

## New report assessment service for residential surveyors

**The new HomeBuyer Report (HBR) is now the only RICS licensed product Chartered Surveyors can produce. The inclusion of condition ratings and a fresh reporting style makes it different from the previous format. The best way to make sure you are offering the right service to your clients is to have a real report assessed. This will allow you to evaluate your strengths and weaknesses and adjust your approach so you can offer the new service with confidence.**

We have met many surveyors who see the HBR as one of the few promising opportunities in these challenging times and have used the product to 're-launch' their services. However, many other practitioners have only just begun to provide the new product and are having to adjust their approach quickly.

### The HBR versus the HSV

The HBR is a completely different product from the last edition with two new features:

- Objective condition ratings to emphasise the physical state of the property, and;
- A concise and clear reporting style that explains the condition rating decisions and offers balanced advice.

Seminars and workshops can help you develop your knowledge but only in bite sized 'chunks'; there are few opportunities to complete a whole report. The Bluebox *partners* HBR assessment service provides you with this opportunity, cost effectively.

### The HBR assessment service

You have two options. You can:

- produce a simulated HomeBuyer Report based on a real HSV you have recently completed, or;
- provide a recently completed HBR you have produced for a client.

Having this assessed will allow you to evaluate your methodology and adjust your approach so you can offer future reports with confidence.

The BlueBox *partners* HBR Assessment Service includes the following features:

**Stage One** - choose a typical and recently completed HSV from your files. Using the RICS Practice Note and other information, convert this into a HBR for the same property. Alternatively you can provide a recently completed report in the new format;

**Stage Two** - send the new HBR, the original HSV (if appropriate), your site notes and appropriate photographs to BlueBox *partners* for assessment;

**Stage Three** - the HBR will be assessed by one of our Directors against the standards described in the Practice Note and other official documentation;

**Stage Four** - the assessor will send you an assessment report that will identify the strengths and weaknesses of your report and recommend an appropriate action plan for your life long learning strategy.

(continued)



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### The feedback

You will receive a confidential report from your assessor that compares the submission to accepted 'good practice' standards including:

- Adequacy of your site notes;
- Appropriateness of your condition rating decisions;
- The clarity of the reporting style;
- The suitability of your 'overall opinion' for the property;
- How well the report conforms to the Practice Note.

The assessor will also identify any general gaps that the process reveals, and will provide you with recommendations for your life long learning. You will also receive a certificate confirming that you have completed the review.

### The cost of the assessment service

BlueBox *partners* will deliver the service through its distance learning framework, thus enabling you to do this wherever and whenever you want. You will be able to include the time spent on this reflective process against your life long learning targets set by the RICS. Although this will vary between individuals, we estimate that the CPD value will be equivalent to a conventional one-day conference. This is a bespoke, one-to-one service that will help you develop your own individual skills and knowledge in a way that is not possible at a conventional training event. Therefore the cost is higher than our other distance learning products. If you provide all the documentation in an electronic format, the cost will be £100 plus VAT. If you can only provide printed material, the cost is £130 plus VAT.

### Our assessment team

As a team, the directors at BlueBox *partners* have a unique and unrivalled blend of skills and knowledge. All are trained assessors, have considerable experience of appraising surveyor's reports, and have been centrally involved in the development of the new HBR. At BlueBox *partners* we want you to know who your HBR will be assessed by, so here is our team:



#### Alan Appleby

Alan runs a small practice in Staffordshire focusing mainly on residential surveys and valuations. He is an assessor with RICS 'Safe as' Assessment Centre, and has contributed to the development of the new HomeBuyer Report.



#### Phil Parnham

Phil is a former academic and is an experienced assessor at all levels. He has written many of the sample phrases for the new RICS 'Surveywriter' and his latest book, 'A Surveyor's Guide to the RICS HomeBuyer Report', was published in September 2009 by RICS Books.



#### Chris Rispin

The Managing Director of BlueBox *partners*, Chris is experienced in reviewing surveyor performance for both large, medium and small sized practices. He has co-written 'Residential Property Appraisal' for Spon Press and is a member of the Product Review Group that wrote the new HBR.



#### Larry Russen

Larry is a Chartered Building Surveyor and Director of a firm that specialises in building surveying and HSVs. He is an assessor, internal verifier and trainer for NES/SAVA, where he also qualified as a NHER Plan assessor. Larry wrote the 'Domestic Energy Assessor's Handbook' with Phil Parnham.

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