



# **Continuous Scottish House Condition Survey**

**Technical Report 2004**

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## **1. Introduction**

### **1.1 Purpose of Technical Report**

The purpose of the Continuous Scottish House Condition Survey Technical Report is to describe and provide an explanatory account of the survey process from sample design to data delivery. This report covers the survey year from October 2003 to September 2004, and also includes details of a pilot undertaken in advance of this. It includes information on the sample design, questionnaire development, fieldwork, response, quality assurance and data delivery. Recommendations for the survey year 2004-5 can be found at the end of the report.

### **1.2 Background and History**

The Continuous Scottish House Condition Survey (CSHCS) was launched in October 2003. The CSHCS is used to monitor the condition of homes in Scotland and is employed to monitor policy directed at improving Scotland's housing stock at both a national and local level. The CSHCS consists of two parts: a social survey interview with the occupier and a physical survey to assess the condition of the dwelling. The CSHCS is carried out by the Office for National Statistics (ONS) and Miller Mitchell Burley Lane (MMBL) on behalf of Communities Scotland. Previously, the Scottish House Condition Survey (SHCS) had been undertaken as a cross-sectional survey in 1991, 1996 and 2002. The aim of introducing a continuous survey approach was to provide an ongoing picture of Scotland's housing and to introduce more flexibility in the topic areas that could be covered.

### **1.3 Communities Scotland**

Communities Scotland is an agency of the Scottish Executive and is responsible for housing and regeneration in Scotland. Communities Scotland (formerly Scottish Homes) has been the sponsor of the survey since its inception in 1991. It is responsible for producing the Scottish House Condition Survey Report which provides profiles of housing and households, and information on housing standards, amenities, repairs, access, fuel poverty and energy efficiency.

### **1.4 Office for National Statistics and Miller Mitchell Burley Lane**

ONS is the government department that provides UK statistical and registration services. ONS is responsible for producing a wide range of key economic and social statistics which are used by policy makers across government. It carries out major social surveys including the Census of Population, Labour Force Survey and General Household Survey. ONS carries out the CSHCS social survey and has overall management responsibility for the CSHCS. The project is conducted by ONS in partnership with MMBL. MMBL Ltd are a UK-wide practice of chartered surveyors. All CSHCS related work was carried out from their Central Administration Unit (CAU) at their Edinburgh office.

### **1.5 General Summary of the Survey Process**

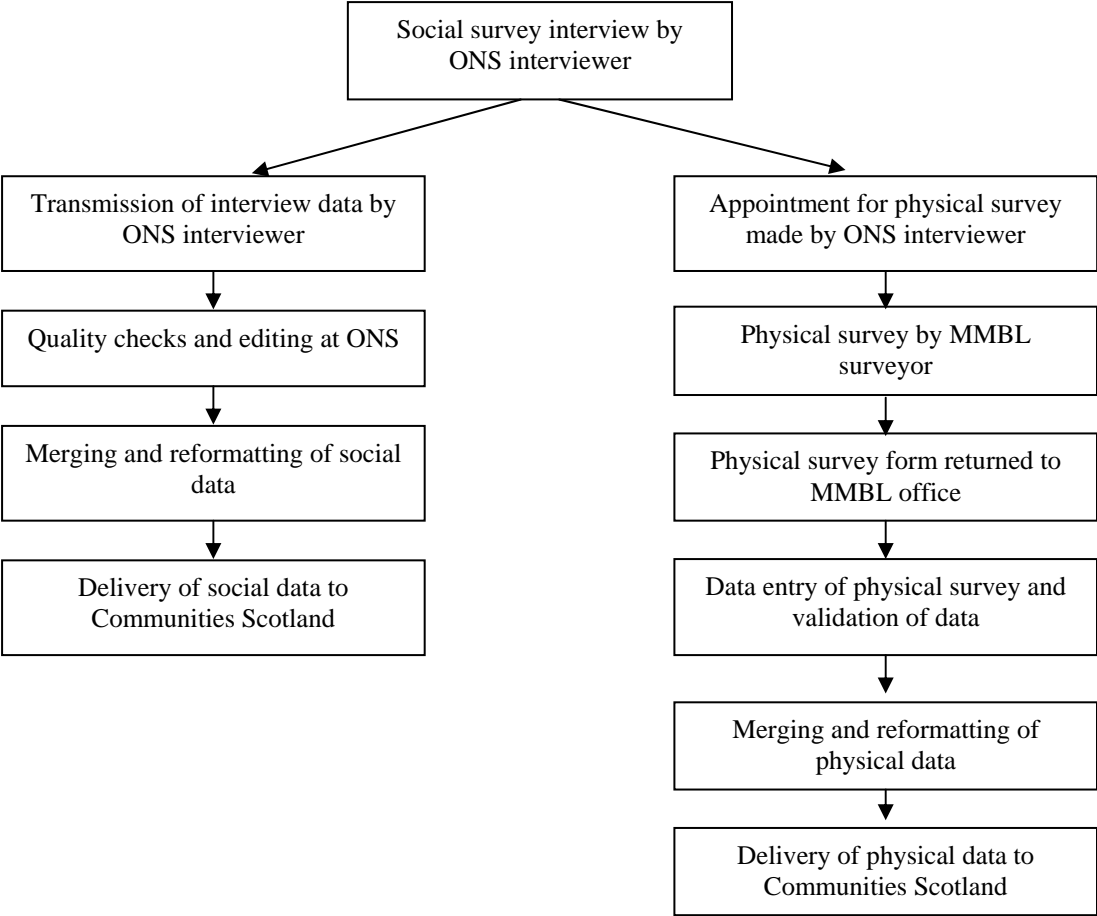
A pilot survey was undertaken in July 2003 to test the processes of the first continuous survey. Fieldwork for Year One of the CSHCS began in October 2003.

The aim is to achieve both a social survey interview with the householder matched with a physical survey of the property the household lives in. This constitutes a paired case. Typically, this involves an ONS interviewer conducting a computer assisted personal interview (CAPI) and making an appointment for a surveyor to call to conduct a physical survey at a later date. Details of the appointment are transmitted to

the MMBL website via ONS. A MMBL surveyor conducts a visual inspection of the property (internal and external) on a paper form which he/she codes and sends back to the MMBL office for data entry.

The social survey information recorded at the interview is transmitted to ONS where it is entered into an edit version of the program to identify inconsistencies, errors and outliers. The social survey data are then edited, formatted and delivered to Communities Scotland. The physical survey forms are received by validators working in the Central Administration Unit office who key the information into a bespoke data input program. The data are then run through a validation program to check for inconsistencies. Physical survey data are then also delivered to Communities Scotland. See Figure 1 for a diagrammatical representation of the process.

**Figure 1: Summary of CSHCS Processes**



## **2 Pilot**

### **2.1 Aims of the Pilot**

A pilot for the CSHCS was conducted in July 2003. The aim of the pilot was to achieve 100 paired interviews (both a social survey and a physical survey). It was designed to:

- Test the social survey questionnaire, its routing, the questions and reaction of respondents.
- Develop and test the physical survey data input and validation program.
- Examine the functionality of the surveyor appointments system.
- Evaluate the documentation supporting interviewers.
- Test the mechanism for ensuring the correct person was selected for interview.
- Ensure interviewers were appropriately trained to carry out a dwelling identification.
- Test the system that sends the questionnaire and addresses to interviewers.
- Assess procedures for the physical survey and the physical survey form.

### **2.2 Sampling**

Two hundred addresses in ten postal sector areas were taken from the Postcode Address File (PAF). The following unitary authorities (UAs) were sampled:

- Aberdeen City;
- Clackmannanshire;
- Dundee City;
- Edinburgh City (2 quotas);
- Falkirk;
- Moray;
- North Lanarkshire;
- South Lanarkshire; and
- West Lothian.

### **2.3 Fieldwork Dates**

ONS interviewers were briefed on 15 July 2003 and the social survey fieldwork was scheduled to take place from 21 July to 1 August 2003. This was extended due to the holiday period, to ensure that one hundred paired cases were achieved. Interviewers completed a form assessing the pilot and provided further feedback at a debrief on 7 August 2003.

The physical surveys were undertaken between 25 July and 10 August 2003.

## 2.4 Response

109 paired cases were achieved. A full breakdown of the response to the social survey is detailed in Table 1.

**Table 1: Response to social survey interview at pilot**

	Numbers	Percentages All	Percentages Eligible
Set sample	200	100	
Ineligible households <sup>1</sup>	23	11.5	
Eligible households	177	88.5	100
Completed social survey interview	109		61.6
Refusal to co-operate	43		24.3
Non-contact	20		11.3
Other non-response	4		2.3
Unknown eligibility	1		0.6

**Table 2: Response to physical survey at pilot**

		Number	Percentages
Achieved social survey		109	
Appointment made for physical survey		97	100
Completed physical survey		84	86.6
Appointment broken:	Non-contact/ doorstep refusal	5	5.2
	Refusal to HQ	2	2.1
	Unsuccessful attempt to rearrange	6	6.2

## 2.5 Recommendations following the Pilot

Recommendations and actions were agreed following feedback from respondents, interviewers, ONS Research and Field personnel, Communities Scotland and MMBL Regional Managers.

### 2.5.1 Sampling

- Addresses selected for any local house condition survey were removed from the sample for Year One of the CSHCS. This will be reviewed for subsequent years.
- Usually household interviews are conducted with the Household Reference Person (HRP)<sup>2</sup>. However, on the CSHCS, if the HRP had not lived at the address for the preceding three months, then the interviewer was 'routed' to ask if there was another householder who had lived there for over three months. If there was, then this person was referred to as the Key Householder and was interviewed. The pilot determined that this new concept of Key Householder was understood by interviewers and should be included at the mainstage of the survey.

<sup>1</sup> Also includes households which had not lived at the address for over three months

<sup>2</sup> Household Reference Person is the person in whose name the accommodation is owned or rented. If there are joint householders, the HRP is the one with the highest income. If they have the same income, the HRP is the eldest. HRP replaces the Head of Household (HOH) and procedures for establishing the HOH can be found in McCrossan, L. (1991) A Handbook for Interviewers, OPCS, pp53-54.

### 2.5.2 Social Survey Fieldwork Documentation

- The interviewer instructions were well received by interviewers but some amendments for clarification, examples and guidance were recommended for the mainstage version.
- Minor changes to the purpose leaflet were suggested and adopted for the mainstage version.
- The purpose leaflet had been included with the advance letter in the pilot and it was decided not to do so at the mainstage as interviewers felt that it increased refusals before interviewers had had a chance to make contact.
- The purpose leaflet referred to an earlier SHCS website ([www.shcs.gov.uk](http://www.shcs.gov.uk)) which required updating by Communities Scotland.

### 2.5.3 Social Survey

- The content of the questionnaire was reviewed following concerns regarding the length of the social survey interview, which was estimated as sixty minutes on average.
- Harmonised<sup>3</sup> questions on ethnicity, employment and benefits were understood and retained.
- Interviewer instructions on screen and helpscreens were expanded, eg, on the definition of crofting in the section on tenure.
- Interviewers found a section from the interviewer instructions documentation particularly useful when discussing repairs with respondents. It was recommended that this section from the instructions be reproduced at mainstage as a laminated card for ease of use.
- Measures were taken to improve the flow of the questionnaire, eg, a preamble to the health section was added as interviewers found this difficult to lead into, and questions on heating service contracts were moved from the repairs section to the heating section.
- A question requiring the interviewers to judge the age of the property was removed after interviewers expressed concerns over the accuracy of the responses.
- There was confusion amongst the interviewers in the pilot regarding describing types of property, eg, four-in-a-block, slabs, tenements, etc. The interviewer instructions at the mainstage included further clarification and example pictures, and the interviewer briefings expanded on this.
- The overall structure of the interview was retained.

### 2.5.4 ONS Systems

- There were no problems with distributing the questionnaire and addresses to interviewers and fieldwork was successfully monitored using the Case Management System (CMS) reports. CMS reports give a detailed picture of how fieldwork is progressing at any point in time and are used by ONS staff to monitor response and 'work-in-progress' for each interviewer.

### 2.5.5 Physical Survey

- Both MMBL Regional Managers and ONS interviewers reported that the appointments system worked successfully and should be continued for the mainstage. The high number of appointments that had to be rearranged (42) was thought to reflect the limited time of the pilot fieldwork.
- Instructions on how to allocate the addresses to be issued for a physical survey were developed.
- The number of appointments that required rearrangement was reviewed after the pilot and thereafter continuously throughout Year One of fieldwork.

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<sup>3</sup> A common set of questions used to provide comparable analysis between data sources. More information can be found at [www.statistics.gov.uk/about/data/harmonisation/default.asp](http://www.statistics.gov.uk/about/data/harmonisation/default.asp).

- Surveyor briefings were reviewed following comments by interviewers and MMBL Regional Managers.
- MMBL developed an instruction sheet for surveyors on how to use the website.
- Communities Scotland had requested that all eligible addresses should be issued for a physical survey. After discussions, it was agreed that those who refused the physical survey at the end of the social interview, should be issued for an external only survey. Surveyors were instructed not to try and convert these households to a full physical survey.
- The process of transferring appointments data from ONS to the MMBL website worked well after initial teething problems.
- Minor adjustments to the physical survey form were made, following comments from the surveyors.
- Comments from the surveyors on the form and processes were built into the main stage surveyor briefing.

## **3 Sampling**

### **3.1 Sampling Frame**

The sampling process was designed by the ONS Methodology Group and carried out by the Sampling Implementation Unit (SIU) at ONS. The sample was selected from the small users Postcode Address File (PAF). This is compiled by Royal Mail as a list of all delivery points that receive fewer than fifty items of post each day. The file is updated twice yearly.

### **3.2 Sample Design**

The sample for 2003-04 was drawn as a stratified one-stage unequal probability sample of addresses. This is carried out in order to meet targets on a Unitary Authority (UA) level in the most efficient way. Addresses for each UA are sampled from the PAF systematically using a fixed sampling interval from a random start point, both of which are proportional to the size of the UA. Addresses are sorted by postcode, which provides implicit stratification by area. Within each UA, every eligible address has an equal chance of selection, but due to differences in UA size, there are differing probabilities of selection between UAs. CSHCS oversamples many of the smaller local authorities in order to deliver a minimum number of responding paired cases (240 over three years). Addresses that had been selected by Local Authorities for any local house condition survey and addresses sampled for the Scottish Household Survey were removed from the sample file in order to avoid respondent burden.

Reweighting will be undertaken to correct for the sample design and plans for this are currently under discussion.

The sample design for continuous SHCS differs from that of SHCS previously undertaken in 1991 and 1996. On the SHCS in 2002, there were two parts to the design. Firstly, a longitudinal sample of addresses previously issued in 1996 was re-issued. Secondly, a sample of addresses drawn systematically from each UA using a random start.

The sample file was sent to Communities Scotland and an urban-rural indicator variable was added to the sample. This variable provides information on the breakdown of social and physical surveys completed in urban and rural areas and ensures the contract specifications are met. The definitions are as follows:

1. Primary cities with a population of over 125,000.
2. Urban settlements with a population of over 10,000.
3. Accessible small towns: Settlements sized between 3,000 and 10,000 and within a 30 minute drivetime of a town with a population of 10,000 or more.
4. Remote small towns: Settlements sized between 3,000 and 10,000 and between a 30 and 60 minute drivetime of a town with a population of 10,000 or more.
5. Very remote small towns: Settlements sized between 3,000 and 10,000 and over a 60 minute drivetime of a town with a population of 10,000 or more.
6. Accessible rural: Settlements of less than 3,000 and within a 30 minute drivetime of a town with a population of 10,000 or more.
7. Remote rural: Settlements of less than 3,000 and between a 30 and 60 minute drivetime of a town with a population of 10,000 or more.
8. Very remote rural: Settlements of less than 3,000 and over a 60 minute drivetime of a town with a population of 10,000 or more.

Each assignment of work given to an interviewer contained between 16 and 44 addresses depending on the area. For example, there were 44 addresses per assignment in Dundee, and 16 in the Western Isles, due to the differences in geography and demography of the respective areas.

### 3.3 Multi-dwelling Procedures

The Continuous Scottish House Condition Survey differs from most other social surveys in that the primary unit of analysis is the dwelling. A dwelling is defined as:

... a unit of accommodation (usually a house or flat) where all the rooms and amenities (i.e. kitchen, bath/shower room and WC) are for the exclusive use of the household(s) occupying them. Amenities may be located outside the front door, but provided they are for the exclusive use of the occupants, the accommodation is still a dwelling.

