

# BlueBox Newsletter

Technical briefing for surveyors, energy assessors and property professionals *Issue Five January 2009*

## New partnership for challenging times

*BlueBox partners is pleased to announce a joint venture with Contact Property Training to create an unrivalled training programme for the residential property sector.*

The BlueBox *partners* and CPT partnership brings together a wealth of training expertise, innovation and surveying skills from people who are at the top of their game. Our first joint training programme is designed to:

- be topical and valuable;
- reinforce, broaden and deepen technical knowledge;
- apply the knowledge to life in practice, and;
- demonstrate how these skills and knowledge fit into business life.

According to cabinet minister Ed Balls, we are facing a global recession that is '*the most serious for over 100 years*' (10.02.09) and this has virtually consumed the property industry. But can we wait for things to get better? Even when the 'new dawn' breaks, we shall see a very different world. Automated Valuation Models, limited credit, new risk management strategies and new RICS products will mean our old skills will at best need updating, and at worse be of limited value. We must use this bleak period to prepare, to retrain, and to acquire flexible and diverse skills to meet the new challenges.

### Maximising the training opportunity

In these times of fiscal restraint, we will want to maximise learning experiences and value for money. Our programme will do this:

- **Before the seminar** - Advance reading materials will set the scene and will maximise the 'on the day' experience;
- **On the day** - The training day will focus on

### What's in this issue?

Welcome to the first issue of 2009 of our technical newsletter. It includes:

- The new BlueBox *partners* and CPT partnership;
- iSBEM news and updates;
- The new RICS CPD regulations
- Assessing the suitability of room heaters, fires, and flues.

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.

real life situations, and there will be plenty of time for questions and discussion;

- **After the seminar** - You will be able to download a 'post course' package that includes electronic copies of all the presentations used along with guidance on how you can reflect on your own strengths and weaknesses and set priorities for your life long learning strategy.



We will also be setting up a 'discussion forum' on our web site to support the initiative. This will be a unique educational experience that goes way beyond conventional CPD events and will add real value to your professional practice.

The first three seminars in this series include:

- **What Value is that House? Valuing in uncertain times:** can we learn from history, are we prepared?;
- **Residential Surveys: Reporting on Environmental Issues** - Opportunities, Challenges and Pitfalls;
- **New Homebuyer Report** - A Step-by-Step Guide.

For more details, please visit the following websites:

[www.cptevents2.co.uk](http://www.cptevents2.co.uk) or  
[www.blueboxpartners.com](http://www.blueboxpartners.com)

Conferences and Technical Briefings  
for Property Professionals



# iSBEM

## New iSBEM version released

As commercial energy assessors should already know, the Building Research Establishment (BRE) released version 3.3.b of the software on 23rd December 2008 - a real Christmas treat!

Although there are no radical changes, further guidance has been added to the user manual including:

- **Zone heights** - the floor to floor and floor to soffit heights remain the same, but where there is a sloping ceiling the zone height is the floor to average room height measurement;
- **Merging zones** - where a number of spaces have been merged into one zone, you should still include the area of any 'heavy'



## BlueBox partners course for Commercial Energy Assessors

Our next Energy Assessor training programme is on the following dates in Coventry:

- 24<sup>th</sup>, 25<sup>th</sup> and 26th March 2009
- 2nd and 3rd April 2009
- Assessment process - 3rd April onwards

On 19<sup>th</sup> February 2009, the Communities and Local Government department (CLG) sent a letter to all Accreditation Schemes describing proposed amendments to their guidance relating to Data Gatherers. In our view, these could effectively abolish the use of Data Gatherers at level 3. We designed our modular training course to allow people to progress through the training and qualification process in manageable stages using CLG's own guidance documents and in consultation with an Accreditation Scheme. As with previous initiatives, CLG now proposes to change these rules. As a consequence, we are amending our level 3 training course to suit the needs of qualified energy assessors only. Please see our website for further updates.

partitions between the merged areas so SBEM can better model how the building retains and releases heat;

- **Cm value** is now known as the Km value - one for the anoraks out there!

The Guide also recommends that users should not create more than 150—200 zones in a single building as this will slow down the calculation and may cause the software to crash. We do not think assessors will exceed this limit because:

- no one has the mental stamina to enter this many zones, and;
- iSBEM usually crashes well before you get the chance to enter that many zones!

