

# Living in Wales 2008 Property Survey

## Technical Report

Research Study Conducted for  
The Local Government Data Unit ~ Wales



March 2010

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# Introduction

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## The 2008 Living in Wales Property Survey

1. The 2008 Living in Wales Property Survey continues a series of Welsh House Condition Surveys, last conducted in 1998 and 2004. Data collected from the survey is used by the Local Government Data Unit ~ Wales (the Data Unit) to monitor the changing condition of the housing stock in Wales, and to measure work being undertaken to the stock. The Property Surveys also provide a major source of information for the Welsh Assembly Government for the development of and monitoring of housing policies directed at the repair, improvement and energy efficiency of the housing stock, covering both the private and public sectors. Ipsos MORI was responsible for the management and administration of the Property Survey and all surveyors employed on the survey and are responsible for the production of this technical report.

## The Property Survey

2. The Property Survey is a key component of the Living in Wales (LIW) survey which also includes a larger household survey component. The Property Survey is designed to collect a wide range of information on the housing stock, including dwelling condition in relation to the Fitness Standard, the Housing, Health and Safety Rating System and the Welsh Housing Quality Standard, the state of repair and provision of amenities, as well as recording other attributes such as its plot and the local environment. A substantial part of the primary data are used to contribute to the overall estimate of repair costs in line with current acceptable standards. Surveyors contribute by carrying out full internal and external dwelling inspections at a sample of pre-selected addresses across Wales.
3. A sample of 3,826 addresses was issued for the Property Survey and overall 2,741 Property Surveys were undertaken. The sample was selected to cover a range of tenures and dwelling types across Wales and all were occupied at the time of selection. Prior to the Property Survey taking place all addresses had a household interview conducted as part of the LIW Household Survey. The Household Survey is used to determine the household characteristics, including full details of their financial circumstances, their tenure, attitudes to the home and environment, to help build the overall picture of condition for that dwelling.
4. A separate Technical Report gives details of the methodology (including sampling) for the 2008 LIW Household Survey.

## Key requirements

5. The Property Survey is unique in providing a wide range of data on the housing stock in Wales. The survey collects core data on levels of unfit, disrepair, health and safety and quality standards on all types of dwellings and is used to feed into development of models to assess repair costs, energy efficiency and fuel poverty levels across Wales. The key requirements of the survey are:

to collect high quality data on the composition of the Welsh housing stock, the interior and exterior condition of properties including surrounding plot and an assessment of the local area;

to maximise response rates; and

to provide the Data Unit with clean, high quality, fully documented data sets.

# Property Survey Tasks

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6. The Property Survey was conducted by Ipsos MORI in partnership with the Building Research Establishment (BRE). Ipsos MORI was the lead partner responsible for the overall management of the Property Survey process including the management of sub-contractors, such as the surveyors.

## The Responsibilities of Ipsos MORI

7. Ipsos MORI was responsible for the overall management of the Property Survey which included the following main tasks:

Attending LIW management meetings;

Recruiting, final selection and contracting of surveyors;

Producing and distributing surveyor contracts;

Providing telephone help-line for respondents and surveyors;

Devising an appropriate sampling strategy and selection of addresses for the Property Survey sample;

Allocating selected addresses by area and surveyor;

Providing digital cameras for surveyors;

Providing all administrative briefing materials including photographic ID, daily return and expenses forms, calling cards, laminated letters and property leaflets, address labels, envelopes, floppy disks and low-energy light bulbs;

Developing a web-based Surveyor Management System and provision of unique user-name and password details;

Giving surveyor briefings on survey administration, appointments, gaining access, quality control and personal safety;

Fieldwork monitoring;

Paying surveyors;

Data entry;

Validation and quality assurance; and

Delivery of data outputs.

## **Building Research Establishment (BRE) responsibilities, on behalf of Ipsos MORI**

8. BRE were subcontracted to Ipsos MORI to provide specialist and technical contributions around form design and briefings. BRE's key responsibilities were as follows:

Attending LIW management meetings where the Property Survey was the focus of discussion;

Agreeing the content and layout of the Property Survey form advising on consistency with English and Northern Ireland House Condition surveys;

Organising the piloting of 2008 Property Survey form by survey supervisors;

Producing survey forms/proofs for printing;

Agreeing the content and layout of the technical briefing manuals;

Producing surveyor technical manuals;

Recruiting and managing four supervisors;

Agreement of selection criteria for surveyors and placing advertisements for LIW surveyors;

Producing and distributing pre-qualification and distance learning packs for potential surveyors, including the briefing manuals, model answer for the briefing houses, survey form and set of instructions;

Recruiting and interviewing of surveyors;

Agreeing briefing venue requirements and final numbers attending from the Data Unit, BRE and guests;

Briefing venue selection and set up;

Developing briefing timetable and producing training materials to support the briefing;

Conducting a dress rehearsal of the briefings;

Selecting and acquiring briefing houses;

Administrative support at the briefings;

Providing validation specification and dummy survey forms for validation testing; and

Providing supervision and advice during the validation process.

## The Data Unit's responsibilities

9. The Data Unit has overall responsibility for approving the various stages of the survey on behalf of the Welsh Assembly Government, as well as the following specific responsibilities:

Attending LIW management meetings monitoring progress against key project milestones;

Setting requirements for, and agreeing the survey form;

Agreeing the Property Survey information leaflet and pre-survey household letter;

Briefing surveyors on the purpose of the LIW survey;

Producing data output and derived variable specifications;

Sign-off of final SPSS data sets and CSV file; and

Depositing the data in the National Archive.



# Supervisors

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## Recruitment of supervisors

10. BRE recruited four supervisors to help co-ordinate the 2008 Property Survey, in discussion with the Data Unit. All had worked on previous House Condition Surveys, including Living in Wales or the broadly similar English or Northern Ireland House Condition Surveys .
11. Although selection of supervisors was agreed between the Data Unit, BRE and Ipsos MORI, they were employed under contract to BRE. BRE initially contacted the supervisors by informal phone call in January 2008 to register their interest in working on the survey, and contracts were finalised in March 2008.

## Supervisor regions

12. Each supervisor was given a team of eleven surveyors. A number of surveyors travelled to their area of work. The areas allocated to each supervisor were set to give approximately the same number of surveys per area. The list of supervisors and their Local Authorities is below:

Supervisors	Region	Local Authority
Liz Robinson	South West Wales	Carmarthenshire, Ceredigion, Neath Port Talbot, Pembrokeshire, Swansea
Andy Bodsworth	South Central Wales	Bridgend, Caerphilly, Cardiff, Monmouthshire, Rhondda Cynon Taf, The Vale of Glamorgan
Keith Russell	South East Wales	Blaenau Gwent, Merthyr Tydfil, Newport, south Powys, Torfaen
Andy Kippax	North Wales	Conwy, Denbighshire, Flintshire, Gwynedd, Isle of Anglesey, north Powys, Wrexham

## Role of supervisors

13. Supervisors were required to take part in the pilot fieldwork, and attend the pilot briefing on 22 April 2008 and the debriefing on the 29 April 2008.

14. Supervisors were contracted to undertake the following tasks:

Assisting in the distance learning package for all surveyors, marking forms and providing telephone help and feedback;

Making contact with their surveyors before the briefing session;

Attending the dummy briefing session on 5 August 2008, where model answers to briefing houses were agreed;

Attending the six-day briefing session with their own surveyor groups between 9 and 17 September 2008, and assisting in the training;

Accompanying each of their 11 surveyors in the field for as long as was required but for a minimum of half a day during their first one or two weeks of work;

Marking (and correcting where necessary) all forms for each of their surveyors;

Monitoring the progress of each of their surveyors on a weekly basis, updating the Surveyor Management System and providing regular updates to Ipsos MORI and BRE;

Assisting with quality control, i.e. monitoring surveyor performance and quality of work; referring to Ipsos MORI surveyors who should be removed from the survey or not be given additional work; and also recommending good surveyors for taking on more work;

Providing technical advice and assistance to surveyors in the field;

Re-distributing additional briefing materials to their surveyors where necessary and ensuring that it was received and understood; and

Undertaking “mopping-up” surveys where necessary, although in practice this was not required.

## Supervisor contracts

15. BRE produced the supervisor contracts, and were responsible for the recruitment, training, management and payment of the supervisors.

## Pilot supervisor briefing

16. A 'dummy' pilot briefing was held at BRE offices on 22 April 2008 and a de-brief took place at BRE on 29 April 2008. All the supervisors attended, along with the briefing teams from the Data Unit, BRE and Ipsos MORI. A copy of the agenda is in Appendix 1.
17. The pilot briefing included a detailed discussion of changes to the 2008 Property Survey form as well as additional briefing on questions which only appear in the 2008 LIW survey and 2008 English Housing Survey. A copy of the elements discussed is in Appendix 2.
18. Supervisors undertook surveys on local properties selected by each supervisor ensuring a good mix of property types. Each supervisor tested the survey form on five separate properties.
19. Supervisors were asked to take photographs of each property using a digital stills camera which were used to inform discussions about the content of the survey form in the pilot de-brief.
20. Supervisors were provided with a pilot pack that included:
  - digital camera, plus case, charger and cable;
  - diskettes;
  - jiffy envelopes;
  - return envelopes;
  - LIW clipboard; and
  - laminated household letter and Property Survey leaflet.
21. The supervisors were asked to sign out their camera and equipment. A copy of the form is in Appendix 3.

## Pilot debriefing

22. The pilot debriefing session took place at BRE offices on 29 April 2008. A copy of the pilot debriefing agenda is in Appendix 4.
23. A number of minor changes or clarifications were made to the form, manual, and briefing materials following the pilot.

24. Supervisors raised concerns about the reliability of the digital cameras to be used and suggested that all cameras and battery packs should be thoroughly tested before start of fieldwork and that there should be some replacements on stand-by should failures arise in the field.
25. Supervisors re-iterated the importance of a session on gaining access to properties, especially as some of the surveyors recruited locally will be unfamiliar with useful hints and tips to promote good access. Some clear instruction on the use and administration of the incentives to be used was also suggested, both of which were addressed for the main briefing.

## **Testing the Living in Wales Surveyor Management System**

26. Ipsos MORI developed the Surveyor Management System specifically for the Living in Wales Property Survey to enable surveyors to update their progress and generate statements to accompany invoices and for supervisors to monitor progress and book-in inspected survey forms. This was a scaled down version of the system originally developed for the 2004 Property Survey, removing the calendar and appointment functions that were necessary when the Household and Property Surveys were conducted simultaneously. Complete details about the system are in Section 2 of the Surveyor Fieldwork Manual, in Appendix 5.
27. Supervisors agreed that the main priority for the Surveyor Management System was to be easy to log-on, simple and user-friendly with the capability to easily amend any erroneous entries either by themselves or surveyors.
28. Prior to commencement of fieldwork, supervisors were asked to test the Surveyor Management System and provide any feedback. Feedback was positive, with supervisors commenting it was much easier to navigate and update than the previous version.

# Surveyors

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29. Ipsos MORI, with the assistance of BRE, was responsible for the selection and management of the 44 surveyors to work on the 2008 Property Survey. Both BRE and the Data Unit advertised for surveyors through a range of channels including the trade press, letters to Welsh local authorities and the Welsh Assembly Government website. Ipsos MORI wrote to all surveyors who had worked on the 2004 Property Survey.
30. All expressions of interest and CV details received were reviewed by BRE who made a selection of suitable surveyors based on experience, location and profession. This list was then passed to Ipsos MORI who selected surveyors based on technical ability, experience, location, willingness to travel, and availability for the main briefing dates.

## Recruiting surveyors

31. In January 2008, BRE placed advertisements in several professional surveying journals for expressions of interest from experienced surveyors with the aim of recruiting a good mix of professional MIEHO Environmental Health Officers, RICS Building Surveyors and Quantity Surveyors, and RIBA Architects. A copy of the advert is in Appendix 6. The Data Unit also promoted the Property Survey through a series of technical presentations to local authority staff and a letter dispatched to all local authorities through the Welsh Local Government Association.
32. There were approximately 110 expressions of interests by telephone, email and letter. Potential surveyors were asked to send their curriculum vitae and having reviewed these a pre-qualification exercise was sent to 54 eligible surveyors initially selected by BRE.
33. BRE produced a list of criteria for the selection of surveyors which included:
  - Recent and relevant experience of house condition surveys;
  - Professional mix;
  - Location; and
  - Competence of completion of pre-qualification exercise.
34. In July 2008, following a meeting between BRE and Ipsos MORI to discuss the results of this exercise a provisional selection of suitable surveyors was made to work on the survey.

## Surveyor contract

35. Two copies of the surveyor contract were sent to all the surveyors in August 2008, along with a covering letter requesting further information before attendance at the main briefing (Appendix 7). The first copy was for the surveyor's records, whilst the other was to be returned to Ipsos MORI.
36. Surveyors were asked to sign both the contract and the Surveyor Declaration on the very last page of the document. The Surveyor Declaration was to ensure that the surveyor had both read and understood the Ipsos MORI rules for surveyors and the MRS leaflet entitled "The Responsibilities of Interviewers", which was also enclosed as Appendix 1 of the contract. Surveyors could only begin work on the survey if they had signed the contract and declaration.
37. There were two different contracts; one for VAT-registered surveyors or firms, and another for non-VAT registered surveyors or firms. A copy of the VAT contract is in Appendix 8, and the non-VAT contract in Appendix 9. The assumption for differentiating between VAT registered and non-VAT registered surveyors, was that those who paid VAT were likely to be firms with greater overheads to pay. Therefore the VAT-registered firms or individuals were paid enhanced rates.
38. For nine of the most senior and experienced surveyors, it was agreed between the Data Unit and BRE that attendance for the full six day briefing was unnecessary. Instead these surveyors attended for two days where training modules covered changes in the 2008 Property Survey form and differences with the English Housing Survey form as well as assessment of the Welsh Housing Quality Standard. This helped reduce the price of the main briefing, as surveyors are paid for their attendance and this was reflected in a variation to the contract (in Appendix 10).
39. Ipsos MORI also sent the surveyors a self-completion proforma, for confirmation of address, contact details, car registration and bank details. Surveyors were asked to keep Ipsos MORI informed of any changes to this information. Surveyors were also asked to send in two passport-sized photographs for use on the LIW identity cards. Copies of the proformas used are in Appendix 11. A copy of the LIW identity card is in Appendix 12.

## Relocation of surveyors

40. Once suitable surveyors had been selected by BRE, Ipsos MORI allocated surveyors as close to their home or work address as possible. Where there was an allocation of addresses that was difficult to assign to a suitably located surveyor, Ipsos MORI contacted the nearest surveyors to confirm their willingness to travel to the allocation. Some of the regions were more difficult to fill than others: for example, there was a shortage of surveyors in the North and West. In this situation, Ipsos MORI called upon those who stated at the recruitment stage that they would be willing to travel to conduct their work. A number of these were surveyors based in England, and Ipsos MORI contracted these surveyors on the basis of paying their mileage from the Welsh border.

Ipsos MORI telephoned each surveyor concerned informing them of this situation.

## Surveyor drop-out

41. The selection process ensured a good mix of surveyors working on the survey including those who had previous experience working on the 2004 survey as well as new, fully trained, surveyors who could work locally.
42. All surveyors new to the 2008 Property Survey were asked to complete a pre-qualification exercise, involving application of a shortened version of the questionnaire. Of the 54 sent a pre-qualification pack, 31 did not complete and return the exercise. Some of the main reasons for dropping out at the pre-selection stage included:

Some did not like filling in the form, or the depth of information that was required;

Others felt they would not have time to devote to the survey; and

For some other work commitments had subsequently arisen.

43. Those surveyors selected were, therefore, familiar with the type of work involved and consequently drop-out after appointments had been made and confirmed was kept to a minimum. Out of the 44 surveyors recruited, just one surveyor dropped out because they could no longer commit to full attendance at the briefing. They were replaced by a surveyor from a reserve list.
44. There were no further drop-outs during the briefing either as a result of poor attendance or because they no longer felt they wanted to work on the survey.

## Strategy for replacing surveyors

45. The selected surveyor who dropped-out before the briefing was replaced by another surveyor from the reserve list drawn up by BRE and Ipsos MORI.
46. It was decided that it was not practical, or economic, to brief more surveyors than was required. One surveyor did drop out very shortly after the survey commenced but it was decided that the addresses allocated to them were reallocated to other surveyors willing to take on more work rather than individually briefing another surveyor. The supervisors were also required to take up any surveys, if necessary, however, in practice this was not required.

## **Non-completion of allocation**

47. A number of surveyors did not complete their original allocation of addresses. The most common reasons for this included:

Poor access rates among non-local sample addresses which some more mobile surveyors were better placed to pick-up. While we took careful measures to avoid this, given the national coverage of the survey it was inevitable particularly in more remote parts of mid and northern Wales; and

New or increased existing work commitments resulting in insufficient time to commit to the property survey.

# Surveyor payments

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48. Ipsos MORI was responsible for the employment, general management and payment of surveyors.

## Fee structure

49. There were two elements to the fee structure for surveyors. There was a fixed fee for successful attendance at the main briefing exercise at the Swansea Marriott, based on either a six-day or two day module of training. The second element was the variable payment, dependent on the number of surveys achieved. These payments were slightly different for VAT and non-VAT registered surveyors, with those VAT registered receiving a slightly enhanced rate of payment. A summary of the work and fee structure is as follows:

Pre-briefing distance learning package – no separate fee;

Main briefing – fixed fee; and

Survey fieldwork – variable fee, performance related.

## Fixed fees

### Main briefing fee

50. Once a surveyor had sent in 20 full surveys to Ipsos MORI, surveyors were asked to invoice Ipsos MORI for the first half of the briefing fee. At this time surveyors were also able to invoice for their travel costs to and from Swansea. This was paid per mile for car travel or standard class rail travel and taxi to and from Swansea railway station.

## Variable fees

51. The payment system for survey work on the 2008 Property Survey was based on results. There were two basic rates of pay: one for a 'full survey' and one for a 'non-survey'. Partial surveys (where a survey was terminated before being fully completed) were treated as non-surveys for payment purposes. 'Blank forms' (where no survey took place because a respondent notified the surveyor they did not wish to take part) were not paid for.

52. For payment to be made on a **full survey**, the following definition applied: all relevant sections of the survey form were complete, i.e. full internal and external inspections and an inspection of the local area. The form had to be completed to an acceptable standard (reviewed by the supervisor), and had to be accompanied with an appropriate number of photographs for the dwelling (back view, front view, up street, down street - as specified by Ipsos MORI/Data Unit). Both the form and photographs had to be booked-in onto Ipsos MORI's Surveyor Management System by the surveyor's supervisor.
53. For payment to be made on a **non-survey**, the following definition applied: any form that was partially completed, i.e. anything short of a full survey, including any sort of partial survey. In most cases, a non-survey will mean only the first two pages of the form will have been completed (sections 1– 4). No photographs were required for non-surveys.
54. Any other outcome, where the surveyor has visited the property, apart from a full survey will be defined as a non-survey, for example:
- no contact made;
  - access refused to surveyor in person or by telephone; and
  - refusal during the survey.
55. Payment was only made once the form was booked-in on Ipsos MORI's Surveyor Management System (SMS) by the surveyor's supervisor and invoice statement raised and submitted by the surveyor.
56. No payment was made for blank forms. These were addresses where the surveyor did not visit, such as:
- the householder notified the surveyor directly they did not wish for the property survey to be conducted;
  - Ipsos MORI notified the surveyor where a householder had made contact to refuse to take part; and
  - other reasons.
57. The standard rate of pay for full surveys and non-surveys were set at two rates: one for VAT registered surveyors and a slightly lower one for non-VAT registered surveyors.

## Payment for mileage

58. Mileage was paid per mile for all miles within the Welsh border. Additional costs were paid for, when agreed in advance with the surveyor. These were:

bridge tolls;

overnight stays – flat fee; and

ad hoc expenses.

## Surveyor payment process

### Statements

59. Surveyors generated statements of work using the Ipsos MORI Surveyor Management System, detailing all the surveys that had been checked and approved, and booked-in on the website by their allocated supervisor. They were then asked to send a copy of this and a matching invoice to Ipsos MORI.

60. The statements showed the following comprehensive information for each address:

Address number;

Full address;

Rate, i.e. standard rate or higher rate;

Outcome, i.e. full survey or non-survey; and

Amount to invoice.

61. Each statement also showed the following details relating to the individual surveyor:

Surveyor name;

Surveyor ID number;

Statement number; and

Statement date.

62. Supervisors played a key role in the efficient processing of invoices as statements showing details of full and non-surveys could only be generated once survey forms had been booked in by the supervisor on the SMS. The main reasons for delays in processing occurred as a result of delays with the post and a varying workload for supervisors particularly at the start of the fieldwork. Any issues or discrepancies around payment of completed work were resolved in discussion between the surveyor, the supervisor and Ipsos MORI.
63. Once a surveyor's invoice reached the Ipsos MORI office, it was checked against the statement. If it matched, then the invoice was authorised. A copy of the invoice and statement was taken and filed for the LIW records. The original invoice and statement were then sent to the Ipsos MORI accounts department for payment. This was done on a weekly basis and surveyors generally received a BACS payment within the following two weeks.
64. A copy of a statement is in Appendix 13.

## **Retention amount**

65. Ipsos MORI automatically retained 50% of each surveyor's briefing fee until all materials and issued work were returned and completed to a satisfactory standard. Once the cameras were received and checked, the 50% retention fee was released to the surveyor in the form of a BACS payment.
66. Checks on the quality of work were ongoing (see section on booking in forms). A further check on surveyor conduct was made through a telephone survey ("back-check") of respondents who had taken part in the Property Survey. Ipsos MORI called back on a sample of each surveyor's addresses to ask the householder about how the survey was conducted.
67. A checklist for release of the retention fee was as follows:

All allocated work was completed and returned in a satisfactory and timely manner;

All remaining survey materials, including the digital camera, blank survey forms and disks, were returned to Ipsos MORI; and

Telephone back-check survey showed the surveyor conducted the survey in a proper and professional manner.

# Pre-briefing Distance Learning Package

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68. Prior to the main briefing, all surveyors recruited to work on the LIW Property Survey were required to undertake the pre-briefing distance learning package distributed in August 2008.

## The aim of the exercise

69. The aim of the exercise was to introduce the surveyors to the general principles of the LIW Property Survey. After completing the exercise, all surveyors should have achieved the following:

Familiarity with the content and layout of the survey form;

An understanding of the general concepts/principles of the form, in particular:

the LIW approach to recording disrepair;

the fitness standard;

the differences between dwellings, houses, flats, modules and blocks; and

construction method and non-traditional building.

How to complete the form for a simple house and flat.

70. The intention was to provide the surveyors with a basic level of knowledge about the LIW survey, ensuring that they were ready for the main briefing in September 2008. Surveyors were not expected to understand everything, nor be able to apply the BRE standards to their judgements, as they would be taught this at the main briefings.

## The package

71. Surveyors were sent their pre-briefing distance learning package by courier about a month before their briefing dates. In the case of a late recruit, they were asked to complete the forms before attending the briefing and to bring the forms to the briefing, rather than posting them, for discussion with their supervisor.

72. The pack included the following:

A LIW surveyor manual;

One blank survey form;

Instructions for completing the test exercises (copy in Appendix 14);

Five test exercises;

A list of equipment they needed to bring to the briefing in Swansea;

Timetable of the briefing in Swansea; and

A booklet about the Swansea Marriot hotel where the training was held.

## The exercise

73. Surveyors were asked to complete the flat section of the survey form and five test exercises for dwellings that they had selected themselves. These were the surveyor's own home, or a flat (for the flat section of the survey form) if the surveyor lived in a house.

74. Surveyors were expected to spend about half a day in total on this exercise. Once the surveyor had completed the form and five exercises, they sent them to their supervisors for marking.

## The supervisor's role in the distance learning exercise

75. Supervisors were given the following instructions for marking their surveyors' completed forms and photographs:

Look at the forms and mark them, commenting on weak or severe judgements, but not changing them;

Keep a photocopy of the form and comments for their own records;

Phone the surveyor to discuss the comments and to agree any further work they need to do before the briefing;

Complete a feedback form on each surveyor and pass it to BRE; and

Phone BRE to discuss any surveyor who fails to return the form and exercises, or where there are serious concerns that they will make a good LIW surveyor.

## **Supervisor feedback form**

76. Supervisors completed a feedback form for every surveyor who undertook the exercise. This form was to ascertain whether the surveyors had any problems with completing the forms or understanding the concepts. They were also asked to comment on whether they would recommend the surveyor to continue onto the next stage, i.e. the main briefing.
77. A copy of the supervisor feedback form is in Appendix 15.

## **Outcome of the pre-briefing package**

78. Supervisors marked the forms and returned them to the surveyor. They then contacted the surveyors to discuss their performance. Surveyors were asked to consider the supervisor's comments and act upon them where necessary, to ensure readiness for the main briefings.
79. Satisfactory performance of the pre-briefing, as assessed by the supervisor, was a necessary requirement for surveyors to qualify for the main briefing exercise, and therefore subsequently being employed as LIW surveyor.
80. All of the surveyors who were sent a pre-briefing pack completed them to an acceptable level that indicated they were capable of conducting the survey to the standard required.



# Production of survey materials

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81. Ipsos MORI was responsible for the production and printing of all the survey materials used by surveyors, although BRE undertook the development and printing of the survey form and briefing manual.

## Survey form and development

82. BRE was responsible for liaison with Formara, the printers, during the production of the Property Survey forms. The Data Unit and BRE were responsible for the content and layout of the 2008 survey form, which was largely based on the 2004 LIW Property Survey form as well as the 2006/7 English House Condition Survey (EHCS) form. It also included additional questions to update certain components of the LIW Property Survey to the 2008 English Housing Survey (EHS) form (mainly on energy and accessibility) and to update the Welsh Housing Quality Standard to reflect the latest guidance (published in April 2008).
83. The 2008 LIW Property Survey also uses a repair cost model that incorporates actual quantities collected through the survey form rather than proportions of areas for treatment (as is used in the EHS form). This meant that the measurement of some treatments is based on actual metres or metres<sup>2</sup> in the 2008 LIW survey form rather than tenths of length or area.
84. The first changes to the form were tested out in the pilot in April 2008.

## Briefing manual

85. BRE were responsible for the content and layout of the briefing manual, and liaison with the Data Unit over its content. BRE also liaised with Formara over the production.

## Appointment cards

86. Ipsos MORI designed the appointment cards that surveyors were to leave if there was no initial contact with the householder. Formara were given the layout of the cards in Word. These were in English on one side, and Welsh the other. An appointment card is in Appendix 16.

## Daily return slips (DRS)

87. Designed by Ipsos MORI, the daily return slips were for surveyors to send back with their completed survey forms, detailing the contents of each pre-paid return envelope. The slips were carbon-backed so that the surveyor also kept a copy of what they sent for their records. The DRS were printed by Formara and an example is in Appendix 17.