Interviewers are provided with a Dwelling/Household Selection form (see Appendices) for each address in their work assignment. These forms are used to record information about each address, such as the type of property, the number of dwellings and eligibility for interview.

On occasion, when an interviewer arrives at a sampled address, they may find that the address is made up of more than one dwelling. The Dwelling/Household Selection Form enables the interviewer to select the dwelling they will be interviewing at. This is done with the use of a Kish grid, which allows for random selection of the dwelling, depending on the serial number of the address and the number of dwellings within that address.

This form is also used to select the primary household to interview, when a dwelling contains more than one household. A primary household is one that has the main responsibility for the dwelling. It is usually the cases that the mortgage or lease is in their name, they have responsibility for paying rent to the landlord, and have responsibility for repairs and maintenance. At a further point in the form there is another Kish grid, to be used for any instances when there is more than one primary household in the dwelling. Again, this enables the interviewer to randomly choose which primary household to include, depending on the serial number of the sampled address and the number of primary households found there.

### 3.4 Ineligible Addresses

The following types of addresses were classed as ineligible:

- Non-residential addresses and institutions. An institution is defined as 'an address at which four or more unrelated people slept; while they may not have eaten communally, the establishment must have been run by a person (or persons) employed for this purpose, or by the owner'<sup>4</sup>. Private households with separate accommodation within an institution were included in the survey.
- Residential accommodation not used by a household as their main address (eg, a holiday home or second home).
- Addresses in the PAF that did not exist because they had been demolished or had yet to be built.
- Households where no one had lived there for over three months were ineligible.

A surveyor would attempt to conduct a full physical survey where the interviewer managed to make contact with the respondent and only where the respondent had lived in the property for at least 3 months. Where successful, the surveyor would obtain appropriate contact information for the respondent and this would be passed back to ONS in order for an interviewer to return and undertake the social survey thereby completing a paired case.

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<sup>4</sup> McCrossan, L. (1991) A Handbook for Interviewers, OPCS, p49.

## **4 Social Survey**

### **4.1 Social Survey Questionnaire Development**

The questionnaire used on the 2002 survey was used as a basis for the first year of the SHCS. This allows comparison between survey years as much as possible. Additionally, some harmonised questions<sup>5</sup> were added. This was to enable comparative analysis of the CSHCS with other surveys and also so that ONS interviewers were familiar with the structure and wording of the questions.

Prior to beginning development of the questionnaire, Communities Scotland consulted users of the SHCS and produced a list of possible changes to the questionnaire. The amendments were then finalised by Communities Scotland and forwarded to ONS for inclusion in the CSHCS.

### **4.2 Computer Assisted Personal Interviewing - Blaise**

The CSHCS social survey uses Computer Assisted Personal Interviewing (CAPI) and was programmed using the Blaise system developed by Statistics Netherlands<sup>6</sup>. ONS has used Blaise since it was created in the mid-1980s and has a close collaborative relationship with Statistics Netherlands regarding the development of Blaise.

Blaise has long been the de facto standard CAPI software in Europe for complex social surveys and is now widely used across North America too. For example, it is used by the US Census Bureau and Statistics Canada.

The pilot version and mainstage version of the CSHCS up to January 2004 was written in Blaise 4.2. From January onwards, the program was updated to Blaise 4.6. This was in line with other surveys produced by ONS.

### **4.3 Content of the Questionnaire**

The social survey questionnaire consisted of the following modules:

- Household composition;
- Nationality and ethnicity;
- Type of accommodation;
- Tenure of property;
- Landlord details;
- Ownership details;
- Neighbourhood;
- Noise;
- Smoking;
- Pet ownership;
- Local services/ facilities;

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<sup>5</sup> A common set of questions used to provide comparable analysis between data sources. More information can be found at [www.statistics.gov.uk/about/data/harmonisation/default.asp](http://www.statistics.gov.uk/about/data/harmonisation/default.asp).

<sup>6</sup> [www.cbs.nl/en/](http://www.cbs.nl/en/)

- Previous address;
- Preferred accommodation;
- Householders wishing to move out;
- Repairs;
- Satisfaction with property;
- Heating and fuel bills;
- Damp;
- Disability, health and access;
- Employment and education;
- Purchase of house/ mortgage;
- Renting;
- Income;
- Housing Benefit;
- Council Tax;
- Benefits; and
- Other income and total household income.

#### **4.4 Versions of the Questionnaire**

The questionnaire was refined and updated throughout the year to take account of both improvements and residual errors. Interviewer instructions and checks were reworded as feedback was received from interviewers in the field.

There were five versions of the questionnaire during the first year of the survey, each update contained minor adjustments. For example, in November 2003, a question was added to define what repairs the landlord pays for. This followed a request from Communities Scotland. In January 2004, the questionnaire was transferred into Blaise 4.6. A new question was inserted in the accommodation section to ensure that interviewers did not conduct interviews at caravans or houseboats. The benefits section was revised in April 2004 to take account of increases in benefit amounts. Also in April, an 'other' response at the questions on housing associations was added as respondents had been indicating that their landlord was not included on the list of associations given.

After two new versions of the questionnaire were created in the first quarter, it was agreed with Communities Scotland that questionnaire changes would only be made on a quarterly basis, unless there were exceptional requirements.

## **4 Social Survey Fieldwork**

### **4.5 Interviewer Training**

Before starting work on the CSHCS, all interviewers were given a one-day briefing by ONS Research and Field staff. Topics covered during the training included the following:

- A presentation by a representative from Communities Scotland on the background to the project and uses of the survey data.
- Explanation of concepts used on CSHCS such as the Dwelling and Household Selection Forms, the Key Householder and different types of tenure.
- Practice scenarios to explore the questionnaire and focus on difficult/complex areas.
- The procedures for booking appointments for surveyors to conduct a physical survey and how to encourage respondents to agree to the physical survey.

### **4.6 Fieldwork Dates**

Year One of the CSHCS began in October 2003. Fieldwork was scheduled to be carried out for the first two months of each quarter, i.e. October, November in 2003, January, February, April, May, July and August in 2004. Fieldwork periods began at the beginning of the month and ran until the end of the month. Social survey fieldwork was completed by the end of September 2004.

In line with other surveys and in an attempt to improve response rates, some addresses were reissued from every quarter. In addition to this, it was agreed by Communities Scotland and ONS that in order to achieve the response targets and number of paired cases required, an additional sample of addresses be drawn for completion during June (see section 6.3).

### **4.7 Contact Procedures**

#### **4.7.1 Advance Letters**

All addresses were sent an advance letter outlining the purpose of the survey and the importance of participation. Confidentiality issues were also explained. Interviewers were given the advance letters to post themselves once they had planned how they would phase their work within the area. Allowing interviewers to post their own advance letters ensures that the time between delivery and the first interview call is not too great, so that the householder is less likely to forget the letter. A copy of the advance letter can be found in the Appendices.

#### **4.7.2 Purpose Leaflets**

Interviewers were given a supply of purpose leaflets to leave with respondents. A purpose leaflet is left at all co-operating households. The leaflet provides more information about survey selection methods, what the data is used for, confidentiality and contact information. The leaflet also makes reference to the CSHCS website. A copy of the purpose leaflet can be found in the Appendices.

#### **4.7.3 Translations**

The advance letter was translated into the most common ethnic minority languages (Punjabi, Urdu, Cantonese, Kurdish, French and Farsi) and interviewers carried spare copies of these.

#### 4.7.4 CSHCS Website

The CSHCS website, which is part of Communities Scotland website, provides information to potential participants in a question and answer format. The advance letter translations described above were also made available on the website. The website can be found at [www.shcs.gov.uk](http://www.shcs.gov.uk).

## **5 Physical Survey**

### **5.1 Physical Survey Form**

The physical survey form used for the CSHCS was based on the 2002 SHCS form. The survey is undertaken by a qualified surveyor and the paper form is completed by hand. Each address issued to MMBL for a physical survey has a unique identification number and the surveyor attaches this to the front of the physical survey form. The surveyor also records their name and identification number on the top of the form along with contact dates and times. Topics covered on the physical survey form include:

- Information on the surrounding area;
- Description of the dwelling;
- Number of rooms;
- Internal repairs;
- Types of defect;
- Amenities;
- Services and fittings;
- Heating and insulation;
- Measurements of the property;
- Details of common areas;
- Construction materials;
- External repairs; and
- Indicators of tolerable standard and if property is Below Tolerable Standard (BTS).

### **5.2 Surveyor Recruitment and Training**

#### **5.2.1. The Role of Regional Managers**

MMBL recruited six Regional Managers to take part in CSHCS, all of whom had worked on previous SHCS studies as either surveyor supervisors (known as 'monitors') or surveyors. The role of a Regional Manager is to ensure that the surveyors deliver high quality data and each Regional Manager has a group of surveyors to manage and supervise. Tasks carried out by Regional Managers include commenting on the pilot, attending surveyor briefings, providing support and guidance to their group of surveyors and monitoring their progress. Regional Managers are responsible for quality control and accompany each of their surveyors for at least two days: once early on in fieldwork and again later in fieldwork. They also check the first ten survey forms from each surveyor and between them conduct a quality check of around five per cent of cases issued for a full physical survey. Additionally, Regional Managers act as surveyors when required.

#### **5.2.2 Surveyors**

The surveyors working on the CSHCS had all worked on the SHCS in 2002. A requirement is that they are fully professionally qualified (as chartered surveyors, architects, civil or structural engineers, environmental health officers or building control officers) and have at least five years post-qualification experience. Forty-nine surveyors began fieldwork (including the six Regional Managers).

### 5.2.3 Surveyor Training

Surveyors attended a three-day residential briefing course prior to fieldwork commencing. The training was jointly presented by representatives from Communities Scotland, MMBL and ONS. The majority of the briefing centred on visiting dwellings to practise conducting physical surveys in the field. MMBL was responsible for identifying a selection of dwellings to be used as test houses and Communities Scotland then selected those dwellings appropriate to be used to highlight key points to the surveyors. Topics covered during the training included:

- A summary of changes to the form from the 2002 survey.
- Details on the heating and insulation section of the physical survey form.
- Changes to Tolerable Standard legislation.
- Administration procedures.
- Survey of test houses.

Each surveyor completed a survey of four test houses, the results of which were processed and calibrated. The surveyors' results were then compared with model answers and feedback given to surveyors.

### 5.3 Fieldwork Dates

The fieldwork for the physical survey was carried out continuously between October 2003 and the end of October 2004.

### 5.4 Types of Physical Survey

In Year One of CSHCS there were three types of physical survey; a full physical survey, an external survey and a dwelling description. A full physical survey is a visual inspection of both the internal and external of a property. The surveyor completes all parts of the physical survey form for a full physical survey. Only a completed social survey interview with a full physical survey constitutes a paired case.

An external survey requires an inspection of the external of the dwelling only. Surveyors will only complete sections of the form that refer to the exterior aspects of the dwelling. Second homes, non-contacts, vacant properties and interviews where the respondent had only agreed to an external survey were issued by ONS to MMBL for an external survey. External surveys may also take place if a surveyor has made repeated calls at an address of a respondent who originally agreed to a full physical survey, but where they have been unable to make contact.

A dwelling description is the shortest of physical surveys and requires a description of the property and the surrounding area only. Addresses are issued for dwelling descriptions when the respondent refuses both options of a full and an external physical survey. Dwelling descriptions may also take place when access to a property is limited, for example, when the surveyor cannot get sufficient access to conduct an external survey.

For full and external surveys, surveyors make a photographic record of the dwelling and take shots of the front and back of the property and the surrounding area (usually taken looking left and right down the road). For a dwelling description survey, a photograph of the front of the property must be taken.

### 5.6 Appointments System

Previously on the SHCS 2002, the addresses were released for a physical survey when a social survey outcome was completed. The surveyor then cold-called on addresses in order to achieve a physical survey at a later date.

A major development for the CSHCS was the introduction of linking the social survey interview with an appointment for the physical survey. At the end of the social survey interview, interviewers seek permission to make an appointment and arrange a convenient time for a surveyor to call at the property and undertake the physical survey. When a physical survey appointment is made the appointment is automatically transmitted back to ONS when the interviewer next transmits. Information sent includes the date and time of the appointment for the physical survey and useful notes the interviewer may wish to pass on to the surveyor, for example, how to reach the front door or location of a tenement within a building. These data are extracted on arrival at ONS and saved in an appointments database. The information is immediately transferred to a secure website at MMBL, thus enabling surveyors to have timely notification of appointments. As a contingency against any problems with the website, a list of new appointments is produced by ONS on a spreadsheet and emailed to MMBL daily. Interviewers are encouraged to block-book appointments leaving enough time between for travelling. If an appointment is booked at short notice, interviewers are reminded, as a soft check in the interview program, that in addition to transmitting the booking information, they should telephone the MMBL Helpline to provide details.

It was envisaged that the new process whereby interviewers create appointments for surveyors had several advantages.

- Response to the physical survey would be improved by making an appointment at a time convenient to the householder.
- The rapport between interviewer and respondent during the social interview could be used to encourage agreement to a physical survey.
- Booking blocks of appointments in advance would mean more efficient use of surveyor time.
- Limiting the amount of time between the social and physical surveys would minimise any changes to the household within the property, for example, changes in the people living there or households that may have moved.

There has been a continual review of the appointments system during Year One of the CSHCS and feedback from MMBL office staff, MMBL Regional Managers and ONS interviewers has been extremely positive.

## **5.7 MMBL Helpline**

Staff in the MMBL office in Edinburgh manage the day-to-day fieldwork process on the physical survey. There is a dedicated helpline telephone number and email address set up for respondents, social survey interviewers and surveyors to contact. The Helpline staff manage communication between respondents and surveyors. One of the core responsibilities of the Helpdesk is to allocate appointments to surveyors. All appointments on the CSHCS are transmitted directly to the 'Edinburgh Diary' for re-booking into the appropriate surveyor's diary. Another responsibility of the Helpline is to book or re-arrange appointments. Circumstances where this is required include the following.

- 'Soft' appointments where the interviewer has been unable to make a firm appointment date and time.
- Appointments which have been cancelled by the respondent and rearranged.
- Missed appointments where the respondent was away when the surveyor called.
- Appointments cancelled by surveyors due to adverse weather conditions,

The diaries of the surveyors are updated continuously, as soon as appointments are made by the Helpline. Helpline staff confirm all new appointments via email and also aim to advise surveyors by telephone.

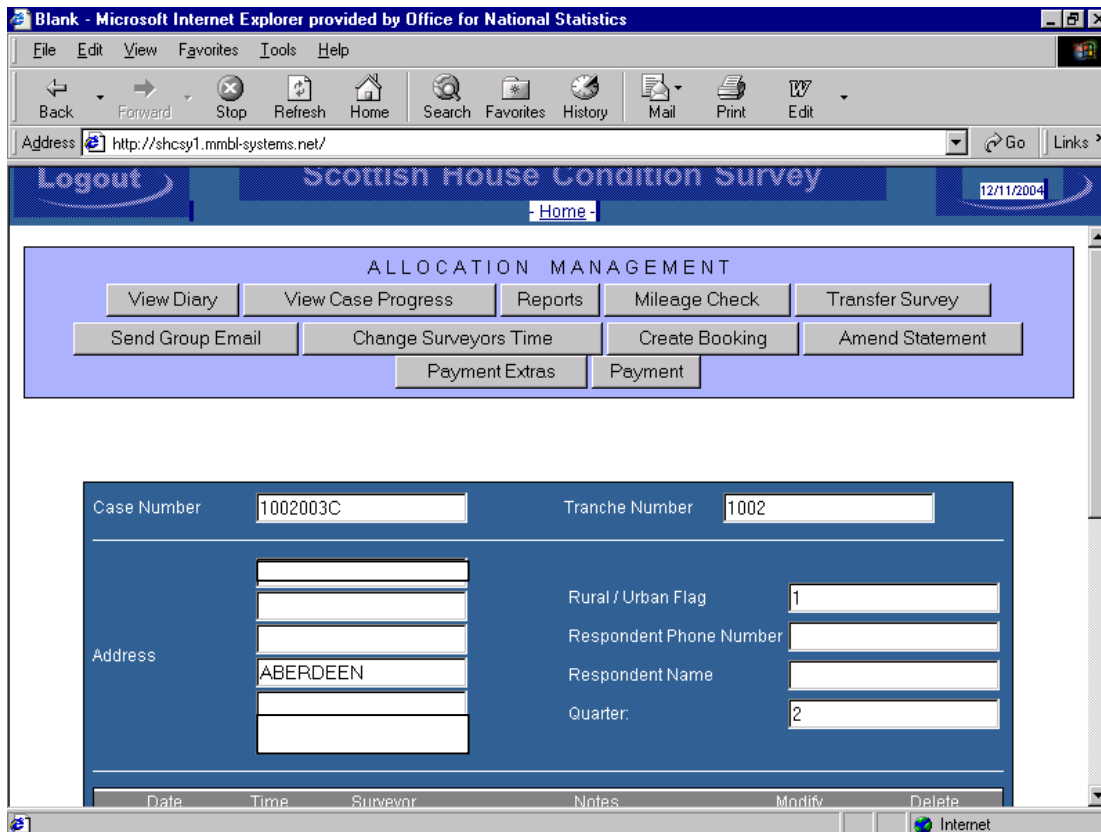
## **5.8 MMBL Website**

The physical survey appointments and the progress of physical surveys are monitored using a secure website managed by MMBL. The website is used by surveyors, Regional Managers, MMBL Helpline staff and ONS. All website users have their own password and are given access to different parts of the site depending on their requirements.

