

BlueBox Newsletter

Technical briefing for surveyors, energy assessors and property professionals *Issue Three Oct. 2008*

The role of the data gatherer

In Issue Two of our newsletter, we covered the creation of the 'data gatherer' in respect of EPCs in the residential sector. In July this year, the CLG published an updated guide confirming the role of this new practitioner: 'Improving the energy efficiency of our buildings—A guide to energy performance certificates for the construction, sale and let of non-dwellings'.

Previously, we raised a number of questions about the part data gatherers would play in the production of EPCs and this article we will revisit some of these issues and investigate how data gatherers can provide flexible support to qualified energy assessors while protecting quality standards.

The CLG guide states:

'A team of people can work on gathering the information for an energy assessment as long as they are working under the direction of an Accredited Energy Assessor'. Although the energy assessor does not have to visit the property, he or she is responsible for the quality of the EPC issued and must ensure the following conditions are met:

- That the data gatherer is 'fit and proper', including being Criminal Record Bureau checked
- Where required, the data gatherer must have the correct insurances, and the technical ability to undertake those duties.

In short, the energy assessor will be responsible for all the actions, data and output of the assistant as though he or she had undertaken the data gathering themselves. This differs to the residential sector where the qualified energy assessor has to visit the property being assessed

Data gatherers in the non dwelling sector

This flexibility has generated a great deal of interest from commercial energy assessors and as a result we have adapted our level three commercial energy assessor course to suit those who wish to train as data gatherers.

What's in this issue?

Welcome to the third issue of 2008 of our technical newsletter. It includes:

- The role of data gatherers in EPC production;
- Revisions to RdSAP 2005;
- Trouble in roof spaces
- The Single Survey in Scotland

If you have any comments on this newsletter or would like to make a contribution, please contact the BlueBox *partners* office on 0845 260 3500.

However, this is no easy or cheap option. Although many level three buildings can be straightforward, others can be very challenging. In our view, a data gatherer will need the following skills and knowledge:

- *Contribute to the maintenance of health, safety and security at work*
- *Develop and maintain effective working relationships*
- *Conduct energy assessments in a professional and ethical manner*
- *Undertake energy inspections of existing non-dwellings with typical characteristics.*

Additionally, data gatherers will also need an understanding of how SBEM works and what assumptions it makes for existing buildings. Without this, they will not be able to collect the information required by the Energy Assessor.

Data gatherers will have to be familiar with non domestic property and capable of measuring complex building shapes and spaces. They will also have to:

- collect data in a clear and 'auditable' way that others can easily interpret;
- interact with a variety of people during their inspection including occupants, owners and members of the public.

Consequently, for the first three days, the BlueBox *partners* Data Gatherer course will run parallel with the Commercial Energy Assessor course as the required skills and knowledge are the same.

Although this is an early stage of development, many organisations are choosing to train a small number of staff as fully qualified Energy Assessors supported by a larger number of competent Data Gatherers. This allows firms to respond flexibly to changing workloads—a very useful facility in these strange economic times!

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Data gatherers in the residential sector

Although we can see a clear role for data gatherers with non domestic buildings, the case for a similar function in the residential sector has not been made.

The CLG requires a DEA to visit the property to '*...satisfy themselves that the data is accurate and can be relied upon...*'. In reality, if the DEA and the Data Gatherer are at the property at the same time, the DEA might as well complete the job themselves. The only advantage Data Gatherers will have is where Landlords have a large stock of property and up-to-date information on the properties. In these cases, the DEA might not need to visit and Data Gatherers could be used to confirm the data already held. As a consequence, we have not adapted our DEA course to suit Data Gatherers specifically.

If you have a view about the role of data gatherers please let us know and we will include this in the next newsletter.



BlueBox partners course for Commercial Data Gatherers and Energy Assessors

Our next combined Commercial Energy Assessor and Data Gatherer course is on the following dates:

- 12th, 13th and 14th November 2008, Coventry (Energy Assessors and Data Gatherers);
- 3rd, 4th and 5th December 2008, Coventry (Energy Assessors only).