These are not the only adjustments; there are 41 others! This shows how important it is to keep checking the NCM website for new versions.

For more information, see [www.ncm.bre.co.uk](http://www.ncm.bre.co.uk)

## New deal for Carbon Checker

In our opinion, iSBEM provides a good introduction to energy assessment of non-dwelling buildings. Although it can be unstable, it gives users a detailed insight into how the software processes the data. However, feedback from newly qualified assessors suggests more are switching to user friendly software packages. The BRE is currently promoting 'Carbon Checker' as a way of improving productivity during the data processing stage because:

- existing building geometry can be entered quickly by drawing zones on a grid;
- CAD drawings can be imported, and;
- Carbon Checker can automatically perform adjacency calculations between zones so there is no need for lots of manual calculation.

Once you have attended the mandatory Carbon Checker one day conversion course (£200 plus VAT), additional costs include:

- £250 per year for members of the BRE Global Accreditation Scheme (usually £450);
- a fee of £7.50 per EPC on top of that charged by the Accreditation Scheme.

For further information, visit:

[www.bre.co.uk](http://www.bre.co.uk)

[www.builddesk.co.uk](http://www.builddesk.co.uk)

## Life long learning - is there anything more tedious?

Mentioning 'CPD' or 'Life Long Learning' in the first paragraph of an article is a way of getting most Chartered Surveyors to throw free newsletters into the nearest rubbish bin. BUT WAIT! GIVE US A CHANCE! We have put together a guide that will help you to painlessly satisfy the RICS's requirements for very little money. Got you interested? Read on!

### The recent changes

Revised procedures for the increased frequency of monitoring of RICS members' CPD records have been in place since 2009. If you are chosen to be monitored, you must be able to produce a Personal Development Plan on request which demonstrates that:

- you have set relevant goals and priorities for your learning;
- based on this plan, you have taken appropriate action. Although the number of hours is no longer specified, most commentators suggest an average of 20 CPD hours per year is about right;
- after the learning activity, you have assessed that the learning has been constructive. Of all the components of the new system, we think this is the one that surveyors will have problems with, and;
- you have objectively reflected on the success of the learning activity, and identified what further skills or knowledge you need to acquire or improve upon.

### Meeting the requirements - an illustrated example

This description of the personal development plan is useful, but without an illustration it remains abstract and unhelpful. Consider the case of a typical experienced residential surveyor working in a small to medium sized practice whose workload consists of 85% mortgage valuations (until recently!) and 15% HSVs. Although they are likely to have up-to-date specialist valuation skills, their technical knowledge skills might be thin. After reading the article about chimneys and flues on the back page of this newsletter, they could identify this area as a knowledge gap they would like to fill through their CPD programme. Using the Personal Development Planner that can be downloaded from the RICS website, here is how this could be tackled:

### Setting goals and priorities

Acquiring technical knowledge about solid fuel appliances is too focused for a broad goal so this could be expanded to:

*'To further develop my skills and knowledge of*

*assessing the condition of building services during 'level 2' residential surveys'.*

This would then allow the surveyor to set a more targeted objective of:

*'To research the regulations governing the installation and maintenance of solid fuel heating appliances and to formulate an appropriate assessment and reporting methodology for my Practice.'*

### Appropriate Action

There may be a suitable training event in the near future but a personalised structured learning activity would better suit the topic. This could be expressed as:

*'I will carry out research into the topic using:*

- *the HETAS and Solid Fuel Appliance website and guidance documents;*
- *Part J of the Building Regulations, and;*
- *other relevant journals and information sources.*

*I will use this information to formulate a suitable assessment methodology and standard report paragraphs for my office.'*

Based on our own experience, this part could take at least half a working day (say 4 hours).

### Assessing effectiveness

The original objective has a clear and measureable purpose; to produce an assessment methodology for the surveyor and his or her colleagues. The effectiveness of the activity can be judged by asking colleagues to comment on the methodology. This could be through a circulated written paper or an in-house lunch time seminar. Using the feedback, the document can be amended to become part of the company's procedure.

### Reflection

Assuming the process had been successful, the surveyor might then identify other building services as priorities for a similar process in the near future.