Surveyors use the website to check the appointments that have been made for them. These are created by Helpline staff following appointments booked by interviewers. Surveyors log their availability on the website diary on a continual basis. There is a notes section at the bottom of each day where they can record information to assist with the allocation of appointments, for example, last appointment must be at 4pm. The website is also used to record the mileage covered by surveyors and to calculate payments to be made to surveyors.

The progress of individual cases can be viewed on the website by entering a unique case identification number. An overview of the case can be seen which includes; date of appointment, surveyor allocated, type of survey, date of completion of survey and date of receipt of form (see Figure 2). Both surveyors and Helpline staff update these on an ongoing basis.

**Figure 2**



Progress by surveyor and by region can also be monitored using the website. In order to produce weekly progress reports for the survey team, progress information is downloaded by ONS from the MMBL website to tie in with the social survey progress information.

## 5.9 Surveyor Variability

### 5.9.1 Allocation Rules

Rules regarding the allocation of surveyors were detailed in the contract between Communities Scotland and ONS/MMBL. The objective of the allocation is to control the distribution of addresses to surveyors to minimise variability between different surveyors and minimise bias within certain geographical areas. The allocation rules are as follows.

1. Each surveyor must work in at least two UAs in each year of fieldwork and at least three UAs over the three-year fieldwork period. (The Highlands and the three Island UAs are exempted from the latter requirement following discussions with Communities Scotland, because of the large distances involved.)
2. No surveyor should complete more than 25% of the surveys issued in a UA per year. (Orkney and Shetland have this level set at 33%.)
3. Each surveyor's allocation should contain a mixture of dwelling types approximate to the profile of the area they are working in, over each year of fieldwork.
4. Each surveyor's allocation should contain a balance of urban/rural properties approximate to the profile of the area they are working in, over each year of the fieldwork.
5. Each surveyor should conduct no more than a maximum number of surveys over each year of fieldwork. This maximum was initially set at:

$$1.5 \quad \times \quad \frac{\text{total number of surveys issued in the year}}{\text{number of surveyors}}$$

At the outset of the survey it was agreed that the allocation rules would be measured against paired cases. At the beginning of the third quarter of Year One, Communities Scotland requested that the allocation rules should be monitored against all surveys that result in a full physical survey or an external survey. The reasoning in this was that the importance of the allocation rules is to ensure that there is no bias in the calculation of repair scores and this is also relevant to external surveys where repair scores for external aspects of the property are made. This did make the process easier to manage since MMBL did not have to identify the paired cases, however, the difficulty was that survey outcomes (i.e. full, external or dwelling description) were not known when allocated. As a result, new 'target' numbers were needed for full/external surveys in each UA in order to calculate surveyor allowances. The new targets were required to reflect the number of vacant properties, second homes, social interviews where the respondent requested an external survey only and unsuccessful surveys that resulted in an external survey. A working tool to guide surveyor allocations by UA was obtained by calculating new targets for the first two quarters of Year One and making the assumption that the same pattern would be repeated in the latter two quarters.

### 5.9.2 Back Checks

In order to guard against any undue effects of a surveyor, back checks on five per cent of responding households were conducted to ensure consistency between surveyors. Seven per cent of all issued sample addresses for 2003-4 were randomly selected. This allowed for up to two per cent of addresses not being issued to MMBL as they were refusals, ineligible or non-contacts. The result was a back-checking of five per cent of all addresses issued to MMBL. Additionally, all addresses that were found to be Below Tolerable Standard (BTS) were routinely back-checked.

## **6 Response**

### **6.1 Response Targets**

The following response targets were agreed between Communities Scotland, ONS and MMBL:

- Response to the social survey
  - 70% response to social survey interview annually.
  - 60% response to social survey interview in any UA annually.
- Number of paired surveys (cases with both a social survey interview and a full physical survey)
  - 3,000 paired surveys annually.
  - 240 paired surveys over three years in any UA (equating to 80 per year).
- Conversion rate (percentage of cases with a social survey interview where a full physical survey has been completed)
  - 83% of cases where a social survey interview has taken place have a full physical survey completed.
  - 75% conversion in any UA annually.
- Vacants
  - 90% of vacant properties have an external survey completed.

### **6.2 Progress Targets**

In order to monitor progress, a series of progress targets was also agreed:

- 95% of social survey interview cases required to provide 3,000 paired surveys at 83% conversion, completed by end of second month of the quarter.
- 95% of paired cases required quarterly to meet annual target of 3,000 paired surveys completed by the end of each quarter. A shortfall in the 750 required each quarter would be carried over into the next quarter and a revised target for that quarter calculated as 95% of the new total.
- 90% of the physical survey forms to be validated within three days of receipt. The remaining 10% to be validated within seven days of receipt.

### **6.3 June Boost**

In May 2004, after a review of progress on the first two quarters of the survey year, there were some concerns regarding the progress against targets in some Unitary Authorities. A minimum 75% of social survey interviews were to be converted to a full physical survey and based on the outcomes from the first six months, there were some UAs where this was unlikely to be reached. Also, the aim was to achieve a minimum of 80 paired cases in any UA and this too was unlikely to be met.

A review of the figures from the first six months indicated that if response rates remained the same for the second half of the year, there would be nine UAs with less than 80 paired cases. In order to pre-empt any shortfalls at the end of the survey year, it was decided to issue a booster sample in particular UAs during June. By conducting this in June, it was envisaged that the response would be back on track to meet the response targets before the end of the survey year.

The UAs identified as requiring a booster sample were:

- Dumfries and Galloway;
- East Dunbartonshire;
- East Renfrewshire;
- North Ayrshire;
- Renfrewshire; and
- Stirling.

#### 6.4 Response to Social Survey

The social survey response rate was calculated using the total number of social survey interviews achieved as the numerator and the total number of eligible cases as the denominator. The denominator includes an estimate of the number of eligible non-responding cases amongst those cases where eligibility is uncertain. The proportion of eligibles amongst those cases where eligibility is uncertain is the same as that amongst cases where eligibility has been established.

**Table 3: Response to social survey**

		Lower Estimate	Response	Higher Estimate
Fully co-operating	3868	70.0%	70.0%	70.5%
Non-contact	320	5.8%	6.5%	5.8%
Refusal	1128	20.4%	20.4%	20.6%
Other non-response	169	3.1%	3.1%	3.1%
Unknown eligibility	44	0.8%		
Ineligible	775			
Total	6304			
Definite eligible	5529		100%	100%
Definite ineligible	775			
Adjusted ineligible	780	12%		

In 2003-04 a response rate to the social survey of 70% was met on the SHCS. An appointment for a surveyor to call to complete a full physical survey was made at 90% of the households that completed a social survey. Twelve per cent of the sample were ineligible to take part in the survey. Five per cent were vacant properties, less than one per cent were second homes and seven per cent were other ineligibles (eg, no trace of address or non-residential addresses). Response by unitary authority ranged from 61% in Glasgow to 88% in the Western Isles.

**Table 4: Response to the social survey**

	Numbers	Percentages All	Percentages Eligible
Set sample	6304	100	
Ineligible households	775	12.3	
Eligible households	5529	87.7	100
Completed social survey interview	3868		70.0
Refusal to co-operate	1128		20.4
Non-contact	320		5.8
Other non-response	169		3.1
Unknown eligibility	44		0.8

**Table 5: Completed social survey interview by agreement to physical survey**

		Numbers	Percentages
Completed social survey interview:	Plus appointment for physical survey	3484	90.1
	Plus agreement to external survey	143	3.7
	With no agreement to physical survey	241	6.2
		3868	100

**Table 6: Eligible/ ineligible addresses**

	Numbers	Percentage of sample
Vacant	298	4.7
Second homes	50	0.8
Other ineligible	427	6.8
Eligibles	5529	87.7
	6304	100



**Table 7: Response to the social survey by unitary authority**

UA	Numbers							Percentages	
	Set sample	Full interview & appointment	Full interview & external/ dwelling	Refusal	Non-contact	Other non-response	Ineligible	Response	
Aberdeen City	160	80	5	40	8	4	23	62.0	
Aberdeenshire	160	100	11	20	2	7	20	79.3	
Angus	152	93	6	29	6	2	16	72.8	
Argyll & Bute	160	99	8	15	8	2	28	81.1	
Scottish Borders	160	91	17	22	8	6	16	75.0	
Clackmannanshire	152	90	5	37	9	2	9	66.4	
West Dunbartonshire	152	83	12	34	2	8	13	68.3	
Dumfries & Galloway	184	105	16	34	3	2	24	75.6	
Dundee	176	96	3	24	15	14	24	65.1	
East Ayrshire	152	94	8	22	4	5	19	76.7	
East Dunbartonshire	172	98	8	46	4	4	12	66.3	
East Lothian	168	98	24	26	3	3	14	79.2	
East Renfrewshire	234	119	20	57	14	5	19	64.7	
Edinburgh City	408	204	15	93	34	8	54	61.9	
Falkirk	153	82	15	28	10	6	12	69.3	
Fife	264	170	6	36	13	3	36	77.2	
Glasgow City	592	237	55	117	48	21	114	61.1	
Highland	160	96	10	17	4	6	27	79.7	
Inverclyde	200	111	4	35	10	11	29	67.3	
Midlothian	152	91	10	33	5	1	12	72.1	
Moray	144	93	11	11	8	0	21	84.6	
North Ayrshire	190	92	11	42	11	4	30	64.4	
North Lanarkshire	284	155	12	47	22	11	37	73.6	
Orkney Islands	160	108	4	15	2	2	29	85.5	
Perth & Kinross	152	93	6	23	7	1	22	76.2	
Renfrewshire	304	140	27	64	26	5	42	63.7	
Shetland Islands	152	100	13	12	5	4	18	84.3	
South Ayrshire	152	77	8	41	5	5	16	62.5	
South Lanarkshire	152	85	7	28	9	6	17	68.1	
Stirling	223	123	14	39	9	6	32	71.7	
West Lothian	152	88	10	29	6	4	15	71.5	
Western Isles	128	93	3	11	1	1	19	88.1	
Total	6304	3484	384	1127	321	169	819	70.0	



**Table 8: Reasons for refusal to social survey**

Reason	Numbers	Percentage of refusers
Doesn't believe in surveys	150	11.2
Anti-government	35	2.6
Invasion of privacy	125	9.3
Concerns about confidentiality	23	1.7
Can't be bothered	197	14.7
Bad experience with previous surveys	20	1.5
Disliked survey matter	52	3.9
Genuinely too busy	147	11.0
Temporarily too busy	65	4.9
Personal problems	86	6.4
Refusal to HQ after interviewers visit	22	1.6
Put off by record keeping	5	0.4
Late contact - insufficient field time	23	1.7
About to go away	16	1.2
Too old/infirm	75	5.6
Not capable	18	1.3
Broken appointment	105	7.8
Other	174	13.0
Total	1338	100.0

### 6.5 Response to Physical Survey

Of the cases where a social survey interview was conducted, 81% achieved a full physical survey. This resulted in 3,114 paired cases for Year One.

**Table 9: Completed social survey interview and type of physical survey**

Social survey interview plus:	Numbers		Numbers	Percentage
Appointment for full physical survey	3484	Full survey	3085	79.8
		External survey	204	5.3
		Dwelling description	127	3.3
		Non-survey	68	1.8
Agreement to external survey	143	Full survey	18	0.4
		External survey	119	3.1
		Dwelling description	6	0.2
		Non-survey	0	0.0
Refusal to physical survey	241	Full survey	11	0.3
		External survey	25	0.6
		Dwelling description	188	4.9
		Non-survey	17	0.3
	3868		3868	100.0

**Table 10: Paired cases by agreement to physical survey**

Completed social survey interview and response to physical survey	Numbers	Percentages
Appointment for full physical survey	3085	99.1
Agreement to external survey	18	0.6
Refusal to physical survey	11	0.4
	3114	

**Table 11: Physical survey type by social survey response**

	Full physical survey	External survey	Dwelling description	Non-survey	Total
Completed social survey interview	3114	348	321	85	3868
Non-contacts	20	106	9	185	320
Vacants	0	255	25	18	298
Second homes	0	39	3	8	50
					4536

**Table 12: Response to the physical survey by unitary authority**

UA	Numbers				Percentages	
	Social survey	Full physical surveys	External surveys	Dwelling descriptions	Non survey	Conversion rate*
Aberdeen City	85	72	8	4	1	84.7
Aberdeenshire	111	94	1	15	1	84.7
Angus	99	87	4	8	0	87.9
Argyll & Bute	107	90	9	5	3	84.1
Scottish Borders	108	84	13	10	1	77.8
Clackmannanshire	95	74	12	6	3	77.9
West Dunbartonshire	95	78	9	8	0	82.1
Dumfries & Galloway	121	90	16	12	3	74.4
Dundee	99	86	7	5	1	86.9
East Ayrshire	102	82	12	8	0	80.4
East Dunbartonshire	106	84	5	15	2	79.2
East Lothian	122	94	11	15	2	77.0
East Renfrewshire	139	103	10	24	2	74.1
Edinburgh City	219	180	21	10	8	82.2
Falkirk	97	78	15	4	0	80.4
Fife	176	148	15	10	2	84.1
Glasgow City	292	203	44	38	7	69.5
Highland	106	90	11	2	3	84.9
Inverclyde	115	98	11	3	3	85.2
Midlothian	101	83	11	4	3	82.2
Moray	104	89	8	7	0	85.6
North Ayrshire	103	80	7	15	1	77.7
North Lanarkshire	167	137	10	15	5	82.0
Orkney Islands	112	95	8	4	5	84.8
Perth & Kinross	99	80	10	6	3	80.8
Renfrewshire	167	127	15	24	1	76.0
Shetland Islands	113	92	3	9	9	81.4
South Ayrshire	85	70	9	6	0	82.4
South Lanarkshire	92	75	4	11	2	81.5
Stirling	137	108	10	10	9	78.8
West Lothian	98	82	9	6	1	83.7
Western Isles	96	81	10	2	3	84.4
Total	3868	3114	348	321	84	80.5

\* Number of full physical surveys achieved as a percentage of number of social survey interviews achieved.



## 6.6 Performance against Targets

The key targets were met during Year One. The target of 70% response to social survey interview annually was achieved. The target of 60% minimum response to social survey interview in any UA was achieved in all UAs.

In Year One, 3,114 paired cases were achieved against an annual target of 3,000. The intention of attaining 80 paired surveys in each UA was achieved in 26 UAs but was below in six UAs. The target is 240 paired cases over three years, so Year Two targets will be updated to reflect this. The new Year Two targets for these six UAs are:

Aberdeen City	Year Two minimum target	88
Clackmannanshire	Year Two minimum target	86
West Dunbartonshire	Year Two minimum target	82
Falkirk	Year Two minimum target	82
South Ayrshire	Year Two minimum target	90
South Lannarkshire	Year Two minimum target	85

The target conversion rate (percentage of cases with a social survey interview where a full physical survey has been completed) was 83%, however, 81% was achieved. A conversion rate of 75% minimum in any UA was achieved in 29 UAs but not in three UAs. Eighty six per cent of vacant properties had an external survey completed against a target of 90%.

## 6.7 Compliance with Surveyor Allocation Rules

Rule One - Each surveyor must work in at least two UAs in each year of fieldwork and at least three UAs over the three-year fieldwork period.