## Household letters

88. An advance letter was sent to all households who had participated in the LIW Household Survey, who had agreed to be re-contacted and who were selected to form part of the sample for the Property Survey. Given that the Property Survey was conducted after the Household Survey was finished, some advance notification was considered important to help surveyors with access when in the field.
89. The advance letter was sent to selected households several weeks before the start of the Property Survey fieldwork and included details of the background to the LIW survey and the specific purpose of the Property Survey. The letter provided assurances of confidentiality and instructions not to allow anyone access to their home unless they display a unique ID badge. Householders were also made aware of the incentive available for assistance with the survey and were offered a named contact together with telephone and email details if they had any questions or concerns.
90. A copy of the advance letter used is in Appendix 18.

## LIW Property leaflets

91. Included with the advance letters sent to sampled addresses was a Property Survey leaflet providing further details about the survey and some commonly asked questions. The content of the Property leaflet was developed by Ipsos MORI and the Data Unit and was printed in English on one side and Welsh on the other. Formara assisted with the design and layout, and printed the leaflets. A copy of the leaflet is in Appendix 19.

## Address labels

92. Ipsos MORI designed the address labels for the survey forms. They consisted of three labels of equal size; one for the survey form, one for the disk of photographs and one spare. These were standard Avery labels, 3 by 5 labels per sheet. A copy of the layout is in Appendix 27.
93. In addition to address details, the address labels included a barcode with the unique address reference number (set up for the Household Survey), the surveyor identity number to whom each address had been allocated, OS grid reference details of the address and details of the time the interview took place.
94. Formara printed the address information onto the labels for every sampled address selected for the Property Survey. Formara batched the labels into surveyor allocations for distribution at the main briefing.

## **LIW clipboards**

95. Every surveyor was given a LIW clipboard on the first morning of the briefings. These were white, with the LIW logo printed in red and green on the back so they would be easily recognisable to respondents.

## **LIW surveyor ID cards**

96. Ipsos MORI designed and produced the photo-ID cards for the surveyor. Every surveyor was asked to send in two passport-sized photographs along with their signed contract. The photographs were then scanned onto the system, so that they could be colour printed straight onto the ID card. They were then printed with the surveyor's name and ID number on, laminated and hole-punched so they could be prominently displayed by surveyors. The text on the back of the ID card, providing details of the survey and who to contact with any queries about the survey or the surveyor, was also shown in Welsh.

## **Surveyor fieldwork manual**

97. Ipsos MORI produced a fieldwork manual for surveyors and supervisors. The manual was produced for the pilot briefing of supervisors and a final version developed taking onboard feedback from the supervisors. The main comments on the fieldwork manual related to ensuring instructions around the use of the Surveyor Management System were clear and easy to follow. These comments and suggestions were incorporated into the production of the manual for the main briefing.
98. Ipsos MORI printed and bound the surveyor fieldwork manuals in-house. A copy of the surveyor fieldwork manual is in Appendix 5.



# Briefing Venue

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## Briefing venue and requirements

99. Most surveyors were required to attend a six-day residential briefing course at a venue arranged by BRE. A venue was needed that could not only accommodate the large number of surveyors, supervisors and other briefing staff in terms of bed spaces, but also have sufficient lecturing facilities for the entire briefing sessions. The Swansea Marriott was again chosen, (it was the same venue used for the 2004 briefings) as it had all the facilities required, was all on one site and was in a location with good access from around the country.
100. Another consideration was the quality and quantity of housing types in the local vicinity. A significant part of the briefing process involved visiting test properties in the afternoon so that the surveyors could put into practice the techniques discussed earlier in the day. Test properties were selected and used in Swansea and Gowerton.
101. The Swansea Marriott also offered a variety of syndicate rooms which could be converted into fully equipped administration offices for the LIW briefing teams. The LIW briefing team took over one office and one secure room, which was used as a storage area for the large number of cameras, briefing packs and stationery etc.
102. BRE were able to book the venue nearly a year in advance to ensure availability for the known briefing dates.

## Property Survey dress rehearsal

103. BRE organised a dress rehearsal of the Property briefings for the new sections, at BRE offices before the main briefings. This took place on 5 August 2008. The agenda is in Appendix 20.
104. No amendments to the briefings were felt to be necessary following the dress rehearsal.

## Arrangements prior to the main briefings

105. BRE was responsible for ensuring the smooth running of the LIW briefings, and this entailed a large amount of preparation before the briefing itself. BRE organised the following:

Stationery for the LIW office;

Installing extra telephone lines for the LIW office and broadband facilities;

Compiling the list of people attending, including guests, surveyors, supervisors and briefing staff;

Devising a suitable timetable for multiple briefing sessions including scheduling of meal and break times; and

Hiring minibuses with drivers.

## The main briefings

106. The main briefings took place from Tuesday 9 September until Wednesday 17 September 2008 at the Swansea Marriott Hotel. The LIW Briefing teams and supervisors arrived several days before the main briefings began to set up the briefing rooms and office.

107. The first surveyors arrived on the afternoon of Monday 8 September for a 6.30pm start that evening. Each surveyor briefing lasted six days in total, during which they attended lectures, made field visits to the briefing houses and attended evening debriefing sessions. The evening activities ended at around 9.30pm each day. A copy of the briefing timetable is in Appendix 21.

108. Surveyor briefing groups consisted of two supervisor groups, i.e. there were 22 surveyors and two supervisors in each briefing group. There were two briefing groups in total which either started their six day sessions on the Tuesday 9 September or Thursday 11 September.

109. Nine senior surveyors who had worked on the LIW property survey in 2004 and who were, at the time, full-time surveyors on the English Housing Survey were invited to attend a shorter briefing session, lasting two days between Friday 12 September to Sunday 14 September. These were highly experienced surveyors who, it was agreed, did not need the full briefing covering all aspects of the form, but who were required to attend key sessions on aspects such as changes to the 2008 survey form and the collection of data for the Welsh repair cost model.

110. The briefing groups were arranged so that the six-day sessions overlapped, but so that none of the briefing sessions or visits to the briefing houses clashed. This was to ensure that there was not much delay between the end of each briefing and the start of fieldwork. This also minimised the time spent by the Data Unit, Ipsos MORI and BRE away from the office. The briefing dates for each group are set out below:

<b>Briefing Group</b>	<b>Supervisors</b>	<b>Briefing Dates</b>
Group 1	Andy Kippax Keith Russell	Tuesday 9 – Monday 15 September
Group 2	Liz Robinson Andy Bodsworth	Thursday 11 – Wednesday 17 September



# Briefing responsibilities

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## BRE's duties

111. BRE was responsible for the overall management of the venue and for providing any administrative support required at the Property Survey briefings, including:

meeting and greeting arriving surveyors;

setting up lecture room(s) with clipboards, timetables, pens, survey forms, place names etc;

ensuring lecture room(s) were fully equipped daily with forms etc;

photocopying model answers;

providing stationery as required;

liaising with the minibus firm and production of maps to the test briefing properties;

liaising with the Swansea Marriott hotel over domestic arrangements, e.g. times of breaks, meals etc;

loading up minibuses with survey forms and refreshments; and

looking after the keys for the test briefing properties and minibuses.

## Ipsos MORI's duties

112. Ipsos MORI's responsibilities included the following:

organising and ensuring delivery of all surveyor administrative materials and first tranche of survey incentives – i.e. light bulbs;

delivering and allocating cameras;

making up and allocating surveyor work packs;

delivering briefing on survey administration and ensuring effective distribution of surveyor work packs on completion of the session; and

answering surveyor contractual queries throughout the duration of the briefing sessions.

## The Swansea Marriott Hotel's duties

113. The Swansea Marriott Hotel's responsibilities included:

reception;

provision of porters;

provision of refreshments;

technical assistance with lecture room equipment and room handling;  
and

arranging couriers.

## Briefing houses

114. In addition to the briefing venue, six properties were required to serve as briefing houses, where surveyors would be trained in form-completion and making assessments. These were to cover a variety of conditions and types of dwelling. A copy of the BRE's specification for the briefing houses is in Appendix 22.

115. BRE was appointed to undertake the selection of briefing test houses, in close consultation with the Data Unit and Ipsos MORI. Assistance was sought from local authorities, housing associations and estate agents who could provide dwellings for rent for the briefing period, and who had local knowledge of building-type and common defects etc. of local dwellings. Briefing test houses were inspected and selected by supervisors.

## Minibuses

116. BRE arranged the hire of four minibuses with drivers for the duration of the briefing. The buses were used to transport surveyors to and from the briefing houses.

## Briefing stationery

117. BRE arranged for a large quantity of stationery to be delivered to the Swansea Marriott for the use by the briefing teams. This included items such as laptops, overhead projectors, printers and cartridges, socket extension leads, lecterns, projection screens, blank survey forms, briefing manuals, test exercises, plastic overheads of survey form, telephones, ladders, torches, binoculars, tape measures, paper for printing, pens, pencils, scissors, paper clips, tippex, staplers, post-it notes, hole punch, floppy disks, etc.

## Surveyor packs

118. On the final day of the briefings, surveyors were issued with their surveyor packs and their address allocations. In order to complete their work, they were issued with the following items:

approx. 100 main survey forms;

sheets of labels for each address;

photo identity card;

digital camera (including instructions, carry case, battery charger and lead);

around 60 diskettes;

large envelopes for returning completed forms to supervisors for checking and booking onto the website;

padded envelopes for return of diskettes;

surveyor fieldwork manual;

appointment cards;

LIW Property Survey leaflets;

daily return slips (x2 pads);

expenses claim forms (x2 pads);

laminated blank copies of letter to householder (x2);

low energy light bulbs (approx half their required allocation);

clipboard and pens; and

Surveyor Management System username and password details (in white envelope).

119. All surveyors were issued with a surveyor pack check list at the end of the administration briefing to identify any missing items before beginning fieldwork. A copy of the check list is included at Appendix 23.
120. Ipsos MORI assembled the packs in sealed cardboard boxes, and sent them to the Swansea Marriott Hotel in advance.

## **Surveyor fieldwork manual**

121. Ipsos MORI produced a surveyor fieldwork manual to aid the surveyors in the administration of the Property Survey. The manual covered the following topics:

Survey website – using the Surveyor Management System;

Fieldwork basics – surveyor identity, completion of front of survey forms;

Contact with households and gaining access – calling cards and frequently asked questions;

Ensuring you are at the correct address – finding and validating addresses;

Survey addresses – selection and how to deal with houses in multiple occupation and vacant properties;

Photographs – taking photographs, trouble shooting and helpful hints;

Survey materials and equipment – including incentives;

Relationship with your supervisor – roles and responsibilities and maintaining communication;

Problems in the field – technical problems, workload and what to do when seeking assistance;

Contracts and payment – covering the contract, expenses and invoicing for completed work;

Quality control – supervisor supervision, back-checking and validation; and

MRS code of conduct summary document.



## Ipsos MORI briefings

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122. Ipsos MORI was responsible for one briefing session per group during the six-day briefing at the Swansea Marriott Hotel. This briefing session covered sections on the front of the survey form and sample addresses, workload and planning (including use of the SMS), fieldwork issues, surveyor packs, payments and quality control procedures. These were presented as the final session on the sixth day before surveyors were able to begin fieldwork.

123. The slides from the presentation are in Appendix 24.

### Survey form and sample addresses

124. This section was first and covered information on how to correctly complete the front of the survey form to accurately collect information on the status and outcome of each visit made, establishing the type of dwelling as well as information on the photographs taken and the issue of incentives.

125. This section of the presentation covered topics such as:

checking surveyor and address details are correct;

recording the outcome of visits made to selected properties;

recording the reason for any visit not resulting in a full or partial survey;

recording how photographs are taken and whether incentives have been issued; and

how sample addresses have been selected, checking a survey is conducted at the correct address and identifying common reasons why there may be discrepancies.

### Workload and planning

126. This section was designed to provide surveyors with some useful hints and tips on how to plan and organise their workload as well as using the Surveyor Management System to enable accurate monitoring of surveyor progress.

127. This section of the presentation covered the following:

- locating addresses to be surveyed;
- how to log-in and log-out of the SMS ;
- monitoring surveyor progress of full and non-surveys;
- identifying addresses where a property survey is not required; and
- identifying outstanding sample addresses still requiring action.

### **Fieldwork issues**

128. This session covered issues which were envisaged to be of assistance to all surveyors, whether they had previous House Condition Survey experience or not, to promote a good access rates.

129. The presentation covered the following topics:

- making appointments and visiting addresses;
- explaining the survey;
- dealing with people on the doorstep;
- calling on older people;
- persuading potential refusals; and
- and what to do when encountering any problems.

## **Administration, payment and quality control**

130. The final sections of the Ipsos MORI briefing was on the administrative side of the survey. Ipsos MORI covered, amongst other things, the following key topics:

contents of the surveyor packs;

using cameras and taking photographs;

invoicing for completed survey work and expenses incurred;

checking outstanding transactions and statements using the SMS;

supervision in the field;

quality control and personal safety; and

MRS code of conduct.



# Digital Cameras

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## Why digital cameras?

131. Just as in 2004, surveyors working on the 2008 Property Survey used digital still cameras to obtain photographs of the survey dwellings. The use of digital photographs was seen as advantageous for a number of reasons, including:

Instant return of photos with completed survey forms;

No delay in the return of photos, and hence booking-in and validation;

Electronic storage and ease and speed of retrieval of images;

Where necessary provides valuable information to assist in validation of unusual or unique property addresses; and

Administratively easier to handle for the surveyors.

132. A key requirement however, when using digital images is the ability to index electronic copies of photographs with reference to the correct properties. Another important point was that surveyors may have been unfamiliar with or lack the skills to view, manipulate and label images using the cameras available for the survey.

## Type of camera

133. Ipsos MORI supplied a Sony Mavica FD-200 camera to every surveyor for the purpose of taking photographs. As these cameras use floppy disk for image storage, they are highly suitable for the quick and efficient transfer of photographs and return to Ipsos MORI.

134. This model offered a zoom lens and a resolution of 1600 x 1200 pixels, which was suitable for general property views. At the highest resolution, each floppy disk can store 4 images. This was ideal, as Ipsos MORI required one floppy disk per property, for ease of booking-in and checking the images were labelled for the correct property.

## Booking-in

135. By taking images in this way, surveyors stuck a pre-printed, bar-coded address label onto each floppy disk. These were then easily booked-in on the SMS website and at Ipsos MORI, when returned, using a specially written part of the SMS which automatically renamed image files according to the scanned address number, and stored them on a network server. The management database was then able to recall photographs on demand, which was required during the validation of the Property forms.
136. Very little training was required on use of the cameras at the briefings, as they are very simple to use, and the surveyors were given the relevant sections of the instruction manual.

## Feedback

137. Ipsos MORI piloted the use of these digital cameras as part of the pilot exercise. Feedback from the supervisors was positive as they found them easy and straightforward to use. The main issues raised were to ensure that all cameras were fully tested and that every surveyor had two working camera batteries; a main battery and a spare. These were provided to all surveyors at the main briefing.

## Property Sample

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138. The achieved Property sample was expected to be approximately one third of the Household sample. The sample frame from which properties were selected are all those who have completed a household interview and who have agreed to be re-contacted for the Property Survey.
139. The sample frame was stratified on the basis of a basic interviewer grading of the condition of three elements of the property with respect to the view seen on approaching the entrance door. The condition of each element was classified as in no evidence of disrepair, moderate disrepair or major disrepair as defined by the Data Unit. Interviewers were briefed on what to look for and use in this grading.
140. Aspects of each property graded by the interviewers were:
- External walls;
  - Doors and windows; and
  - Roofs and roof structure.
141. For roofs and roof structure an additional code 'not visible' was allowed, e.g. for flat roofs.
142. The result of the grading given to each aspect was then used to determine which category the dwelling would be in, classing it as either 'good' where all of the aspects were coded as 'No evidence of disrepair', 'bad' where at least one aspect was coded as 'Moderate disrepair', or 'ugly' where at least one aspect was coded as 'Major disrepair'.
143. Any property which was graded as 'bad' or 'ugly' was selected for the Property Survey.
144. A differing proportion percentage of 'good' properties were selected for inclusion in the Property Survey according to repair costs estimates and tenure. Using information from the 2004 Property Survey, an ideal sample of 'good' properties for each local authority area was produced proportional to the mean dwelling repair cost in each area. The effect of this was to bias the sample towards those in poorer condition. That is those areas with the highest mean repair costs have a greater chance of selection than those with the lowest mean repair costs.
145. A total of 4,767 respondents to the 2008 LIW Household Survey agreed to be re-contacted to participate in the Property Survey. The table below summarises the distribution by local authority area according to property grading.

**Table showing profile of Household Survey respondents agreeing to be re-contacted by property grading**

<i>Local authority</i>	Permission granted at 02 July 2008			
	<i>Good</i>	<i>Bad</i>	<i>Ugly</i>	<i>Total</i>
Blaenau Gwent	169	10	2	182
Bridgend	178	9	7	194
Caerphilly	175	14	5	194
Cardiff	329	22	5	360
Carmarthenshire	211	20	14	247
Ceredigion	178	15	9	202
Conwy	138	18	16	174
Denbighshire	181	18	2	201
Flintshire	144	6	4	154
Gwynedd	144	10	11	165
Isle of Anglesey	174	9	6	190
Merthyr Tydfil	154	12	7	173
Monmouthshire	217	4	3	225
Neath Port Talbot	217	17	9	243
Newport	220	15	2	237
Pembrokeshire	193	12	9	214
Powys	166	14	5	185
Rhondda Cynon Taf	301	8	10	319
Swansea	275	19	13	309
The Vale of Glamorgan	184	9	2	195
Torfaen	214	7	3	224
Wrexham	167	15	11	193
<b>TOTAL</b>	<b>4,329</b>	<b>283</b>	<b>155</b>	<b>4,767</b>

*Source: Ipsos MORI*

146. The Property Survey sample included all properties assessed to be 'good' and where the tenure was identified as either social or private rented. The remaining 'good' properties that were sampled were those that were owned with the numbers determined by the target number of 'good' properties required for each area. The number of 'good' properties in ownership selected in each local authority area was adjusted to reflect the overall expected response rate (assumed at 67% based on the previous 2004 survey allowing for a predicted improvement reflecting the separate survey approaches followed in 2008).

147. To ensure a minimum number of surveys were conducted in each local authority area, any shortfall arising from the inclusion of all 'bad' and 'ugly' properties as well as 'good' social and rented properties is made up by the inclusion of additional 'good' properties in ownership. The minimum target number of interviews to be achieved in each local authority areas was 87.
148. To improve the precision of the sampling strategy for 'good' properties in ownership (by reducing the design effect), a weight limit of three was set and the sample adjusted accordingly where the weight limit was exceeded. The effect of this is to increase the number of 'good' properties included in the overall sample for each local authority area. The final number of addresses sampled was the sum of the 'bad', 'ugly' and 'good' rented properties plus the final sample of adjusted 'good' owners.
149. The probability of selection was re-weighted when the grossing weights were applied to take account of this differential sampling approach. A summary of the final Property Survey sample selection approach is in Appendix 25.
150. Once selected, addresses were then allocated to surveyors to achieve the target number of surveys.



## Address allocation specification

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151. All surveyors were allocated between 70 and 90 addresses, with the exception of those working in South West Wales (Liz Robinson's group) who covered the largest number of local authority areas. Surveyors working in this region were each allocated between 100 and 120 addresses. From these allocations, each surveyor was expected to have a full survey completed for between approximately 50 and 70 addresses.

### Addresses for issue

152. The addresses selected came from a sample frame of respondents to the 2008 Household Survey who had agreed to be re-contacted to take part in the Property Survey. Addresses were selected according to the strategy outlined in the preceding section of this document.

### Allocation of addresses

153. The addresses were selected to ensure a minimum number of surveys were conducted in each of the 22 local authority areas covering Wales. To allocate addresses to surveyors, Ipsos MORI used postcode software to identify the distance between selected sample address and the home address of surveyors. A postcode map was used to validate the automation process and make manual corrections where necessary. The aim was to ensure, as much as possible, that surveyors were allocated addresses that were in close proximity to their home or area of residence (if they were living temporarily in an area to work on the survey).

154. The allocations varied in size, regionally, depending on the number of local authority areas in each and the target number of interviews to be achieved. The total number of addresses selected to achieve the target number of interviews in each area assumed an overall response rate of 67% (allowing for an improvement in response rates from the 2004 Property Survey reflecting the separate survey approaches). In consequence, surveyors covering the South West Wales had the most amount of allocated addresses whereas North Wales had the least.

<b>Supervisor Group</b>	<b>Area covered</b>	<b>Number of allocated addresses</b>
Liz Robinson	South West Wales	1,196
Andy Bodsworth	South Central Wales	972
Keith Russell	South East Wales	865
Andy Kippax	North Wales	793

155. Based on the region, between around 50 and 70 completed full surveys were expected to be achieved per surveyor. As fieldwork progressed, Ipsos MORI carefully monitored progress and liaised closely with supervisors with the larger allocations over surveyors to be used to carry out reallocations to ensure targets were achieved.
156. One surveyor was unable to work on the survey after allocations had been made but before the main briefing took place. As no suitable replacement could be found at short notice, the decision was taken to divide up the allocation of addresses for this surveyor to the remaining surveyors covering that region. The supervisor for that region liaised with the remaining surveyors and advised Ipsos MORI on the best way to carry out the reallocations.

## Rules for allocation

157. Ipsos MORI adhered to the following rules for the allocation of addresses. Any changes or exceptions to the rules were agreed with the Data Unit.

Allocations were ordered into groups to achieve approximately 50-70 addresses per surveyor depending on region;

Selected surveyors were to work in the supervisor regions allocated;  
and

There was an agreed maximum number of surveys any one surveyor could complete.

## Surveyor dropout

158. There were no incidents of surveyor dropout during the fieldwork period. However, towards the end of fieldwork a number of address reallocations were undertaken where surveyors were unable to fully work their original allocated addresses. These were closely discussed with respective supervisors and co-ordinated and administered by Ipsos MORI following the procedures commented on further below.

## Additional allocations

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159. Once surveyors had completed or were nearing completion of their original allocation of addresses, they contacted or were contacted by Ipsos MORI about availability to complete further addresses.
160. All reallocations were discussed closely with respective supervisors with all re-issued addresses co-ordinated and administered by Ipsos MORI.

### Selecting the addresses

161. Once a surveyor decided to undertake additional addresses, Ipsos MORI checked that the surveyor was both ready and capable of doing more addresses. This involved checking the website progress updates and checking with his or her supervisor. It was necessary to find out where the surveyor was based and where he or she would like the addresses.
162. Normally, surveyors preferred the addresses to be as near to their home as possible to minimise their travel. However, when deciding on addresses to reallocate, ensuring that one local authority area was not completed solely by one surveyor was an important consideration.

### Re-allocation on the Surveyor Management System

163. Once Ipsos MORI and the surveyor agreed the allocation, the addresses were re-allocated on the SMS. This kept an accurate record of the status of all the addresses in the Property Survey sample. This also ensured that addresses would not be attempted by more than one surveyor at any one time.
164. Each address to be re-allocated was detailed in an updated allocations Excel spreadsheet and sent to our software development team to update the SMS. This enabled tracking of allocations for each address, in the event of errors in allocating or queries from surveyors, interviewers or respondents. The following information was recorded:

surveyor name and ID of original allocation;

address numbers to be re-allocated;

pay rate, i.e. standard or higher; and

who addresses have been re-allocated to.

165. Having updated the SMS this meant that both supervisors and surveyors could see which addresses were still being worked and where a survey was still outstanding.

166. Once addresses were reallocated on the SMS, the next stage was to distribute new address labels and additional stationary and incentives. Re-allocated survey addresses kept their original ID but with an amended final digit to clearly distinguish it from an original allocated address. All address ID numbers ended with a 1, but re-allocated address numbers ended with a 2. The only consequence of this was a slight increase in time for booking-in the forms in the Ipsos MORI office, to ensure the correct address could be matched against original ID numbers.

# Survey administration & fieldwork

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## Address allocations

167. Surveyors were issued with their allocated addresses after the Ipsos MORI administration briefing on their last day at the Swansea Marriott Hotel. The address allocations were issued only on the labels to be used on the survey forms and disks. The allocated address list could also be viewed through the Surveyor Management System.
168. A copy of an anonymised list of sample addresses available through the SMS is in Appendix 26.

## Labels

169. Surveyors were given Avery labels, one row of 3 labels for every address allocated to them; one label for the survey form, one for the disk of photographs, and one spare. Each sheet consisted of labels for up to five addresses. A copy of the label is in Appendix 27. All the labels had a unique address identifier in the form of a barcode. The barcode enabled both forms and disks to be booked-in quickly and accurately.
170. The labels also gave the surveyor further information about the property, including:

Unique address number/check digit;

Barcode;

Sample address;

Surveyor ID number;

OS grid reference for address location; and

Date of household survey interview.

## Fieldwork

171. During the briefings, supervisors were asked to provide feedback on their surveyors to assess their suitability to begin the fieldwork. This was to ensure that the supervisor was content that their surveyors had completed the LIW briefing exercise to a suitable standard and were fit to work on the survey fieldwork.

172. Surveyors were expected to start fieldwork within a few days or weeks of their briefings. This was dependent on the areas in which the interviewers were working and the response rates the interviewers achieved.
173. The supervisors were required to accompany every one of the surveyors in their supervisor group for at least half a day in the first few weeks of fieldwork. This was to ensure that the surveyor was competent in survey methodology and in recording of data. Supervisors were to design individual programmes of accompaniment, so that they went out with the weaker surveyors first. In some cases, further visits were necessary to give encouragement and to provide constructive advice.

## **Notification of the survey**

174. Ipsos MORI was responsible for informing both police and local authorities about the survey as well as senior officers within the local authorities (including Chief Housing Officers, Chief Environmental Health Officers and Public Relations Officers) and Chief Executives of the largest Housing Associations.

### **Police Authorities**

175. Ipsos MORI wrote to the Chief Constables of all police authorities in Wales to notify them of the start of the LIW survey. A copy of the letter is in Appendix 28.

### **Local Authorities**

176. Local authorities were also informed about the survey. Letters were sent to all 22 Chief Executives in Wales as well as the Chief Executive of the Welsh Development Agency. A copy of the letter is in Appendix 29.

### **Senior staff within local authorities**

177. Letters were sent to 22 Chief Housing Officers and 22 Chief Environmental Health Officers, as well as 29 officers covering local authority communication departments. Copies of the letter are in Appendix 30.

### **Chief Executives of housing associations**

178. Ipsos MORI wrote to 63 Chief Executives of Housing Associations operating across Wales. A copy of the letter is in Appendix 31.

# Ipsos MORI office

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## Survey assistant tasks

179. Ipsos MORI employed one Executive Assistant and one temporary Research Assistant to help with organisation and administration on the LIW Property Survey. The main administrative tasks are described in more detail below.

## Opening the post

180. All completed survey forms were sent directly to the supervisors, for checking and booking-in on the SMS, who in turn sent them to Ipsos MORI using large pre-paid envelopes. Surveyors were required to include a completed Daily Return Slip (DRS) for each batch of returned envelopes.