The Data Gatherer part of the course will provide all the knowledge and understanding required. However, if you are interested in following this route, you must consider the following issues carefully:

- A Data Gatherer will work closely with a qualified Commercial Energy Assessor who will issue the EPC, take full responsibility for the certificate's contents and be accountable for the conduct of the Data Gatherer;
- The BRE Global Accreditation Scheme is happy with the form and content of our course. However, as this is a new development, if you intend to join another scheme, you should check to see if they have any particular requirements.

Costs

Data Gatherer - £700 + VAT

Commercial Energy Assessor - £3,450 + VAT



The launch of the Home Report in Scotland

From the 1st of December 2008, all houses for sale in Scotland will have to be marketed with the new Home Report.

This is a pack of three documents:

- a Single Survey,
- an Energy Report, and;
- a Property Questionnaire.

The Home Report will be made available on request to prospective buyers of the home.

The Single Survey contains an assessment by a surveyor of the condition of the home, a valuation and an accessibility audit for people with particular needs. At the heart of the Single Survey is the objective process of condition rating of each building element that enables both buyers and sellers to understand the condition of the property. The accompanying report is brief and to the point, without the usual 'waffle' and unnecessary exclusion clauses.

The Energy Report contains an assessment by a surveyor of the energy efficiency of the home and its environmental impact and it also recommends ways to improve the home's energy efficiency.

The Property Questionnaire is completed by the seller of the home. It contains additional information about the home, such as Council Tax banding and factoring costs that will be useful to buyers.

The Scots lead the way

An interesting aspect of this development is the way the Scottish Parliament has built on existing strengths rather than create something new and untested. For example, the Home Report:

- is based on a successful corporate survey product that has been successfully 'road tested' over the last three years, and;
- uses the existing professional infrastructure in Scotland to deliver quality and monitoring standards.

BlueBox partners has developed an intensive one day 'in-house' training package on condition rating and report writing for the Single Survey.

Please contact the BlueBox partners office for more information on 0845 260 3500.

Increase in fuel prices – new advisory opportunities?

In its latest email news update, SOLIFTEC, the website of the Solid Fuel Technology Institute, highlighted the massive increase in fuel prices over the last 12 months. Using figures from the UK Office for National Statistics, it revealed:

- prices of all domestic fuel types increased by 24.6% between August 2007 and August 2008;
- domestic electricity prices rose by 18.0%;
- gas by 28.2%;
- heating oils by 58.4%, and;
- coal and smokeless fuels by 17.8%.

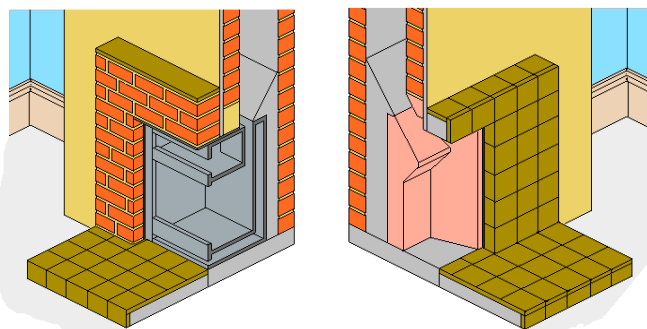
This resulted in solid fuel consumption rising by 3.0%, while all other fuels fell, oil by 4.7%, gas by 0.8% and electricity by 11.2%.

An updated fuel cost spreadsheet can be downloaded from the SOLIFTEC website and this estimates the heating costs for various heating systems and different dwellings. For example, it compares the hourly cost of heating appliances using different fuels. The following costs are expressed in pence per kW hour and the assumed efficiencies are shown in brackets:

- Condensing gas boiler (90%) 6.2p
- Standard gas boiler (78%) 7.2p
- Live fuel effect gas fire (25%) 22.4p
- On peak electric heater (100%) 11.7p

Although care must be exercised when giving advice to clients, information like this could add depth and breadth to reports. The relative costs of different heating systems is sometimes difficult for many home owners to understand and information from the SOLIFTEC website can help with this process.

