key factor in establishing and maintaining a consistent approach as we employ more surveyors and ensures the quality of our service offering is second to none.”*

**Conclusion**

In summary, there are many benefits of adopting a digital data collection strategy that covers all aspects of efficiency, consistency and quality. Whether you are a sole trader or working in a large complex enterprise, these benefits are easily attainable with many organisations able to demonstrate how they have been able to achieve them. While many in the surveying industry are yet to adopt digital, it is becoming increasingly likely that it will be difficult to remain competitive without adopting a suitable solution for your needs.

James Brook, Managing Director, Novello Chartered Surveyors, commented: *“Technology is essential to the success of our business as it helps us to maintain constant and open communications with our clients, providing quick, detailed reports. When forming the business, we were searching for technology partners who understood our desire to focus on quality and consistency and allowed our brand and methodology to stand out against the competition. GoReport*



**About GoReport**

GoReport is an industry leading solution that digitises surveying, inspection, reporting and analysis in the built environment. The solution enables you to capture survey and inspection data quickly and easily using a mobile device, then upload this data to the web portal to edit, review and analyse before publishing high-quality outputs. A fast turnaround for individual survey reports is often the requirement to achieve a greater experience for the client. In delivering this, GoReport also ensures that asset portfolio data can easily be aggregated, analysed and reviewed to provide actionable insight for Portfolio Management.

Our clients deliver an extensive range of surveys and inspections, including residential property, commercial, industrial and infrastructure for private and public sector clients. Whether you are using our Smart Library Templates, the full RICS suite of Home Standards, or availing of our custom template building capability, GoReport can help you increase efficiency, improve accuracy and drive consistency.

Visit our website to discover how we help our customers drive increased productivity through innovative use of our technology: [www.goreport.com](http://www.goreport.com)



**Gavin O’Neill, CEO, GoReport**

An experienced chartered engineer with a background in both technology and the built environment, Gavin has specific expertise in business improvement, change management and systems implementation. From his earlier professional jobs Gavin has been driven to understand people and their place of work to deliver technology solutions that help them get their job done faster and smarter, giving them the opportunity to do more or make better use of their time. Gavin is now CEO at GoReport, the market leading solution that enables comprehensive digital data capture and the efficient production of consistent and high-quality output reports for surveyors in the built environment.

# THE SAVA PROTOCOL

## RECENT UPDATES

We have recently released a new version of the Sava Protocol. This article explains the history of the protocol, why it was implemented and explains some of the recent changes. You will also find a copy of the latest protocol appended to the back of this article.

### History

The Sava Protocol arose out of necessity.

Some time ago, when Sava was one of the leading training centres for the Home Inspector Qualification (DipHI), we identified that part of our responsibility as an assessment centre was to provide as consistent an experience as possible for all learners in both training and assessment.

In a traditional NVQ environment, this can be relatively straightforward, but for a more sophisticated and involved qualification, such as the DipHI and the Diploma in Residential Surveying and Valuation, this can be much more challenging because learners all use different properties for the case studies in assessment.

The protocol was born in the back garden of a bungalow in Bletchley. Several of the trainers and assessors involved with the Home Inspector qualification were inspecting this property as part of a standardisation exercise – we wanted to ensure that every surveyor assessing for us took the same approach. The bungalow was in reasonably good condition, but there were one or two issues with the roof covering, particularly the ridge tiles.

Six very experienced surveyors stood in the back garden of that property and could not agree on the condition ratings. Three of them are still training and assessing for Sava – Ian Brindle, Larry Russen and Anne Hinds (who now actually works for Sava as Lead Internal Quality Assurer).

We had to address this in order for assessment and training to be as consistent as possible. So, those six surveyors locked themselves in a room and created the Sava Protocol. They road-tested it, made a few amendments, and then we introduced it as a fundamental part of training and assessment for home inspectors doing the DipHI.

And it worked!

Using the protocol, these surveyors could consistently allocate condition ratings to properties that they inspected together or, **if they did not agree on the final condition rating, they agreed on the thought process that they had used to get to the condition rating. They were able to debate the professional judgements made at the various decision points along the way.**

This is the most significant point about the Sava Protocol – it is not a tool to make sure everyone gets to the same condition rating. Rather it is a tool to give people a **consistent approach** to condition ratings.

Or to put it another way, it is a “decision tree” that prompts consistent and specific consideration when deliberating over a defect or a deficiency in a property.

For this reason, we insist on the use of the protocol in training and assessment. But of course, we hope that others use it in their professional practice.

The protocol is a living document. Things change, and when they do we need to revise the protocol to ensure it remains relevant and up to date. Larry Russen FRICS FCABE, who uses the protocol in his building surveying practice, led on the latest revision.