181. The DRS showed the following information:

Surveyor name;

Surveyor ID number;

Date sent;

Address number;

Type of survey, i.e. full or non-survey;

Disk enclosed; and

Space to include any other enclosures, e.g. invoice.

182. This information allowed the Ipsos MORI team to check the contents of the package against information supplied on the DRS and retain a record of items received in the post.

183. The DRSs were date stamped by the person opening the package. All forms were filed in date order, so that if there were any queries the relevant form could be located easily. A copy of the DRS is in Appendix 17.

## Checking the forms

184. Each form was checked for its completeness as a full or non-survey. Attention was paid to the completion of information on the first two pages, in particular the information to be recorded if a full survey was obtained; whether the property was unfit and if photos were taken. This double-checked that the supervisor had booked it in correctly. Any missing information or queries were dealt with by telephoning or e-mailing the supervisors.

## Booking-in

### Survey forms

185. All main survey forms were booked-in to the SMS by swiping the barcode with the tabletop barcode reader. The address and the ID of the allocated surveyor automatically appeared on the screen. These details were checked by the person booking-in the form and edited if necessary. From then on, there were prompts to input the following key information from the front page of the survey form:

Level of internal and external inspection i.e. Full/Partial/None;

Survey outcome, with space to specify 'other' outcomes;

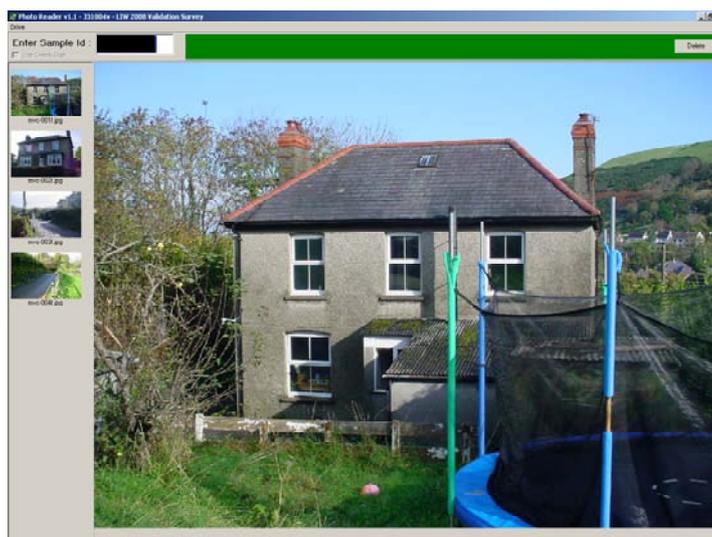
For full surveys: whether photos were taken; and

For non-surveys: reason for non-survey.

186. Once the forms were booked-in, the barcodes were scanned into an Excel spreadsheet. Each column in the spreadsheet was headed with that day's date, and one barcode per cell was listed below. After they were scanned onto the spreadsheet they were boxed and sent for data processing at RR Donnelley.

## Photographs

187. The disks were booked-in by scanning the barcode on the label. They were then saved using the LIW photo-reader software developed by Ipsos MORI. This system uploaded photographs on to a secure drive for use with the validation system.



## Contact with surveyors

188. Two dedicated telephone help-lines were set up for surveyors and householders – one for Welsh speakers and one for English speakers. These numbers were printed on the back of the surveyor and supervisor ID cards. Ipsos MORI also set up dedicated e-mail addresses for surveyors and the public to send messages to ([liw@ipsos-mori.com](mailto:liw@ipsos-mori.com) for English speakers, and [bywcymru@ipsos-mori.com](mailto:bywcymru@ipsos-mori.com) for Welsh speakers). This was checked regularly, as all members of the LIW team had shared access to these addresses.
189. Surveyors phoned the Ipsos MORI help-line and e-mailed for a number of reasons, e.g. requests for more stationery, further allocations, help locating addresses and payment queries.
190. Respondents also called and e-mailed for several reasons, e.g. to refuse to take part in the survey, to make an appointment for the surveyor to call, to request further information on the survey, or to make a complaint.
191. The survey assistant dealt with the majority of requests from surveyors and respondents. Issues relating to payment, allocations and individual complaints were handled by senior members of the LIW team.

## Refusals & appointments

192. Refusals and requests for appointments were logged daily and surveyors contacted as quickly as possible to inform them of refusals and appointments. This included details of the address number, the surveyor and supervisor it was allocated to, the nature of the contact and the time when contact was made.
193. The surveyors were given these messages firstly by telephone. If the surveyor could not be contacted directly, then messages were left on their answer-phones, as the majority of them had mobile phones. If they could not be contacted in this way, then an e-mail was sent.

## Other administrative tasks

194. The survey assistant also undertook a range of other administrative tasks. These included:

Using progress reports to chase any surveyors where survey forms had not been returned;

Investigating any discrepancies between what the surveyor said they had returned and what Ipsos MORI had received and booked-in;

Contacting surveyors about incomplete survey forms/ anomalies;

Contacting surveyors directly to offer more work; and

Handling requests for further fieldwork materials from surveyors.

## Surveyor paperwork and administrative tasks

195. Surveyors were required to undertake a small amount of administration as part of their work on the LIW.

196. Ipsos MORI provided every surveyor with a carbon copy pad of daily return slips (DRS). Surveyors were required to fill in a DRS for each batch of forms/disks returned to Ipsos MORI. The original DRS was included in the pack sent to Ipsos MORI via the supervisors and the duplicate copy kept by the surveyor for their own records, in case of disputes.

197. As noted in the section on surveyor payments, surveyors were required to raise and submit invoices that tallied with the statements of work generated by them on the Surveyor Management System (which showed all survey forms received and booked-in for an individual surveyor).

198. Some surveyors were also required to submit receipts for direct costs incurred throughout the fieldwork period e.g. bridge tolls, additional postage costs, etc.

## Fieldwork period

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199. Surveyors were originally contracted to work from September 2008 to the end of October 2008.
200. Many of the surveyors completed their allocations within this deadline, although there was variability by region. In particular, those working in the South West and South Central parts of Wales took longer to complete their allocations, which in the main reflected the larger number of addresses selected in these areas.
201. Further, rigorous attempts were made to achieve the target number of interviews within each local authority area. To ensure that these targets were met, the fieldwork period for the Property Survey was extended.
202. Although all surveyors did complete the minimum required number of surveys, the extension of fieldwork was necessary to accommodate the larger proportion of local surveyors recruited for the 2008 Property Survey that had existing full-time work commitments (many being employees of local authorities). As the fieldwork period was extended it became harder for many surveyors to commit sufficient time to take on additional reallocation work.
203. Aside from extending the deadline, other measures taken to encourage prompt completion of the survey included:
- Relaxation of the upper limit on the number of full surveys achieved by any one surveyor; and
  - Payment of accommodation and expenses for surveyors picking up reallocations in more remote areas to encourage consecutive days of work on outstanding addresses.
204. The final deadline given to surveyors for completion and return of work was the middle of December 2008.

## Back-check survey

205. Throughout the fieldwork period, checks were made on the conduct of all LIW surveyors. Members of the LIW project team undertook a 'back-check' survey.

206. The back-check survey was a five-minute telephone interview which asked householders, who took part in the survey, questions relating to surveyor conduct including:

Showing an ID card to the householder;

Being professional;

Being helpful, polite and courteous;

Arriving promptly to a booked appointment, or contacting the householder to make an appointment; and

Confirming a selection of property data collected on the form – such as time of survey, tenure or construction date of dwelling.

207. Specific addresses for every surveyor where a full survey had been completed were selected and where interview survey details (name and telephone number) could be appended. These householders were then contacted and asked a series of questions to confirm the survey had been conducted in an appropriate fashion.

208. Back-checks were ongoing throughout the fieldwork period but more checks were made at the start to allow time for corrective action. Where possible, a total of five checks were made per surveyor.

209. Backcheck results were monitored by senior members of the LIW team at Ipsos MORI. In the overwhelming majority of cases the results were very good, with surveyors displaying all the qualities of correct conduct. Some responses did warrant some further discussions with the supervisor but in no instances did the back-check survey give cause to instigate any further action.

## Data entry and validation

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210. Ipsos MORI was responsible for the data entry and validation of the data from the Property Survey.

### Data entry

211. Ipsos MORI contracted RR Donnelley to scan the survey forms in the UK and then data enter them from the electronically transferred scanned images in Sri Lanka. RR Donnelley had large workforces specialising in data entry in these offices who had worked on many large government contracts in the past.

212. Once Ipsos MORI had booked-in basic dwelling information from each survey form onto the SMS, they were boxed and sent over to RR Donnelley.

213. RR Donnelley prepared forms for scanning by guillotining the top off each form (to remove the staples). Each individual page was then scanned. As a check for missing pages or two pages scanning as one, the scanner was programmed to count the number of pages. Any address number where there were either more or less than 23 pages scanned was rejected and rechecked.

214. RR Donnelley designed the data entry specification, in co-operation with Ipsos MORI. RR Donnelley set up the data entry programme and undertook the briefing of data entry staff working on the project. A copy of the specification is in Appendix 32.

215. All specifications were checked and approved by Ipsos MORI before being programmed.

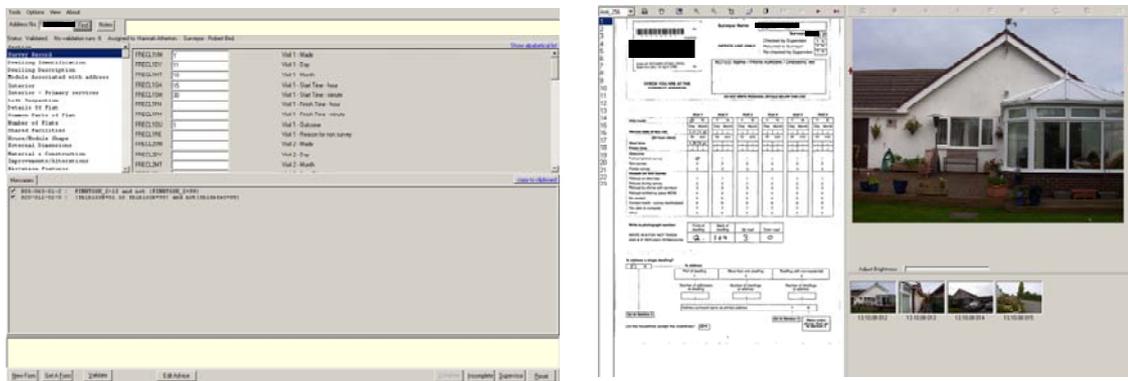
### Validation

216. The Property Survey validation was undertaken by Ipsos MORI to a specification provided by BRE and agreed with the Data Unit. The data checks followed broadly those used in the 2004 LIW Property Survey, namely range checks on all fields, detailed consistency checks, and plausibility checks on a few selected items. The specification from BRE was in the form of commandments to the tried and tested 2004 LIW Property Survey validations.

### Validation method

217. The validation programme was set-up by Ipsos MORI, using code developed for the 2004 LIW Property Survey. The specification for validation broadly followed that used in the 2004 Property Survey with amendments made to reflect changes to the 2008 Property Survey form. A copy of the specification documents used to update the validation programme is in Appendix 33.

218. Once set-up, the validation system was viewed and approved by both the Data Unit and BRE. Where necessary, some minor changes were also made throughout the use of the validation system, and all forms were then bulk validated to ensure they passed the changed rules.
219. The validation system was entirely interactive enabling any one form to be selected for validation by an individual validator. Once a form had been selected for validation, the programme ran at the press of a button. On the left hand screen the data and the output of the validation run (i.e. the ‘errors’) were shown; on the right hand screen the scanned image of the form and the photographs were shown.
220. The validators referred to images of individual pages of the survey form and the photos of the property and edited the data and then re-ran the validation. Each form was run through the validation programme until all anomalies were either resolved or filed for ‘supervisor’ attention (in this case, Liz Robinson from BRE). The validation system allows for any edits to the data to be ‘tracked’ and at any stage, the validator could revert to the original data.
221. The two assistants were trained by Liz Robinson to be validators. Aside from teaching assistants how to use the validation programme, Liz was vital in teaching the assistants how to work their way around the form and interpret important pieces of technical information. Liz visited Ipsos MORI at regular times throughout the validation process and was on-hand, together with other members of the BRE project team, to help with any queries and troubleshoot forms filed for supervisor help. This was when a detailed knowledge of surveying was required to ensure possible anomalies on a survey form were correctly interpreted and amended if necessary.
222. The image below shows the validation programme as seen in use. The left half shows the data from the survey, with errors listed below. The right half shows the scanned image of the survey form and the four photographs taken by the surveyor:



223. This is shown in bigger detail in the two images below. The first screen is the data and any errors. It shows the address number, the list of sections of the form, the variable names, data from the survey, any error messages, and has the buttons for saving the validated form and obtaining the next form for validation.

224. The second screen shows the scanned form, list of page numbers, photographs, and image adjustment buttons.

The screenshot shows a survey form with the following sections:

- Type of occupancy (clarify with household):** A table with columns: Single family dwelling (1), Shared house (2), Household with lodgers (3), Bedside or kitchen (4), Purpose built with shared amenities (5), Hostel (6), and Hostel (7).
- Dwelling type:** A table with columns: House/flat (1), End terrace (2), Mid terrace (3), Semi detached (4), Detached (5), Temporary (6), Purpose built (7), Converted (8), and Non residential plus flat (9).
- Construction date (clarify with household):** A table with columns: Pre 1850 (1), 1850-1899 (2), 1900-1918 (3), 1919-1944 (4), 1945-1964 (5), 1965-1974 (6), 1975-1980 (7), 1981-1990 (8), 1991-1995 (9), 1996-2002 (10), and Post 2002 (11).
- Actual construction date (or best estimate):** A text input field containing '1990'.
- Occupancy (ask where possible):** A table with columns: Occupied (1), Awaiting another owner (2), Awaiting another tenant (3), Awaiting demolition (4), Vacant (5), Being modernised (6), New never occupied (7), and Being used for other purpose (8).
- Have all the accommodation units exclusive use of key amenities?** A table with columns: Yes - sole use (1), Mix (2), and No (3).
- Number of units with exclusive use of amenities:** A text input field.
- Number of units which share amenities:** A text input field.
- Photograph:** A large photo of a white house with a conservatory. Below it are four smaller photos with timestamps: 13.10.08 012, 13.10.08 013, 13.10.08 014, and 13.10.08 015.

225. The validated data was exported in ASCII format from the validation system. SPSS syntax was created to read in the 2,407 variables, name them, label them, apply missing values and output them to an agreed data structure. Data was named and labelled according to conventions agreed with the Data Unit. Derived variables requested by the Data Unit were also created in SPSS syntax, which can be found in Appendix 34.

226. Once validated data was outputted into an SPSS data file, and the derived variables attached, data were weighted according to a specification agreed between Ipsos MORI and Gfk NOP. Data were weighted to account for the differential sampling strategy used with properties distinguished on the basis of their observed condition (as assessed by the interviewer on the household survey), their tenure and broad age category.

227. A grossing factor was then applied to the data using grossed estimates derived from the 2008 household survey which acted as a measure of the population with a correcting weight applied so that the sum of the Property Survey weights is equal to the sum of the grossing weights in the household survey. The weighting approach used for the 2008 Property Survey can be found in Appendix 35.

228. The final stage of the data delivery process involved Ipsos MORI producing 30 individual SPSS data files covering key parts of the survey form to a specification agreed between the Data Unit and Ipsos MORI. Each individual SPSS data file included a set of variables common to all to enable further analysis and modelling of the data. These included the dwelling type description, the construction date, a summary of fitness, the Property Survey grossing factor and tenure.

229. The specification for the production of these individual data files can be found in Appendix 36.
230. Following delivery of the LIW Property Survey SPSS data files, Ipsos MORI provided a full version of the data as a Comma-Separated Values (CSV) file based on a specification provided by the Data Unit.

## Response rates

231. Below follows a series of tables showing survey response outcomes.

**Table 1: Overall response rates**

<b>Outcome</b>	<b>n</b>	<b>%</b>
Full survey	2,741	71.6
Refusal on doorstep	473	12.4
Refusal during survey	9	0.2
Refusal by phone with surveyor	147	3.8
Refusal notified by Ipsos MORI to surveyor	80	2.1
No contact	266	7.0
Other	49	1.3
Target reached – survey not undertaken	61	1.6
<b>Total</b>	<b>3,826</b>	<b>100.0</b>

*Source: Ipsos MORI*

232. The overall response rate achieved for the 2008 Property Survey was 71.6%.  
The most common reason for a non-survey was refusal on the doorstep (12.4%).

**Table 2: Number of calls taken to achieve a full survey**

<b>Number of calls</b>	<b>Number of full surveys achieved</b>	<b>%</b>
1	1,130	41.2
2	883	32.2
3	379	13.8
4	178	6.5
5	87	3.2
6	84	3.1
<b>Total</b>	<b>2,741</b>	<b>100.0</b>

*Source: Ipsos MORI*

**Table 3: Pattern of full surveys during fieldwork, by local authority**

Local authority	Month of full survey (2008)					Total
	Sep	Oct	Nov	Dec	Not stated	
Blaenau Gwent	27	68	25	0	1	121
Bridgend	12	66	41	2	1	122
Caerphilly	24	86	15	0	1	126
Cardiff	50	60	37	0	1	148
Carmarthenshire	39	85	24	11	2	161
Ceredigion	13	64	44	7	3	131
Conwy	34	76	7	0	2	119
Denbighshire	11	74	10	0	2	97
Flintshire	59	38	2	0	3	102
Gwynedd	30	72	10	0	5	117
Isle of Anglesey	15	59	5	0	0	79
Merthyr Tydfil	45	58	11	0	1	115
Monmouthshire	26	55	30	0	1	112
Neath Port Talbot	44	72	49	0	3	168
Newport	24	68	12	2	0	106
Pembrokeshire	11	31	59	26	4	131
Powys	20	74	18	5	2	119
Rhondda Cynon Taf	32	76	26	0	1	135
Swansea	35	109	38	1	3	186
Torfaen	34	98	29	0	3	164
Vale of Glamorgan	11	54	17	4	0	86
Wrexham	61	34	1	0	0	96
<b>Total</b>	<b>657</b>	<b>1,477</b>	<b>510</b>	<b>58</b>	<b>39</b>	<b>2,741</b>

*Source: Ipsos MORI*

**Table 4: Response rates by local authority (n)**

Local authority	Property Survey outcome (numbers)								Total
	Full survey	Refusal on door-step	Refusal during survey	Refusal by phone with surveyor	Refusal notified by Ipsos MORI to surveyor	No contact	Other	Target reached – survey not undertaken	
Blaenau Gwent	121	26	1	3	2	14	3	0	<b>170</b>
Bridgend	122	20	0	8	6	9	3	0	<b>168</b>
Caerphilly	126	19	0	11	1	22	2	2	<b>183</b>
Cardiff	148	31	1	9	4	8	2	3	<b>206</b>
Carmarthenshire	161	23	3	5	4	17	0	18	<b>231</b>
Ceredigion	131	15	0	15	6	2	0	20	<b>189</b>
Conwy	119	13	0	6	3	12	1	0	<b>154</b>
Denbighshire	97	24	2	6	3	10	1	0	<b>143</b>
Flintshire	102	8	0	5	6	6	3	0	<b>130</b>
Gwynedd	117	10	0	6	2	17	3	0	<b>155</b>
Isle of Anglesey	79	29	0	9	1	11	1	0	<b>130</b>
Merthyr Tydfil	115	24	0	3	5	15	2	0	<b>164</b>
Monmouthshire	112	10	0	3	2	3	0	0	<b>130</b>
Neath Port Talbot	168	26	1	3	7	22	1	2	<b>230</b>
Newport	106	13	0	3	1	5	3	0	<b>131</b>
Pembrokeshire	131	15	0	15	5	21	5	9	<b>201</b>
Powys	119	11	0	15	4	16	3	6	<b>174</b>
Rhondda Cynon Taf	135	19	0	3	3	14	4	0	<b>178</b>
Swansea	186	69	1	8	6	12	7	0	<b>289</b>
Torfaen	164	23	0	3	3	15	2	0	<b>210</b>
Vale of Glamorgan	86	33	0	4	2	3	1	1	<b>130</b>
Wrexham	96	12	0	4	4	12	2	0	<b>130</b>
<b>Total</b>	<b>2,741</b>	<b>473</b>	<b>9</b>	<b>147</b>	<b>80</b>	<b>266</b>	<b>49</b>	<b>61</b>	<b>3,826</b>

*Source: Ipsos MORI*

**Table 5: Response rates by local authority (%)**

Local authority	Property Survey outcome (%)								Total
	Full survey	Refusal on door-step	Refusal during survey	Refusal by phone with surveyor	Refusal notified by Ipsos MORI to surveyor	No contact	Other	Target reached – survey not undertaken	
Blaenau Gwent	71.2	15.3	0.6	1.8	1.2	8.2	1.8	0.0	<b>100</b>
Bridgend	72.6	11.9	0.0	4.8	3.6	5.4	1.8	0.0	<b>100</b>
Caerphilly	68.9	10.4	0.0	6.0	0.5	12.0	1.1	1.1	<b>100</b>
Cardiff	71.8	15.0	0.5	4.4	1.9	3.9	1.0	1.5	<b>100</b>
Carmarthenshire	69.7	10.0	1.3	2.2	1.7	7.4	0.0	7.8	<b>100</b>
Ceredigion	69.3	7.9	0.0	7.9	3.2	1.1	0.0	10.6	<b>100</b>
Conwy	77.3	8.4	0.0	3.9	1.9	7.8	0.6	0.0	<b>100</b>
Denbighshire	67.8	16.8	1.4	4.2	2.1	7.0	0.7	0.0	<b>100</b>
Flintshire	78.5	6.2	0.0	3.8	4.6	4.6	2.3	0.0	<b>100</b>
Gwynedd	75.5	6.5	0.0	3.9	1.3	11.0	1.9	0.0	<b>100</b>
Isle of Anglesey	60.8	22.3	0.0	6.9	0.8	8.5	0.8	0.0	<b>100</b>
Merthyr Tydfil	70.1	14.6	0.0	1.8	3.0	9.1	1.2	0.0	<b>100</b>
Monmouthshire	86.2	7.7	0.0	2.3	1.5	2.3	0.0	0.0	<b>100</b>
Neath Port Talbot	73.0	11.3	0.4	1.3	3.0	9.6	0.4	0.9	<b>100</b>
Newport	80.9	9.9	0.0	2.3	0.8	3.8	2.3	0.0	<b>100</b>
Pembrokeshire	65.2	7.5	0.0	7.5	2.5	10.4	2.5	4.5	<b>100</b>
Powys	68.4	6.3	0.0	8.6	2.3	9.2	1.7	3.4	<b>100</b>
Rhondda Cynon Taf	75.8	10.7	0.0	1.7	1.7	7.9	2.2	0.0	<b>100</b>
Swansea	64.4	23.9	0.3	2.8	2.1	4.2	2.4	0.0	<b>100</b>
Torfaen	78.1	11.0	0.0	1.4	1.4	7.1	1.0	0.0	<b>100</b>
Vale of Glamorgan	66.2	25.4	0.0	3.1	1.5	2.3	0.8	0.8	<b>100</b>
Wrexham	73.8	9.2	0.0	3.1	3.1	9.2	1.5	0.0	<b>100</b>
<b>Total</b>	<b>71.6</b>	<b>12.4</b>	<b>0.2</b>	<b>3.8</b>	<b>2.1</b>	<b>7.0</b>	<b>1.3</b>	<b>1.6</b>	<b>100</b>

*Source: Ipsos MORI*

**Table 6: Urban/rural classification by summary outcome (n)**

Urban/ rural classification	Property Survey outcome (numbers)								Total
	Full survey	Refusal on door-step	Refusal during survey	Refusal by phone with surveyor	Refusal notified by Ipsos MORI to surveyor	No contact	Other	Target reached – survey not undertaken	
Hamlet & Isolated Dwelling - Sparse	149	15	1	16	7	10	2	16	<b>216</b>
Hamlet & Isolated Dwellings - Less Sparse	73	7	0	7	2	7	2	1	<b>99</b>
Town & Fringe - Less Sparse	370	78	3	16	11	42	2	4	<b>526</b>
Town & Fringe - Sparse	100	12	0	11	3	13	4	8	<b>151</b>
Urban >10K - Less Sparse	1,599	302	4	60	45	148	33	11	<b>2,202</b>
Urban >10k - Sparse	68	11	1	6	0	7	0	8	<b>101</b>
Village - Less Sparse	188	26	0	9	5	17	2	2	<b>249</b>
Village - Sparse	194	22	0	22	7	22	4	11	<b>282</b>
<b>Total</b>	<b>2,741</b>	<b>473</b>	<b>9</b>	<b>147</b>	<b>80</b>	<b>266</b>	<b>49</b>	<b>61</b>	<b>3,826</b>

*Source: Ipsos MORI*

**Table 7: Urban/rural classification by summary outcome (%)**

Urban/ rural classification	Property Survey outcome (%)								Total
	Full survey	Refusal on door-step	Refusal during survey	Refusal by phone with surveyor	Refusal notified by Ipsos MORI to surveyor	No contact	Other	Target reached – survey not undertaken	
Hamlet & Isolated Dwelling - Sparse	69.0	6.9	0.5	7.4	3.2	4.6	0.9	7.4	<b>100</b>
Hamlet & Isolated Dwellings - Less Sparse	73.7	7.1	0.0	7.1	2.0	7.1	2.0	1.0	<b>100</b>
Town & Fringe - Less Sparse	70.3	14.8	0.6	3.0	2.1	8.0	0.4	0.8	<b>100</b>
Town & Fringe - Sparse	66.2	7.9	0.0	7.3	2.0	8.6	2.6	5.3	<b>100</b>
Urban >10K - Less Sparse	72.6	13.7	0.2	2.7	2.0	6.7	1.5	0.5	<b>100</b>
Urban >10k - Sparse	67.3	10.9	1.0	5.9	0.0	6.9	0.0	7.9	<b>100</b>
Village - Less Sparse	75.5	10.4	0.0	3.6	2.0	6.8	0.8	0.8	<b>100</b>
Village - Sparse	68.8	7.8	0.0	7.8	2.5	7.8	1.4	3.9	<b>100</b>
<b>Total</b>	<b>71.6</b>	<b>12.4</b>	<b>0.2</b>	<b>3.8</b>	<b>2.1</b>	<b>7.0</b>	<b>1.3</b>	<b>1.6</b>	<b>100</b>