The website also has a number of other useful downloads including a guide to solid fuels, flue safety with thatched roofs and installation standards for open fires. For more information, visit www.soliftec.com



Revisions to RdSAP 2005

As many DEAs should now be aware, a new version of RdSAP (9.82) has now been released. The main driver for the changes is the Government's wish to allow multiple production of EPCs in the social rented sector and to make the program more flexible.

Although these changes are not fundamental, users of RdSAP based software should be familiar with the following:

- The type of transaction must be chosen from marketed and non-marketed sales, rental (private and social), or not for sale or rental;
- Ability to include separated conservatories that are heated;
- Additional construction type of 'cob wall';
- New roof type options including pitched slate or tiles, and thatch;
- A new method for recording the insulation of a room-in-the-roof and for insulation of flat roofs;
- More questions on floor construction including solid and suspended timber;
- Addition of triple glazing to the glazing types;
- Ability to enter wind turbines into the program;
- Provision for dwellings with no heating or hot water provision, and;
- Different fuels for district heating.

Elmhurst Energy Systems Ltd has produced a Technical Bulletin for members of its scheme that can be downloaded from its website. In Elmhurst's view, familiarising yourself with these changes could account for two hours CPD.

A revised SAP 2005 document published by the Building Research Establishment incorporating all these changes can be downloaded from www.projects.bre.co.uk/sap2005.

The next BlueBox *partners* course for Domestic Energy Assessors course will be on the 21st–23rd October and the 3rd and 4th November 2008 in Coventry. This restructured course will include all the new revisions.

For more information, visit our website at www.blueboxpartners.com

Trouble in the roof space!

At BlueBox *partners*, we encourage people to send in photographs of defects that they have encountered 'on-site'. Not only does this keep us amused but it also highlights developing issues. In this issue, we feature faults discovered in the roof spaces of recently constructed properties.

John Wheller from Taunton has discovered a number of problems in his area mainly associated with the provision of lateral restraint and bracing in trussed rafter roofs.



In the above example, the installation of a flexible duct connecting a bathroom fan to a roof vent has resulted in a number of problems:

- The duct has become detached allowing moist air into the roof space. This could result in excessive levels of moisture, mould, and in some cases, wood rot;
- Because of poor coordination and quality control during construction, the lateral bracing was cut to make space for the duct. This could weaken the structural integrity of the roof especially in areas exposed to high winds, and;
- The roofing felt has been overcut which could result in rain-water penetration.

This would not be so bad if this was the only fault in the roof. Just to prove that lightning sometimes does strike twice, a little further along in the same roof space, John discovered the handiwork of the gas engineer. Challenged

Contact

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by the task of installing a twin-piped flue from a boiler in the room below, he or she decided that the plank of timber that was in the way wasn't that important and cut it out.



Presumably feeling guilty, the engineer nailed it back into position but forgot to drive the nails all the way home.

We are not sure whether John has been following the same contractor around his region but the photograph below shows



another example of over enthusiastic cutting of the roofing felt. The first attempt was too close to the lateral bracing while the second could allow wind blown rain and snow to get into the roof space.

These examples show the importance of the roof space inspection during a survey. The complexity of the current building regulations requires good quality control on site. Roof space ventilation, roof structure bracing and heating and ventilating appliances mean that a lot of things have to be fitted into a small space. If there is a problem, operatives will usually resolve the issue with a rip saw and a big hammer! In most cases this will be of little consequence and mildly amusing, in others it could be more serious and occasionally dangerous!

If you have come across any interesting defects that you would like to share, email them to info@blueboxpartners.com