Forty-five surveyors worked in four or more UAs during Year One. On average, surveyors worked in 6.4 UAs during Year One fieldwork. Three surveyors in Orkney and Shetland only worked in two UAs and one surveyor in the Western Isles only worked in one UA due to ill health.

Rule Two - No surveyor should complete more than 25% of the surveys issued in a UA per year, with the exception of Orkney and Shetland where one surveyor should not exceed 33%.

The addition of external surveys to the target in the third quarter of fieldwork meant that 25 surveyors who had carried out additional external surveys, were already over the 25% limit in some UAs. These surveyors were not allocated surveys in those UAs in the final quarter of Year One. Table 13 shows the surveyors over the 25% limit at the end of Year One.

**Table 13: Percentage of surveys completed within a unitary authority by an individual surveyor during Year One**

Surveyor number	Unitary authority exceeding 25%	Percentage
15	Dumfries and Galloway	30.0
47	Perth and Kinross	29.7
22	East Lothian	29.6
31	Moray	29.6
34	Angus	29.5
18	South Lanarkshire	29.2
42	Argyll and Bute	28.6
21	Scottish Borders	28.4
32	Aberdeen City	28.3
33	Aberdeen City	28.3
40	Clackmannanshire	28.3
29	Fife	27.8
27	West Lothian	27.6
41	Eilean Siar	27.1
43	Argyll and Bute	26.7
44	Argyll and Bute	26.7
12	Dumfries and Galloway	26.7
38	Highland	26.5
13	North Ayrshire	26.5
14	Inverclyde	26.1
39	Perth and Kinross	26.1
36	Dundee City	25.7
19	Inverclyde	25.2
	Unitary Authority Exceeding 33%	Percentage
49	Orkney Islands	36.5
50	Shetland Islands	37.3

Rules Three and Four - Each surveyor's allocation should contain a mixture of dwelling types and a balance of urban/ rural properties approximate to the profile of the area they are working in over each year of fieldwork.

In order to monitor this, analysis of all full and external surveys by property type for each UA, and by urban/rural for each UA allowed MMBL to profile allocation for each surveyor according to the rules. This was monitored through the website - and indications are that there was limited variance with allocation of urban/rural and property type in any UA for surveyors (see Appendices for example of web based report).

Rule Five - Each surveyor should conduct no more than a maximum number of surveys over each year of fieldwork.

Initially the maximum number of surveys per surveyor was 92 full surveys per year which was derived from one and a half times the annual target number of full surveys (3,000) divided by the number of surveyors (49). MMBL set its own internal target of between 45 and 75 full surveys with a mean of 62. When externals were included the maximum became 115 full and external surveys per surveyor per year, derived from one and a half times the annual target number of full and external surveys (3,800) divided by the number of surveyors (49). MMBL also re-set its own internal target, which became between 50 and 100 full and external surveys per surveyor. Table

14 shows the number of full and external surveys completed by each surveyor. As shown, no single surveyor conducted over 115 surveys per year, therefore this rule was adhered to.

**Table 14: Number of full and external surveys by surveyor number**

Surveyor number	Total full and external
23	102
38	98
45	96
15	95
27	94
17	94
13	94
11	91
14	91
22	90
8	90
47	90
3	89
18	88
9	88
39	88
2	88
25	87
32	87
6	87
37	86
5	86
43	85
28	84
44	84
26	83
31	82
42	82
19	81
24	81
12	81
36	81
29	80
33	78
40	76
49	76
50	76
16	75
34	75
21	72
7	69
41	65
35	64
10	64
20	62
48	56
1	49
4	44
46	20

## **7 Delivery of the Social Interview Data**

### **7.1 Social Survey Edit Program**

An edit application for the CSHCS was programmed by ONS using Manipula<sup>7</sup>. Manipula is part of the Blaise suite of survey software that allows customised extraction and reformatting of collected interview data. The edit application has a front-end that allows cases to be edited on an individual basis, thus reducing potential editor error. Photographs of the property taken by the surveyors are also available with the interview data. The main focus of the edit application is to check cases for errors, inconsistencies and outliers. All the soft checks included in the questionnaire program were included as checks in the edit program. Additional checks, specified by Communities Scotland, were also included. All 'other' responses were flagged up so that backcoding to one of the response categories could take place where possible.

### **7.2 Edit Process**

Social survey data from each quarter received from interviewers were divided into batches of 100 cases (equivalent to 10 batches per quarter). A batch of data was then run through the program and a list of errors/ checks (validation report) was produced. This was then converted into a spreadsheet, which the editors used as a basis for their work. Justifications for editing or not editing the data were made on the spreadsheet along with recording variables that had been checked. The spreadsheet was quality assured by another member of the ONS research team.

Both the unedited and edited data are run through SPSS<sup>8</sup> syntax files in order to rename the variables, add labels and convert multicode questions to dichotomous variables. As the questions on the social survey questionnaire usually end in a numeric, the variable names produced from the Blaise data differ from how they originally appeared in the questionnaire. By running the data through the syntax files, the variable names are recreated according to specification from Communities Scotland.

For each batch, three datafiles are created; unedited numeric data, edited numeric data, edited open-ended data. These, together with the spreadsheet, are delivered by ONS to Communities Scotland.

### **7.3 Accepting and Rejecting Data**

Staff at Communities Scotland run their own checks on the delivered datafiles. Of the open-ended data, ten per cent are checked at random to ensure consistency of backcoding. All the edit changes on the edited numeric data are checked for consistency and accuracy. Batches of data have been rejected for any of the following reasons.

- The information in the case leads to the conclusion that data should have been amended, but they were not.
- An edit change cited was not made.
- A change was made/ not made which was inconsistent with other batches.
- Variable labels were misleading or missing.

Communities Scotland send a memo to ONS acknowledging rejection or acceptance of the batch of data.. Any rejected data are re-edited by ONS and sent back to Communities Scotland for further checking.

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<sup>7</sup> For more information on Manipula and Blaise see [www.cbs.nl/en/](http://www.cbs.nl/en/).

<sup>8</sup> Statistical Package for the Social Sciences. For further information see [www.SPSS.com](http://www.SPSS.com).

Once all the data batches for a quarter have been accepted, ONS combines the batches to create a full quarterly dataset, which is then delivered to Communities Scotland.

#### **7.4 Review of the Edit Checks and Process**

During March 2004, a joint review of the social survey edit checks was undertaken by Communities Scotland and ONS. It was felt that the spreadsheet produced by the edit program could be reduced in length. This was achieved by deleting those checks that would not result in an edit change, removing duplicate or similar checks and re-specifying/ tightening the specification of certain checks so that they appeared less often. However, some additional checks were also added where it was felt that the existing program did not cover areas sufficiently.

The process and timetable were also discussed. ONS was concerned that information as to why a batch was being rejected would not be detailed enough, which would be time-consuming to identify and remedy. Communities Scotland reiterated that the reason for doing this was so that all data could be re-checked as other errors may appear. It was agreed to continue with the existing process and review at the end of the year.

## 8 The Physical Survey Edit and Validation Process

The process of editing the physical data on the CSHCS can be broken down into three steps: return of survey forms, keying forms and validation. Each of the stages is described below.

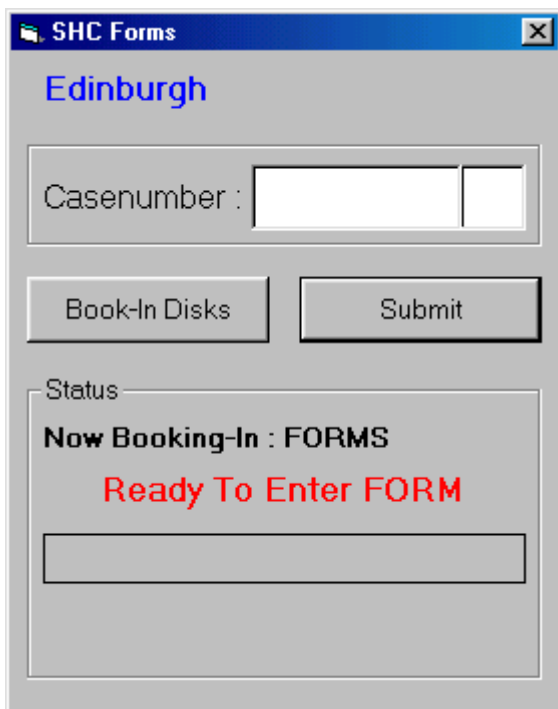
### 8.1 Return of forms and outcomes

Once the physical survey has taken place, surveyors code the form and send it for checking and validation to the MMBL office in Edinburgh.

When the form has been received in Edinburgh, the first stage is to electronically book it in and perform a clerical check of each page to ensure that all pages have been completed as required, and that each box has a value to be entered to the database.

The booking-in involves entering the case number for each form into the SHCS physical survey database. Editors also book in the floppy disks which usually hold four images of the surveyed property (front, back and two area pictures).

**Figure 3: Booking-in forms screen**



The screenshot shows a Windows-style application window titled "SHC Forms". The window has a blue title bar with a close button. Below the title bar, the word "Edinburgh" is displayed in blue. There is a text input field labeled "Casenumber :". Below this field are two buttons: "Book-In Disks" and "Submit". At the bottom of the window, there is a "Status" section containing the text "Now Booking-In : FORMS" and "Ready To Enter FORM" in red. Below the status text is an empty rectangular box.

**Figure 4: Booking-in disks screen**

The screenshot shows a window titled "SHC Forms" with a blue header bar. Below the header, the word "Edinburgh" is displayed in blue. There is a "Casenumber" label followed by a text input field. Below this are two buttons: "Book-In Forms" and "Submit". A "Status" label is positioned above a larger rectangular area. Inside this area, the text "Now Booking-In : DISKS" is shown in bold black font, and "Insert Picture Disk" is shown in red font. At the bottom of this area is a horizontal rectangular box.

There are three types of physical survey:

- a full physical survey 'full'
- an external only survey 'external'
- a dwelling description only 'dwelling description'.

The extent of the physical survey is dependent on the outcome of the social survey (full, partial, non-contact, refusal or ineligible) and whether the respondent has agreed to the request for a physical survey. It is necessary to link the outcomes of the social survey to a physical survey, the following rules outline the criteria for each type of survey.

#### **Full Physical**

Willing =1 and where outcome = full '110' or '120' (this will constitute a 'paired case')

#### **External only physical survey**

Willing=2 and outcome '210', '220', '230'

Vacants 730

#### **Dwelling description only physical survey also for the following social survey outcomes**

310, 320 and 330 Non Contacts

750 Second Homes

510 Ill at home during survey period

520 Away in hospital throughout survey period

530 Physically or mentally unable

540 Language difficulties

550 Interview lost/ deletion requested after data collected

Once the social interview was concluded and a final outcome assigned, together with an indication of whether the household would be willing to take part in the physical survey, the questionnaire was transmitted to HQ and the relevant details immediately routed to the secure MMBL website.

## 8.2 Keying of forms

Each form was keyed into the Blaise database. An editor can key a booked-in form by selecting its serial number and then selecting to key the form. If the form has already been entered or if the form has not been booked-in, a warning will be issued. This guards against forms being entered more than once. If a form needs to be checked after it has been entered, or if the input was not completed, the editor can access it by selecting 'edit existing case'.

**Figure 5: Screen to input details for a booked in case**

The screenshot shows a software dialog box titled "SHC Physical Survey Data Input" with a subtitle "Edinburgh". The dialog is divided into several sections. The first section, "Select stage", contains a dropdown menu with "310" selected and an "OK" button. The second section, "Select serial/case number", contains a dropdown menu with "23005019" selected, two radio buttons ("Key new case" is selected and "Edit existing case" is unselected), and an "OK" button. Below these sections is a "Validate case" button. At the bottom of the dialog are two more buttons: "Update Master dataset" and "Quit".

Once a case is edited, an electronic Blaise object exists for it. This is known as computer assisted data input (CADI). In CADI, as in CAPI, the electronic questionnaire routes to relevant questions based on answers to previous questions and, following programming logic, obeys the circumstances of the individual case. For the CSHCS, as data input takes place, the editor can also look at the picture images to verify details. The survey form for the CSHCS consists of a number of separate sections, as shown in Table 15.

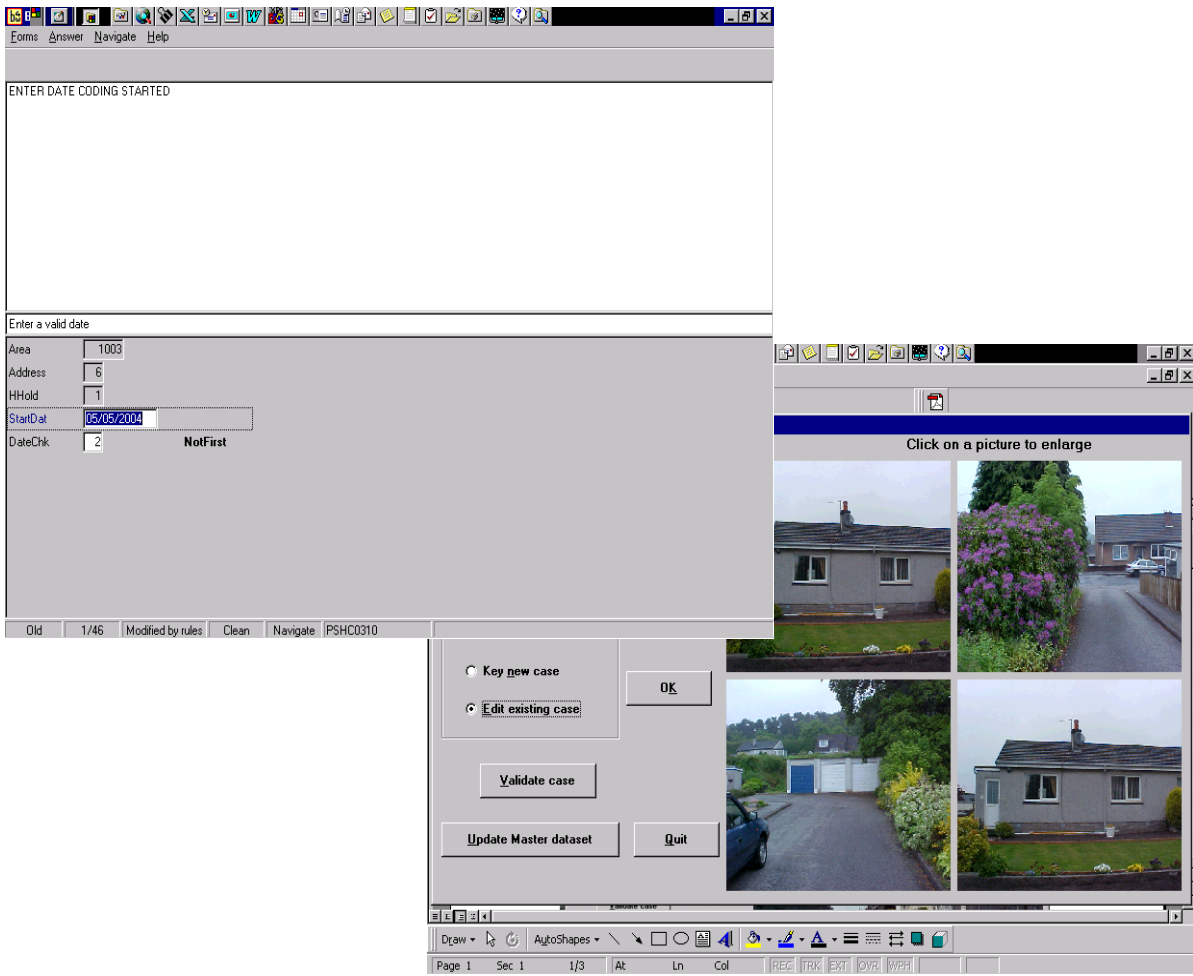
**Table 15: Summary of the SHCS physical survey form**

Section	Title of section	Section contents
A	Contact information	Date and time of each call made and call outcome
B	Type of survey	
C	Area information	Characteristics of the general area
D	Dwelling description	Type of accommodation, entry level, date of construction etc.
E	Characteristics of the Common Block	Flats, conversions, number of dwellings in common block
F	Room by room record	Location of and use of each room
G	Room repairs	Comprehensive assessment of state of repair of each room
H	Types of defect/condition	Features of the room - access, lighting, ventilation etc
I	Repairs to the whole dwelling	Overall assessment
J	Rooms/Floors summary	
K	Amenities	Specific information on bathroom, WC and kitchen
L	Services and fittings	Power supply, water supply etc.
M	Heating and insulation	Primary/secondary, appliances, fuel, repairs, insulation
N	Dwelling measurements	
O	Characteristics of common elements	Communal areas, stairs, lifts, entry system etc
P	Repairs to common elements	
Q	External construction/materials	Wall exposure, thickness, roof type, window type
R	External repairs	Roof, chimney, flashings, gutters etc
S	External features	Surface drainage, fences, walls, paths, steps
T	Tolerable standard - statutory declaration	Essential components of 'Below Tolerable Standards' assessment

The program has a number of data input rules which are in place to ensure the accuracy and validity of each piece of data entered. Rules will cross-reference between different parts of the survey form, eg, if the dwelling is a house, then aspects of common dwelling section should not be completed, or, if the house is a flat, then details for these items should be present, e.g. number of common dwellings, if the common block contain a non-residential use, number of storeys in the common block.