*Source: Ipsos MORI*

**Table 8: Local authority by overall condition of property (n)**

Local authority	Overall condition of property (numbers)				Total
	Good	Bad	Ugly	Not seen	
Blaenau Gwent	124	10	2	34	<b>170</b>
Bridgend	146	8	7	7	<b>168</b>
Caerphilly	150	13	5	15	<b>183</b>
Cardiff	163	20	6	17	<b>206</b>
Carmarthenshire	195	20	14	2	<b>231</b>
Ceredigion	162	13	9	5	<b>189</b>
Conwy	116	16	16	6	<b>154</b>
Denbighshire	114	17	2	10	<b>143</b>
Flintshire	117	6	4	3	<b>130</b>
Gwynedd	129	9	11	6	<b>155</b>
Isle of Anglesey	115	9	6	0	<b>130</b>
Merthyr Tydfil	125	9	7	23	<b>164</b>
Monmouthshire	118	4	4	4	<b>130</b>
Neath Port Talbot	191	15	9	15	<b>230</b>
Newport	95	15	2	19	<b>131</b>
Pembrokeshire	173	12	9	7	<b>201</b>
Powys	140	14	5	15	<b>174</b>
Rhondda Cynon Taf	136	8	10	24	<b>178</b>
Swansea	252	19	13	5	<b>289</b>
Torfaen	161	7	3	39	<b>210</b>
Vale of Glamorgan	113	8	2	7	<b>130</b>
Wrexham	100	12	11	7	<b>130</b>
<b>Total</b>	<b>3,135</b>	<b>264</b>	<b>157</b>	<b>270</b>	<b>3,826</b>

*Source: Ipsos MORI*

**Table 9: Local authority by overall condition of property (%)**

Local authority	Overall condition of property (%)				Total
	Good	Bad	Ugly	Not seen	
Blaenau Gwent	72.9	5.9	1.2	20.0	100
Bridgend	86.9	4.8	4.2	4.2	100
Caerphilly	82.0	7.1	2.7	8.2	100
Cardiff	79.1	9.7	2.9	8.3	100
Carmarthenshire	84.4	8.7	6.1	0.9	100
Ceredigion	85.7	6.9	4.8	2.6	100
Conwy	75.3	10.4	10.4	3.9	100
Denbighshire	79.7	11.9	1.4	7.0	100
Flintshire	90.0	4.6	3.1	2.3	100
Gwynedd	83.2	5.8	7.1	3.9	100
Isle of Anglesey	88.5	6.9	4.6	0.0	100
Merthyr Tydfil	76.2	5.5	4.3	14.0	100
Monmouthshire	90.8	3.1	3.1	3.1	100
Neath Port Talbot	83.0	6.5	3.9	6.5	100
Newport	72.5	11.5	1.5	14.5	100
Pembrokeshire	86.1	6.0	4.5	3.5	100
Powys	80.5	8.0	2.9	8.6	100
Rhondda Cynon Taf	76.4	4.5	5.6	13.5	100
Swansea	87.2	6.6	4.5	1.7	100
Torfaen	76.7	3.3	1.4	18.6	100
Vale of Glamorgan	86.9	6.2	1.5	5.4	100
Wrexham	76.9	9.2	8.5	5.4	100
<b>Total</b>	<b>81.9</b>	<b>6.9</b>	<b>4.1</b>	<b>7.1</b>	<b>100</b>

*Source: Ipsos MORI*

**Table 10: Property Survey outcome by overall condition of property**

Outcome		Overall condition of property				Total
		Good	Bad	Ugly	Not seen	
Full survey	n	2,268	185	105	183	<b>2,741</b>
	%	82.7	6.7	3.8	6.7	<b>100.0</b>
Refusal on doorstep	n	384	31	19	39	<b>473</b>
	%	81.2	6.6	4.0	8.2	<b>100.0</b>
Refusal during survey	n	8	0	0	1	<b>9</b>
	%	88.9	0.0	0.0	11.1	<b>100.0</b>
Refusal by phone with surveyor	n	119	10	10	8	<b>147</b>
	%	81.0	6.8	6.8	5.4	<b>100.0</b>
Refusal notified by Ipsos MORI to surveyor	n	69	3	3	5	<b>80</b>
	%	86.3	3.8	3.8	6.3	<b>100.0</b>
No contact	n	205	29	10	22	<b>266</b>
	%	77.1	10.9	3.8	8.3	<b>100.0</b>
Other	n	32	2	6	9	<b>49</b>
	%	65.3	4.1	12.2	18.4	<b>100.0</b>
Target reached – survey not undertaken	n	50	4	4	3	<b>61</b>
	%	82.0	6.6	6.6	4.9	<b>100.0</b>
<b>Total</b>	<b>n</b>	<b>3,135</b>	<b>264</b>	<b>157</b>	<b>270</b>	<b>3,826</b>
	<b>%</b>	<b>81.9</b>	<b>6.9</b>	<b>4.1</b>	<b>7.1</b>	<b>100.0</b>

*Source: Ipsos MORI*

## Surveyor Response Rate

233. The following table shows the response rate for each surveyor.

**Table 11: Property Survey outcome by surveyor (n)**

Surveyor number	Property Survey outcome (numbers)								Total
	Full survey	Refusal on door-step	Refusal during survey	Refusal by phone with surveyor	Refusal notified by IM to surveyor	No contact	Other	Target reached – survey not undertaken	
15	57	10	0	4	2	9	1	0	83
16	55	15	0	4	0	5	0	0	79
17	69	12	0	0	3	1	2	0	87
18	63	17	1	0	1	2	0	3	87
19	63	13	1	8	0	2	0	0	87
20	50	32	0	0	0	3	1	1	87
21	69	7	0	6	2	3	0	0	87
22	71	6	0	7	4	3	1	0	92
23	81	13	0	7	2	8	0	4	115
24	51	9	0	1	0	8	1	0	70
25	44	14	0	4	1	7	0	0	70
26	55	5	0	3	2	13	1	0	79
27	49	7	0	8	1	11	0	2	78
28	72	7	2	10	4	3	0	15	113
29	54	4	1	4	4	4	0	0	71
30	57	9	0	5	2	1	1	0	75
31	60	4	0	0	2	7	2	0	75
32	55	11	0	2	1	10	1	0	80
33	51	2	0	8	1	6	3	0	71
34	67	11	0	3	4	2	1	0	88
35	83	7	0	1	1	0	0	0	92
36	68	13	0	2	1	2	0	0	86
37	78	11	1	4	2	4	2	0	102
38	82	8	1	0	0	11	0	17	119
39	79	11	0	9	5	2	0	14	120
40	68	21	0	4	6	9	1	0	109
41	52	10	0	2	3	3	0	0	70
42	57	4	0	5	3	1	2	0	72
43	42	15	0	0	0	12	2	0	71
44	69	5	0	1	1	2	2	0	80
45	72	9	0	1	5	14	2	2	105
46	61	6	0	0	0	13	0	0	80
47	64	7	0	2	2	1	2	0	78
48	51	11	0	6	0	4	0	0	72
50	68	9	0	3	0	4	2	0	86
51	67	8	0	8	2	11	4	1	101
52	50	24	0	0	3	14	1	0	92
53	59	5	0	1	2	6	0	0	73
54	74	24	0	5	0	6	2	0	111
55	58	3	0	5	1	3	3	0	73
56	51	14	1	2	2	2	0	0	72
57	58	30	1	1	1	5	4	0	100
58	47	6	0	1	1	25	5	2	87
59	90	4	0	0	3	4	0	0	101
<b>Total</b>	<b>2,741</b>	<b>473</b>	<b>9</b>	<b>147</b>	<b>80</b>	<b>266</b>	<b>49</b>	<b>61</b>	<b>3,826</b>

*Source: Ipsos MORI*

Table 12: Property Survey outcome by surveyor (%)

Surveyor number	Property Survey outcome (%)								Total
	Full survey	Refusal on door-step	Refusal during survey	Refusal by phone with surveyor	Refusal notified by IM to surveyor	No contact	Other	Target reached – survey not undertaken	
15	68.7	12.0	0.0	4.8	2.4	10.8	1.2	0.0	100
16	69.6	19.0	0.0	5.1	0.0	6.3	0.0	0.0	100
17	79.3	13.8	0.0	0.0	3.4	1.1	2.3	0.0	100
18	72.4	19.5	1.1	0.0	1.1	2.3	0.0	3.4	100
19	72.4	14.9	1.1	9.2	0.0	2.3	0.0	0.0	100
20	57.5	36.8	0.0	0.0	0.0	3.4	1.1	1.1	100
21	79.3	8.0	0.0	6.9	2.3	3.4	0.0	0.0	100
22	77.2	6.5	0.0	7.6	4.3	3.3	1.1	0.0	100
23	70.4	11.3	0.0	6.1	1.7	7.0	0.0	3.5	100
24	72.9	12.9	0.0	1.4	0.0	11.4	1.4	0.0	100
25	62.9	20.0	0.0	5.7	1.4	10.0	0.0	0.0	100
26	69.6	6.3	0.0	3.8	2.5	16.5	1.3	0.0	100
27	62.8	9.0	0.0	10.3	1.3	14.1	0.0	2.6	100
28	63.7	6.2	1.8	8.8	3.5	2.7	0.0	13.3	100
29	76.1	5.6	1.4	5.6	5.6	5.6	0.0	0.0	100
30	76.0	12.0	0.0	6.7	2.7	1.3	1.3	0.0	100
31	80.0	5.3	0.0	0.0	2.7	9.3	2.7	0.0	100
32	68.8	13.8	0.0	2.5	1.3	12.5	1.3	0.0	100
33	71.8	2.8	0.0	11.3	1.4	8.5	4.2	0.0	100
34	76.1	12.5	0.0	3.4	4.5	2.3	1.1	0.0	100
35	90.2	7.6	0.0	1.1	1.1	0.0	0.0	0.0	100
36	79.1	15.1	0.0	2.3	1.2	2.3	0.0	0.0	100
37	76.5	10.8	1.0	3.9	2.0	3.9	2.0	0.0	100
38	68.9	6.7	0.8	0.0	0.0	9.2	0.0	14.3	100
39	65.8	9.2	0.0	7.5	4.2	1.7	0.0	11.7	100
40	62.4	19.3	0.0	3.7	5.5	8.3	0.9	0.0	100
41	74.3	14.3	0.0	2.9	4.3	4.3	0.0	0.0	100
42	79.2	5.6	0.0	6.9	4.2	1.4	2.8	0.0	100
43	59.2	21.1	0.0	0.0	0.0	16.9	2.8	0.0	100
44	86.3	6.3	0.0	1.3	1.3	2.5	2.5	0.0	100
45	68.6	8.6	0.0	1.0	4.8	13.3	1.9	1.9	100
46	76.3	7.5	0.0	0.0	0.0	16.3	0.0	0.0	100
47	82.1	9.0	0.0	2.6	2.6	1.3	2.6	0.0	100
48	70.8	15.3	0.0	8.3	0.0	5.6	0.0	0.0	100
50	79.1	10.5	0.0	3.5	0.0	4.7	2.3	0.0	100
51	66.3	7.9	0.0	7.9	2.0	10.9	4.0	1.0	100
52	54.3	26.1	0.0	0.0	3.3	15.2	1.1	0.0	100
53	80.8	6.8	0.0	1.4	2.7	8.2	0.0	0.0	100
54	66.7	21.6	0.0	4.5	0.0	5.4	1.8	0.0	100
55	79.5	4.1	0.0	6.8	1.4	4.1	4.1	0.0	100
56	70.8	19.4	1.4	2.8	2.8	2.8	0.0	0.0	100
57	58.0	30.0	1.0	1.0	1.0	5.0	4.0	0.0	100
58	54.0	6.9	0.0	1.1	1.1	28.7	5.7	2.3	100
59	89.1	4.0	0.0	0.0	3.0	4.0	0.0	0.0	100
<b>Total</b>	<b>71.6</b>	<b>12.4</b>	<b>0.2</b>	<b>3.8</b>	<b>2.1</b>	<b>7.0</b>	<b>1.3</b>	<b>1.6</b>	<b>100</b>

Source: Ipsos MORI



# Implications

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## Methodology and sampling

234. Moving away from the paired methodological approach used in 2004 to a two stage survey process with the Property Survey conducted after completion of the Household interview survey worked well. It was more appealing to surveyors as it meant they could fully work their allocated addresses within a set period of time and consequently meant their workload was far more predictable than previously.
235. This was considered a major advantage by surveyors and was stressed at the recruitment stage to encourage as many surveyors as possible to express an interest in working on the survey. It also meant that a much larger proportion of local surveyors could be considered rather than having to rely heavily on experienced surveyors from England.
236. A potential concern was whether there would be a sufficient level of agreement among participants to the household survey to be re-contacted. This proved not to be the case as the marked improvement in response rates from using the two-stage approach meant the sampled addresses were sufficient to achieve the required number of surveys. In undertaking any future surveys using the same approach it will continue to be important to re-iterate to household interviewers the importance of obtaining agreement to any follow-up property survey work.
237. Issuing a letter of notification to all households whose property had been selected as part of the Property Survey was an important strategy to help with response rates. This was not undertaken in 2004, as the interviewers were responsible for notifying when a property had been selected with the property survey being conducted shortly afterwards. In 2008, it was possible that more than six months would have elapsed between the conduct of the Household and Property surveys.
238. The selection of predominantly poorer condition properties to maximise data reliability for subsequent analysis, such as the repairs costs estimates for example, again worked well. Initial analysis of survey results suggested a strong correlation between interviewer condition assessment and surveyor assessments of fitness.
239. In practical terms, however, the application of this sampling approach increased the number of addresses selected in particular parts of the country, especially the South West and South Central regions. The effect of this was that the 22 surveyors covering these regions had larger allocations and higher targets to achieve and, consequently, resulted in a higher proportion of re-allocations in these areas. Greater consideration should be given to adjusting the balance of surveyors operating in each region should a similar sampling approach be used in future surveys.

## Recruitment

240. The advertisements placed in professional surveying journals by BRE, together with the concerted promotional activities of the Data Unit through the Welsh Local Government Association proved very effective at generating a large number of expressions of interests from experienced surveyors. Many of these came from Housing and Environmental Health Officers working in Welsh local authorities. Together with contacts from surveyors who had worked on the previous 2004 Property Survey, we were able to draw on a substantial pool of surveyors.
241. Given the level of interest, a pre-qualification exercise proved an essential tool to refine the selection approach. The overarching aim was to achieve a good balance between those with previous experience of working on the survey together with new surveyors (mainly local) whose background indicated they could be brought up to speed effectively through the main briefing sessions. The recruitment mechanisms used proved to be very effective and are recommended for any future surveys. All but one of the surveyors originally recruited successfully completed their allocation of surveys.

## Briefing materials

242. Surveyors found all the briefing materials useful and easy to complete. Floppy disks, pens and daily return slips were the most commonly requested materials during fieldwork, although in the main, the quantity of materials handed out at the briefing was considered sufficient.
243. The introduction of higher visibility clipboards that more prominently displayed the Living in Wales Survey brand was welcome, although some surveyors mentioned the size and lack of an inside envelope to securely store materials as problematic.
244. The inclusion of an offer of an incentive (low energy light bulbs) for those participating in the 2008 Property Survey was viewed as a positive step by all partners to help with surveyor access. Surveyors were allocated half at the briefing and the rest dispatched on request during fieldwork. Consideration should be given to alternative approaches to the administration of this aspect for future surveys. It was inefficient and costly to organise, as well as resulting in some delays to completed survey work especially towards the end of fieldwork when surveyors were picking up re-allocations. Dispatch of all incentives to all surveyors prior to the main briefing, or using the regional supervisors to regulate and monitor distribution are some alternative approaches that could be considered.

## The briefing

245. Surveyor feedback from the main briefing was very positive, with praise for the venue, the organisation and the content and quality of the briefing presentations. The pre-briefing exercise was a useful way for surveyors to begin thinking about the survey so they could hit the ground running when their briefings began. It also provided a good opportunity for pre-briefing contact to help foster a 'team' mentality and a familiar point of contact when first arriving.
246. There was also positive feedback for the test properties used during the briefing exercises, which proved to be sufficiently challenging to stimulate good discussion and debate about the correct judgements.

## Notifications

247. The survey was widely publicised and prior to the start of fieldwork advance letters were not only sent to households selected for the Property Survey but also to Local Authority Chief Executives, the Chief Constable of each Police Authority and senior staff working in housing, environmental health and public relations departments of each local authority. Advance notification was also sent to Chief Executives of the largest Housing Associations operating in Wales. Feedback from surveyors was that there was a strong awareness of the survey which helped with their access rates.
248. Automatic notification of appointments to surveyors was not used in the 2008 Property Survey which, instead, relied on regular telephone or email contact between Ipsos MORI office staff and the surveyor. Once we ensured that all surveyor contact details were up to date, this proved a highly effective and efficient way of informing surveyors about potential appointments.

## Surveyor management and processing payments

249. The Surveyor Management System was re-designed for the 2008 Property Survey offering a simpler interface for supervisors and surveyors alike to monitor and manage their allocations. Supervisors and surveyors found this both helpful and user-friendly.
250. In particular changes were made to the supervisor approval screen, enabling quicker navigation of surveyor allocations and amendments to be made if errors had arisen during the approval process. The address status report page was also simplified, allowing surveyors to select the type of status report they wanted to run where previously all addresses would be listed.
251. There did still remain some delays in processing payments. In part this reflected delays in the provision of approved survey forms from the supervisors to Ipsos MORI for booking in and processing. Provision was made for a regular return of forms through the post although some supervisors felt this was time consuming, instead favouring to deliver forms in bulk in person.

252. There were also some delays in the processing of some expenses when checking that the expenses forms had been completed correctly by surveyors. Some more detailed briefing of surveyors on this aspect will help in future surveys.

## Timetable

253. The timetable worked well for the recruitment of surveyors and provided sufficient time for the development and production of all materials to feed into the briefing date. The length of time allowed could remain as it is for future surveys.

254. The original eight-week window for fieldwork proved problematic for those regions in the south with the largest allocations. Despite achieving higher than expected access rates overall, fieldwork inevitably took longer to complete in these areas. To meet some of the area targets in these regions it was necessary to reallocate some work to surveyors who still had time to commit to the survey. This process in itself resulted in additional delays to organise and distribute all necessary materials. A better balance of surveyors more closely aligned to the regional allocations would have helped reduce some of the delay in completing the fieldwork.

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Checked & Approved:



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Gary Welch

Checked & Approved:



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Stephen Finlay

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# Appendices

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<b>Appendix 1</b>	<b>Pilot agenda</b>
<b>Appendix 2</b>	<b>Pilot discussion of survey form amendments</b>
<b>Appendix 3</b>	<b>Camera form</b>
<b>Appendix 4</b>	<b>Pilot de-briefing agenda</b>
<b>Appendix 5</b>	<b>Surveyor fieldwork manual</b>
<b>Appendix 6</b>	<b>Surveyor recruitment advert</b>
<b>Appendix 7</b>	<b>Responsibilities of interviewers</b>
<b>Appendix 8</b>	<b>Surveyor contract (VAT)</b>
<b>Appendix 9</b>	<b>Surveyor contract (non-VAT)</b>
<b>Appendix 10</b>	<b>Surveyor contract (2-day briefing)</b>
<b>Appendix 11</b>	<b>Banking details form</b>
<b>Appendix 12</b>	<b>ID card</b>
<b>Appendix 13</b>	<b>Pay statement</b>
<b>Appendix 14</b>	<b>Instructions for test exercise</b>
<b>Appendix 15</b>	<b>Supervisor feedback form</b>
<b>Appendix 16</b>	<b>Surveyor appointment card</b>
<b>Appendix 17</b>	<b>Daily return slip</b>
<b>Appendix 18</b>	<b>Advance householder letter</b>
<b>Appendix 19</b>	<b>Property Survey leaflet</b>
<b>Appendix 20</b>	<b>Dress rehearsal agenda</b>
<b>Appendix 21</b>	<b>Briefing timetable</b>
<b>Appendix 22</b>	<b>Briefing houses specification</b>
<b>Appendix 23</b>	<b>Briefing pack check list</b>

<b>Appendix 24</b>	<b>Ipsos MORI administration briefing slides</b>
<b>Appendix 25</b>	<b>Summary of sample approach</b>
<b>Appendix 26</b>	<b>Sample address list</b>
<b>Appendix 27</b>	<b>Address label</b>
<b>Appendix 28</b>	<b>Police letter</b>
<b>Appendix 29</b>	<b>LA letter</b>
<b>Appendix 30</b>	<b>CHO/ CEHO letter</b>
<b>Appendix 31</b>	<b>HA letter</b>
<b>Appendix 32</b>	<b>Scanning specification</b>
<b>Appendix 33</b>	<b>Validation programme updates</b>
<b>Appendix 34</b>	<b>Derived variables specification</b>
<b>Appendix 35</b>	<b>Property Survey weighting approach</b>
<b>Appendix 36</b>	<b>SPSS data file specification</b>

# **Appendix 1 Pilot agenda**

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## Living in Wales Property Survey 2008: Pilot Survey Briefing 22 April 2008

### Agenda

- |       |   |                        |
|-------|---|------------------------|
| 10.00 | Arrive/coffee   |                        |
| 10.30 | Welcome, introductions, purpose of the day  | <b>BRE</b>             |
| 10.45 | Differences between the 2008 LIW PS form and the current EHCS form, and the 2004 LIW form | <b>BRE</b>             |
| 11.00 | Measuring disrepair using the WHCS method - refresher                                     | <b>BRE</b>             |
| 11.15 | Discussion of the Welsh Housing Quality Standard + briefing on new questions for 2008     | <b>BRE</b>             |
| 11.45 | Energy update   | <b>BRE</b>             |
| 12.15 | Surveyor recruitment  | <b>BRE, Ipsos MORI</b> |
| 12.45 | Lunch   |                        |
| 13.30 | Pilot survey administrative procedures  | <b>BRE, Ipsos MORI</b> |
| 14.30 | Questions   |                        |
| 15.00 | Tea/Optional tour of BRE Innovation Park  |                        |



## **Appendix 2 Pilot discussion of survey form amendments**

---

## **Piloting the Living in Wales Property Survey 2008: Briefing for Supervisors on how to complete the survey form**

This briefing is provided for the four Supervisors who are taking part in the April 2008 pilot survey of the Living in Wales Property Survey 2008.

The 2008 form is essentially a hybrid of the Living in Wales Property Survey 2004 form and the 2006/07 English House Condition Survey form. It has additional questions to update certain components of the LiW PS to the 2008 English Housing Survey form (mainly energy and accessibility), and to update the Welsh Housing Quality Standard to the latest guidance (due to be published at the end of April 2008).

This briefing assumes that the Supervisors are familiar with, and have access to, the 2004 LIW briefing and the 2005/06 EHCS or NIHCS briefing. Therefore, in Part 1 below, we have identified the areas /questions of the form that are new or have changed for the LIW PS 2008, and in Part 2 we have provided some briefing on how to complete the new or changed questions that you may not be familiar with. Some questions have been removed completely.

Supervisors are reminded that the Living in Wales repair cost model uses actual quantities collected through the survey form and not proportions of areas for treatment, as with the EHCS and NIHCS.

### **Part 1: Changes to the Living in Wales Survey form for 2008**

Page numbers relate to the 2008 survey form.

#### **Front page**

Re-branded as 2008 Living in Wales form.

#### **Page 1**

Survey record reflects the 2008 LIW approach to contacting households.

#### **Page 2**

Added 'Actual date of construction', as for 2008 EHS and new codes to reflect passage of time since last survey.

#### **Page 3**

Function – New WHQS Guidance (2008).

Add question on 'internal insulation' to room-by-room wall assessment to ensure parity with EHS SAP model.

Slippery flooring – New WHQS Guidance (2008).

Added 5 HHSRS flags for dwelling interior in place of 'Internal design defects'. Security of dwelling (other doors and windows)) - New WHQS Guidance (2008).

Mains powered smoke detectors – New WHQS Guidance (2008).

Replaced 'Access for the disabled' with revised EHS 'Accessibility' questions.

Added 'Adequate internal storage space' to inform WHQS.

Added question on 'Rubbish/pests inside dwelling' to inform HHSRS domestic hygiene model.

#### **Page 4**

Adequate cooker space – New WHQS Guidance (2008).

Cupboards – New WHQS Guidance (2008).

Added questions on 'Number of high level units' and 'Number of base level units' to inform WHQS.

Added questions on 'Length of worktop' and 'L shaped' to inform WHQS.

Washing machine provision – New WHQS Guidance (2008).

Tumble dryer provision – New Guidance WHQS (2008).

Refrigerator provision – New WHQS Guidance (2008).

Added question on 'Number of convenient power sockets' to inform WHQS.

Changed code of kitchen and bathroom amenities last refurbished to reflect passage of time since last survey

Added question on 'Bathroom wheelchair accessible'.

Changed 'second bath/shower' question to 'second bath' only.

Added question on 'second shower/shower not in bathroom' to inform WHQS.

#### **Page 5**

Added question on 'Is there a heat recovery system in the dwelling'

Added question on 'Is there any evidence of cavity wall insulation in/around electricity or gas meters'.

Added question on 'Total number of open fireplaces'.

### **Page 6**

Added two additional fuel types: 'biomass' and 'other' to primary heating fuel.

Added 'Other renewable' to 'Other heating types'.

Facing page notes on heating codes augmented to reflect three different types of heat pump: ground source, water source and air source.

### **Page 7**

Hot water system – Other

Cylinder insulation thickness codes altered to reflect WHQS and SAP requirements.

Added question on 'Is there any evidence of cavity wall insulation in the loft'

### **Page 8**

No changes.

### **Page 9**

Added questions on: 'Lift controls accessible to a wheelchair user' and 'Lift controls accessible to a visually impaired user'.

Added 5 HHSRS flags on health and safety of common areas.

Removed duplicate questions on fire safety of common areas.

### **Page 10**

No changes

### **Page 11**

Added EHS 'Accessibility' questions.

Added 3 flags on health and safety of shared areas.

### **Page 12**

No changes

### **Page 13**

Revised dates and codes of improvements/alterations to reflect time lapse since last survey.

Added question on 'exact year of loft conversion'

Clarified that solar panels applies to water heating. Added questions on PV panels and wind turbines to elevation features.

Added question in 'Is there any evidence from the air bricks of cavity wall insulation'.

### **Page 14**

Removed 'Unknown' option from 'Roof structure' and 'Roof covering' faults.

### **Page 15**

Added questions on conservatory design (as EHS) to inform SAP.

Removed 'Unknown' option from 'Damp proof course' faults.

### **Page 16**

Added question on 'are external doors and windows adequately draft proofed', to inform WHQS.

Filter question for Plot has changed to inform HHSRS and WHQS.

Revised section on 'Accessibility' to meet both WHQS and Lifetime Homes requirements, including question on 'is entrance covered'.

Added question on 'Level accessible area' to inform WHQS.

Added 3 flags on HHSRS of private plot.

External storage – New WHQS Guidance (2008).

Added questions on:

- Provision of external drying line;
- Paved access to drying line provision;
- Is rear garden:
  - easy to maintain;
  - reasonably private; and
  - safe and suitable for children to play?

All to inform WHQS.

**Page 17**

Added question on 'Is off-plot parking located within 30 metres of the entrance to dwelling/module, with an even access route of less than 1:12 gradient.'

Added 'Cavity wall insulation summary' section, leading to final question: Is cavity walls insulation present?

**Page 18**

No changes

**Page 19**

No changes

**Page 20, 21, 21**

New pages on the 5 measured HHSRS hazards added (from 2006/07 updated to 2008 EHS).