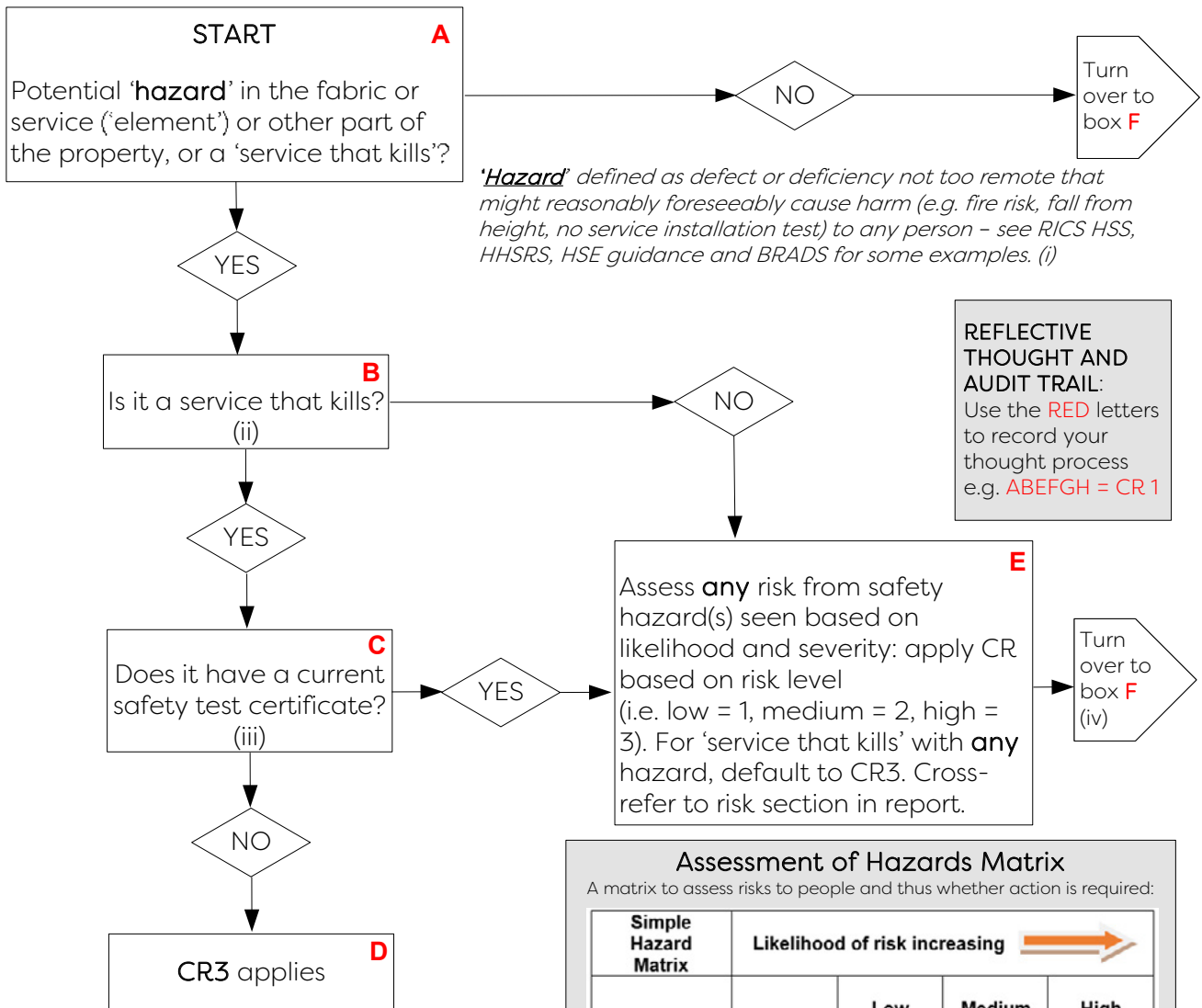
### So, what have we changed?

- We've amended some of the wording to make some areas clearer
- We've made a direct route for services that kill that do not have a test certificate.
- It now includes an 'Assessment of Hazards' Matrix
- Includes a reminder that the protocol may need to be used more than once for each element of part

Let us know what you think, if you use it and if you find it helpful.



## ASSESSING CONDITION RATINGS (CRs)



*'Hazard' defined as defect or deficiency not too remote that might reasonably foreseeably cause harm (e.g. fire risk, fall from height, no service installation test) to any person - see RICS HSS, HHSRS, HSE guidance and BRADS for some examples. (i)*

**REFLECTIVE THOUGHT AND AUDIT TRAIL:**  
Use the **RED** letters to record your thought process e.g. **ABEFGH = CR 1**

**NOTES:**

(i) 'BRADs' - Building Regulations Approved Documents, 'HSS' - RICS Home Survey Standard, 'HHSRS' - Housing Health and Safety Rating System.

(ii) 'Services that kill' include electricity, gas, oil, heating and pressurised hot water systems, typically installed and serviced by a member of a 'competent persons scheme'.

(iii) Definition of 'current' is within last 12 months.

(iv) Once any hazard(s) considered, element condition must also be considered and reported on as appropriate.

(v) Surveyors must be aware that where the report is for a 'buy to let' or similar, the client must be advised regarding liabilities under HHSRS and associated legislation.