As the data input progresses, anomalies will be flagged to the editor who can check the information and if necessary refer back to the surveyor or leave as a query for Communities Scotland to resolve.

Figure 6: Edit screens



**Figure 7: Example of errors triggered during data input**

Forms Answer Navigate Help

Is the repair urgent? (Secondary roof structure)

1. yes  
 2. no  
 8. n/a  
 9. unob.

R01VPT1 0  
 R01VPT2 0  
 R01REP 8  
 R02VPT1 0  
 R02VPT2 0  
 R02REP 8  
 R02RES 4  
 R03VPT1 99

Active Signal

ERROR R3cR7. Q10 indicates some/no secondary roof cover. Response at R03REP is inconsistent. Please check.

Questions involved	Value
QREPEXT.R03REP	unob.
QEXTCONS.Q10	felt
QREPEXT.VIEWPT2	Back with left
QREPEXT.VIEWPT1	Front only

R05VPT2 88

Old 39/46 Modified by rules Suspect Navigate PSHC0310

Forms Answer Navigate Help

Cover to secondary roof

1. slates  
 2. tiles  
 3. felt  
 4. asphalt  
 5. asbestos

Q01 1  
 Q02 2  
 Q03 4  
 Q04 1  
 Q05 1  
 Q06 1  
 Q07 1  
 Q08 10

Active Signal

Q08 indicates extent of principal roof type is 100%. Response at Q10 is inconsistent with this. Please check.

Questions involved	Value
QEXTCONS.Q10	felt
QEXTCONS.Q08	10

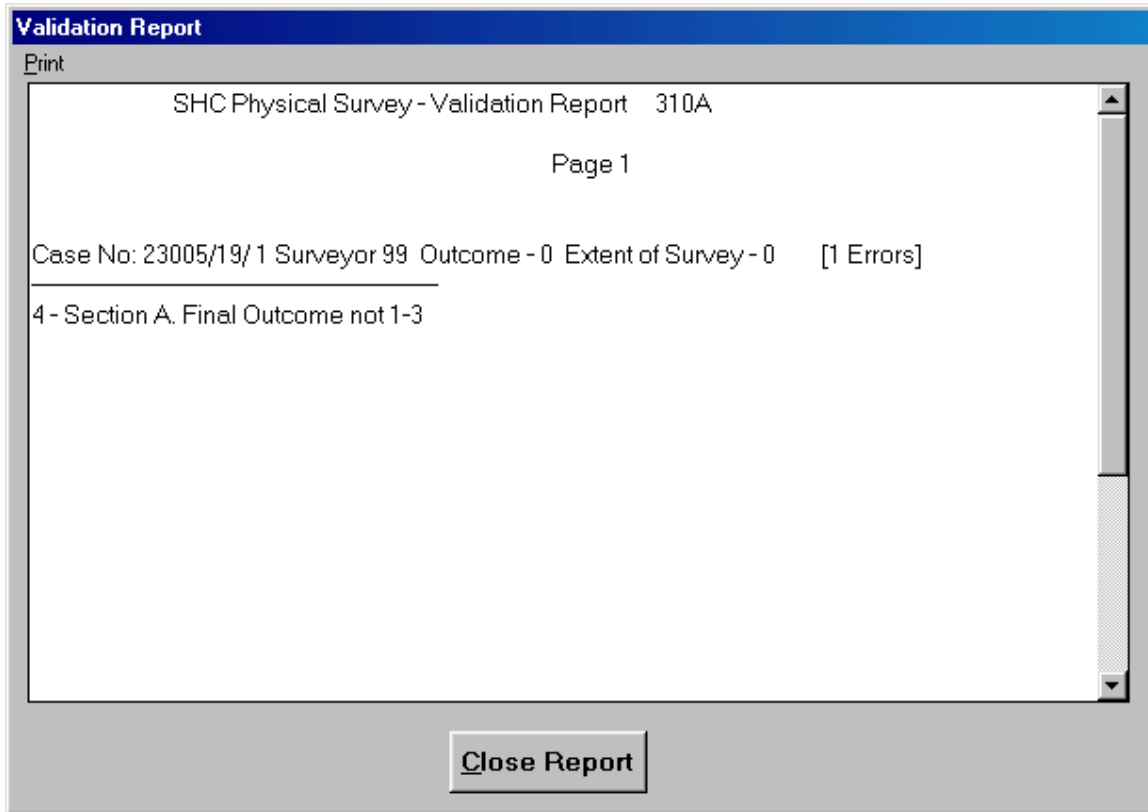
VIEWPT1 3 **felt**

Old 37/46 Modified by rules Suspect Navigate PSHC0310

### 8.3 Validation

Once the survey form has been fully keyed and any potential errors resolved or noted, the data is re-validated. The re-validation identifies any earlier checks which were not dealt with and a number of final checks are also undertaken to ensure that the data is high quality, logical and consistent. The validation produces a 'validation report' for each case which is printed and all entries re-checked. A copy of such a report follows.

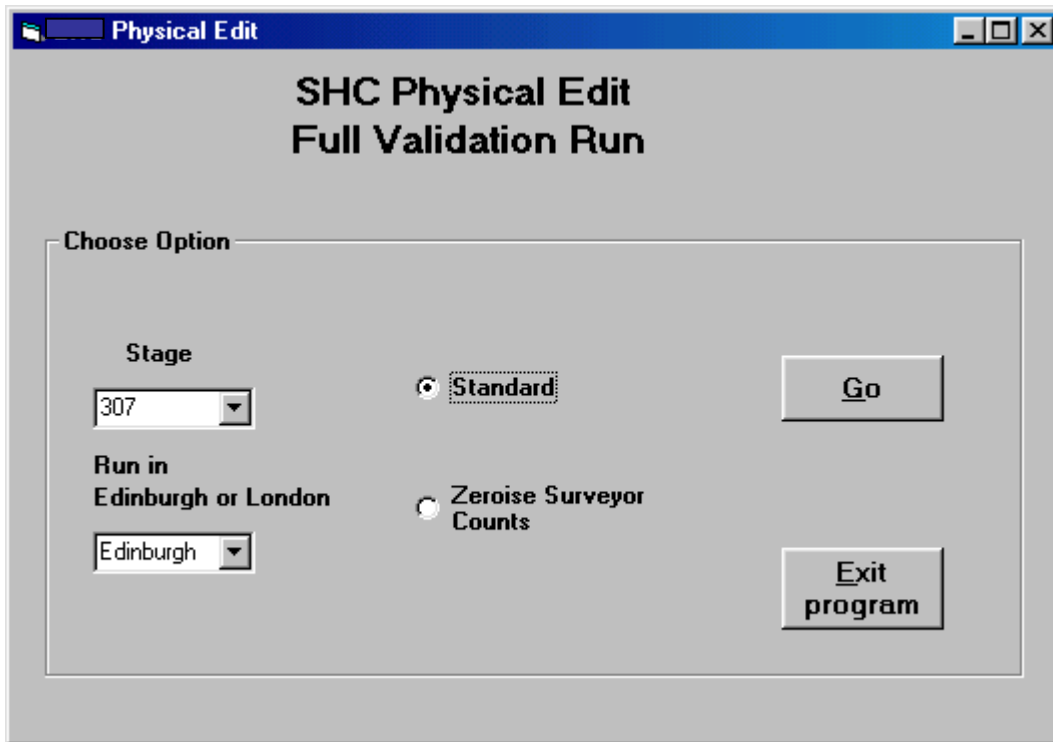
**Figure 8: Physical survey validation report**



Once the form is clean or where any entries are accepted by Communities Scotland, the electronic form is saved to the master datafile.

Delivery of physical survey data to Communities Scotland takes place quarterly. In preparation for delivery, a final set of validation reports are produced on data for the whole quarter. This lists all forms keyed and any unresolved discrepancies. This full validation run produces a summary of any remaining errors which are then dealt with by further editing, followed by individual validation and full validation. Over the course of the year, ongoing refinements have been made to the checks and error statements to ensure that they are as accurate as possible and trap only those cases where the data input or form are incorrect.

Figure 9: Physical edit validation screen



Once the full validation produces a set of clean reports the data are then zipped and transmitted to London where the information is reformatted from Blaise into SPSS for delivery. Twelve SPSS datafiles are delivered to Communities Scotland for each quarter of the CSHCS physical survey.

## **11 Recommendations for Year Two**

### **11.1 Sampling**

The sampling process for Year Two was redesigned by the ONS Methodology Group. As the sample for Year Two had to be drawn well in advance of the beginning of the Year Two fieldwork, assumptions were based on the evidence of the first three quarters of Year One data.

Ineligibility rates were higher than the expected rate in all but three of the Scottish UAs. The overall difference is over 4% higher and in most UAs the difference is around this level. However in six UAs the difference was higher even higher. The new assumption is that ineligibility rates are 3% higher than expected in the majority of UAs and 6% higher in Angus, East Ayrshire, Fife, North Lanarkshire, Perth and Kinross and Stirling. This pattern will be checked against Scottish Labour Force Survey data for Year 3.

Overall the response rate in Year One was 2% lower than expected, but within UAs the response rate varied greatly from 14% higher than expected to 17% lower than expected. Where the differences were significantly different from the assumption made for Year One, the response rate was increased or decreased by approximately half of the difference between the two rates. These assumptions are probably the least robust due to the large variation in observed response rates. It is recommended for Year Three that response in each UA is monitored and the sample adjusted accordingly in light of new information.

Overall conversion rates (physical survey agreed to when a social survey has been completed) in Year One were 3% lower than expected, however in the majority of UAs, conversion rates were not significantly different to what was predicted. However, in seven UAs where the conversion rate was significantly different to the expected figure, a new rate halfway between the expected and the observed in these UAs was assumed for Year Two (lower in six UAs and higher in one UA). These observed rates are based on the smallest sample sizes so the lack of variation is encouraging.

Overall, the set sample for Year Two has 336 more addresses than Year One to achieve a sample of just over 3,000.

### **11.2 Improving Response**

ONS has successfully used small 'token' incentives to boost unit response<sup>9</sup>. It was agreed that incentives would be used on the CSHCS from quarter two of Year Two in order to increase response rates.

### **11.3 Social Survey Questionnaire Development**

After discussion between Communities Scotland and ONS, and consultation with the users of the CSHCS, the social survey questionnaire for Year Two is to be amended. The significant changes are detailed below:

- Questions asking respondents to specify which housing association they rent from will be removed.
- The section on amenities will be re-worked with some questions rephrased and some removed.
- Various other questions will be removed, eg, DPF9.

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<sup>9</sup> McConaghy and Beerten in *Social Survey Methodology Bulletin* No 51 January 2003 pp 27-35, ONS, London

- The heating section was refined in order to eliminate repetition of questions. Respondents will be asked if they have a timer for their heating and whether all rooms are heated for the same time per day.
- The questions on Housing Benefit and rent will be amended based on those used on the Family Resources Survey. This was decided following on from comments from the editors at ONS who has noted this as a particular problem during Year One.
- The Council Tax questions will be amended to distinguish more accurately between rates paid with and without water and sewerage. These questions will also be based on those already asked on the Family Resources Survey.
- ONS will expand some of the answer categories at questions where other responses were specified in Year One and then backcoded. Additionally, any other responses specified that were frequently seen were added to response categories where possible.
- A general health questionnaire (called 'GHQ12') is to be added to the social survey interview for Year Two. This will be included in the questionnaire for respondents to fill in themselves.

#### **11.4 Physical Survey Form Development**

After discussion between Communities Scotland, ONS and MMBL and consultation with the users of the CSHCS, the physical survey form is to be amended for Year Two. The significant changes are detailed below:

- Questions in the Area Information section, will be removed, eg, the nature and land use of the area.
- Additional questions will be added e.g. NHER to measure heating efficiency
- The Aide Memoire will be printed on the reverse of each page so that relevant facts and procedures are available to the surveyor at the appropriate point of the form

#### **11.5 Surveyor Feedback**

A questionnaire was designed by MMBL and sent to the surveyors that had worked on the CSHCS during Year One. The survey addressed areas including the physical survey form, the documentation, training, survey administration and the MMBL website. Twenty-five surveyors returned their forms. Comments were generally favourable. Any specific suggestions were incorporated into plans for Year Two. For example, some surveyors suggested that the time given at the test houses during the training was too short and so this was extended for the training for Year Two.

#### **11.6 Types of Physical Survey**

In Year One, there were three types of physical survey: full physical survey, external physical survey and dwelling description. . The main difference between the external survey and a dwelling description is the assessment of the state of repair of the external parts of the property. The external survey was used to gain a picture of and put a value on unoccupied stock and potentially to collect information that could be used in statistical modelling. Communities Scotland proposed at the end of Year One to drop the external survey as the cost of collecting the information in external surveys outweighs its value. During Year Two, the option of a respondent being offered an external survey will be removed and unoccupied stock will have a dwelling description only.

## **11.7 Review of Targets**

Towards the end of Year One, the response and progress targets were reviewed by Communities Scotland. The progress targets will be amended for Year Two. The necessity to complete 95% of social survey interviews by the end of second month of the quarter will be removed from the targets and will be used for monitoring purposes only. The progress target to complete 95% of the paired cases required quarterly by the end of each quarter will remain in place. The key progress target remains 750 paired cases per quarter.

As external surveys will no longer exist in Year Two, it was agreed between Communities Scotland, ONS and MMBL that the 90% target for vacant properties would be an annual target only and would relate to dwelling descriptions.

It was agreed that the surveyor allocation rules will be based on full paired cases only for Year Two.

## **11.8 Delivery of the Social Interview Data**

Deadlines for delivery of the social interview data have consistently not been met during Year One. At the outset this was due to teething problems with the initial setting up of the process and edit program. Further delays were caused by problems with the computer systems at Communities Scotland, MMBL and ONS. ONS reported that the edit process was time consuming and took much longer than had originally been envisaged. ONS put forward a proposal to reduce the number of checks in the edit program and therefore streamline the process for Year Two. After agreement from Communities Scotland, ONS is to amend the social edit program for Year Two accordingly. ONS has also taken on more staff to help with the social data editing.

## **Appendix**

List of abbreviations

Advance letter

Purpose leaflet

Dwelling/ household selection form

Repairs and Work Done

Copy of Physical Form

## List of Abbreviations

BTS	- Below Tolerable Standard
CAI	- Computer Assisted Interview
CMS	- Case Management System
CSHCS	- Continuous Scottish House Condition Survey
HRP	- Household Reference Person
MMBL	- Miller Mitchell Burley Lane
ONS	- Office for National Statistics
PAF	- Postcode Address File
SHCS	- Scottish House Condition Survey
SIU	- Sampling Implementation Unit
UA	- Unitary Authority
Year One	- the first year of the Continuous Scottish House Condition Survey from October 2003 to September 2004
Year Two	- the second year of the Continuous Scottish House Condition Survey from October 2004 to September 2005

Advance Letter



Office for National Statistics  
1 Drummond Gate  
London SW1V 2QQ

[www.shcs.gov.uk](http://www.shcs.gov.uk)  
[www.statistics.gov.uk](http://www.statistics.gov.uk)

Date as Postmark

### Scotland's housing

Dear Resident(s)

I am writing to ask for your help with an important survey of Scottish households. The survey is about housing and the neighbourhoods people live in and will influence decisions the **Scottish Executive** makes on investment and policy for communities across the **whole of Scotland**. The Office for National Statistics in conjunction with Miller Mitchell Burley Lane (a building surveying company) is conducting this study with the SHCS Team at **Communities Scotland**.