**Page 23**

Formerly LIW 2004 page 20. Otherwise no changes.

## **Part 2: Additional briefing on questions which appear only in the 2008 LIW survey and 2008 EHS survey**

### **Page 2**

#### **Actual construction date**

The purpose of this information is to give more accurate dates within the age bands for dwelling identification and to be able to link dwellings to the Building Regulations implementation for insulation purposes. If there is no clear indication of an exact date, enter your best guess based on your professional judgement. If it is not possible to guesstimate an age for the dwelling, enter the earliest date within the band you have chosen.

### **Page 3**

#### **Function – Bedroom sizes**

Bedroom sizes and functions - this data is not used directly for WHQS. However, bedroom sizes do inform Nominal Occupancy which is used at several points further on in the form. WHQS bedrooms are simply defined as single if more than 6m<sup>2</sup> but less than 10 m<sup>2</sup> and twin/double if 10m<sup>2</sup> or over.

#### **Internal insulation**

##### **Slippery flooring**

New WHQS Guidance (2008) explicitly states that 'Untextured linoleum is not suitable'.

##### **Security of dwelling – Other external doors/Accessible windows**

Move patio doors into the windows category. Leave French windows in other doors section (WHQS 2008).

##### **Mains powered smoke alarms**

Tweak to cover suitable location - same with battery back up. Circulation space and non sealed rooms are considered to be suitable for location.

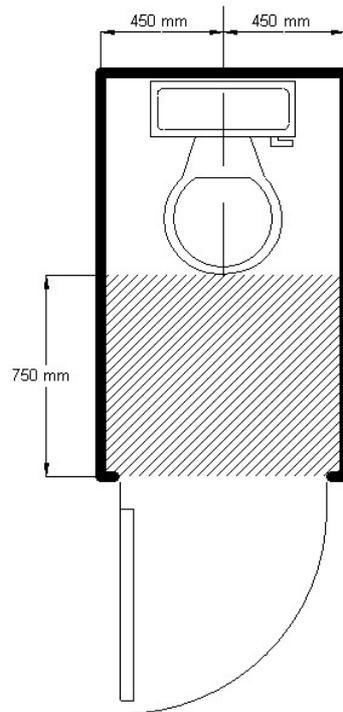
##### **Wheelchair accessible WC at entrance level**

Record **Yes** if the WC at entrance level meets the following Part M criteria:

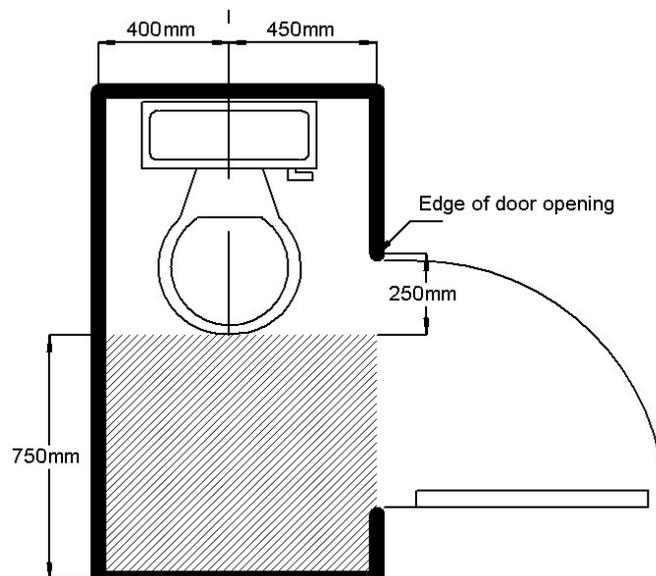
- The space between the front of the WC bowl and the opposite wall/door should be a minimum of 750mm.
- The distance from the central line of the cistern and adjoining wall should be a minimum of 450mm.

- Where oblique access is provided, there should be a minimum of 250mm to the side of the door.
- The WC door should open outwards. Wheelchair users should be able to enter the amenities unaided.

**Minimum space requirements for wheelchair accessible WC at entrance level.**



**Minimum space requirements for oblique access for wheelchair accessible WC at entrance level.**



## Adequate internal storage space

To meet the WHQS, a dwelling should have:

- A tall cupboard suitable for storage of brooms etc;
- High level shelving for storage of cleaning materials out of reach of small children; and
- An airing cupboard (where applicable).

These should be **conveniently** located.

Record **Yes** if all these are present.

## Rubbish/pests inside dwelling

### Page 4

## Adequate cooker space

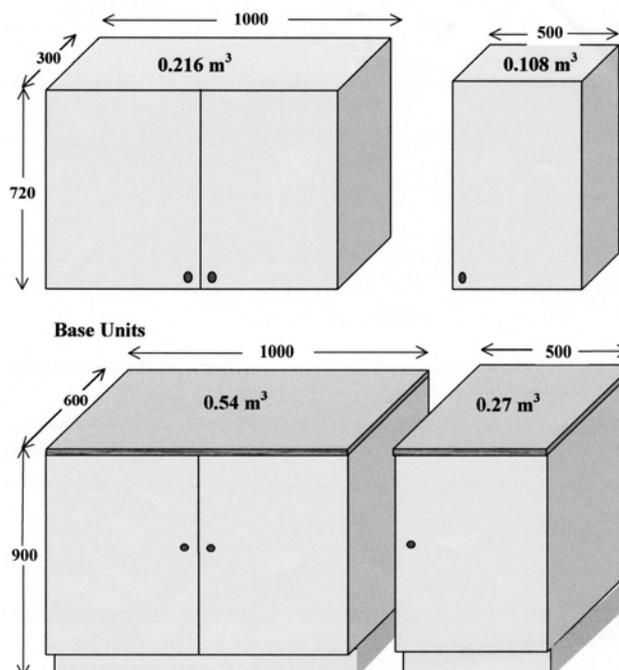
Clear space now also includes 1200mm in front of the cooker (WHQS 2008).

## Number of high level units

These should be counted in standard sizes (500mm wide, 300mm deep) by the number of doors, ie double door units count as 2. (see examples below)

## Number of base level units

These should be counted in standard sizes (500mm wide, 600mm deep) by the number of doors, ie double door units count as 2. (see examples below).



## **Cupboards**

*Working*

### **Length of worktop**

Measure these and record in tenths of metres (eg 2.4).

### **L shaped**

Record **Yes** if the worktop is 'L' shaped. Include worktops with two changes of direction ('U' shaped) or more.

### **Washing machine provision**

Clear space now also includes 1000mm in front (WHQS 2008).

### **Tumble dryer provision**

Clear space now also includes 1000mm in front (WHQS 2008).

### **Refrigerator provision**

Clear space now also includes 1000mm in front (WHQS 2008).

### **Number of convenient power sockets**

There should be enough power sockets to avoid using multi-way adaptors and trailing flexes

There should be at least one convenient power socket in addition to used for the refrigerator. This should be provided close to the main food preparation area.

Record the number of **convenient** power sockets. Doubles should count as 2. Inconveniently placed sockets should not be counted.

### **Bathroom wheelchair accessible**

To record **Yes** to this question, the bathroom should be designed for ease of access for a wheelchair user of the bath, WC and wash hand basin, and incorporate:

- A turning circle of minimum 1500mm diameter within the bathroom allowing sufficient space for a wheelchair user to access the amenities.
- 750mm space adjacent to the WC to provide sufficient space for side access to the WC.

- 700mm x 1100 mm space adjacent to the bath, preferably at the tap end, to provide sufficient space for access to the bath.
- 700mm x 1100mm space adjacent to the wash hand basin to provide sufficient space for access.

### **Second shower/shower not in bathroom**

Record **Yes** if there is a shower which is in a room separate from the bathroom.

This does not have to be a second shower just one that is not in the main bathroom (New guidance states that the **dwelling** must have a shower not in the main bathroom). (WHQS 2008).

## **Page 5**

### **Domestic heat recovery ventilation systems**

A heat recovery ventilation system will provide fresh air to the dwelling - retaining the heat from stale humid air extracted from, bathrooms, kitchens etc. by passing the warm air from these rooms over a heat exchanger before being expelled to the outside. Fresh air entering the building is heated as it passes through the heat exchanger before entering the habitable rooms in the dwelling.

#### *Identification of systems*

Look for the control panel (mainly located on walls) as the most likely indicator of an installed heat recovery ventilation system. Other indicators include:- ducting throughout the dwelling, extract fans and a heat exchanger (unlikely to be easily accessible).

Record **Yes** if this is present. Such systems are uncommon.

### **Evidence of cavity wall insulation in/around electricity or gas meters**

Record **Yes** if there is any evidence of cavity wall insulation, such as white, yellow or orange foam, or substance in or around the gas or electricity meters. Gaps in the wall due to incoming pipes may reveal insulation materials.

If there is no evidence of cavity wall insulation around meters, but you know it exists, you should still code **No**.

### **Ventilation – Total number of fireplaces**

Record the number of open fireplaces within the whole dwelling. Only record un-blocked fireplaces where heat will/can be lost via the flue. Do not record boarded-up fireplaces even if they have ventilation grills or airbricks.

## Page 6

### Primary heating fuel - Other fuels

### Other heating – Other renewable

## Page 7

### Evidence of cavity wall insulation in the loft

Record **Yes** if there is any evidence of cavity wall insulation, such as white, yellow or orange foam or substance in any spaces or gaps in the loft space. Gaps around the rafters and purlins where they meet the party or gable walls may reveal insulation materials. (see examples below)

If there is no evidence of cavity wall insulation in the loft, but you know it exists, you should still code **No**.



## Page 9

### Lift controls accessible to a wheelchair user

Lift controls should be designed to allow unaccompanied wheelchair users to easily use the lift.

To record **Yes** the landing and car controls should be:

- Positioned at a height of not less than 900mm and not more than 1200mm above the landing and the car floor and at a distance of at least 400mm from the front internal wall of the lift.

## **Lift control available to a visually impaired person**

Lift controls should be designed to allow unaccompanied visually impaired users to easily access the lift.

To record **Yes** they should incorporate the following:

- Suitable tactile indication on the landing and adjacent to the lift call button to identify the storey in question.
- Suitable tactile indication on or adjacent to the lift buttons within the car to inform the floor selected.
- A signalling system which gives visual notification that the lift is answering a landing call and a 'dwell time' of five seconds before the doors begin to close after they are fully open.
- When the lift serves more than three storeys, visual and audible indications of the floor reached.

## **Page 13**

### **Exact year of loft conversion**

Indicate if the loft space has been converted to a habitable space. Ask household exact year of loft conversion. The data will give a more accurate indication of the insulation levels. If the householder does not know the exact year of the loft conversion then enter your best guess based on your own judgement. If it is impossible to guess the age of a conversion, enter the earliest date within the band you have selected.

### **Solar panels (water heating)**

Record **Yes** if there are any solar panels installed for water heating purposes. If they are on the roof, record their presence on the face into which the roof slopes. They will usually be found on a south facing roof slope.

A solar water heating system should be identifiable in a number of ways. There should be some solar panels on the roof of the dwelling and there should also be some additional pipes connected to the hot water storage tank. If this is not the case there should be an additional tank located somewhere (to contain the solar heated water). It is possible that both cases occur (i.e. additional pipes and additional tank). It is sometimes possible for solar water heating panels to be used in conjunction with a combination boiler. However, this system will usually require a specific storage tank (solely for the solar heated water) and for the combination boiler to be able to accept pre-heated water.

**A solar water heating panel**



**A photovoltaic panel – NOT a solar water heating panel**



### **PV panels**

Record **Yes** if there are any photovoltaic panels present on any face of the dwelling/module. These generate electricity and should not be confused with solar panels which heat water. If they are on the roof, record their presence on the face into which the roof slopes. They will usually be found on a south facing roof slope.

### **Wind turbines**

Record **Yes** if there is a wind turbine located on the face of the dwelling/module. It will usually be attached to the wall or chimney stack. If it is attached to the chimney stack, record it on the same face as the chimney included in the view system.

### **Evidence from the air bricks of cavity wall insulation**

Indicate if there is evidence that the wall has had cavity wall insulation installed from looking around the air bricks. Answer **Yes** if there is evidence in/or around the air bricks, or the airbricks are newly installed/replaced as part of cavity wall treatment.

If there is no evidence of wall insulation in or around the air bricks, even though you know the walls have been insulated, you should still code 'No'.

### **Page 15**

#### **Conservatories**

### **Page 16**

#### **Doors and windows adequately draft proofed**

Record **Yes** if all external doors and windows have good quality designed-in or retrofitted effective draft proofing.

### **Level accessible area**

The WHQS requires that dwellings with either a front or rear garden should have a level area of no less than 10m<sup>2</sup> that is directly accessible.

Record **Yes** if the area is directly accessible and within the curtilage of the dwelling. Paths and steps may be considered an acceptable method of access.

### **External storage**

Record **Yes** if the dwelling has access to a robust and lockable external store.

This should be **conveniently** located.

### **Provision for external drying line**

Record **Yes** if there is provision on plot for an external drying line. Provision will include either the poles and/or attachment for a line or the ground securing for a rotary system. The line itself does not have to be present, but can be easily installed.

### **Paved access to drying line provision**

The WHQS requires that where a dwelling has a garden with an area with **provision** for a drying line, the access to the provision for the line should be fully paved. Record **Yes** if this is the case.

### **Rear exit from plot exists**

Record **Yes** if there is independent access to the plot at the rear of the dwelling.

### **Path to exit fully paved**

Record **Yes** if the path to the rear exit is fully paved. Record **No** if there is no path or no rear exit.

### **Rear garden is:**

For WHQS a garden is an area associated with the dwelling that may consist of a hard and/or soft landscaped area. This area will be for use by the residents of the dwelling but will not normally be a shared area.

### **Easy to maintain**

Record **Yes** if the rear garden is considered to be easy to maintain. This should be assessed in relation to the intended occupants and will consider issues such as:

- Poor design;
- Space constraints; and
- Steep topography.

### **Reasonably private**

Record **Yes** if the rear garden is considered to be reasonably private. For example:

- Landlords must ensure gardens have proper/secure boundaries. Secured By Design guidance advises that easy access to the back and sides of the dwelling can be prevented by the provision of locked gates. The use of post and wire fences, low level shrubs or walls is not considered suitable. Trellis topping also makes climbing difficult and will add security.

### **Safe and suitable for children to play**

Record **Yes** if the rear garden is considered to be safe and suitable for children to play. This also includes allowing supervision from the dwelling. Issues that may be considered in relation to this element are:

- Boundaries should be suitable to prevent children leaving the garden and should not encourage climbing;
- If the garden is on an incline, the landlord must ensure that any retaining walls are structurally stable and have an appropriate guard rail/balustrade; and
- Ensure pathways are even and unobstructed.

## **Page 17**

### **Off plot parking**

Record **Yes** if off-plot parking is located within 30 metres of the entrance to the dwelling/module, with an even access route of less than 1:12 gradient.

For this question you should imagine that the dwelling is occupied by an ambulant disabled car user. This information is relevant for meeting the Lifetime Homes standard.

## **Cavity wall insulation summary**

This summary enables surveyors to summarise the cavity wall insulation (CWI) details obtained throughout the survey. All relevant flags on the form should be reviewed and a final judgement to determine whether there is CWI present should be made. If you believe it to be present (include as-built as well as retro-fit insulation in your final assessment of the presence of CWI) then record **Yes**. However, do not guess – if you cannot tell if as-built insulation is present, record **No**. This assessment should be made for all dwellings of all ages. Surveyors should not assume that recently constructed dwellings are insulated without evidence. BREs energy modellers will undertake this exercise on a consistent basis based on the Building Regulations at the time and the type of dwelling.

BRE April 2008

## **Appendix 3 Camera form**

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Please sign below to confirm receipt of the camera. As specified in the contract, you are responsible for the camera during the survey, and for returning it to Ipsos MORI in good working order upon the completion of your Living in Wales Survey work.

Camera Serial Number:

.....

Name (print)

.....

Signature

.....

## **Appendix 4 Pilot de-briefing agenda**

---

**2008 LIW Property Survey: Pilot Survey Debriefing**  
**10.00 29<sup>th</sup> April 2008 BRE**



**Content**

10.00	Arrive/coffee
10.30	Page by page feedback on the 2008 LIW survey form and supporting briefing notes
12.45	Feedback on Survey admin/manual.
13.00	Lunch
13.45	Agreeing final design of form for 2008, and briefing clarifications required <b>BRE / IPSOS MORI / LGDU only</b>
15.15	Tea / leave

# **Appendix 5 Surveyor fieldwork manual**

# **Living in Wales Property Survey 2008**

## **SURVEYOR FIELDWORK MANUAL**





01/09/2008



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## 1. INTRODUCTION

The fieldwork manual provides information on how to carry out your fieldwork effectively. It provides details of:

- the survey addresses;
- what to survey;
- the use of photographs;
- the use of Ipsos MORI's Survey Management Website;
- administrative requirements of surveyors; and
- how your progress will be monitored.

It also contains information on how to deal with any problems you may encounter while undertaking the surveys, and how claims for payment should be made. **Please read this entire document carefully.**

### 1.1 USEFUL CONTACT DETAILS

Below are key contact details for fieldwork supervisors and key personnel at Ipsos MORI involved in the Living in Wales Property Survey 2008. Should you have any queries, or require any further assistance while undertaking the surveys please get in touch with the most appropriate person.

Contact	Tel. No	Email
Andy Bodsworth	07711153340	bods59@hotmail.com
Andy Kippax	07776205438	andy.kippax@stockport.gov.uk
Liz Robinson	07725949159	robinsonl@bre.co.uk
Keith Russell	07801341014	keith.russell@exeter.gov.uk
Stephen Finlay	020 7347 3353	liw@ipsos-mori.com
Hannah Atherton	020 7347 3353	liw@ipsos-mori.com

### 1.2 THE LIVING IN WALES SURVEY

The Living in Wales Surveys began in 2004 and are managed by the Local Government Data Unit ~ Wales on behalf of the Welsh Assembly Government. They comprise two distinct types of surveys:

- Annual household surveys, carried out via face-to-face interviews. These provide information on households, their characteristics and the people living in them; and
- Ad-hoc property surveys, conducted by qualified surveyors. These provide information on the structure and condition of properties in Wales.

Results from each survey typically become available a year after the survey is completed.



To see previous years' questionnaires and results – or to read more about the surveys and their methodology – you can visit the Living in Wales section of the Welsh Assembly Government's website at the following address (<http://www.wales.gov.uk/livinginwalesurvey>)

### 1.3 SUMMARY OF REQUIRED WORK

Surveys will be required at approximately 2,500 addresses for the Living in Wales Property Survey 2008. These will consist of a range of tenures and dwelling types. All households where a Property Survey will take place will have had a Household Survey in the first half of 2008. The Household Survey is used to determine the households' characteristics, including full details of household relationships, tenure, financial circumstances, attitudes to their home and the environment. You will undertake full dwelling inspections at a sample of the addresses where an interview has taken place.

All respondents of the Household Survey have been asked for permission to be re-contacted for the property survey. Only those agreeing will form the basis of the sample from which addresses are selected for inspections. You will be allocated approximately 50-60 addresses and will, therefore, know the areas and the distances you will be expected to travel.

All properties selected for the survey will be sent a pre-survey letter and leaflet outlining the purpose of the survey and the format of the inspection. All surveyors will be issued with laminated versions of these for reference.

### 1.4 THE SURVEY

The survey is a non-intrusive visual inspection. You will be required to undertake a physical assessment of the dwelling at each address provided. All surveys will involve a full internal and external inspection, in accordance with surveying procedures specified by BRE/Ipsos MORI, and will involve an inspection of two general purpose rooms, in addition to the main kitchen, bathroom and circulation space, and, where relevant, a loft inspection.

The survey is a paper-based survey, and surveyors will be provided with survey forms to be completed for each address. You should expect to spend between 45 and 90 minutes to complete a full survey, although the duration will vary according to the type and condition of the property. The average length is expected to be 75 minutes for flats and 60 minutes for all other property types.

It is important that you visit the correct address, and make sure that it is the same address that was visited by the Ipsos MORI/NOP interviewer. **No substitutions of other properties may be made.** Any discrepancies in address information that you come across during the course of your survey work must be passed to Ipsos MORI immediately. It is essential you undertake the survey at the address where the interview has taken place,



however, if you suspect that the interview has taken place at the wrong address, you must inform Ipsos MORI before undertaking the survey, as it may mean that the address is now not eligible for a Property survey.

Photographs should be taken at all full-survey addresses where you have received the permission of the household to do so. Digital cameras will be loaned to you for this purpose. A set of photographs for each dwelling (front and back views plus up and down the road) should be saved and stored on a separate disk, and returned at the same time as the survey form to which they relate. Photographs are not required at non-survey addresses.

All completed survey forms (a form where a final outcome has been achieved – either a full survey or a non-survey) should be labelled and sent to your Supervisor for checking. You will be provided with addressed and postage-paid envelopes for this purpose. For full surveys, a labelled disk containing the digital photographs for the dwellings should be returned with the form. Forms and disks should be sent to your Supervisor for checking on a daily basis. A daily return slip should be completed and returned with each envelope listing the forms and their outcome, to confirm the contents of each envelope. To ensure completed forms can be easily processed, it is advised that you return between 3 and 5 forms in each envelope. Supervisors will check the forms and photographs and either return them to Ipsos MORI for booking-in and data entry, or return them to you if there are any errors or omissions on the form.

Supervisors will accompany each surveyor in the field for at least one day (or as long as deemed necessary) during the first or second week of fieldwork. Supervisors will make a written assessment of each surveyor and will make recommendations as to whether further accompaniment will be required, or whether any surveyors should not continue with survey work.

**Surveyors should complete each survey form as neatly and as clearly as possible and in black ink only.** The survey forms will be scanned and stored electronically after they have been returned to Ipsos MORI by the Supervisors.

**One survey form must be returned to Ipsos MORI for every address issued once a final outcome has been achieved.** For non-surveys this will mean a labelled form with Sections 1, 2, 3 and 4 of the form complete. (For refusals received via Ipsos MORI only Section 1 of the form will be completed if no calls have yet been made). For full surveys this will mean a labelled form with all the relevant sections of the form complete.

It should be pointed out that a standard survey form cannot accommodate some of the more unusual situations that you may come across. If you feel that the answers coded on the form do not represent a proper picture or could be misunderstood, please write notes on the form or draw diagrams as these



will be invaluable when we are checking for errors or apparent inconsistencies in the data.

### **1.5 THE ROLE OF IPSOS MORI IN THE LIVING IN WALES SURVEY**

Ipsos MORI have been appointed by the Local Government Data Unit ~ Wales to manage the Living in Wales Surveys on behalf of the Welsh Assembly Government. In addition to undertaking the Household Survey, Ipsos MORI is responsible for the management of the Property Survey, including the employment of surveyors, sample selection and the allocation of addresses to surveyors.

Ipsos MORI have contracted the Building Research Establishment (BRE) to provide technical input to the survey. BRE are responsible for the management and employment of four Living in Wales Supervisors. Supervisors play a vital role in ensuring high quality survey data and are, therefore, an important and integral part of Ipsos MORI's management of the survey.

BRE are also responsible for the content and delivery of the Briefing Exercise and ensuring all surveyors who work on the survey are working to a suitable and common standard.



## 2. SURVEY WEBSITE

The following chapter sets out the basic principles you will need to know when using the survey website.

### 2.1 USING THE WEBSITE

The Survey Website is integral to the effective running of the Living in Wales Property Survey 2008. This is where you will enter your fieldwork progress for discussion with your Supervisor, and where you can generate invoices to enable us to pay you. The website address is:

<https://liwpropertysurvey2008.ipsos-mori.com>

When you reach the website, you will be asked to login using your User name and Password, which will be supplied to you by Ipsos MORI in your briefing pack. If you forget your password, please phone Ipsos MORI on 020 7347 3353 and we will remind you.

### 2.2 ADDRESS STATUS REPORT

The 'Address Status Report' shows you what stages your addresses have reached in the Survey. You can view your address allocations by different stages.

The first shows where your full surveys have been received and booked in, and therefore, are eligible to be invoiced.



#### Living In Wales Property Survey 2008

Status of Addresses for [REDACTED]

##### Full Survey

Address No	Details	Interviewed
1.	12935961 64 Gelli Road, [REDACTED] Directions:	Sat 26 Jan 2008
2.	12925981 Flat 2 Garth Hall, [REDACTED] Directions	Thu 31 Jan 2008
3.	12919961 42 William Street, [REDACTED] Directions:	Sat 2 Feb 2008
4.	12930751 Charlesville, 158 Brithweunydd Road, [REDACTED] Directions:	Fri 8 Feb 2008
5.	12942711 Flat 1 Pendyrus Court, East Road, [REDACTED] Directions:	Wed 13 Feb 2008
6.	12937941 80 Baglan Street, Treherbert, [REDACTED] Directions:	Fri 15 Feb 2008
7.	12932731 32 Harcombe Road, [REDACTED] Directions:	Fri 22 Feb 2008



The second shows where your Non-surveys have been received and booked in and, therefore, are eligible to be invoiced.



### Living In Wales Property Survey 2008

Status of Addresses for [REDACTED]

#### Non Survey

Address No	Details	Interviewed
1.	12928201 44 Mikado Street, [REDACTED] Directions:	Mon 19 Oct 1903
2.	12930341 5 Broadfield Close, [REDACTED] Directions:	Fri 1 Feb 2008
3.	12929941 4 David Street, Penygraig, [REDACTED] Directions:	Thu 6 Mar 2008
4.	12925801 36 Trebanog Road, [REDACTED] Directions:	Wed 14 May 2008
5.	12919881 7 Railway Terrace, [REDACTED] Directions:	Fri 16 May 2008

The third section (not shown) contains a list of any surveys that have been received and booked in by your Supervisor, and have been sent back to you for amendments.

You must send all of your forms to your Supervisor for them to check the quality and completeness of the form. This is to minimise errors found in the validation process.

The fourth section shows addresses where no Property Survey is required. This is most likely to be due to a 'Refusal' by the householder who has notified Ipsos MORI or where you are unable to find or gain access to an address.



### Living In Wales Property Survey 2008

Status of Addresses for [REDACTED]

#### No Property Survey Required

Address No	Details	Interviewed
1.	12928201 44 Mikado Street, [REDACTED] Directions:	Mon 19 Oct 1903
2.	12930341 5 Broadfield Close, [REDACTED] Directions:	Fri 1 Feb 2008
3.	12929941 4 David Street, Penygraig, [REDACTED] Directions:	Thu 6 Mar 2008
4.	12925801 36 Trebanog Road, [REDACTED] Directions:	Wed 14 May 2008

The last section shows the addresses allocated to you where there is yet to be an outcome – that is all those addresses that do not fall into any of the previous stages.



