
| TECHNICAL GUIDANCE SERIES | | | | | |
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| Ref: | NTGS0103 | Rev: | 0 | Date: | 1 st August 2020 |

The Technical Guidance Series aims to provide clarity on industry concerns, queries and any issues raised with the core focus on education and improvements.

Survey Reports

Objective: Survey reports – model types of reports, the detail that is commonly missing from reports including building descriptions

This guidance should be applied to all survey types comprising Management, Refurbishment and Demolition. It should also be applied to Re-inspections.

To effectively manage ACMs, a survey must be fit for purpose. Similarly, a good survey must be partnered by a good survey report otherwise the surveys effectiveness is jeopardised.

The key to an effective survey is in the planning as per Section 4 of HSG264. There must be a suitable exchange of information between the client and surveyor whereby a formal agreement is made of exactly what will be delivered, why, how, when and how much it will cost.

The first problem reflected in a survey report is that of poor planning. The industry needs more than ‘just turning up’ to do a survey. All survey types need careful planning to deliver a fit for purpose and well understood report. A UKAS Accredited organisation should habitually conduct this thorough planning process whereas a sole trader may not be as thorough.

Survey planning and survey execution aside, common problems encountered within the industry stem from poor report templates or poor transposition of survey data, further compounded by poor final review.

The survey report must present the data in a clear and unambiguous fashion which must also be user-friendly and presented in easy to understand ‘layman’s’ terms.

HSG 264 Asbestos: The Survey Guide should be used as initial guidance for the report. As it states, the survey report is a record of the information collected at a particular time on the presence and condition of ACMs.

A survey report should contain the following sections:

- Executive summary
- Introduction covering the scope of work
- General site and survey information
- Survey results (including material assessment results)

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- Conclusions and actions
- Bulk analysis results

There is no need to repeat HSG264 text here, please refer to section 6 of HSG264 for full details.

To put it simply, the survey report is your last chance to showcase the skills of the surveyor, to present your data in the best way possible to suit your clients' needs. It is your final chance to shine and to make yourself 'bullet-proof' by clearly stating what you DID and as important, what you DID NOT do.

As per HSG264 Section 7, 'Dutyholder's use of survey information', we should encourage our clients to check the accuracy of our survey reports as per Box 11. We must encourage more accountability from our clients; did we do what we said we would do?

An excellent way to take your chance to shine is to present your reports to your clients. This of course wouldn't be practical for a volume based social housing contract but is far more relevant and extremely useful for buildings with numerous ACMs and recommended remedial actions. Sit with your clients, talk them through the report contents and give them peace of mind they are in safe hands. In some cases, you'll be delivering bad news, so do it well.

The following list details common mistakes of report templates:

- Too generic; site specific data hidden amongst huge amounts of generic text
- 'Site specific' data not specific enough
- Vague building descriptions – you should fully and accurately describe the building you surveyed; not just 'We carried out a management survey of a commercial office block'; you need to describe its general construction, it's age, it's use, the number of floors, total floor area, any unique features etc
- Vague 'Scope of Work' – again you need to fully describe exactly what you did; not just 'Refurbishment Survey for Planned Works', describe exactly what the planned works are and therefore how your survey was tailored to be fit for purpose, what rooms were affected and the level of intrusion and tidying/making good that was agreed
- Mixed survey types should be very clear which rooms/areas were subjected to what type of survey eg a Management Survey with targeted Refurbishment work; or Reinspection Survey with 'no-access' rooms subject to Management Survey – provide clarity
- Data transposition errors not picked up during production / first review (resulting in missing or incorrect ACMs, spelling mistakes, inconsistent reference numbers etc)
- Material Assessments not as per HSG264 (you can go 'off-peak' but does your client agree and is it as good as, if not better than HSG264? But remember the guidance is there to help standardise the industry, going with your own scoring system is unnecessary)
- Priority Assessments (as per HSG227) not present and/or not stated that the client has a duty to review PA scores if they have been applied by the Surveyor only
- Poor descriptions of ACMs making them difficult to locate

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- Lead Surveyor poor review (over reliance on production team)
- Lead Surveyor has not authorised the report
- No clear data (ie table) of areas not surveyed (No Access)
- No clear data of areas with restricted or limited access
- Single man surveys resulting in too many no-access areas in the report (where a 2-man team would have been far more useful to inspect at a higher level)
- Missing photographs
- Photographs not clear / too close to the ACM; no perspective
- Plans using simple icons in rooms to demarcate an ACM present rather than a hatched area
- General building materials not mentioned (ie in each room, from ceiling, walls, floor, fixtures & fittings, accessible voids etc)

A major factor of difference in report formats is whether the general materials within each room need to be stated. Some reports will simply state “Room 1 - No ACMs found at time of survey”. This provides very little information nor confidence that the room has been adequately inspected.

Where a full breakdown of the room is included, it firstly shows that all elements have been inspected and also makes for a more useful report for the client.

As members of either NORAC or FAAM, we would expect to see information detailing the general construction materials within each room; from ceiling, walls, floor, boxings, fixtures & fittings, insulation materials and what was found within accessible voids or behind sacrificial coverings (where the scope allows).

This could be blocked together as Rooms 1 – 10 contained XYZ findings rather than a repeat of the same information for 10 rooms.

Reports presented this way are more likely to instil habitual inspection techniques which check and capture all data, produce a more useful report and bring the consistency which is much needed.

Another factor to consider is the financial side; this consistency of data capture and presentation will help bridge the gap between a fair price for a sustainable business and the cheap unsustainable prices that are often seen.