Your address has been selected at random to take part. To make sure the final results are accurate, we need to speak to people living in all kinds of property. This means those who own their homes as well as those who rent and those in remote rural areas as well as towns and cities. One of our interviewers will contact you shortly to explain the survey in more detail. More information can also be found by visiting the website - [www.shcs.gov.uk](http://www.shcs.gov.uk). If you are busy when the interviewer calls s/he will be happy to call again.

All of our interviewers carry an official identification card that includes their photograph and the National Statistics logo as it appears on the top of this letter. Everything you tell us will be treated in the strictest confidence and will be used for statistical purposes only. You will not receive any 'junk' mail as a result of taking part.

As with all our surveys we rely on people's voluntary co-operation; this is essential if our work is to be successful and the results of this study are to be an accurate account of housing in Scotland today.

For further information please call 0800 083 83 88 (direct line).

Thank you in advance for your help.

A handwritten signature in black ink, appearing to read "Robert Hull".

Robert Hull  
Survey Manager

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The Office for National Statistics is the government office that organises the Census and conducts surveys on behalf of Government Departments and other public bodies.

# FURTHER DETAILS ON REPAIRS AND WORKS DONE SECTION (DR1 – DR2 and DR20b - DR21)

## 1. General building projects

**Build extension or conservatory** – Include building over garages to create extra room or rooms. Do not include porches.

**Convert loft or garage into living accommodation** -include all conversions which provide additional living space for the occupants. Do not include any rearrangement of existing rooms e.g. knocking two rooms into one or partitioning of one large room into two smaller ones.

**Completely refit or extend kitchen** - this means replacing all of the kitchen units and /or making the kitchen significantly larger. In many cases other work will have been done as well e.g. re-planning, new tiles, new floor etc. Smaller jobs such as just replacing the worktops, cupboard doors or sink unit and minor adjustments to accommodate new appliances e.g. moving a cupboard to accommodate a dishwasher or built-in oven do not count.

**Replace bathroom suite** Include cases where all of the facilities in a bathroom, separate toilet or shower room have been replaced. Smaller jobs such as replacing just one item e.g. toilet cistern do not count.

**Provide additional bathroom or WC** - this could involve installing amenities in a newly built extension or installing them in an existing room. New separate toilets and new en-suite bathrooms count. Do not count cases where additional amenities are put into an existing bathroom e.g. installing a shower over the bath.

**Build garage or car port** - include all garages on the plot of the house. They do not need to be attached to the dwelling. Do not include garages elsewhere e.g. if the council have built a new block of garages on the estate.

**Re-surface drive or path** – include all types of material (tarmac, concrete, paving slabs, brick etc.)

**Work to foundations or structural work to walls** – For foundations, the work will normally be underpinning – this involves digging a deep trench down below the existing foundations and filling it with concrete to make the foundations stronger. It includes rebuilding any sections of the exterior walls (replacing damaged bricks) or replacing any concrete or stone window sills. It also includes replacing lintels-these are the beams above door and window openings and are normally made of timber, concrete or steel. Work to the wall surface (pointing, rendering and cladding) is covered on card 5.

**Any work to damp proof course** - this normally means installing a new damp proof course to all or part of the outside walls. Work normally involves drilling a horizontal line of holes at the bottom of the wall and injecting a special chemical compound.

## 2. Heating and insulation

**Install complete central heating system where none before** – this just includes cases where the dwelling had no central heating before and it has been installed. Storage heaters count as central heating provided that there are at least 2 of them.

**Extend central heating** – this means adding one or more extra radiators, or for storage heater systems, extra storage heaters.

**Install additional gas fires or heaters** – this means extra fires/heaters rather than replacing existing ones. Include any type of mains gas fire or gas convector heater. Do not include gas water heaters or portable bottle gas heaters.

**Replace central heating boiler** - just include replacements of boiler itself. If the occupants have just replaced the pump, time-clock or other controls do not code this as replacing the boiler.

**Service central heating boiler or heating appliance** – this means someone has been round specifically to service the boiler, fire or heater. This would normally be done by the gas company or a registered gas fitter.

**Install or improve loft insulation** – this includes putting in insulation where there was none before, adding extra insulation on top of the old or removing the old and replacing it with new material.

**Install cavity wall insulation** - this involves drilling holes in the walls and injecting foam into the cavity between the inner and outer sections of the wall. The holes will be at a variety of different heights and not in a line at the bottom as for a damp proof course.

### 3. Other work inside the home

**Completely rewire dwelling** - this means replacing all of the sockets, light fittings, electrical cable and fuse box.

**Install burglar alarm or security lighting**- this includes any additional external lights.

**Any work to stairs or staircase** – This just refers to stairs inside the house or flat. Any other staircases in common areas or external fire escape stairs are covered on card 6 "work to the whole block". Include any work to the staircase itself no matter how small e.g. replacing a handrail or replacing a broken balustrade. Do not include any replacements of carpet or other covering to the stairs.

**Re-plaster at least one entire wall or ceiling** - include cases where the ceiling or wall has been replaced with plasterboard. Do not include smaller jobs such as filling in cracks to walls or ceilings.

### 4. Windows and external doors

(External doors means main front door and any back, side, patio or balcony doors).

**Paint or varnish the outside of windows**

**Major repairs to windows – cut out and replace rotten parts of windows or frames**

**Replace one or more windows with single glazed units** - this involves taking out the complete window and frame and replacing it with a new one which is single glazed. This will normally be made of wood and painted. It does not mean just replacing the glass.

**Replace one or more windows with double glazed units**- as above but the replacement window is double (or triple) glazed and will be made of UPVC or hardwood.

**Replace door with standard door without double-glazing**

Replace door with double-glazed door

## 5. Work to the outside of the house or block of flats

**Replace a large area of roof covering (at least 6ftx6ft or 2mx2m)** - this means removing the existing tiles, slates, felt or asphalt cover and replacing them/it.

**Replace flat roof with pitched roof** – this is sometimes called over-roofing. The old flat roof may have been for the whole house or block or it may have just been for part of it e.g. over a porch or a bay

**Rebuild or re-point chimney stack** – re-pointing means scraping out the old mortar from the joints between the bricks and replacing it with new mortar.

**Replace gutters or rainwater pipes** – some people refer to rainwater pipes as 'downpipes'. Include cases where only some of the guttering or rainwater pipes have been replaced as well as cases where all have been replaced.

**Clear out drains or gutters** - clear any blockages in the outside drains or clear away any dead leaves and other debris from guttering.

**Repair or replace pointing, rendering or cladding** - these are all different types of wall finish. Pointing refers to the mortar joints between bricks. Rendering is a coat of cement applied to the outside of the walls and sometimes studded with pebbles ('pebbledash'). Cladding refers to any panels or other material which is fixed to the outside of the wall. For houses cladding is not very common but normally consists of wooden planks, tiles or imitation stone. For purpose-built blocks of flats cladding normally consists of concrete or panels made from laminate or plastics.

**Replace mains water connection** – This involves replacing the pipework which runs from the water main in the street to the stopcock inside the house (normally found under the kitchen sink). This will have been done by the local water company. Include cases where the dwelling was connected to the water mains for the first time.

## 6. Work to the whole block

*Install entryphone system where none before*

**Install security cameras where none before**

**Basic repairs to corridors, stairways or main entrance** - include any type of repairs carried out to walls, floors, stairs, doors or screens.

**Install or replace fire alarm** - this refers to the main fire alarm system for the block. It does not refer to any smoke detectors.

**Install or replace lifts** - include cases where the block did not have lifts before but these have been installed and also cases where the old lifts have been replaced with new ones.

**Remove one or more storeys or demolish part of block** - this refers to major remodelling of blocks of flats which would normally only take place in large area regeneration schemes. Occasionally one or more of the top floors is simply taken off the block and a new roof put on. Sometimes sections along the length of very long blocks of flats are demolished to create a number of smaller blocks.

(OVS)

2003/04 SCOTTISH HOUSE  
CONDITION SURVEY  
Dwelling/Household  
SELECTION FORM

<b>SERIAL</b>  STICKER  LABEL
---

<b>Interviewer</b>				
<b>Number</b>				

**DWELLING/HOUSEHOLD SELECTION FORM**

COMPLETE Q1 & Q2; BEFORE MAKING CONTACT

**PROPERTY TYPE**

Q1. Code property type of printed address:

Detached house	1
Semi-detached house	2
Terraced house	3
Tenement flat	4
4-in-a-block flat	5
Tower block/slab flat	6
Conversion flat	7
Other (WRITE IN & CODE '8')	8
Not applicable	9

**FLOORS**

Q2. How many floors does the building containing the address have?  
(ESTIMATE IF UNKNOWN) - (EXCLUDING BASEMENTS)

less than six	1
six or more	2

**NUMBER OF DWELLINGS**

**Dwelling:** A dwelling is a unit of accommodation (normally a house or flat) where all the rooms and amenities (ie kitchen, bath/shower room and WC) are for the exclusive use of the household(s) occupying them. Amenities may be located outside the front door but provided they are for the exclusive use of the occupants the accommodation is still a dwelling.

Q3. Does the sample address consist of...

a single dwelling	1	GO TO Q6
part of a dwelling	2	GO TO Q4
more than one dwelling	3	GO TO Q5
dwelling(s) with non-residential unit(s)	4	
Don't know/Refused	5	<b>GO TO Q6</b>

**NUMBER OF PAF LISTED ADDRESSES AT THE DWELLING**

Q4. Contact SIU and record the number of PAF listed addresses at the dwelling.

 GO TO Q6

**NUMBER OF DWELLINGS AT THE ADDRESS**

Q5.

**Please estimate the number of dwellings at the sampled address.**

 GO TO KISH GRID (below)

**NOW SELECT ONE DWELLING FOR INTERVIEW USING THE KISH GRID BELOW.**

**IF MORE THAN 9 HOUSES/FLATS AT ADDRESS CALL OFFICE FOR INSTRUCTIONS.**

SELECT NUMBER USING GRID

		NUMBER OF DWELLINGS AT ADDRESS								
PLEASE RING		1	2	3	4	5	6	7	8	9
	<b>0</b>	1	1	2	1	3	6	5	4	7
	<b>1</b>	1	2	3	4	1	1	6	5	9
<b>LAST</b>	<b>2</b>	1	1	1	3	4	3	3	1	4
<b>DIGIT</b>	<b>3</b>	1	2	2	1	5	4	7	6	8
<b>OF</b>	<b>4</b>	1	1	3	2	2	5	2	3	6
<b>SERIAL</b>	<b>5</b>	1	2	1	4	3	2	1	7	2
<b>NUMBER</b>	<b>6</b>	1	1	2	3	1	6	4	2	1
	<b>7</b>	1	2	3	1	4	1	5	8	3
	<b>8</b>	1	1	1	2	5	3	6	4	5
	<b>9</b>	1	2	2	4	2	4	3	5	7

**NOW GO TO QUESTION 6**

Q6. Is the dwelling selected for interview.....

Occupied and contacted	1	}	GO TO Q7
Vacant/derelict	2		
Occupied and not contacted	3	}	END
Could not identify dwelling status	4		
Don't know/Refused	5		

# interview screening

**Household:** A household is defined as one person living alone or a group of people, who may or may not be related, living at the same address who share at least one living or sitting room and/or have a regular arrangement to share at least one meal a day.

Q7 How many households in total are at the dwelling?

.....Now go to Q8

## Q8 SELECTION OF PRIMARY HOUSEHOLD

**Primary household:** The primary household is defined as the household that has the main responsibility for the dwelling. The mortgage or lease is in their name, they have the responsibility for paying rent to the landlord; this household is also responsible for repairs and maintenance. The primary household contains the Household Reference Person (HRP).

**Single Dwelling**

If there is only **one primary household** at the dwelling/dwelling selected at Q5 go to Q9.  
 If the dwelling/dwelling selected at Q5 contains **more than one primary household**, record the number of primary households in the box below.

**Part of a Dwelling**

If sample address is part of a dwelling (code 2 at Q3) and there is only **one primary household** at the address go to Q9. If the sample address contains **more than one primary household** then record the number of primary households in the box below.

**NOW SELECT HOUSEHOLD FOR INTERVIEW FROM THE KISH GRID BELOW.**

SELECT NUMBER USING GRID

PLEASE RING	NUMBER OF PRIMARY HOUSEHOLDS AT ADDRESS									
	1	2	3	4	5	6	7	8	9	
<b>0</b>	1	1	2	1	3	6	5	4	7	
<b>1</b>	1	2	3	4	1	1	6	5	9	
<b>LAST</b>	<b>2</b>	1	1	1	3	4	3	3	1	4
<b>DIGIT</b>	<b>3</b>	1	2	2	1	5	4	7	6	8
<b>OF</b>	<b>4</b>	1	1	3	2	2	5	2	3	6
<b>SERIAL</b>	<b>5</b>	1	2	1	4	3	2	1	7	2
<b>NUMBER</b>	<b>6</b>	1	1	2	3	1	6	4	2	1
<b>7</b>	1	2	3	1	4	1	5	8	3	
<b>8</b>	1	1	1	2	5	3	6	4	5	
<b>9</b>	1	2	2	4	2	4	3	5	7	

**NOW GO TO QUESTION 9**

**ANY OTHER HOMES**

Q9. Can I check, which of these applies to *your household* and this home. Do you have ...

<b>this home only</b>	1	<b>GO TO QUESTION 12</b>
or more than one home? (include second homes and those on holiday here)	2	GO TO Q10
Refused/don't know	3	<b>END</b>

**MAIN/SECOND/HOLIDAY HOME**

Q10. Can I just check, is this your, or your household's, main home, your second home, or are you only here on holiday? IF HOLIDAY ASK: Are you staying with the people who own or permanently rent this property?

main home	1	<b>GO TO QUESTION 12</b>
second home	2	<b>END</b>
on holiday here – owners/renters not resident	3	GO TO Q11
on holiday here – staying with owners/renters	4	

**HOLIDAY HOMES**

Q11. Is this the **main home** of the household who owns/permanently rents it?

Yes	1	ARRANGE TO CALL BACK WHEN THEY MAY BE AVAILABLE
No	2	<b>END</b>
Don't know	3	

**LENGTH OF RESIDENCE**

Q12. Can I just check how long have you and/or your spouse/partner lived here?

If ALL householders (and their spouse/partners) have lived at the property for 3 months or less then code 1 below.

If any householder (or spouse/partner) has lived at property for more than 3 months then code 2 below.

3 months or less	1	<b>END</b>
Over 3 months	2	<b>START MAIN INTERVIEW</b>

**Q13. PLEASE NOTE ANY INFORMATION THAT MAY HELP THE SURVEYOR IDENTIFY AND CONTACT THE RESPONDENT**

Logout Scottish House Condition Survey 08/12/2004

Glasgow Change

House Type	Detached	Semi-detached	Terraced	Tenement	4-in-a-block	Flat converted building	Tower Slab	Other	Total	% of total for UA	Rural	Urban
% of house type determined from 2002 figures	2.05	12.24	12.25	49.95	12.64	1.16	9.72	0	100		0	100
Number predicted by 2002 figures	8	47	48	195	49	4	38	0	392		0	392
Surveyor	1											
Ideal	0.6	3.3	3.3	13.5	3.4	0.3	2.6	0.0	27.0		0.0	27.0
Actual	2	4	5	10	2	1	0	3	27.0	6.9%	1	26
0												
- Ideal	0.1	0.9	0.9	3.5	0.9	0.1	0.7	0.0	7.0		0.0	7.0
	0	0	1	3	2	1	0	0	7.0	1.8%	0	7

Internet

Internet Explorer browser window showing the Scottish House Condition Survey results. The address bar displays <http://shcsy1.mmbi-systems.net/>. The page title is "Logout Scottish House Condition Survey" with a date of 08/12/2004.

<b>Ideal</b>	0.7	4.2	4.2	17.0	4.3	0.4	3.3	0.0	34.0		0.0	34.0
<b>Actual</b>	0	7	6	12	3	4	0	0	34.0	<b>8.7%</b>	1	33
0												
<b>Ideal</b>	0.2	1.2	1.2	5.0	1.3	0.1	1.0	0.0	10.0		0.0	10.0
<b>Actual</b>	1	2	2	1	3	1	0	0	10.0	<b>2.6%</b>	0	10
0												
<b>Ideal</b>	0.4	2.3	2.3	9.5	2.4	0.2	1.8	0.0	19.0		0.0	19.0
<b>Actual</b>	1	2	2	9	1	2	1	1	19.0	<b>4.8%</b>	0	19
0												
<b>Ideal</b>	0.0	0.2	0.2	1.0	0.3	0.0	0.2	0.0	2.0		0.0	2.0
<b>Actual</b>	0	1	0	0	0	1	0	0	2.0	<b>0.5%</b>	0	2
0												



ONS is the government department which gathers and publishes a range of statistics about the economy and the society in which we live. ONS carries out many important surveys throughout Great Britain, providing information on the cost of living, health, housing, and many other matters of public interest.