## Living In Wales Property Survey 2008

Status of Addresses for [REDACTED]

### Pending Outcome

Address No	Details	Interviewed
1.	12935961 64 Gelli Road, [REDACTED] Directions:	Sat 26 Jan 2008
2.	12925981 Flat 2 Garth Hall, [REDACTED] Directions	Thu 31 Jan 2008
3.	12919961 42 William Street, [REDACTED] Directions:	Sat 2 Feb 2008
4.	12930751 Charlesville, 158 Brithweunydd Road, [REDACTED] Directions:	Fri 8 Feb 2008
5.	12942711 Flat 1 Pendyrus Court, East Road, [REDACTED] Directions:	Wed 13 Feb 2008
6.	12937941 80 Baglan Street, Treherbert, [REDACTED] Directions:	Fri 15 Feb 2008
7.	12932731 32 Harcombe Road, [REDACTED] Directions:	Fri 22 Feb 2008

This provides you with an overview of the status of all your allocated addresses.

### 2.3 SURVEY PROGRESS

This screen will list all of your completed Property Survey addresses, providing you with an overview of the status of these addresses. It is a useful section for you to regularly check to so that any survey forms that may go missing will be noticed quickly.

### 2.4 OUTSTANDING TRANSACTIONS

The statements you generate to accompany your invoices, will be from this screen. It will show you which addresses can be invoiced, and at what price. It will also show any additional items entered by Ipsos MORI, such as the Briefing Fee. You **MUST** submit one of these statements when you send Ipsos MORI an invoice.

**NB – once you generate a statement, it will be a recorded document. It will have a unique statement number.**

The statements page of the website provides a record of the statements you've generated, when they were generated and the total amount.



## **2.5 SURVEY ADDRESSES**

All surveyors who complete the main briefing exercise to satisfactory standards will be issued with addresses for the survey. Whether the surveyor meets the required criteria will be judged on their professional competence, as demonstrated at the briefing: through their grasp of the principles and concepts of the Living in Wales methodology; willingness to apply the standards set out by the professional instructors at the briefing; ability to complete all the required parts of the survey form in a correct and legible way in the time available; commitment, energy and enthusiasm for the survey.

## **2.6 ADDRESSES TO NAMED SURVEYOR**

All survey addresses must be completed by the named surveyor to whom they are issued. Surveyors are not permitted to pass survey addresses on to any other Living in Wales surveyor, or any other individual, for completion. If a surveyor is unable to complete any part of their address allocation, then this must be discussed with their Supervisor and Ipsos MORI immediately. Ipsos MORI will be responsible for any re-allocation of survey addresses.

## **2.7 VACANT DWELLINGS**

Although a household interview would have already taken place at the address, a change in circumstances may mean that the property has become vacant. In cases such as these surveyors should still attempt to gain access and undertake a full survey where possible. This may be achieved by seeking access from the relevant estate agent, local authority or private individual. We know from previous experience that it is often possible to obtain keys in the most unlikely circumstances, and that once the keys are obtained the survey itself is usually very easy and speedy. Surveyors should talk to their Supervisors for advice on the best ways to gain access to vacant properties.



### 3. FIELDWORK BASICS

The following chapter sets out the basic elements you will need to know in order to carry out the survey effectively.

#### 3.1 SURVEYOR IDENTIFICATION NUMBER

Each surveyor will be allocated a unique two-digit identity number. This ID number should be used throughout the survey period, including the six-day briefing exercise. It should be written on all paperwork and survey forms that are submitted to Ipsos MORI or Supervisors.

#### 3.2 SURVEY ADDRESS NUMBER

Each survey address has a unique seven digit identification number which is called the Address Number. This will be listed next to the survey address on your allocation lists on the website. It will also appear on the printed address labels. **You must ensure the address number appears on every form you complete.** The address number should always be used to identify any address in any correspondence with Ipsos MORI or your Supervisor.

The address number will also appear as a barcode on the address labels. This will be used for booking-in the forms at Ipsos MORI.

#### 3.3 ADDRESS LABEL

Surveyors will be issued with three labels for each address in their allocation: One to stick on the front of the survey form, one to stick on the diskette for the digital photographs, and a spare label.

The following information will be provided on the label:

- Address number;
- Survey Address (the address recorded by the interviewer);
- OS grid reference; and
- Date of household interview survey.

All completed survey forms (full and non-surveys) must always be returned with the address label attached and all the relevant administrative details completed.

It is suggested that once a participant has agreed to take part in the survey or an appointment has been made for an address, the surveyor should stick the appropriate label on the front of the survey form ready for survey.



### **3.4 ON-LINE SURVEY ADDRESS LISTS**

Surveyors will be provided with details of each survey address on their address list. Each address will be listed with its address number. This list will appear on the Survey Management Website. It is to be used as a monitoring tool for each address and to help you feed back progress to your Supervisor.

### **3.5 FRONT OF THE SURVEY FORM**

One address label should be stuck on the front of the survey form. The other details to be completed are:

- Surveyor Name; and
- Surveyor ID number.

### **3.6 FULL SURVEY**

Surveys are defined as either a full survey or a non-survey. For the Living in Wales Property Survey 2008 no partial surveys are required. However, if a partial survey is carried out externally you should return to the address to attempt to complete the survey by gaining internal access. Where a partial survey is internal (i.e. the survey is aborted) this will be treated as a non-survey. All partial inspections, whether internal or external, will be treated as a non-survey.

For payment to be made on a full survey, the following definition applies:

- All relevant sections of the survey form are complete in their entirety, i.e. full internal and external inspections and an inspection of the local area. The form must be completed to an acceptable standard, and must be accompanied with the required number of photographs for the dwelling (front and back views plus up and down the road). Both forms and photographs must be booked-in on Ipsos MORI's Survey Management System.

Every effort should be made to complete all sections of the survey form, although payment will still be made on a full survey if it is not possible to undertake an inspection in the loft, (Section 7 of the survey form). Where a loft is present, however, we do expect you to make an inspection and will be closely monitoring this aspect in the assessment of completed survey forms.

### **3.7 NON-SURVEY**

A non-survey is any form that is partially completed following an actual visit to the property; i.e. anything short of a full survey.



In most cases a non-survey will mean that only the first two pages of the form will have been completed (Sections 1 to 4). Only when a refusal is received via Ipsos MORI and no calls have previously been made to the address will completion of **Section 1 alone** be accepted as a non-survey.

The following outcomes are also classed as a non-survey and are eligible for payment:

- Any other outcome, apart from a full survey, covering; no contact made, access refused to surveyor, access refused at Ipsos MORI (where the householder has contacted Ipsos MORI directly to refuse), or others such as address untraceable, dwelling derelict, dwelling demolished or property no longer useable as a dwelling;
- Where a surveyor has not gained access to a vacant property, and only the exterior has been completed, the survey will be defined as a non-survey.

**Where a survey is refused or aborted directly with the surveyor, or through contact with Ipsos MORI, under no circumstances should you attempt to either carry on with the survey or visit the property (either for the first time or again).**

Please note **photographs are not required** for non-surveys. Payment for non-surveys will only be made with a labelled form booked-in on Ipsos MORI's Survey Management System.

### **3.8 COMPLETION OF SURVEY FORMS**

You should check the form for completeness and accuracy, once the survey is finished. It is important that the forms are completed legibly in **black ink** as they will be scanned and stored electronically after they have been returned to Ipsos MORI.

Full surveys should be returned to your Supervisor with the accompanying photographs on a disk. The disks should be labelled with the appropriate address label (one disk of photos per dwelling). Disks for each day's surveys should be put in the Jiffy bags provided by Ipsos MORI and enclosed in the large envelopes with the survey forms to which they relate. To ensure the integrity of completed forms it is recommended that no more than five completed forms are submitted per envelope. Supervisors must receive the survey form and disk together.

Pre-paid addressed envelopes will be provided to return forms and disks to Supervisors. The Supervisor will check the forms and either return them to the surveyor, if there are any errors or omissions, or forward them to Ipsos MORI. The Supervisor will log each form they receive on Ipsos MORI's Survey Management System to state that they have received the form and



disk. Each envelope should contain the surveys (full and non surveys) for each day together with disks of photos for full survey addresses. You should also complete and enclose a daily return slip in each envelope that lists the addresses, and their survey outcome, you have enclosed.

One fully labelled form must be returned for every address where there is a final outcome, regardless of that outcome, including addresses that have had a telephone refusal via Ipsos MORI.

### **3.9 DAILY RETURN SLIPS**

Daily Return Slips will be provided by Ipsos MORI. These should be completed each day and simply list the completed survey forms and disks you are returning to the Supervisor together with the survey outcomes. These are on duplicate paper to allow you to maintain a record of the survey address numbers and their outcome you are returning that day. This will help you, the Supervisor and Ipsos MORI to verify forms returned and booked-in at Ipsos MORI.

### **3.10 PROGRESS**

Progress of each surveyor will be monitored by their Supervisor and by Ipsos MORI. If you find you are falling behind with your workload you must contact your Supervisor as quickly as possible so contingency arrangements can be made.

**It is the responsibility of the surveyor to ensure that any appointments that have been arranged are met. If you are unable to make an appointment that has been set up it is your responsibility to telephone the household to re-arrange the appointment.**

Your Supervisor will receive weekly updates from Ipsos MORI on progress. If he or she is concerned that you may be falling behind with your workload they will contact you to discuss this and to make alternative arrangements with you to ensure that your workload is completed.

***We want to help surveyors complete their assignments as quickly as possible. Please do get in touch if you need any assistance.***

## **4. CONTACT WITH HOUSEHOLDS**

The following chapter covers the main issues you will need to be familiar with in order to achieve successful contact with households.

### **4.1 NOTIFYING THE HOUSEHOLD**

Households will know in advance that you will be calling to undertake the Property Survey. The household will already have taken part in the Household Survey undertaken by an Ipsos MORI or NOP interviewer. They will have been provided with an advance letter and an explanatory leaflet about the survey by Ipsos MORI. The letter and the leaflet are printed in both English and Welsh. You will be provided with a laminated copy of these for reference or to show the household if necessary. You will also receive some spare copies to leave with the household if required,

### **4.2 PREPARATION FOR CONTACT WITH THE HOUSEHOLD**

Although the householder will be informed of your visit, unless they have contacted Ipsos MORI to arrange a convenient time, your first contact will not have been arranged. In some instances you may come across a particular household member who is not aware of the survey or may have forgotten. It is essential that we obtain a survey at a very high proportion of issued addresses and therefore, you must ensure you are prepared to persuade householders of the importance of their participation.

Here are a few points, which may seem obvious, but we think are worth emphasising:

- Know your survey;
- Get your paperwork and disks in order;
- Plan your route;
- Have your identity card easily accessible;
- Be polite but confident when speaking with the householder
- Dress neatly and appropriately; and
- Think positively.

### **4.3 APPROACHING THE HOUSE**

Again, many of the following suggestions on approaching the property may seem obvious, but their importance in securing as many surveys as possible has been emphasised to us by surveyors and interviewers alike:

- Don't park right outside the house;
- Close the garden gate;
- Check if the curtains are drawn in case the householder may be sleeping;
- Don't stand on the doorstep - step back;
- Be brief – don't say too much, or you may talk yourself out of a survey;



- Smile;
- Stress the importance - it is the only reliable source of housing information for Wales.
- “Sell” participation in the survey – helping to inform and develop appropriate policies for the wider benefit of all residents living in Wales;
- Assure confidentiality – information is not shared with any third parties;
- Be prepared to answer questions;
- Try to persuade refusals; and
- After your introduction, it can be helpful to give people a cue e.g... *“Is it convenient to do the survey now?”* and *“May I come in?”*

#### 4.4 INTRODUCTION TO THE HOUSEHOLD

Below is a suggested introduction. Of course, you will need to adapt this to the particular situation, or you may have your own technique.

*“Good morning/afternoon/evening. My name is... and I am carrying out a survey for the Welsh Assembly Government on people’s housing throughout Wales. I am a surveyor working with Ipsos MORI, the research company, conducting the survey on behalf of the Welsh Assembly Government. You will probably already have taken part in an interview about your home, and this is the second stage, where I would like to survey your home. It won’t take up much of your time, I just need to look around the inside and outside of your home. I can do this by observation only and won’t need to move anything. All the information I collect will be treated in the strictest confidence; it is used for statistical purposes only and will not be shared with any third- party organisations ”*

#### 4.5 TYPICAL DOORSTEP REACTIONS

Please think carefully about how you will respond if someone initially refuses to take part, and prepare yourself to persuade people to change their minds, perhaps by calling back a few days later. Below is a list of potential reactions from households, and suggested responses:

##### ***“I never do surveys”***

Answer – This is a major national survey being undertaken by the Welsh Assembly Government that will help inform and develop key housing policies in future years (refer to website for further details). It is a very important survey and we need to make sure it is accurate by covering all types of housing. I can come back at a time that most suits you.

##### ***“I’m too busy”***

Answer – I can call back whenever you like – and again stress the importance of the survey.



***“I’ve done surveys like this before and nothing was done as a result”***

Answer – the survey measures housing conditions throughout Wales as a whole, but to protect confidentiality and respondent anonymity we cannot pass on details of any particular homes to other bodies. However, the results are used to make sure policy and spending is directed towards where it is needed.

***“I’m going away on holiday”***

Answer – your assistance is very important to us; would you mind if I called back in a couple of weeks after you’ve returned from holiday to arrange a convenient time to do the survey.

***“I’m an owner occupier; the survey is irrelevant to me”***

Answer – the survey is designed to cover all types of housing in Wales. Only by doing this can we understand the condition of all types of homes in Wales properly – and make sure that housing policy and spending is directed to the areas where it is most needed. Future policy initiatives informed by results from this survey may have relevance to you in future years.

***“My house is only two years old; the survey is irrelevant to me”***

Answer – we need to include all types of homes to properly understand the overall condition of housing in Wales. It is very important for the survey to cover newly built properties in order to monitor the effect that policies and regulations are having on the overall quality of the stock.

***“I’ve already done an interview, why should I take part in the survey”***

Answer – this survey is a vital component of the Living in Wales Survey, and provides the government with the only detailed and reliable source of information on the condition of housing in Wales, which is vital for policy making and financial planning for the future. Data from the interview and property surveys will be linked anonymously to enable some of the analysis, such as estimating Fuel Poverty levels, to be done.

***“Hasn’t the government got enough information from the Census?”***

Answer – although the Census provides very comprehensive information about the people who live in Wales, the government needs to carry out other surveys to obtain more detailed information about matters such as housing. By conducting the survey every four year the property survey enables progress and change to be monitored over time.

#### **4.6 FREQUENTLY ASKED QUESTIONS**

Below is a list of questions that you may be asked. With them is a list of suggested answers. These are all answered on the explanatory leaflet that will be sent to all addresses in the sample.



### ***What is the Living in Wales Survey?***

Living in Wales is a survey carried out by Ipsos MORI, assisted by NOP, on behalf of the Welsh Assembly Government. It is the main source of information on households and the condition of homes in Wales.

### ***How is the survey used?***

The Assembly will use the survey to:

- Measure whether housing conditions are getting better or worse for **everyone** and which groups of households have the poorest housing or have problems keeping their homes warm in winter;
- Monitor whether what is being done to improve standards in both public and private housing is working. Also to assess the energy efficiency of our homes;
- Target resources. Over £250 million of public money is spent on housing related work each year. The money is used to provide assistance to owner-occupiers, landlords and the disabled who need help to repair and improve their homes. This survey is used to ensure funding for housing is directed to the people, areas and regions where it is most needed; and.
- Assist with the creation, development, monitoring and evaluation of housing policies.

### ***Why are you choosing my home?***

It is too expensive to call on every address in the country so we select a few thousand addresses to represent the country as a whole. The addresses are selected from those that participated in the household survey (interview). This allows data from the interview to be **anonymously** linked to the property survey. This is needed for some of the analysis done by the Welsh Assembly Government, such as Fuel Poverty levels.

### ***How do I know you are a genuine surveyor?***

All surveyors carry ID photocards, with a number to call if you want to check that they are who they say they are.

### ***Should I let my landlord know I am taking part?***

There is no need to do so, it is up to you. We have written to all the main social landlords (Councils and larger Housing Associations) informing them that the survey is taking place.

### ***How long will the survey last?***

Only a short amount of time is required inside the property with most of the time spent outside. If time is a particular concern, ask the occupier to indicate how much time they can spare, but ensure there is sufficient time to complete the survey to the expected standard.



***Is the information confidential?***

Yes, all information collected from your home will be combined with all other homes in the survey. A report will be written summarising the results, and it will not be possible to identify any individual or home from the results.

A small number of households may be re-contacted by the survey team just to check that the survey has been conducted correctly and professionally.

However, no personal details will ever be released to anyone outside the survey team. Details will not be released to any other Government Department or official body. The use of the information collected is controlled by the Data Protection Act. You will never receive sales calls or direct mail as a result of taking part in the survey. It is completely confidential.

***Can I have a copy of the survey?***

The survey is used for statistical purposes only and it would be very difficult to interpret the information written on it. I need to take this form away with me, but you can contact Ipsos MORI if you have any further queries.

**4.7 OLDER PEOPLE AND GAINING ACCESS TO VULNERABLE HOUSEHOLDS**

For older households you may need to adjust to their pace. It is important to respect their worries, and if necessary, you should offer to call back when a friend or relative is present. Always show your identity card, and a copy of the explanatory letter and or leaflet.

**4.8 OCCUPANT NOT AT HOME/ NUMBER OF VISITS**

If the occupant is not at home when you visit, you should note the time and day and try to contact the household to make a new appointment. Alternatively you should make a return call at a different time of the day, and on a different day of the week. You should make at least six attempts to obtain a survey. Such addresses can be held back until later weeks. You may make more than six attempts to contact the household in order to achieve a full survey if required.

When you are at the property look for any potential clues as to when may be a good time to catch the occupant; such as children's toys which would indicate that daytime is a good time to call. In a similar way signs such as closed curtains would indicate that the occupant is not there or that it is an inconvenient time to call. If return calls are necessary, at least one should be in the evening or at a weekend.

**Please remember that if you come across a property with unaccompanied children under the age of 18 do not attempt to conduct the survey. Leave a calling card and make a return call at a later date.**



#### **4.9 CALLING CARDS**

Although you should always attempt to make face-to-face contact with the household in the first instance, you will be provided with calling cards to leave with the household if you wish to use them. You should leave the time of day that you called and provide them with your telephone number for the householder to call to arrange a time for you to return.

#### **4.10 CHANGE OF APPOINTMENT OR REFUSAL BY TELEPHONE**

Even if they have agreed to a Property Survey, a householder may subsequently contact Ipsos MORI to refuse or even change a time if an appointment has been made. In these instances Ipsos MORI will notify you by telephone where possible and as quickly as possible.

**If you receive a refusal from Ipsos MORI, you must not visit the address.** You must however, ensure that you complete Section 1 of the survey form, label the form and return it to Ipsos MORI on the day you receive notification of the refusal.

#### **4.11 TIME OF VISITS**

You should not call at an address before 9.00 a.m. (and 10.00 a.m. on a Sunday) or after 9.00 p.m., unless requested by the occupant. Again it is important to exercise some common sense – closed curtain might indicate it is an inconvenient time to make a call.

#### **4.12 ENERGY SAVING LIGHT BULBS**

A pack of energy saving light bulbs is being offered as a thank you to every household taking part in the Property Survey. A sufficient number of light bulbs to cover your sample allocation will be distributed to you; half at the surveyor briefing and the remainder, by post, as required. It is your responsibility to ensure these are offered to every participant after completion of a full survey.

Households are not obliged to take these incentives, but it is essential they are all offered the opportunity to receive them. It is suggested that you hand these to occupants once they have agreed to the survey not only to help confirm legitimacy (it is mentioned in their pre-survey letter) but also so you don't have to carry these around for the duration of the survey.

The Welsh Assembly is required to monitor the uptake of this incentive and so it is important that you record this at the appropriate question on the survey form.



#### **4.13 NEW TECHNICAL INSTRUCTIONS**

From time to time during the fieldwork period Ipsos MORI may despatch new briefing on technical issues that have been made by BRE. These will be decisions that have been made as a result of questions or queries that arise while surveyors are in the field. Surveyors must ensure they fully understand and apply them. Any queries should be discussed with your Supervisor.





## 5. ENSURING YOU ARE AT THE CORRECT ADDRESS

This chapter provides guidance on ensuring you carry out surveys at the correct addresses.

### 5.1 FINDING THE CORRECT ADDRESS

Finding the correct Living in Wales address is a crucial part of the survey. In order to provide the information required for analysis of the survey, extensive preparations have been made for selecting a sample of addresses that will produce a good mix of tenures, property types and ages in each part of the country. Rigorous sampling procedures have been followed to ensure that the data from the survey will be representative of all housing in Wales, and it is therefore vital that as many households as possible, that have taken part in the Household Survey are then subsequently located correctly for the Property Survey.

**You must only visit and survey the selected address** - no substitutions may be made.

All *addresses* will have participated in the Household Interview survey, and therefore all *addresses* on your address list will have been visited by an interviewer from Ipsos MORI or NOP. You need to ensure that there are no discrepancies between the addresses you visit and those already visited by interviewers. **It is therefore important that you undertake the survey at the same address that was visited by an interviewer and that the unit of accommodation you include, is that of the household Ipsos MORI or NOP interviewed.**

### 5.2 REASONS FOR DISCREPANCY BETWEEN SURVEYS

In most cases, you will be provided with the full address and OS grid reference, but in all cases you must check carefully whether you are at the correct address. The householder may also not be aware that an interview has previously taken place, for example, where the interview was carried out with a different household member. In a few cases the occupier may have even changed since the interview was carried out, or the address has been converted into other dwellings since the interview.

In order to minimise potential problems you should contact the household before you start undertaking any external elements of the survey.

You should not undertake the external survey before contacting the household. You may discover that you are not at the correct address or subsequently get a refusal which will only attract payment for a non-survey regardless of how much of the external assessment has been completed.



### **5.3 DIFFERENT ADDRESS VISITED FROM INTERVIEW SURVEY**

If, on speaking to the household you establish that you are at a different address from the one visited by the interviewer, you must try to establish whether you are at the wrong address, or whether the interviewer went to the wrong address.

In this instance you must make general enquiries with the household to try and establish whether any changes have taken place which would explain any apparent differences.

If you think you are at the wrong address, you must try to find the correct address. If, on the other hand, you are sure you are at the correct address, and that the interviewer visited the wrong address you must telephone Ipsos MORI as soon as possible with the address details on 020 7347 3353 **and wait for instructions on how to proceed.**

The vast majority of addresses you come across will be straightforward. Complications are most likely to arise in the case of HMOs or where there have been changes since the Household Interview survey, although this will be rare. You need to ensure that you undertake a survey at the property where the Household interview took place. This is the dwelling occupied by the household that was interviewed and may not be the complete dwelling – for example one flat or bedsit within it.

### **5.4 DIFFERENT HOUSEHOLD**

If you establish that a different household is present, then you need to consider whether you are at a different address than the one visited by an interviewer or that there has been a genuine change of occupancy. If you are sure you are at the correct address, and it is obvious that the interviewer visited the wrong address, you must telephone Ipsos MORI with the address details on 020 7347 3353 as soon as possible **and wait for instructions on how to proceed.**

### **5.5 DIFFERENT DWELLING TYPE**

You will need to confirm that you are either at a different address or you are at the correct address. In these instances, you must telephone Ipsos MORI with the address details on 020 7347 3353 for instructions. These are important aspects of the survey; you must ensure that any address discrepancies between the Household and Property Surveys are communicated to Ipsos MORI when you are aware of them. Surveyors should contact BRE with any technical queries on difficult HMOs.



## 6. MORE ABOUT SURVEY ADDRESSES

The following chapter provides further information on the addresses used in the survey: the selection, locating them and some unusual situations.

### 6.1 WHERE THE ADDRESSES ARE DRAWN

All addresses issued to each surveyor will have already been included in the Living in Wales Household survey, which was conducted before the Property Survey. Therefore all these addresses will have been visited by an interviewer. All addresses should, therefore be residential or at least partially residential. The Household Survey respondent will have given consent to be re-contacted for the Property Survey.

### 6.2 VALID PROPERTIES FOR SURVEY

The units to be surveyed are described in the main manual – see section 2.1.4. Surveys should be completed at the address where a Household Survey was conducted. Note that holiday and second homes are not included in the survey.

Examples of invalid properties might include:

- Non-residential properties where there is no private residential accommodation at the address printed – e.g. a shop, a school, a factory, a hotel. However, note that where there is private self-contained accommodation that forms part of an address, e.g. a flat over a shop, a caretakers flat or house, or a managers flat, this should be included; and
- Derelict properties that are unsafe for survey: You need to attempt a full survey at vacant dwellings (see section 2.7 of this manual) and a photograph will be required. But you should **not** enter dangerous structures. If you come across a dangerous property please telephone Ipsos MORI with the address details on 020 7347 3353.

If you come across an unusual dwelling in your allocation, e.g. a caravan, mobile home or houseboat, please telephone Ipsos MORI with the address details on 020 7347 3353 for instruction on whether or not a survey is required.

### 6.3 WAYS OF LOCATING ADDRESSES

Use of satellite navigation systems are a very efficient way of locating addresses using postcode information (supplied on the address labels) but we would recommend keeping a hard copy map for back-up.



Maps or street plans should be printed or bought locally by surveyors (at their own expense). If an address proves difficult to find, surveyors may find the following methods useful:

- asking local people, including the postman/woman;
- phoning local post-code enquiries. Phoning the local posting sorting office before 11.00 am;
- asking at local post offices;
- contacting neighbourhood offices for local authority and RSL properties;
- asking the police; and
- internet sources – both [www.multimap.com](http://www.multimap.com) and [www.streetmap.co.uk](http://www.streetmap.co.uk) will provide maps pinpointing the centre of any postcode; [www.royalmail.co.uk/paf](http://www.royalmail.co.uk/paf) will provide listings of all the properties in a postcode, which may be helpful to see what other properties are nearby. A link to multimap provided on the Survey Management Website will pinpoint the actual location of an address using Ordnance Survey supplied grid references.

#### **6.4 HOUSES IN MULTIPLE OCCUPATION**

Where surveyors have an address which is suspected to be an HMO, it is important to read through the relevant parts of the main manual (sections 1.4, 1.24 and 2.1) before visiting. If you feel very unsure, contact your Supervisor and ask him or her to accompany you. If you run into difficulties during the survey, ring your Supervisor.

#### **6.5 DWELLINGS WITH OTHER USES**

Where the survey address includes a non-residential use such as a shop, surgery, pub etc. only the residential part of the internal part of the address should be surveyed. An exception is where a single room at the address is used as an office in what would otherwise be a residential property. In this case the 'office' should be included as a room and considered for survey.

#### **6.6 VACANT DWELLINGS**

If the survey address is found to be currently vacant because of a change in circumstances since the Household survey then you should still attempt to gain access to the dwelling (see section 2.7 of this manual).

#### **6.7 UNDERGOING RENOVATION**

If the address is found to be in the course of extensive repairs (i.e. improvements and/ or extensions are being carried out and the address is not currently capable of being cited as a dwelling) then a survey should not be undertaken. Surveyors should not go near, or into, dangerous or unstable structures. As far as possible, however, we would like full surveys on vacant dwellings, so surveyors need to be sure that it is too dangerous to enter before abandoning the address as a non-survey.