### Assessment of Hazards Matrix

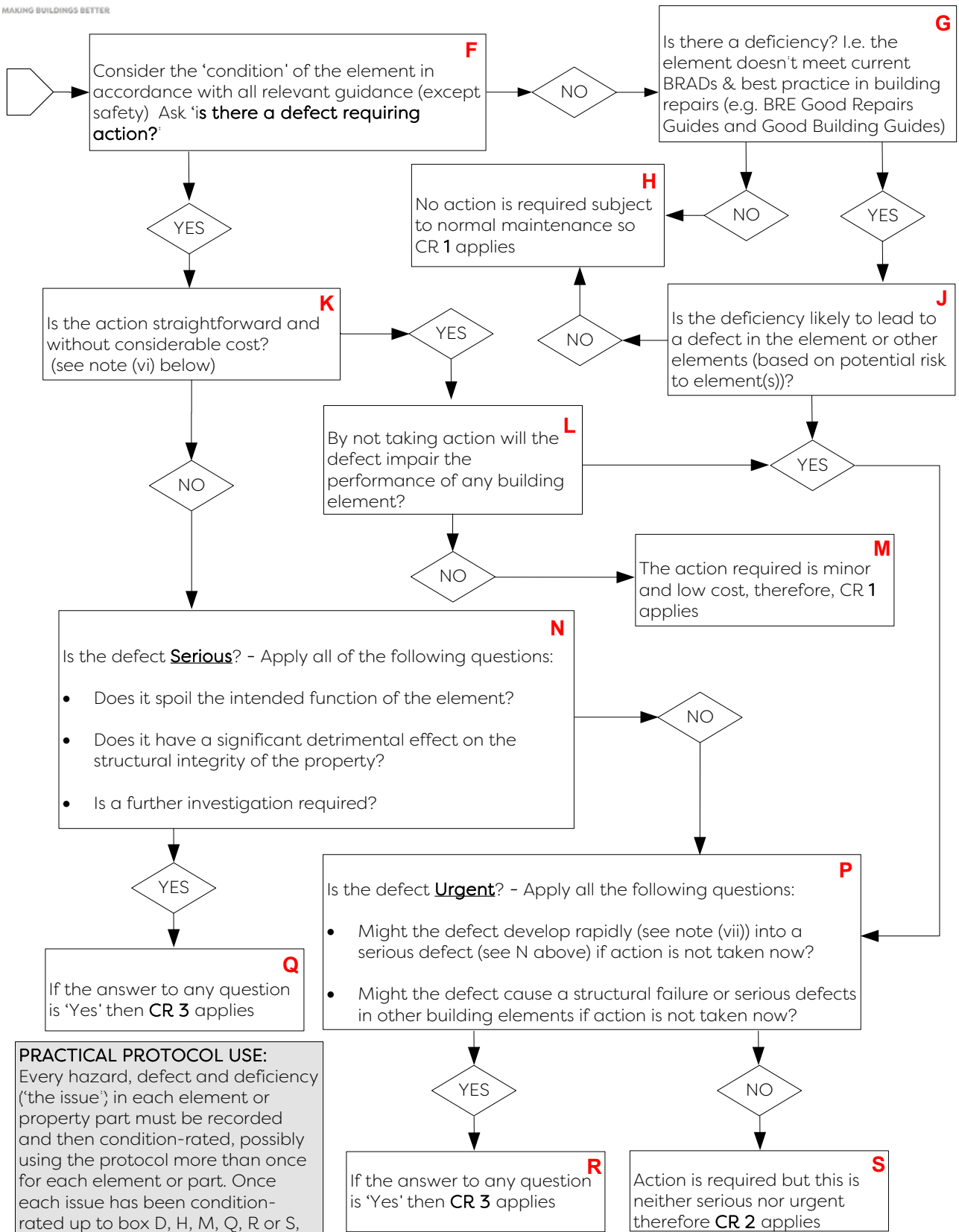
A matrix to assess risks to people and thus whether action is required:

Simple Hazard Matrix	Likelihood of risk increasing			
	Low	Medium	High	
Likely result of risk, increasing in severity	Low	CR1	CR1	CR2
	Medium	CR1	CR2	CR3
	High	CR2	CR3	CR3

**Some examples of the 'likely result of risk':**  
This list is not exhaustive. See HSE guidance online for more info.  
**Low** - bruise to arm or skin elsewhere, twisted ankle, small cut on finger, leg or similar.  
**Medium** - partial loss of mobility, broken arm or other limb, lost eye.  
**High** - significant loss of mobility or some other faculty, amputation of limb, death.  
In all cases, be reasonable, do not always assume 'worst case'. Every hazard will not necessarily occur - hence consider 'likelihood'. Every hazard will not result in death - thus consider the likely result. However, if unsure, adopt a mantra of 'better safe than sorry'.



### ASSESSING CONDITION RATINGS (CRs)



**PRACTICAL PROTOCOL USE:**  
 Every hazard, defect and deficiency ("the issue") in each element or property part must be recorded and then condition-rated, possibly using the protocol more than once for each element or part. Once each issue has been condition-rated up to box D, H, M, Q, R or S, the surveyor should then ask "is there any other issue to be condition-rated and reported?"

**NOTES**  
 (vi) 'Considerable cost' is defined as 2.5% of reinstatement assessment.  
 (vii) The definition of 'rapidly' will depend on property type, but will generally be any time up to 12 months.