[www.statistics.gov.uk](http://www.statistics.gov.uk)

Miller Mitchell Burley Lane will be conducting the visual inspection of the property.

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

The Scottish House Condition Survey is undertaken by Communities Scotland on behalf of Ministers. Its purpose is to collect information on the changing condition of housing in Scotland and the characteristics of the households living in different types of housing.

[www.communities.scotland.gov.uk](http://www.communities.scotland.gov.uk)

**If you have any further queries please call ONS on 0800 883 8388 or email [SHCS@ons.gov.uk](mailto:SHCS@ons.gov.uk).**



# Scottish House Condition Survey



[www.shcs.gov.uk](http://www.shcs.gov.uk)

#### WHAT IS THE SCOTTISH HOUSE CONDITION SURVEY?



The information collected by the Scottish House Condition Survey is the only source of information on the condition and energy efficiency of Scotland's homes. The survey builds a picture of all types of housing, whether owner-occupied or owned by local authorities, housing associations or private landlords.

#### WHO CARRIES OUT THE SURVEY?

The survey is carried out by the Office for National Statistics (ONS) and Miller Mitchell Burley Lane (MMBL) on behalf of the Scottish Executive's housing and regeneration agency, Communities Scotland. There are two parts to the survey. First, an ONS interviewer conducts an interview with you. Interviewers work flexible hours and can call at a time convenient to you.

A few days later, a professionally qualified surveyor, from MMBL, will visit you to assess the condition and energy efficiency of your home.



#### WHY ARE YOU CHOOSING MY HOME?



We want to ensure that all types of housing across Scotland are represented. To visit every home in Scotland, however, would take too long and cost too much, so we have selected a number of addresses in urban, rural and island locations for interviewers to visit. These were chosen at random from the Post Office list of addresses, and once chosen, cannot be replaced with another. This way we can be sure we talk to a cross-section of people and view as wide a range of properties as possible.

This is also why it is so important that each household contacted takes part in the survey whether they own or rent their homes, and whatever their circumstances. Even if you have only recently moved in or are planning to move in the near future, the information you give us is necessary to ensure we have a proper mix of households and properties.

#### SHOULD I LET MY LANDLORD KNOW I AM TAKING PART?

There is no reason to inform your landlord of your participation unless you want to.

#### HOW IS THE SURVEY USED?

The interview will include questions on your home and neighbourhood, work recently done on your home, and background information about your household. The Scottish Executive, Scottish Ministers and local authorities use this information to:



- measure whether housing conditions are getting better or worse for everyone; areas most affected by poor housing, how satisfied people are with where they live;
- monitor whether what is being done to improve standards in both public and private housing is working;
- target resources to where they are most needed.

#### WHAT WILL THE SURVEYOR DO?



Our surveyors usually take 30-40 minutes to assess the design, condition and energy efficiency of your home. Much of this time is spent surveying the outside, but they will ask to see all the rooms inside. The survey is a visual one and will include taking pictures of the front and back of your home. It will not disrupt your home in anyway.

#### IS THE SURVEY CONFIDENTIAL?

Yes. The information you provide is treated with the strictest confidence by the Office for National Statistics (ONS), as directed by the National Statistics Code of Practice. It is used to produce anonymous statistics for decision-making in government and genuine research purposes only.

In addition to staff in ONS, other staff of the Government Statistical Service, Universities and research organisations may apply for access to detailed but anonymous data from the survey. When approved these staff sign an agreement to abide by the same code of practice and its confidentiality clauses. No information which could identify you or your household will be passed to other civil servants or local authorities, commercial organisations or the press.





Surveyor Name

Surveyor Number

Surveyor: write serial number here  
Affix serial number label here

**A. CONTACT INFORMATION**

1. Contact Record **Make at least 4 attempts to obtain a full survey including a weekday (morning, afternoon and evening) and a weekend**

Call No.	Day (1-7)	Time (1-4)	Date (ddmmyy)	Day 1 = Monday 2 = Tuesday 3 = Wednesday 4 = Thursday 5 = Friday 6 = Saturday 7 = Sunday	Surveyor's Comments
1			/ /		
2			/ /		
3			/ /		
4			/ /		
5			/ /		
6			/ /		

2. Total number of calls

3. Time at Dwelling (minutes)

4. Final Outcome

property not usable as dwelling	5	property no longer used as dwelling	4	contact & refusal	3	no contact	2	contact	1
invalid dwelling type		9		withdrawn by ONS	8	dwelling untraceable	7	dwelling demolished	6

5. Refusal Information **If Final Outcome (A4) is not code 3, "Contact and Refusal" then use code 88, Not Applicable**

worried about landlord	08	nothing wrong with my house	07	not interested	06	no reason for refusal	05	too busy	04	SHCS too intrusive	03	will take too long	02	never does surveys	01
not applicable		88		language difficulties	14	worried about safety/security	13	worried about confidentiality	12	waste of money	11	not council house	10	nothing in it for me	09

6. Recontact by another surveyor?

no (exceptional circumstances only)	2	yes	1
-------------------------------------	---	-----	---

7. Photographic Record

- A Photograph 1
- B Photograph 2
- C Photograph 3
- D Photograph 4

none	8	dwelling description	4	area	3	back	2	front	1
none	8	area	3	back	2	front	1		
none	8	area	3	back	2	front	1		
none	8	area	3	back	2	front	1		

**B. TYPE OF SURVEY**

1. Extent of survey completed	dwelling description sections A,B,C,D & E	3	external survey, sections A,B,C,D,E,O,P,Q,R,S,T1,T8,T10,T13	2	full survey all relevant sections	1				
2. Is the dwelling occupied?	no, requires repair, not being marketed	5	no, requires repair, being marketed	4	no, suitable for immediate use, not being marketed	3	no, suitable for immediate use, being marketed	2	yes	1


**C. AREA INFORMATION**

1. Nature of area		isolated	5	village	4	town	3	suburban	2	urban	1			
2. Predominant land use of area						non-residential	3	mixed resident & other	2	residential only	1			
3. Predominant age of dwellings	no adjacent dwellings	8	pre-1919	5	1919 - 1944	4	1945 - 1964	3	1965 - 1982	2	post-1982	1		
4. Predominant residential type	non residential	8	high-rise flats	6	low-rise flats	5	tenements	4	detached houses	3	semi-detached houses	2	terraced houses	1
5. Predominant original tenure							no adjacent dwellings	8	social rented	2	private	1		
6. Predominant current tenure							no adjacent dwellings	8	mixed	3	social rented	2	private	1
7. Is the dwelling / block in a similar condition to those adjacent?							no adjacent dwellings	8	worse	3	better	2	yes	1
8. Evidence of residential building activity	no adjacent dwellings	8	mixed activity	5	developing	4	demolishing	3	repairing or improving	2	no activity	1		
9. Parking provision							unob.	9	adequate	3	inadequate	2	no parking provision	1
10. Visual quality of local area	Worst	7		6		5		4		3		2	Best	1

**D. DWELLING DESCRIPTION Answer all questions in this section**

1. Type of house	not a house	8	corner	6	detached	5	semi-detached	4	end terrace	3	terrace with passage	2	mid terrace	1	<input type="checkbox"/>				
2. Type of flat					not a flat	8	flat from converted house	4	tower/slab	3	4-in-block type	2	tenement	1	<input type="checkbox"/>				
3. If a flat, is it located directly above shops, offices or other commercial premises?									not a flat	8	yes	2	no	1	<input type="checkbox"/>				
4. Flat only, floor exposure					not a flat	8	non heat loss floor	4	part exposed	3	exposed (above grd)	2	ground floor	1	<input type="checkbox"/>				
5. Flat only, roof exposure					not a flat	8	non heat loss roof	4	part exposed	3	flat roof	2	pitched roof	1	<input type="checkbox"/>				
6. Flat only, wall exposure	not a flat	8	4 walls exposed	7	3-4 walls exposed	6	3 walls exposed	5	2-3 walls exposed	4	2 walls exposed	3	1-2 walls exposed	2	1 wall exposed	1	<input type="checkbox"/>		
7. Entry level of dwelling	unob.	9	basement	7	six-plus	6	fifth	5	fourth	4	third	3	second	2	first	1	ground	0	<input type="checkbox"/>
8. Wheelchair access to entrance door of dwelling or common block is...					unob.	9	n/a	8	loose / unsuit surface	3	suit. width, hard stand.	2	inad. width, hard stand.	1	<input type="checkbox"/>				
9. Pathways from road and/or car spaces up to but not including the entrance door to the dwelling or common block are...					unob.	9	n/a	8	step free	3	potentially step free	2	step free not poss.	1	<input type="checkbox"/>				
10. Number of access steps within the curtilage to the entrance door			unob.	9	over 10 steps	4	6-10 steps	3	3-5 steps	2	1-2 steps	1	no steps	0	<input type="checkbox"/>				
11. Is door bell/ entry system to dwelling or common block accessible for wheelchair users?									unob.	9	n/a	8	yes	2	no	1	<input type="checkbox"/>		
12. Quality assessment of dwelling											of superior quality	3	better than basic	2	basic	1	<input type="checkbox"/>		
13. Date of construction of dwelling	pre - 1919	8	1919 - 1944	7	1945 - 1964	6	1965 - 1974	5	1975 - 1982	4	1983 - 1990	3	1991- 1997	2	post - 1997	1	<input type="checkbox"/>		
14. Presence of porch / conservatory			unob.	9	n/a	8	porch and conservatory	4	conservatory only	3	porch only	2	none	1	<input type="checkbox"/>				
15. Is dwelling suitable for solar panels?					unob.	9	n/a	8	already installed	3	yes	2	no	1	<input type="checkbox"/>				
16. Provision for exclusive parking associated with dwelling			no exclus. parking	8	space/gar elsewhere	4	space on plot	3	garage on plot	2	integral / attached garage	1			<input type="checkbox"/>				

**E. CHARACTERISTICS OF COMMON BLOCK**

1. Is the dwelling a flat?			no - ignore section E	2	yes - complete section E	1	<input type="checkbox"/>				
2. Type of common block (or converted building)	corner	5	detached	4	semi detached	3	end terrace	2	mid terrace	1	<input type="checkbox"/>
3. Does the common block contain a non-residential use?					unob.	9	yes	2	no	1	<input type="checkbox"/>
4. Is there a dwelling(s) or part dwelling(s) in the roof?					unob.	9	yes	2	no	1	<input type="checkbox"/>
5. Is there a dwelling(s) or part dwelling(s) in the basement?	unob.	9	yes	3	no dwelling(s) or part dwelling(s) in basement	2	no basement	1			<input type="checkbox"/>
6. Number of actual dwellings in the common block					unob.	999	specify				<input type="text"/>
7. Estimate equivalent number of dwellings in the common block (floor area basis)					unob.	999	specify				<input type="text"/>
8. Number of storeys in the common block					unob.	99	specify				<input type="text"/>

F. ROOM BY ROOM RECORD								0 entry level 1 first level 2 second level 3 third or more 7 below entry level 8 no room 9 unob
	Hall/ Landing	Kitchen	R1	R2	R3	R4	R5	Bathroom
1. Room level	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Room type	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

G. ROOM REPAIRS ('00' no repairs; '55', '01' - '10' disrepair; '88' n/a; '99' unobtainable)								1 kitchen only 2 living 3 other public 4 bed 5 bath and WC 6 bath only 7 WC only
	Hall/ Landing	Kitchen	R1	R2	R3	R4	R5	Bathroom
1. Floor structure	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Floor finish	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Skirtings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Wall finish	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Ceiling finish	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Cornices	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Doors and frames	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. Fireplaces and flues	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

H. TYPES OF DEFECT/CONDITION								1 satisfactory 2 through another room 3 inadequate fixed access 4 off winder
	Hall/ Landing	Kitchen	R1	R2	R3	R4	R5	Bathroom
1. Is access to room satisfactory?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Is arrangement of room or area satisfactory?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Is the room structurally stable?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Is the room free from dry/wet rot?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Has the room satisfactory provision for natural light?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Has the room satisfactory provision for artificial light?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Have all opening windows suitable window locks?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. Has room satisfactory provision for ventilation?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. Has room satisfactory provision for heating?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10. Is room free from rising damp?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11. Is room free from penetrating damp?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12. Is room free from condensation?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13. Is room free from mould?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

I. REPAIRS TO WHOLE DWELLING ('00' no repairs; '55', '01' - '10' disrepair; '88' n/a; '99' unobtainable)		1 yes, central heating 2 yes, roomheater 3 yes socket 4 no
1. Internal walls / partition(s)	<input type="checkbox"/>	<input type="checkbox"/>
2. Party wall(s)	<input type="checkbox"/>	<input type="checkbox"/>
3. Staircase(s)	<input type="checkbox"/>	<input type="checkbox"/>

J. ROOMS/FLOORS-SUMMARY				0 yes, 0% 1 no, <2% 2 no, 2% <5% 3 no, 5% <10% 4 no, 10% <20% 5 no, 20% <30% 6 no, 30% <40% 7 no, over 40%		
1. Total number of habitable rooms plus kitchen	unob.	99	specify:	<input type="checkbox"/>		
2. Number of habitable floors in the dwelling(excluding the roof)	unob.	9	specify:	<input type="checkbox"/>		
3. Number of habitable rooms in roof space	unob.	99	n/a 88	specify:		
4. Number of habitable rooms in the basement	unob.	99	no basement 88	specify:		
5. Does the dwelling have a non-residential use?		yes	2	no	1	
6. Is the internal circulation barrier free?	unob.	9	yes	2	no	1

**K. AMENITIES**

1. Where is the bathroom located?	unob. 9	no bathroom 8	shared bathroom 4	outside 3	in building 2	in dwelling 1	<input type="checkbox"/>	
2. Is the shortest dimension of the bathroom compartment...?	unob. 9	no bathroom 8	>=2400mm 3	>=2100mm 2	<2100mm 1	<input type="checkbox"/>		
3. Where is the main WC located?	unob. 9	no WC 8	shared WC 5	outside 4	in building 3	in dwelling 2	in bathroom 1	<input type="checkbox"/>
4. Is there a separate WC compartment, within the dwelling, suitable for use by a wheelchair user?	unob. 9	yes, 1500 x 1800mm 3	no, too small 2	no sep. WC comp. 1	<input type="checkbox"/>			
5. Is the main WC located directly off kitchen?	unob. 9	no WC 3	yes 2	no 1	<input type="checkbox"/>			
6. Is wash-hand basin associated with main WC located with?	unob. 9	no WC 8	no wash-hand basin 3	elsewhere 2	WC 1	<input type="checkbox"/>		
7. Number of WC's within dwelling?							<input type="checkbox"/>	

What repairs are required to the following exclusive amenities inside the dwelling	unob.	no amenity	renew		medium		minor		small up to 5%	no repair
			100%	60%	60%	25%	25%	5%		
8. Main WC	9	8	4	3	2	1	0	<input type="checkbox"/>		
9. Wash-hand basin	9	8	4	3	2	1	0	<input type="checkbox"/>		
10. Hot and cold to wash-hand basin	9	8	4	3	2	1	0	<input type="checkbox"/>		
11. Fixed bath/shower in bathroom	9	8	4	3	2	1	0	<input type="checkbox"/>		
12. Hot and cold to bath/shower	9	8	4	3	2	1	0	<input type="checkbox"/>		
13. Sink	9	8	4	3	2	1	0	<input type="checkbox"/>		
14. Hot and cold to sink	9	8	4	3	2	1	0	<input type="checkbox"/>		
15. Kitchen storage and worktops	9	8	4	3	2	1	0	<input type="checkbox"/>		
16. Is area in front of all kitchen worktops and fittings...?	unob. 9	no kitchen worktops or fittings 8	>=1500mm 3	>=1200mm 2	<1200mm 1	<input type="checkbox"/>				
17. What extra kitchen storage provision is required?	unob. 9	100% 5	75% 4	50% 3	25% 2	0% 1	<input type="checkbox"/>			