If surveyors find the address in the course of minor repairs (i.e. improvements/ and or extensions but the address is capable of being used as a dwelling) then the interior should be surveyed along with the exterior, if access is gained with the owner/builder's permission. In all these cases, surveyors should survey what is seen at the time of the survey, recording faults and treatments as appropriate - regardless of the fact that these may be remedied in the near future.





## 7. PHOTOGRAPHS

This chapter gives you the reasons behind taking photographs for the survey, how to do so and offers some troubleshooting in terms of the cameras used.

### 7.1 USE OF PHOTOGRAPHS

Photographs are invaluable in helping to interpret survey data and illustrate presentations on the survey. In some instances they help interpret complex dwellings which cannot be accurately reflected on the form.

Photographs should be taken at each full survey address using the digital camera supplied by Ipsos MORI. Photographs should not be taken at dwellings where a refusal has been received either from Ipsos MORI or at the door.

For addresses where you achieve a full survey you should take the following photographs:

- photographs of front and back of dwelling;
- two photographs to illustrate the local environment. These will normally be “up the road” and “down the road”; and
- if an additional photo is required to show the whole of the front or back you should only take one photo of the local environment.

**You should take only four photographs per dwelling.** Photos should not be taken of internal or external faults and surveyors must not use photographs to revise judgements made on the survey form.

Photographs should be taken in landscape mode (i.e. only with the camera held horizontally) and it is important to ensure the camera is set to **‘STILLS’ mode only**.

### 7.2 OCCUPANT’S PERMISSION

You should always seek the permission of the household prior to taking any photographs. You should explain that the purpose of the photographs is to aid interpretation of the data on the form. Photographs should only be taken of the exterior of the dwelling, even though there may be internal problem areas.

### 7.3 DATA PROTECTION ACT

The provisions of the Data Protection Act classify photographs containing identifiable individuals as “personal data”. You should therefore ensure that householders are **not** included in the photographs you take of the dwelling.



#### **7.4 DIGITAL CAMERAS**

Digital cameras with diskettes will be used for collecting photographs in the Survey. They are seen as advantageous for a number of reasons:

- Images are returned with the survey form;
- Surveyors do not need to arrange processing or rematch photographs to survey dwellings at a later date;
- They speed up the validation of survey forms at Ipsos MORI; and
- Storage and retrieval of photographs is enhanced.

#### **7.5 PHOTOGRAPHIC EQUIPMENT**

Surveyors will be provided with the following equipment for use during the fieldwork period.

- Digital camera Sony Mavica FD200;
- Camera case;
- One battery;
- One charger unit and cable; and
- Floppy disks.

Surveyors are required to sign-out each camera and all equipment. Surveyors are then liable for any damage that may arise from their use in the field. Any surveyor not returning the camera and equipment in fully working order at the end of the survey (excluding reasonable allowance for wear and tear, and excluding manufacturing defects) will be liable for the full cost of replacing the camera and accessories. If a manufacturing defect or fault develops on the camera contact Ipsos MORI on 020 7347 3353. They will arrange its replacement and pay for courier shipping.

#### **7.6 TAKING THE PHOTOGRAPH**

The relevant pages from the camera's operating instructions are appended at the end of this manual, but we have set out basic instructions below. We suggest that you practice using the camera before you start fieldwork. The basics of taking a picture are listed as follows:

- Turn on the power by sliding the power button down (at right hand side of screen)
- Insert floppy disk
- Ensure PLAY/STILL/MOVIE is set to STILL
- Press the shutter button halfway down to lock auto focus, auto white balance and auto exposure (the camera will beep when ready)
- Press the shutter button down fully
- The image is then recorded on the disk (you may move the camera after it has beeped).

## 7.7 REQUIRED CAMERA SETTINGS

The cameras have been preset to take photographs (JPEG format) in 1600x1200 resolution.

It is essential that you use **one disk for each dwelling that you survey**. You will be provided with labels for each address, and you should stick a label that relates to the address on the disk. It may be helpful to label up disks at the beginning of each day's fieldwork, and carry the disks in the front pocket of the camera case. If more than one set of address photos is on one disk, Ipsos MORI will not be able to identify which photos relate to the correct address. You must change the disk after you have completed taking the photos for that dwelling.

## 7.8 BASIC TROUBLESHOOTING

Tips for checking problems – see manual for further troubleshooting tips:

- Ensure Play/Still/Movie is set to Still (switch below bottom right of screen).
- Ensure MS/FD switch always set to FD (switch to the right of bottom right of screen).
- Flash settings toggled using button at bottom left of back of camera – if orange light is on then flash is in one of its three on settings. Exact setting is displayed on LCD:
  -  red-eye reduction on (not appropriate for property photos!)
  -  flash always on
  -  flash always off
  - no symbol – flash auto depending on lighting level.
- Ensure a floppy disk is inserted (can only be inserted one way round – with label towards back of camera).
- Only four photos can be stored per disk.
- To delete photos, switch Play/Still/Movie to Play. Use the cursor control left/right to change between photos. Switch the menu on by pressing the cursor up, then move the highlight (using left/right keys) to “Delete”. Press the cursor switch in the middle to select this option, then press up to select OK and press in the middle to select. Switch the menu off again by pressing the cursor down. Remember to switch the Play/Still/Movie button back to Still.
- If you accidentally change any other setting, contact Ipsos MORI on 020 7347 3353 for assistance.

If you have any further problems please call Ipsos MORI on 020 7347 3353.



## **7.9 BEST PRACTICE AND HELPFUL HINTS**

- Label all your disks at the beginning of each day; and
- Charge battery - each night.

## **8. SURVEY MATERIALS AND EQUIPMENT**

The following chapter provides a brief overview of the materials provided and required to conduct the survey. It also gives instructions on how the identify card scheme works.

### **8.1 EQUIPMENT PROVIDED BY THE SURVEYOR**

You must provide yourself with the necessary surveying equipment to complete the survey forms satisfactorily. This will normally comprise:

- A metric measuring tape/rod;
- A portable ladder;
- A torch;
- A pair of binoculars; and
- Maps.

### **8.2 SURVEY MATERIALS PROVIDED BY IPSOS MORI**

Surveyors will be provided with the following materials:

- Survey forms (50-60);
- Copies of advance letters to householders (one laminated version);
- Living in Wales Property Survey 2008 Information leaflets;
- Pre-paid envelopes for returning survey forms and photographs to your Supervisor;
- Jiffy bags for the return of diskettes;
- Calling cards;
- Daily Return Slips;
- Identity card; and
- Pre-printed address labels (three per address).

If you are missing any of these items or require further supplies contact Ipsos MORI on 020 7347 3353.

### **8.3 CAR**

It is a condition of employment that each surveyor provides a car for his or her own use during the survey period, insured for business use. Ipsos MORI must be informed of the registration number of every car used for survey work in case of queries from the public or police. If for any reason the car becomes unavailable, it is the responsibility of the surveyor to provide an alternative vehicle at their own expense. Ipsos MORI should be informed immediately of any new car registration number on 020 7347 3353.



#### **8.4 LIVING IN WALES IDENTITY CARD SCHEME**

Each surveyor will be issued with an identity card. This must be shown to the household on initial contact - as they have been informed by letter that this will happen. If the card is lost you must notify Ipsos MORI immediately on 0207 7347 3353.

All identity cards must be returned to Ipsos MORI at the end of the survey period.

#### **LIVING IN WALES Identity Card Scheme: Rules for Surveyors**

The Surveyor:

1. Should do everything possible to ensure a continuing climate of good will, responsibility and trust and should leave respondents disposed to receive future contacts on research projects.
2. Must not mislead any respondent by giving inaccurate information.
3. Must not disclose any information given in confidence during the survey to any person other than those needing it to check the validity of the data or those engaged in processing them.
4. Must be polite and courteous at all times and allow respondents to withdraw at any stage of the survey, if they so wish.
5. Must always follow the instructions given by Ipsos MORI/BRE or Supervisors.
6. Must always show the Living in Wales Identity Card at the outset of the survey.
7. Must, if asked by the household, give:
  - the name of the person at Ipsos MORI responsible for the project.
  - an explanation of why the household has been approached (e.g. the household's address is part of a representative sample taken from completed Household Surveys).
8. Should not call in person or by telephone a household before 9.00am weekdays, 10.00am Sundays, or after 9.00pm any day, unless by appointment.
9. Must maintain strict confidentiality of all data collected, which must not be used for any other purpose. The surveyor may not retain records of addresses or persons visited beyond the requirements of completing this work, and must not disclose such details to any other person or organisation.



## 8.5 ENERGY SAVING LIGHT BULBS

You will be supplied with a sufficient number of light bulbs to cover your sample allocation. A proportion of these will be supplied at the surveyor briefing. The remainder will be posted to you as and when you require more. Each household taking part in the survey will be offered a pack of energy saving light bulbs as a thank you.

You should ensure you have sufficient supply to offer this incentive before starting your allocation for the day. If you have concerns about your supply of light bulbs you should notify Ipsos MORI on 0207 7347 3353.





## **9. YOU AND YOUR SUPERVISOR**

The following chapter lays out the interaction between Supervisors and surveyors: their respective roles and responsibilities.

### **9.1 SUPERVISION**

There are four regional Supervisors for the Living in Wales Property Survey 2008, who have been allocated 11 surveyors each. Your Supervisor will be present at your six day briefing, and will attend briefing and debriefing sessions with you. Supervisors will help to ensure you have fully understood all the briefings and that you are recording data correctly. It is essential that you maintain weekly contact by telephone with them while undertaking the surveys.

### **9.2 ACCOMPANIMENT DURING FIRST WEEKS OF WORK**

Within the first two weeks of the beginning of your fieldwork, you will be accompanied in the field by your Supervisor. This will give you the opportunity to resolve any problems which you may encounter and to raise any individual problems which may arise. It will also enable your Supervisor to ensure that each surveyor is carrying out fieldwork in a competent, efficient and professional manner.

During your briefing exercise, you must arrange a time and place to meet your supervisor at the start of your fieldwork. You may find it more useful to spend a day or two on your own in the field, and make a note of any problems you may have, and arrange for your supervisor to accompany you on, say, day three or four. This can be agreed with your Supervisor at the briefing.

### **9.3 CHECKING ALL SURVEY FORMS**

All survey forms that you complete must be sent to your Supervisor for checking. The Supervisor will check the forms for completeness and accuracy and highlight any problem areas. The Supervisor will telephone you to discuss any problems and if necessary send them back to you for amendment. The Supervisor will log all forms received on to the Survey Management Website, and once they are of sufficient standard, the Supervisor will send them back to Ipsos MORI as quickly as possible, so they can be sent for scanning and data entry, prior to validation.

### **9.4 TECHNICAL PROBLEMS**

Your Supervisor will act as the first line of technical assistance in the field. Any technical problems you may have should be directed through to your Supervisor, who may then refer any query to Ipsos MORI if necessary.



## **9.5 MAINTAINING STANDARDS**

After accompanying you in the field, and/or checking survey forms, and at any other time during fieldwork, Supervisors will be asked to inform Ipsos MORI of any surveyors who are not judged to be up to the standards of undertaking the surveys. Contracts may be terminated if this is the case.

**You should remember however, that your Supervisor is primarily there to act as a source of assistance in the field, to assist you with any technical queries you have. Should a surveyor be unable to complete the address quota for any reason, their Supervisor must be notified immediately.**

## **9.6 WEEKLY MONITORING OF PROGRESS**

Surveyors' work will be closely monitored throughout the period of the survey and Supervisors will make arrangements to keep in regular contact with their surveyors so that overall progress can be monitored. It is a requirement that surveyors provide weekly progress reports to their Supervisors, i.e. the outcome of each address visited that week. Surveyors should be in weekly telephone contact with their Supervisor for a verbal update. Failure in maintaining weekly contact with their Supervisor may result in delays to surveyor payments.

It is also important that you maintain regular contact with your Supervisor as they need to ensure that you have been informed of any new briefing decisions that have been made by BRE/Ipsos MORI.

Supervisors may also decide to have informal meetings with their group of surveyors from time to time throughout the survey period. You may be contacted and asked to attend an informal meeting mid-way through your fieldwork. You should attend any session that is organised.



## **10. PROBLEMS IN THE FIELD**

The following chapter aims to address some of the most likely problems you may encounter whilst in the field. These include technical problems, workload issues, the need for additional materials, dealing with refusals and requests for further information.

### **10.1 TECHNICAL PROBLEMS**

Your Supervisor will act as the first line of technical assistance in the field. Any technical problems you may have should be directed to your Supervisor, who may then refer any query to Ipsos MORI.

### **10.2 WORKLOAD PROBLEMS**

If you are experiencing any difficulties in completing your workload, or you are ill and fall behind with your surveys, you must contact your Supervisor as soon as possible so alternative arrangements can be made.

For short term absences it may be possible, by agreement with your Supervisor to complete the allocation of addresses over a specified period. However, if it is not possible for you to complete the work, then it may be necessary to give all or some of the remaining addresses to another surveyor and terminate the contract. However, you should be aware of your contractual obligations, and the requirements that must be met for you to receive payment for the briefing exercise.

### **10.3 ADDITIONAL STATIONARY AND PAPERWORK**

You should be provided with sufficient numbers of survey forms for you to easily complete your survey workload. If however you need additional forms, or any other items of paperwork, please call Ipsos MORI on 020 7347 3353. There will be an answer-phone attached to the telephone outside office hours and messages will be dealt with as soon as possible.

Any requests for additional stationary will be sent to your home address by return of post.

### **10.4 REFUSALS**

The occupant of any survey address is not obliged to permit a survey to be undertaken. If after explaining about the survey, the occupant still does not wish you to undertake a Property Survey, you must not attempt to complete any part of the survey form. You should leave the property as quickly and politely as possible. The exterior must not be surveyed. You should note on the survey form that a refusal was given and complete Sections 1 to 4 of the survey form, and return the form to Ipsos MORI, labelled in the usual way. Do not take photographs.



### **10.5 HOUSEHOLD REQUESTING INFORMATION ABOUT THE SURVEY**

All information collected on the survey form is confidential, but if the occupant insists on looking at the form, you should allow them to do so. Ipsos MORI will not be providing the occupant with a copy of the survey form. You should explain to the household that the information is collected for statistical purposes only, and no findings about a particular dwelling can be identified.

You should also avoid telling the occupant about any detailed findings or specific problems which you have found while undertaking the survey. If however you come across a dangerous situation, e.g. you can smell gas, you should advise the occupant to contact the local gas company. If there are serious problems with the dwelling you may wish to advise the household to contact the local authority.

If there are serious problems with the dwelling that you think need to be brought to the attention of other authorities you must not do so yourself but should contact your Supervisor to discuss. They will then liaise with Ipsos MORI.

### **10.6 LANGUAGE DIFFICULTIES**

If you find that the occupant does not speak English, then a neighbour or a member of the family should be sought to act as a translator. Children are often good at this task.

### **10.7 SOCIAL PROBLEMS**

You should avoid getting involved with social problems. If however you come across circumstances that cause concern, you should use your discretion, and discuss the issue with your Supervisor. You may wish to suggest to the household to contact their local town hall or the list of local welfare organisations held at the Citizen's Advice Bureaux. In exceptional cases you can contact Ipsos MORI on 020 7347 3353 for further advice.

### **10.8 SEEKING ASSISTANCE**

You should always contact your Supervisor in the first instance if you have any technical queries or problems relating to completing your workload. If you have any questions relating to the organisation of the survey, fieldwork or payment after your survey period you should contact Ipsos MORI on 020 7347 3353.

## 11. CONTRACTS AND PAYMENT

The following chapter addresses issues surrounding invoicing and expenses.

### 11.1 TERMS AND CONDITIONS OF THE CONTRACT

Payment will be in accordance with the rates and conditions set out in the contract.

### 11.2 MILEAGE AND EXPENSE PAYMENTS

During survey fieldwork, surveyors will be entitled to claim for mileage travelled to each survey address, at a rate of £0.40 per mile. Mileage to each survey address will be monitored by Ipsos MORI, and the surveyor must record each days mileage travelled on expenses sheets supplied by Ipsos MORI. A copy of the expenses sheet is set out below.

Any other expenses incurred, such as toll bridges, must be agreed in advance with Ipsos MORI.

Ipsos MORI

#### Living in Wales Property Survey 2008 Surveyor Expenses Claim Form



Surveyor Name:	Surveyor Number:	Dates: (week ending)
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Surveys + Other Addresses Visited (List Address Reference Numbers)

	MON	TUES	WEDS	THURS	FRI	SAT	SUN
1							
2							
3							
4							
5							
6							
7							
8							
9							
10							

Mileage	MON	TUES	WEDS	THURS	FRI	SAT	SUN
Start							
- Finish							
= Daily mileage							

Expenses Claim	£	p	Notes
_____ miles @ £0.40 per mile (as allowed)			
Others (specify) 1			
2			
3			
Expenses			
VAT (is applicable-VAT invoice required)			
Total Expenses			

Signature of Surveyor:	Date:
------------------------	-------

For Ipsos MORI use only

Authorised by:	J31845	Date:
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### **11.3 INVOICING IPSOS MORI**

Ipsos MORI will make payment to surveyors in accordance with the terms of the surveyor's contract, upon receipt of the surveyor's invoices, as quickly as reasonably possible. Invoices from the surveyor should be submitted at regular intervals throughout the contract period, as detailed below.

Regular statements will be generated by surveyors via the Survey Management website providing details of the amount to be claimed for each completed, booked-in address. Surveyors will be able to generate statements weekly, subject to a minimum of ten completed full surveys. The statements will list the outcomes of all booked-in addresses, and the amount they are entitled to claim for each address. Surveyors will then be asked to invoice Ipsos MORI based on these statements, plus the mileage incurred for undertaking those surveys at the agreed mileage rates. Invoices will be paid by BACs transfer.

Final invoices submitted by surveyors will only be paid if Ipsos MORI is satisfied with the performance based on the following criteria:

- Performance of the surveyor as measured by the Supervisor (factors measured will include, quality of survey forms – completeness and accuracy, response rates, and regular flow of work);
- Performance of the surveyor as measured by responses from householders (factors measured will include whether or not rules set out in the Living in Wales Identity Card Scheme have been adhered to, length of time at the survey address);
- Timeliness of forms returned; and
- Return of materials, including camera and any unissued light bulbs, at the end of fieldwork.

## **12. QUALITY CONTROL**

For quality control purposes, surveyors' performance will be monitored throughout the survey in a number of ways which are set out below.

### **12.1 SUPERVISION AND SUPERVISOR ASSESSMENT**

Supervisors will monitor surveyor performance in a variety of ways including accompaniment in the field and checking completed survey forms for quality and completeness. Supervisors will also monitor performance in terms of response rates (i.e. the number of full surveys that each surveyor is achieving, and the flow of work being returned to Ipsos MORI).

### **12.2 BACK-CHECKING ADDRESSES**

Ipsos MORI will undertake a telephone back-check on a random sample of each surveyors' addresses that have been returned and booked-in at Ipsos MORI, over the course of their fieldwork period. The call will ask the household to verify that a surveyor called to undertake the survey, and ask the household about how the survey was conducted, and the length of time at the address.

### **12.3 VALIDATION OF SURVEY FORMS**

Once a survey form has been booked-in at Ipsos MORI, it is then entered onto the computer system. Each survey undergoes a validation process, whereby the data is cleaned by listing all errors on the form, e.g. implausible data or inaccurate data. This will highlight any surveyors with particularly high error rates. The validation process will be on-going at Ipsos MORI throughout the fieldwork period. Surveyors will be notified if their survey forms show persistent and unacceptable error levels.

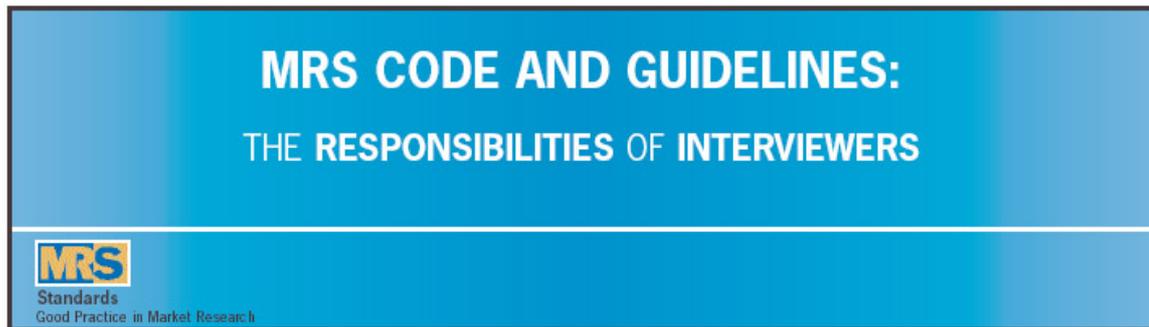
### **12.4 PROGRESS**

Surveyor's progress will be closely monitored during fieldwork, by their Supervisor, (weekly telephone calls from each surveyor) and by Ipsos MORI, (forms booked-in to the Survey Management System).



## 13. MARKET RESEARCH SOCIETY: RESPONSIBILITIES OF SURVEYORS

Ipsos MORI adheres to the principles and Code of Conduct of the Market Research Society, MRS. Please read the following section carefully as surveyors are required to abide by the same principles.



### The Market Research Society Revised November 2005

#### 13.1 INTRODUCTION

This statement of the responsibilities of research interviewers towards the people they interview, and the clients who commission the surveys on which they work, is based on the detailed Code of Conduct, issued by: **The Market Research Society (MRS)**

It is intended for:

- New interviewers – to help with learning the key DOs and DON'Ts of the job; and
- Experienced interviewers – as a quick reference guide.

MRS has issued this as part of its policy of supporting people in the profession, so that they are able to maintain the reputation of market research and ensure that it prospers by the professionalism they bring to their work.

The formal code is supplemented by a '**Code of Commonsense**' for interviewers – something suggested by experienced market researchers who were consulted when this version was in preparation.



## 13.2 MARKET AND SOCIAL RESEARCH PRINCIPLES

These are the principles which **market and social research** seeks to follow:

- It must be based on willing co-operation between the public and business organizations.
- Both parties must be able to have confidence that the research is carried out honestly and objectively, without intruding on the people who take part, or harming them.
- Its purpose is to collect and analyse information, not to sell, and not to influence opinions of those taking part.
- The rights of privacy must be respected; people who take part must not be identified without their agreement; and they must not be harmed or embarrassed as a result of taking part.
- Wherever possible, those who take part must be told the purpose of the research.
- The findings must be reported accurately and must never be used to mislead.

### The people concerned

Four sets of people are primarily concerned in market and social research;

1. The clients who commission research;
2. The researchers who carry it out: interviewers, their managers, the companies that employ them;
3. The people they interview; and
4. The public who see interviewers at work and the wider public in general.

## 13.3 BEFORE YOU BEGIN A PROJECT

You must be properly trained so that you fully comply with the Code and all legal requirements. You must also be briefed on the particular job to enable you to understand the project. This may include the following issues:

### Client supplied lists (B7)

Knowing whether the client supplied the sample list. In this instance, if requested by the respondent, the client's identity must be revealed at some point in the research.

### Confidentiality vs. non-confidentiality

Understanding whether the research you are administering is **confidential** or **non-confidential** as this will affect what you say to the respondent in the introduction.

### What is confidential research? (B8)

Confidential survey research means research projects based on the anonymity of the people who supply information; in which their identity and



personal details are used only with their consent, and only for purposes of the research project in which they take part.

### **What is non-confidential research? (B9, B10)**

Non-confidential research means research projects that require personal details to be passed back to the client for a particular reason. You must get permission from the respondents to be able to do this and the permission statement must include what the client wishes to do with this data and who (in general) is likely to see it.

### **13.4 WHEN INTRODUCING A SURVEY (B15, B17, B18, B21, B22)**

- Don't mislead or pressurise a respondent when asking them to take part.
- State your name and the name of the research supplier.
- Show your Interviewer Identity card.
- Make it clear that the interview will be carried out according to the MRS Code of Conduct.
- State what the interview is about.
- If asked, state how long it will take.
- Tell them where you got their name from (if appropriate).
- If the respondent is to be monitored during the research let them know so they can make an informed decision whether to continue (unless it is for internal quality control/supervision purposes in which case you do not need to tell respondents they are being monitored).

### **13.5 DURING THE PROJECT (A3, A6, A8, A10, B17)**

#### **Your responsibility to the people you interview**

The following responsibilities must be adhered to:

- Researchers must take all reasonable precautions to ensure that respondents are not directly harmed or adversely affected as a result of participating in a research project.
- Any assurances you give about the interview including how long it will take must be factually correct.
- If you promise an incentive to respondents this promise must be honoured.
- Avoid criticism or disparagement of other researchers.
- Tell the truth about your own skills and experience and about the organization you work for and never make false claims.
- Always act to maintain the good name of market and social research, and public confidence in it.



### **13.6 AFTER THE PROJECT (B62-B64)**

If you are storing the data for any length of time you must keep this data secure. If anything were to happen to the data in your care the Office of the Information Commissioner (the body responsible for data protection legislation in the UK) would expect that the data was kept adequately secure.

If you are keeping the data for any length of time and reusing the data you may need to register with the Information Commissioner as a registered data controller.

### **13.7 CODE OF COMMON SENSE**

#### **Preparing for research interviewing**

Don't be afraid to ask your supervisor about anything that isn't clear in the instructions for the research. If you understand fully, you will work with confidence and that communicates itself to the people you interview and will make the experience more successful for both them and for you.

#### **Seeking interviews**

Approach people courteously when you request an interview: show your identity card, and introduce yourself as a market or social research interviewer and give the name of your company.

Respect their convenience: in the street, don't force them to step into the road, or stop anyone who is about to go into a shop or get on to a bus.

Accept a refusal without question, at once, and with a smile

#### **Courtesy to the general public**

Show good manners to other street users: don't obstruct the pavement, or block access to shop windows or entrances.

Look good: dress appropriately for the place and circumstances where you are working, don't eat or smoke on the street.

#### **Taking care of yourself**

Take commonsense precautions for your own security: always tell your family and /or the company where you are going before starting work on interviews.

Leave your bag/wallet at home, and carry the minimum of essential possessions and cash.

Keep your car keys in your pocket.

## **Appendix 6 Surveyor recruitment advert**

«Surveyor name»  
«Job\_Title»  
«Addres\_1»  
«Addres\_2»  
«Addres\_3»  
«Addres\_4»  
«Postcode»

February 2008

Dear <<Surveyor name>>

## Living in Wales 2008 Property Survey

You may be aware that the Living in Wales survey (which you took part in as a surveyor in 2004) is again going into the field later this year. I am writing at this stage to see if you would like to express an interest in taking part.

For 2008 we have made some improvements in the survey design, which we believe will make it a more attractive proposition for surveyors.

The 2008 household interview surveys are currently underway and will be completed by early Summer 2008. The addresses selected for the property survey will be batched and issued to surveyors in one go after the surveyor briefing in September. Surveyors will then have approximately 6 weeks to complete their allocations (expected to be around 60 surveys each).