### CPD with attitude

There are many different approaches to satisfying the RICS's CPD requirements. This example could easily provide up to 6 - 8 hours of CPD for an individual, fill an important knowledge gap and help prevent future claims from clients. Additionally, apart from the surveyors time, it will cost nothing!

Taking a structured approach to professional development is not a 'tick box' exercise instigated by meddlesome bureaucrats, but a process by which a professional can develop and adapt during challenging times. It is time we all moved into the modern age.

## How to assess chimney breasts, fires, and flues

Anecdotal feedback from surveyors and energy assessors suggests that the number of newly installed open fires, wood burning stoves and biomass room heaters has increased dramatically. For some home owners, it is about fashion; for others environmental concerns, fuel security (following the big Russian 'switch off') and rising fuel costs have been the motivating factors.

Whatever the reasons, solid fuel appliances pose similar carbon monoxide poisoning risks to gas and oil yet many survey reports fail to properly highlight this. This could expose surveyors to challenge, especially if injury or death results from the use of the installation.

### What to look for - new installations

Where a hearth, fireplace (including a flue box), flue or chimney is relatively new (fitted since 2002) it should have either building regulation approval (under part J) or have been fitted by a 'competent person' registered under the HETAS scheme (see below for details). There should also be a fixed notice or other permanent label (see figure one) somewhere in the building. This label should include the following information:

- *the location of the appliance or flue;*
- *the generic types of appliances that can be safely used;*
- *the type and size of the flue (or its liner if it has been relined) and the manufacturer's name;*
- *the installation date.*

Notice plates should be robust, indelibly marked and securely fixed. Typical locations include:

- *next to the electricity consumer unit; or*
- *next to the chimney or hearth described; or*
- *next to the water supply stop-cock.*

If this information is not available, then the quality and the safety of the system cannot be assured. In our view, you should strongly advise that the system is checked by an appropriately qualified person before it is used.

### Contact

This newsletter is published by BlueBox partners, part of the Allied Surveyors group. For more information contact us at 3 High Street, Chipping Sodbury, Bristol BS37 6BA. Tel. 0845 260 3500 or email info@blueboxpartners.com. Visit our website at www.blueboxpartners.com

Essential information	IMPORTANT SAFETY INFORMATION This label must not be removed or covered
	Property address ..... 20 Main Street New Town
	The hearth and chimney installed in the ..... lounge
	are suitable for ..... decorative fuel effect gas fire
	Chimney liner ..... double skin stainless steel flexible, 200mm diameter
	Suitable for condensing appliance ..... no
	Installed on ..... date
Optional additional information	Other information (optional) ..... Designation of stainless steel liner stated by manufacturer to be T450 N2 S D 3
	<small>e.g. installer's name, product trade names, installation and maintenance advice, European chimney product designations, warnings on performance limitations of limitation elements, e.g. false hearths.</small>

Figure One - Typical information plate

### What to look for - existing systems

Older installations are unlikely to have any formal approvals and so you should look for a number of indicators:

- *The room should have sufficient ventilation, especially if the windows and doors have been replaced or effectively draught stripped;*
- *A reasonably sized non combustible hearth is present in front of the appliance;*
- *Evidence that the chimney or flue has been swept annually by an appropriately qualified person (for example, by a member of the National Association of Chimney Sweeps);*
- *The owner has been using the correct fuel for the appliance and the smoke control status for that neighbourhood. For example, using unseasoned wood and increased tar deposits in the flue that may result in a chimney fire.*

We have come across many installations where owners burn literally anything from garden rubbish, painted off-cuts from DIY projects and even one entrepreneurial owner who burnt old electrical wiring so he could sell the copper wire to the local scrap yard!

Assessing existing installations will always be a matter of judgement but we think if an owner cannot produce information that proves they have properly maintained their solid fuel appliance then you should recommend an appropriately qualified person check the system before it is used.



*Older open fireplaces may add character to a room but where they are in a bedroom, without a hearth and with an unswept flue they can pose a danger to a new owner who may like the idea of an open fire on the first night in their new home!*

For more information, see:

- [www.solidfuel.co.uk](http://www.solidfuel.co.uk)
- [www.hetas.co.uk](http://www.hetas.co.uk)