**L. SERVICES AND FITTINGS**

1. What mains services does the dwelling have?	unob. 9	no services 8	gas only 3	electricity and gas 2	electricity only 1	<input type="checkbox"/>		
2. Does the dwelling have a privately generated power supply?	unob. 9	no power supply 8	yes 2	no 1	<input type="checkbox"/>			
3. Is standard of electrical power system satisfactory?	unob. 9	no electrical power sys. 8	5/15 amp system 4	mixed system 3	adequate number of sockets 2	inadequate number of sockets 1	<input type="checkbox"/>	
4. Are there any power socket(s) in the conservatory?	unob. 9	no conservatory 8	no 2	yes 1	<input type="checkbox"/>			
5. Is the electrical power system dangerous?	unob. 9	no power system 8	yes 2	no 1	<input type="checkbox"/>			
6. Is the standard of the electrical lighting system satisfactory?	unob. 9	no electrical lighting system 8	no, dangerous 3	no 2	yes 1	<input type="checkbox"/>		
7. Are the location of power sockets barrier free?	unob. 9	n/a 8	yes 2	no 1	<input type="checkbox"/>			
8. Are the location of light switches barrier free?	unob. 9	n/a 8	yes 2	no 1	<input type="checkbox"/>			
9. Is the underground water main (or communal rising main to the flat) lead free?	unob. 9	no water main 8	no 2	yes 1	<input type="checkbox"/>			
10. Is the entire water distribution and storage system in the dwelling lead free?	unob. 9	no 8	yes 2	no 1	<input type="checkbox"/>			
11. Is there a private water supply to the dwelling?	unob. 9	no water main 8	yes 2	no 1	<input type="checkbox"/>			
12. Are there smoke detectors in the dwelling?	unob. 9	no 8	more than 1 mixed 5	more than 1 mains power 4	1 mains powered 3	more than 1 batt power 2	1 battery powered 1	<input type="checkbox"/>
13. Do all external door(s) have adequate locks?	unob. 9	no 8	yes 2	yes 1	<input type="checkbox"/>			
14. Door viewer and restrictor present on main entrance door?	unob. 9	both viewer & restrictor 4	restrictor only 3	viewer only 2	no 1	<input type="checkbox"/>		

What repairs are required to the following services and fittings?	unob.	no amenity	renew		medium		minor		small up to 5%	no repair
			100%	60%	60%	25%	25%	5%		
15. Cold water system	9	8	4	3	2	1	0	<input type="checkbox"/>		
16. Hot water system	9	8	4	3	2	1	0	<input type="checkbox"/>		
17. Electrical power system	9	8	4	3	2	1	0	<input type="checkbox"/>		
18. Electrical lighting system	9	8	4	3	2	1	0	<input type="checkbox"/>		

**M. HEATING AND INSULATION**

1. What is the primary source of heating in the dwelling?	heat pump	6	warm air system	5	room heater	4	storage heating	3	community heating	2	boiler	1				
2. Primary system heat emitters?	unob.	9	no wet system	8	under floor chip. floor	3	under floor conc. floor	2	radiators	1						
3. Extent of central heating system?			unob.	9	no central heating	8	partial	2	full	1						
4. Primary heating fuel?	anthracite nuts	08	smokeless fuel	07	house coal	06	oil (28sec/ kero/C1)	05	oil (35sec/ diesel/D1)	04	bottled gas	03	bulk LPG	02	gas mains	01
	unob.	99	n/a	88	comm. heat with CHP	14	comm. heat with no CHP	13	off peak elec	12	peak electric	11	wood/peat	10	anthracite grains	09

**Primary appliance type:**

5. Gas central heating	n/a	8	back boiler	6	condensing combi	5	combi	4	pre 79	3	condensing	2	standard	1
6. Oil central heating	n/a	8	condensing combi	5	combi	4	pre 85	3	condensing	2	standard	1		
7. Gas room heaters	n/a	8	pre 60	5	condensing	4	open fire with fire, open	3	gas, coal effect fire, flued	2	post 60	1		
8. Solid fuel room heaters	n/a	8	closed fire with back boiler	4	back boiler	3	closed fire	2	open fire	1				
9. Electric storage heating	n/a	8	under floor	4	old style	3	fan assisted	2	new style	1				

10. Principal hot water heating source	kitchen range	07	gas instant (multi point)	06	gas instant (single point)	05	electric instantaneous	04	electrical single immersion	03	electrical dual immersion	02	pri. heating source	01
	unob.	99	n/a	88	water boiler	10	sep. back boiler	09	gas circulator	08				

11. What is the water heating fuel?	anthracite nuts	08	smokeless fuel	07	house coal	06	oil (28sec/ kero/C1)	05	oil (35sec/ diesel/D1)	04	bottled gas	03	bulk LPG	02	gas (mains)	01
	unob.	99	n/a	88	comm. heat with CHP	14	comm. heat with no CHP	13	off peak elec	12	peak electric	11	wood/peat	10	anthracite grains	09

**What repairs are required to the central heating system?**

	unob.	no amenity	renew	medium	minor	small	no repair			
			100%	60%	60%	25%	25%	5%	up to 5%	
12. Central heating source?	9	8	4	3	2	1	0			
13. Central heating distribution?	9	8	4	3	2	1	0			

14. Heating controls for primary heating	TRV only	07	programmer & TRV	06	programmer, room stat & TRV	05	programmer & room stat	04	room stat only	03	programmer only	02	no controls	01
	unob.	99	Boiler energy manager	12	SHtr auto charge control	11	SHtr manual charge control	10	RHtr appliance stat & prog	09	RHtr appliance stat	08		

15. Are all the primary heating controls accessible for wheelchair users?	unob.	9	n/a	8	all	3	some	2	none	1		
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16. What is the secondary heating, if any? (room heaters only)	open solid fuel fire	4	pre 1960 gas fire	3	post 1960 gas fire	2	gas, coal effect fire	1	no secondary system	0		
	unob.	9	other	7	electric room heaters	6	closed solid fuel fire	5				

17. Is the loft space insulated?	100mm	4	75mm	3	50mm	2	25mm	1	none	0		
	unob.	9	n/a	8	>200mm	7	200mm	6	150mm	5		

18. Type of insulation to hot water storage cylinder?	unob.	9	no hw storage	8	no insulation	3	jacket	2	sprayed	1		
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19. Is the insulation to hot water storage satisfactory?	unob.	9	no hw storage	8	no insulation	3	no	2	yes	1		
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20. Is the insulation to own tanks and pipes in loft satisfactory?	unob.	9	n/a	8	no loft space	4	no insulation	3	no	2	yes	1
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21. Heating in conservatory	unob.	9	no conservatory	8	portable heater	4	fixed heater	3	direct from pri. system	2	no heating	1
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22. Is there a door separating the dwelling from the conservatory?	unob.	9	no conservatory	8	no	2	yes	1				
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**N. DWELLING MEASUREMENTS**

	area (m <sup>2</sup> )	measurement type (area)	height (m)	Area 888 = not applicable 999 = unobtainable Measurement Type (area) 1 = External 2 = Internal 8 = not applicable 9 = unobtainable Height 8.8 = not applicable 9.9 = unobtainable
1. Ground / lowest floor	<input type="text"/>	<input type="text"/>	<input type="text"/>	
2. First floor	<input type="text"/>	<input type="text"/>	<input type="text"/>	
3. Second floor	<input type="text"/>	<input type="text"/>	<input type="text"/>	
4. Third floor	<input type="text"/>	<input type="text"/>	<input type="text"/>	
5. Fourth floor and above	<input type="text"/>	<input type="text"/>	<input type="text"/>	

Surveyors working space for calculating floor areas

**O. CHARACTERISTICS OF COMMON ELEMENTS**

1. Is the dwelling part of a block with common access?	no - ignore O & P		2	yes - complete O & P		1	<input type="checkbox"/>	
2. Type of common access in the block	other 7	gallery 6	balcony 5	deck 4	passage 3	landing 2	ground only 1	<input type="checkbox"/>
3. Number of staircases in the block	unob. 9		no staircases 8	specify:				<input type="checkbox"/>
4. Number of lifts in the block	unob. 9		no lifts 8	specify:				<input type="checkbox"/>
5. Are the lifts suitable for wheelchair users?	unob. 9		no lifts 8	no 2	yes 1			<input type="checkbox"/>
6. Is the common circulation area barrier free?	unob. 9		no 4	yes, concierge 3	yes, entry phone 2	yes, bell to each flat 1		<input type="checkbox"/>
7. Is there an entry system?	unob. 9		no 4	yes, concierge 3	yes, entry phone 2	yes, bell to each flat 1		<input type="checkbox"/>
8. Is there a surveillance camera(s) in area(s) of common access?	unob. 9		n/a 8	no 2	yes 1			<input type="checkbox"/>
9. Is rear access to common block secure?	unob. 9		n/a 8	no 2	yes 1			<input type="checkbox"/>

**P. REPAIRS TO COMMON ELEMENTS**

What repairs are required to the following common elements?	Repair assessment: 00 = no repairs 55, 01-10 = disrepair 88 = n/a 99 = unob	Is the repair urgent? 1 = yes 2 = no 8 = n/a 9 = unob	Residual life after repair for whole element: 1 = 1 - 5 years 2 = 6 - 10 years 3 = 11 - 30 years 4 = 30+ years 8 = n/a 9 = unob
1. Stairs, landings and balustrades (O3)	<input type="text"/>	<input type="text"/>	<input type="text"/>
2. Access balcony / gallery / decks and balustrades	<input type="text"/>	<input type="text"/>	<input type="text"/>
3. Halls and passages	<input type="text"/>	<input type="text"/>	<input type="text"/>
4. Wall finishes	<input type="text"/>	<input type="text"/>	<input type="text"/>
5. Ceilings and soffit finishes	<input type="text"/>	<input type="text"/>	<input type="text"/>
6. Doors, screens, windows and rooflights	<input type="text"/>	<input type="text"/>	<input type="text"/>
7. Lifts (O4)	<input type="text"/>	<input type="text"/>	<input type="text"/>
8. Decorations	<input type="text"/>	<input type="text"/>	<input type="text"/>
9. Service mains	<input type="text"/>	<input type="text"/>	<input type="text"/>
10. Public lighting to common areas	<input type="text"/>	<input type="text"/>	<input type="text"/>
11. Communal security systems	<input type="text"/>	<input type="text"/>	<input type="text"/>
12. Refuse chutes / chambers	<input type="text"/>	<input type="text"/>	<input type="text"/>
13. Bin stores	<input type="text"/>	<input type="text"/>	<input type="text"/>

**Q. EXTERNAL CONSTRUCTION / MATERIALS**

1. Is more than two thirds of the attached flank wall(s) exposed?	unob. 9	detached 4	yes, both flanks 3	yes, one flank 2	no 1				
2. External wall construction		unob. 9	other 3	cavity 2	solid 1				
3. External wall construction material	unob. 9	other 8	metal 7	concrete 6	timber 5	blockwork 4	brick 3	whin/granite 2	sandstone 1
4. Principal external wall finish	other 8	metal 7	concrete panel 6	concrete block 5	timber 4	brick 3	stone 2	render 1	
5. External wall thickness		unob. 9	>750mm 3	450 - 750mm 2	<450mm 1				
6. Has additional insulation been added to external walls since built?	100mm int or ext. 7	75mm int. or ext. 6	50mm int. or ext. 5	25mm int. or ext. 4	filled 75mm cavity 3	filled 50mm cavity 2	none/partial 1		
7. Principal roof type		unob. 9	half mansard 5	mansard 4	mono 3	flat 2	pitched 1		
8. Extent of principal roof type		unob. 99	specify: (tenths)						
9. Principal roof cover	unob. 9	other 7	metal 6	asbestos 5	asphalt 4	felt 3	tiles 2	slates 1	
10. Cover to secondary roof	unob. 9	no secondary roof 8	other 7	metal 6	asbestos 5	asphalt 4	felt 3	tiles 2	slates 1
11. Underground drainage		unob. 9	no drainage 4	other 3	septic tank cesspool 2	public connection 1			

**Dwelling only**

12. Principal window type to dwelling	unob. 9	other/mixed 5	pivot 4	tilt & turn 3	casement 2	sash & case 1
13. Window frames	u.p.v.c. 4	metal (no thermal break) 3		metal (thermal break) 2		wood 1
14. Glazing (if some single & some double select largest area)	unob. 9	double with low 'e' glass 4		triple 3	double 2	single 1
15. Type of double glazing	unob. 9	no double glazing 5	part only 4	mixed 3	yes, secondary 2	yes, sealed units 1

**R. EXTERNAL REPAIRS**

<b>What repairs are required to the following elements of the dwelling or common block</b>	front only = 1	back only = 4	5 4 6 DWELLING / BLOCK 3 1 2
	front with right = 2	back with left = 5	
	front with left = 3	back with right = 6	
	unobtainable = 9	unobtainable = 9	
VIEWPOINT 1	VIEWPOINT 2	Is the repair urgent?	Residual Life

1. Principal roof structure	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
2. Principal roof covering	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
3. Secondary roof structure	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
4. Secondary roof covering	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
5. Chimney stacks	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
6. Flashings	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
7. Roof gutters and downpipes	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
8. Soil waste and vent pipes	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
9. Wall structure (Q2/Q3)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
10. Wall finish	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
11. Foundations	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
12. DPC	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
13. Underground drainage	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

**Repair score**  
 00 = no repair  
 55, 01 - 10 = disrepair  
 88 = n/a  
 99 = unob.

**Is the repair urgent?**  
 1 = yes  
 2 = no  
 8 = n/a  
 9 = unob.

**Residual life for whole element after repair**  
 1 = 1-5 years  
 2 = 6-10 years  
 3 = 11-30 years  
 4 = 30+ years  
 8 = n/a  
 9 = unob.

**What repairs are required to the following elements of the dwelling only?**

14. Private balcony to dwelling	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
15. External doors to dwelling	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
16. Windows to dwelling	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
17. External paint to dwelling	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
18. External stairs to own door (4-in-block & converted houses only)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

**S. EXTERNAL FEATURES**

**What repairs are required to the following external elements?**

1. Fences, walls and gates	('00' no repairs, '55', '01' - '10' disrepair; '88' n/a; '99' unobtainable)							<input type="checkbox"/>
2. Paths, paved areas, ramps	('00' no repairs, '55', '01' - '10' disrepair; '88' n/a; '99' unobtainable)							<input type="checkbox"/>
3. Steps and plats	<b>unob.</b>	<b>no amenity</b>	<b>renew</b>	<b>medium</b>	<b>minor</b>	<b>small</b>	<b>no repair</b>	<input type="checkbox"/>
			100% 60%	60% 25%	25% 5%	up to 5%		
	9	8	4	3	2	1	0	<input type="checkbox"/>
4. Surface drainage	9	8	4	3	2	1	0	<input type="checkbox"/>

**T. TOLERABLE STANDARD - STATUTORY ACTION**

For a Full Survey (B1) answer all questions in this section, for an External Survey (B1) answer T1, T8, T10 & T13.

	unob.	no (BTS)	yes			
1. Is the dwelling structurally stable?	9	2	1	<input type="checkbox"/>		
2. Is the dwelling substantially free from rising or penetrating damp?	9	2	1	<input type="checkbox"/>		
3. Has the dwelling satisfactory provision for natural and artificial light, for ventilation and for heating?	9	2	1	<input type="checkbox"/>		
4. Has the dwelling an adequate piped supply of wholesome water within the house?	9	2	1	<input type="checkbox"/>		
5. Has the dwelling a sink provided with satisfactory supply of both hot and cold water within the house?	9	2	1	<input type="checkbox"/>		
6. Has the dwelling a water closet available for the exclusive use of the occupants of the house suitably located within the house?	9	2	1	<input type="checkbox"/>		
7. Has the dwelling a fixed bath/shower and a wash-hand basin all with a satisfactory supply of hot and cold water suitably located within the house?	9	2	1	<input type="checkbox"/>		
8. Has the dwelling an effective system for the drainage and disposal of foul and surface water?	9	2	1	<input type="checkbox"/>		
9. Has the dwelling satisfactory facilities for the cooking of food within the dwelling?	9	2	1	<input type="checkbox"/>		
10. Is there satisfactory access to all external doors and outbuildings?	9	2	1	<input type="checkbox"/>		
11. Would you expect action to be taken on this dwelling under the Housing Acts?	unob. 9	close or demolish 4	improvement order 3	repair notice 2	no action 1	<input type="checkbox"/>
12. Would you expect the common parts to be subject to a repairs notice?	unob. 9	no common parts 3	action 2	no action 1	<input type="checkbox"/>	

**13. Write in reason for each BTS failure, at 1 - 10 (above)**

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**Surveyors notes box to assist data validation team**