The Surveyor briefing will take place over a 6 day period between 8-17 September 2008 and the survey form will be similar to that used in 2004, along with some additional information on five health and safety (HHSRS) hazards. The pay rates for completed surveys will be broadly similar to those for the 2007/08 EHCS.

As with the previous survey, once we have received an expression of interest, we will require you to undertake a pre-selection exercise with your Supervisor before offering a contract.

If you wish to be considered for selection for this survey can you please get in touch with Stephen Finlay at Ipsos MORI at the above address or email [stephen.finlay@ipsos-mori.com](mailto:stephen.finlay@ipsos-mori.com) by 20 March 2008.

We look forward to hearing from you.

Yours sincerely



Gary Welch – Living in Wales Project Manager



Llywodraeth Cynulliad Cymru  
Welsh Assembly Government

## LIVING IN WALES PROPERTY SURVEY 2008

### SURVEYOR ADVERT



#### **Part time work for EHOs on Living in Wales Property Survey 2008**

Ipsos MORI (working for the Local Government Data Unit ~ Wales, on behalf of the Welsh Assembly Government) are looking to recruit EHOs to work on the Living in Wales Property Survey 2008. This survey, which is part of a timeseries, and was last undertaken in 2004, collects data to support the monitoring and development of the WAGs strategy for housing quality and energy efficiency. In particular, information is collected on: the age and type of the housing stock; its state of repair; fitness for habitation; HHSRS; the WHQS; SAP and fuel poverty.

At this stage we are looking for expressions of interest from Wales based EHOs who are prepared to undertake approximately 55 surveys over a 2 month period in Autumn 2008. These will be organised at your convenience and can take place during weekends and early evenings. The pay rate for completed surveys is attractive and broadly comparable with other national surveys. Full training will be given and will be particularly useful to those wishing to learn and apply the HHSRS. You will be paid to attend a 6 day briefing in Swansea, between 8-17 September 2008, prior to going out into the field.

If you wish to be considered for selection, please email your CV to Stephen Finlay at: [Stephen.finlay@ipsos-mori.com](mailto:Stephen.finlay@ipsos-mori.com) by 23 May 2008, or call him on **0207 347 3071** if you wish to discuss participation.

As with previous surveys, once we have received an expression of interest, we will require you to undertake a pre-selection exercise and confirm whether there is an appropriate space available in your locality before offering a contract.

## **Appendix 7 Responsibilities of interviewers**

<<Surveyor name >>

<<Address 1>>

<<Address 2>>

<<Address 3>>

<<Address 4>>

<<Postcode>>

Dear <<FirstName>>,

Congratulations on being selected to work on the Living in Wales Property Survey in 2008. As you may be aware, there was an extremely high level of interest for the surveyor positions, but we felt you were able to demonstrate the requisite experience and knowledge needed to ensure the success of the survey. We look forward to working with you on this important piece of research.

Enclosed is your contract for the Living in Wales survey. Please can you sign and return a copy to us **as soon as possible**, to the address shown below. Please also include:

- 2 passport sized photographs – taken against a **white** background;
- your car registration details; and
- your bank details to which we should make payments (form to complete is enclosed)

The photograph is for your ID card. We have found on previous surveys that some queries may be received to check the identity of surveyors, and car registration details are very useful as a reference.

Please also complete the bank details form for the account to which we should make payments. All payments will be made by BACS.

Your allocation of addresses will be in the North Wales area. If you have any queries about the above or wish to discuss anything about the survey, please contact Hannah Atherton urgently on 020 7347 3403.

Yours sincerely,



Gary Welch  
Living in Wales Project Manager

## **Appendix 8 Surveyor contract (VAT)**

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## Living in Wales 2008 Property Survey Contract for Surveyors

1. This contract is made between Ipsos MORI and <<name>> "The Contractor" (name of the Employer providing Surveyor or name of the individual if surveyor is self employed).
2. Throughout this contract the term "surveyor" and/or "surveyors" shall mean the Contractor where the context allows.

### The Programme of Work

3. The Contractor agrees to carry out the Programme of Work and produce outputs (together referred to as "the work") specified in Schedule 1 of this contract.

### The Designated Person

4. The person designated to undertake the work on behalf of the Contractor is <<Surveyor name>> (name of surveyor provided by the contractor for the duration of the survey) and no other person shall undertake the work designated.

### Timetable

5. The work will start in September 2008 and will be completed no later than October 2008, as follows:

Pre-briefing distance learning exercise	July-August 2008
Main Briefing exercise (6-days)	between September 11th-17th
Surveys	between September and October 2008 (or as specified by Ipsos MORI)

### Payment

6. Ipsos MORI agrees to make payment to the Contractor in accordance with the terms of this contract, and within six weeks of receipt of the Contractor's invoices, submitted in accordance with paragraph 34.

### Financial Risk

7. For the avoidance of doubt, Ipsos MORI will have no contractual or other financial relationship with surveyors employed by the Contractor.
8. The Contractor will remain solely responsible for the surveyor's remuneration and the surveyor will not be entitled to receive holiday pay or other absence pay, or any other benefits from Ipsos MORI. Any reasonable expenses incurred by the surveyor in performing the work (provided they are incurred with the prior written consent of Ipsos MORI and in accordance with this contract) will be reimbursed by Ipsos MORI.

### Non-exclusive Services

9. The Contractor will, at all times, represent itself, and will, if relevant, procure that each surveyor will represent him/herself, as an independent business and will not represent itself or him/herself or hold itself or him/herself out as a representative of Ipsos MORI.

10. The Contractor is free to undertake other contracts, client services and other work for other organisations at any time, either before, after or concurrently with the work.
11. Nothing in this contract shall oblige Ipsos MORI to provide work to the Contractor at any time whatsoever and it is hereby agreed that where no such work is provided, Ipsos MORI shall not be liable to the Contractor or the surveyor for any claims or costs arising from such failure to provide such work.
12. At no time is Ipsos MORI obliged to offer any ongoing contracts or further work to the Contractor.

### **Intention of the Parties**

13. The Contractor and Ipsos MORI agree that this is a contract for services in respect of the surveys to be undertaken and completed by the surveyor. In entering into this contract the parties do not intend to create any relationship, whether of employer and employee or otherwise between Ipsos MORI and the surveyor, or any relationship other than this contract between Ipsos MORI and the Contractor.

### **Tax Liabilities**

14. It is the intention of the parties that the Contractor is a separate and independent business and, as such, is responsible for all Income Tax liabilities and National Insurance or similar contributions in respect of any payments made by it to the Contractor. The Contractor hereby indemnifies Ipsos MORI in respect of any claims that may be made by the relevant authorities against Ipsos MORI for Income Tax or National Insurance, or similar contributions relating to the fees paid by Ipsos MORI for the surveys or any payments made by Ipsos MORI to the Contractor.

### **Fees**

15. There are two elements to the fee structure for this Contract. The first element is a fixed fee for successful attendance at the 6-day residential briefing exercise, and the second element is a variable payment based on performance on surveys achieved. Full details are set out in Schedule 1, however a summary of the work and the fee structure is as follows:

Application exercise – no fee

Pre-briefing qualification exercise – no fee

Main briefing exercise – fixed fee based on duration of briefing and dependent upon successful completion of survey fieldwork

Survey fieldwork – variable fee, performance related

Ipsos MORI shall pay the Contractor for the above at the rates set out in paragraphs 16 - 28 in this contract (exclusive of Value Added Tax).

## Fixed Fees

### Pre-Briefing Exercise

16. No payment will be made to surveyors for completing the pre-briefing exercise, which includes:
- reading the briefing manuals
  - completing a survey of a flat in a block
  - completion of seven specified exercises
  - postage of the completed survey form to the Supervisor
  - discussion with the Supervisor via phone/email prior to the residential briefing

### Main Briefing Exercise

17. Ipsos MORI will pay £210 per day, totalling £1260 for attendance at, and successfully completing the 6-day briefing. No payment will be made for attendance at the briefing if a surveyor does not subsequently work on the survey. A minimum of **twenty** allocated surveys must be completed for payment (fees and expenses) to be made for the briefing exercise. If twenty allocated addresses are not subsequently completed, then the equivalent sum £1260 of survey payment will be withheld. Whilst surveyors are attending the briefing exercise, Ipsos MORI's survey partners, the Building Research Establishment (BRE) will provide hotel accommodation and meals, but the following items will not be reimbursed by Ipsos MORI /BRE:
- use of telephones
  - drinks at the bar
  - laundry services
  - any other costs incurred

### Travel Costs to and from the Briefing Exercise

18. Travel costs to and from the main briefing exercise will be paid at £0.40 per mile for car travel, or standard class rail travel, and taxi to and from Swansea railway station to the Swansea Marriot Hotel, paid at cost with receipts supplied.

## Variable Costs

### Rates of Pay for Surveys

19. The payment system for survey work on the 2008 Living in Wales Property Survey is based on results. There are two basic rates of pay for all properties visited on Ipsos MORI's instructions, one for a fully completed internal and external inspection - a "Full survey"; and the other for a "Non-survey" (as defined in paragraph 22). No further sums will be paid for subsistence or consumables for survey work, except where detailed below, or otherwise agreed in writing by Ipsos MORI.
20. Payment will only be made for forms returned and booked-in by the Supervisor or at Ipsos MORI, accompanied by appropriate photographs (for full surveys only) for each dwelling. The basic rate of pay for full surveys and non-surveys will be as follows:

	Non-VAT registered	VAT registered
Full Survey	£85	£95
Non Survey	£12	£15

The following items are covered in the basic set fee, i.e. no additional payment will be made for the following:

- maps
- telephone calls
- stationary
- accommodation (unless agreed in advance with Ipsos MORI)

Any additional expenses, such as bridge tolls within Wales, must be agreed in advance with Ipsos MORI.

For the purposes of payment, the definitions are outlined below.

### **Full Survey**

21. For payment to be made on a full survey, the following definition applies: all relevant sections of the survey form are complete, i.e. full internal and external inspections and an inspection of the local area. The form must be completed to an acceptable standard, and must be accompanied with an appropriate number of photographs for the dwelling (as specified by Ipsos MORI/BRE). Both forms and photographs must be booked-in onto Ipsos MORI's Survey Management System either by the Supervisor or by Ipsos MORI.

### **Non-Survey**

22. For payment to be made on a non-survey, the following definition applies: any form that is partially completed, i.e. anything short of a full survey, including any sort of partial survey, such as a survey where only the exterior has been completed. In most cases a non-survey will mean only the first two pages of the form will have been completed (sections 1– 4). Any other outcome apart from a full survey will be defined as a non-survey, i.e. no contact made; access refused to surveyor or other outcome. Where a surveyor has not gained access to a vacant property, and only the exterior has been completed, the survey will be defined as a non-survey. Payment will only be made with a form booked-in onto Ipsos MORI's Survey Management System either by the Supervisor or by Ipsos MORI. No photographs are required for non-surveys. In cases where no visit is made to an address, (e.g a telephone refusal to the surveyor or, where the householder has contacted Ipsos MORI directly to refuse), no payment will be made.

### **Additional Mileage Payments**

23. During survey fieldwork, surveyors will be entitled to claim for mileage travelled to each survey address, at a rate of £0.40 per mile. Mileage to each survey address will be monitored by Ipsos MORI, and the surveyor must record each days' mileage travelled on log sheets supplied by Ipsos MORI.
24. Surveyors will agree, in advance with Ipsos MORI, the area in Wales where they will be working. The addresses will, as far as possible be grouped in one area. If surveyors are working from England, mileage will be paid for travel from the Welsh border to their addresses.

### **Number of Surveys**

25. The addresses for the Property Survey will be a proportion of all addresses that have been issued for the Household Survey, which has been completed in advance of the Property Survey. The selection of addresses for the Property Survey will only come from those that have agreed to be re-contacted in the Household Survey. Ipsos MORI expects to give each surveyor a list of between 40 – 80 addresses from which to achieve the required number of Property Surveys.
26. Surveyors will need to maintain regular contact with Ipsos MORI's Survey Management Website to manage their allocation.
27. It is expected that each surveyor will complete an average of 40-60 full surveys over the fieldwork period, and no surveyor will complete more than 80 full surveys, and Ipsos MORI cannot guarantee a minimum number of surveys. Ipsos MORI reserves the right to change surveyors address allocations as necessary, e.g. where one particular surveyor allocation is too high and another is too low because of the pattern of addresses selected from the Household Survey.
28. Surveyors will be expected to achieve a full survey in almost all addresses issued for a Property Survey. Ipsos MORI will expect response rates of approximately 80% full surveys or higher. Although re-contact will have been agreed, surveyors will be required to persuade householders where necessary to agree to a survey. Any performance below the expected response rates will be subject to review by Supervisors, and a surveyor's contract may be terminated if response rates are unacceptably low.

### **Availability**

29. Surveyors need to ensure they are available to work on the survey immediately after the briefing exercise, this will include evenings and weekends. They will need to be accompanied by their Supervisor for one day (or as long as deemed appropriate by the Supervisor) within the first two weeks following the briefing exercise. Throughout the survey period - between September and October 2008, surveyors need to ensure they are regularly available to undertake the surveys, and surveyors must seek permission from Ipsos MORI to take any periods of leave from the survey. The surveyor's contract may be terminated if a regular flow of work is not maintained.

## Digital Camera

30. For the purposes of fulfilling this contract, surveyors will be provided at the briefing with a digital camera plus sufficient floppy disks. Surveyors will sign for safe receipt of the camera and will assume all responsibility for damage or loss until it is returned to Ipsos MORI upon contract completion. A charge of up to £280 + VAT will be made for non-return, or damage to the camera, or the equivalent sum withheld from final payment. Cameras that develop faults should be returned to Ipsos MORI as soon as possible for replacement, for which Ipsos MORI shall bear the costs.

## Internet Access

31. It is a requirement of this contract that surveyors regularly log-on to Ipsos MORI's Survey Management Website to manage their allocation. All surveyors need to provide their own access to appropriate equipment in which to do this, which will mean accessing a **secure** website. Surveyors also need to ensure they are contactable via mobile phone at all reasonable times throughout the survey period.

## Quality Control and Payment of Surveyors

32. Surveyor's performance will be monitored by Ipsos MORI, by calling back on a sample of the surveyor's addresses to ask the household about how the survey was conducted. Final invoices submitted by surveyors will only be paid if Ipsos MORI is satisfied with the performance based on the following criteria:
- performance of the surveyor as measured by the Supervisor (factors measured will include quality of survey forms – completeness and accuracy, response rates, and regular flow of work)
  - performance of the surveyor as measured by responses from householders (factors measured will include maintaining appointments, whether or not MRS Codes of Conduct have been adhered to, and length of time at the survey address)
  - performance of the surveyor as measured by Ipsos MORI in terms of keeping survey progress up to date and logging on to the Survey Management Website regularly
  - quality of forms returned in terms of accuracy, error rate and completeness
  - timeliness of forms returned

## Retention Sum

33. Ipsos MORI will retain half of the fee for the main briefing exercise until all issued work is completed and returned to Ipsos MORI, and Ipsos MORI are satisfied with the quality of work in terms of acceptable level of errors of validated forms, and all survey materials including the camera are returned.

## Invoicing

34. Regular statements will be generated by surveyors via the secure website providing details of the amount to be claimed for each completed, booked-in address. Surveyors will be able to generate the statements at intervals of around two weeks, and a minimum of ten completed full surveys. The statements will list the outcomes of all booked-in addresses, and the amount they are entitled to claim for each address. Surveyors will then be asked to invoice Ipsos MORI based on these statements, plus the mileage incurred for undertaking those surveys at the agreed mileage rates. Invoices will be paid by BACs transfer.

**Value Added Tax**

- 35. It is understood that the supply of goods and services by the surveyor under this Contract is standard rated at 17.5%. If this rate should change then MORI will pay VAT on the supply of goods and services at the rate then lawfully due. All amounts specified in this Contract are, however, exclusive of VAT payable by MORI in respect of that supply.
- 36. This is a fixed term contract and surveyors are required to complete the minimum of 20 addresses, unless removed from the survey in accordance with the terms of this contract by Ipsos MORI.

**Law Applicable**

- 37. This Contract is governed by English Law and the English Courts shall have exclusive jurisdiction in deciding on matters relating to this contract.

Name:
-------

Signature.....  
on behalf of the Contractor  
Date .....

Name:
-------

Signature.....  
On behalf of Ipsos MORI  
Date .....

The following documents are attached:

- Schedule 1 Programme of Work
- Appendix 1 Market Research Society Code of Conduct
- Appendix 2 Living in Wales Identity Card Scheme
- Appendix 3 Surveyor Declaration

## Schedule 1 Programme of Work

### Introduction

1. Living in Wales, the 2008 Property Survey is the latest in a series of surveys that previously comprised both a household social survey and a linked physical inspection of dwellings to be known as the Property Survey. The last such survey in Wales was the 2004 Living in Wales Survey. The Living in Wales survey has two components: the first is a Household Survey conducted in person by Ipsos MORI and GfK NOP interviewers. For 2008 a total of 7,500 Household Surveys will be achieved; around 300 in each local authority area. A sample of the dwellings where an interview has taken place, and where they have given permission to be re-contacted, will then be selected for a Property Survey to be undertaken by surveyors. A total of 2,450 full Property Surveys must be received.

2. The Property Survey seeks to establish the condition of the housing stock in Wales by carrying out a full internal and external inspection of dwellings. The surveys provide a major source of information for the development and monitoring of housing policies directed at the repair, improvement and energy efficiency of the housing stock, in the private and public sectors. The Local Government Data Unit (LGDU) on behalf of the Welsh Assembly Government has commissioned Ipsos MORI to manage the survey process. Ipsos MORI will be responsible for the management and administration of the Property survey, and all surveyors employed on the survey. Ipsos MORI has appointed the Building Research Establishment (BRE) to be responsible for briefing surveyors and managing survey supervisors who will, in turn, oversee the work of surveyors.

3. Forty four surveyors will be employed to work on the survey, made up of a pool of professional MIEHO Environmental Health Officers, RICS Building Surveyors and Quantity Surveyors, and RIBA Architects. All surveyors will be allocated to one of four regionally based teams (11 surveyors per team) led by a Supervisor.

### The Property Survey Contact Arrangements

4. A sample of around 2,450 addresses will be achieved for the Property survey. These will consist of a range of tenures and dwelling types. All households where a Property Survey will take place will have undergone the Household Survey, which is used to determine the households' characteristics, including full details of their financial circumstances, their tenure, attitudes to their home and the environment. Surveyors will undertake full dwelling inspections at a sample of the addresses where an interview has taken place. Properties will be selected for inclusion in the

Property Survey on a random basis with greater weight being given to some characteristics recorded in the Household Survey.

Property Survey addresses will be selected from all those who have agreed to be re-contacted from the Household Survey. Prior to commencement of fieldwork all addresses selected for the Property Survey will be written to, notifying them when survey work will begin. The household will, therefore, know in advance that a surveyor will be calling but not the name of the surveyor. The first contact with the selected households will be initiated by the surveyor.

5. Surveyors will need to regularly log on to the Ipsos MORI Survey Management website to manage their allocation. Surveyors will be notified by telephone of any appointment cancellations or refusals received by Ipsos MORI.

6. Surveyors will be notified of all the addresses within their allocation, which will be approximately 60-80 addresses each, although this will vary considerably by region. Surveyors will therefore know in advance the areas and distances they will be expected to travel. Each surveyor will be expected to achieve approximately 40-60 Property Surveys.

7. All surveys will be completed within a time-period to be specified by Ipsos MORI, and information will be recorded on survey forms provided by Ipsos MORI.

### **The Surveys**

8. The survey is a non-intrusive visual inspection. Surveyors will undertake a physical assessment of the dwelling at each address provided. All surveys will involve a full internal and external inspection, in accordance with surveying procedures specified by BRE/Ipsos MORI, and will involve an inspection of three general purpose rooms, in addition to the main kitchen, bathroom and circulation space, and, where relevant, a loft inspection. The survey is a paper-based survey, and surveyors will be provided with survey forms to be completed for each address. Surveyors should expect to spend between 45 and 90 minutes to complete a full survey, although the duration will vary according to the type and condition of the property. The average length is expected to be 75 minutes for flats and 65 minutes for all other property types.

9. A Full Survey is defined as the completion of all relevant sections of the survey form as specified by Ipsos MORI/BRE. Anything other than this will be treated as a Non-Survey. (See paragraphs 21 and 22 of the contract).

## **The Survey Management System**

10. The Survey Management System for the survey will be handled centrally by Ipsos MORI.

Surveyors should regularly log onto the Survey Management Website to manage their allocation and generate invoice statements for work completed.

11. It is a requirement of this contract that surveyors have a mobile phone and on-line internet access for use throughout the survey period. There may be times where a surveyor will need to be notified of a short notice cancellation made through contact with Ipsos MORI.

12. Surveyors must make at least six attempts to contact the occupants, (if occupants are not present at the time of the initial call or subsequent appointment times if these have been arranged), before abandoning the address as un-contactable. Where more than one call is necessary, these calls should be made, in person, at different times of the day, in at least two different weeks, and at least one should be in the evening and one during the weekend.

13. It is the responsibility of the surveyor to ensure that they visit the correct address to undertake the Property Survey, i.e. the address where the Household interview has been completed. Surveyors will usually be provided with address details together with the date the interview took place. If Ipsos MORI establishes that the survey has been undertaken at the wrong address no payment will be made for that survey, and the surveyor will be required to undertake the survey at the correct address. If the surveyor suspects that an interview has been undertaken at the wrong address they must contact Ipsos MORI and await further instruction from Ipsos MORI.

14. If there are circumstances where a surveyor is unable to make the appointment made with the household, it is essential that the surveyor telephones the householder themselves to re-arrange the appointment in the first instance.

## **Briefings and Training**

### **Pre-briefing Exercise**

15. For those surveyors working on the Living in Wales Property Survey for the first time, each surveyor will be required to complete a pre-briefing distance learning package, which will be despatched before the main briefing. This will include a full set of briefing manuals and a number of exercises, including a full survey of a flat in a block, to be discussed with the Supervisor. Satisfactory performance of this work is a necessary requirement to prepare for the residential briefing. No direct payment will be made for this, although it has been taken into account in the setting of the survey payment rate.

### **Main Briefing**

16. Surveyors will attend a fixed 6-day residential briefing at The Marriot Hotel Swansea, and no surveyor will be permitted to work on the survey if they have not attended the full briefing. The briefing will be undertaken by staff from the Building Research Establishment (BRE) and other specialists, and managed by BRE/Ipsos MORI. The briefings will consist of a mix of classroom lectures, practical fieldwork exercises and evening debriefing sessions.

17. Surveyors will be organised into regional groups of 11 surveyors headed up by a regional Supervisor. Surveyors will be accompanied at the briefing by their Supervisor. At the end of the briefing session, surveyors will be expected to meet the standards of work necessary to undertake Living in Wales survey work, as judged by their Supervisors and the BRE/Ipsos MORI staff. Whether the surveyor meets the required criteria will be judged on:

- their professional competence, as demonstrated at the briefing;
- grasp of the principles and concepts of the Living in Wales methodology;
- willingness to apply the standards set out by the professional instructors at the briefing;
- ability to complete all the required parts of the survey form in a correct and legible way in the time available;
- commitment, energy and enthusiasm for the survey.

The contract may be terminated if Supervisors and the BRE/Ipsos MORI staff agree that surveyors do not meet these requirements. Surveyors who do not subsequently work on the survey following the briefing will not be paid for their attendance at the briefing. This is defined by the successful completion of twenty full surveys.

### **Allocation of Addresses to Surveyors**

18. The address allocations for each surveyor will be fixed and non-negotiable. The addresses will be allocated in order to comply with the rules for the address allocation process, which are designed to ensure that no biases are brought into the survey by too few surveyors making judgements in one area. Another aim of the allocation process is to ensure that all surveyors get, as far as possible, equitable and fair work patterns. Ipsos MORI therefore reserves the right to change allocations as necessary, although this will be done only where absolutely necessary.

19. All survey addresses must be completed by the named surveyor to whom they are issued. Surveyors are not permitted to pass survey addresses on to any other surveyor, or any other individual, for completion. If, due to exceptional circumstances, a surveyor is unable to complete any part of their address allocation, then this must be discussed with the Supervisor and Ipsos MORI immediately. Ipsos MORI will be responsible for any re-allocation of survey addresses.

### **Confidentiality**

20. Surveyors may be allocated addresses within the local authority in which they work. Surveyors are required to sign an additional statement on the contract that states that the surveys undertaken in the Living in Wales Survey are purely for statistical purposes, and that any information revealed will not be acted on in a professional capacity. This is contained in Appendix 3.

21. Confidentiality of all addresses surveyed, and all information gathered is of the utmost importance. All surveyors will be required to undertake work in accordance with the Market Research Society Code of Conduct in this respect. This is contained in Appendix 1. Surveyors must not discuss the content of the survey results with the occupier or any other party. No copies of the completed form should be made or passed on to a third party. Any personal address information held by the surveyor must be destroyed by the surveyor, or returned to Ipsos MORI at the end of the survey. Ipsos MORI is the data Controller for all personal data collected or used for this survey, and the Contractor acts only as a Data Processor.

## **Work Patterns**

22. Surveyors will not be expected to work on the survey full time, although they will be expected to maintain regular progress during the survey fieldwork. Performance (in terms of completed forms and photographs on floppy disks booked-in at Ipsos MORI) will be monitored at all times. Surveyors may have their addresses reallocated to other surveyors unless a regular flow of work is returned.

23. Surveyors must be available to work during the day (although they will not be expected to work full time on the survey) in addition to evenings and weekends throughout the fieldwork period. It is essential that surveyors are also contactable at all reasonable times by mobile phone where information from householders need to be relayed.

## **Supervision and Assistance in the Field**

24. Surveyors will be assigned to a Supervisor who will act as a source of assistance in the field. During the first week in the field (or as close as possible to their first week), surveyors will be accompanied for one day (or as long as is deemed appropriate) by their Supervisor. The Supervisor will make a report on surveyor performance in the field. If, in agreement with the BRE/Ipsos MORI staff, surveyor performance is judged not to meet the required standards, in terms of accuracy of forms completed, accuracy of judgements made, regular completion of surveys etc. the contract may be terminated. Ipsos MORI reserves the right to terminate the contract of any surveyor whose performance at any time is not considered to reach the required standard. Any surveyor removed from the survey must return all materials associated with the survey within five working days of being notified as such.

25. Surveyors should seek assistance from their Supervisors in the first instance if they have technical queries in the field. If surveyors encounter any surveying queries or other difficulties while undertaking their survey work, they should report these directly to their Supervisor. Surveyors are expected to maintain close contact with their Supervisors throughout the survey period. Should a surveyor be unable to complete the address allocation for any reason, their Supervisor must be notified immediately.

### **Feedback to Supervisors**

26. The work of surveyors will be closely monitored throughout the period of the survey and Supervisors will make arrangements to keep in regular contact with their surveyors so that overall progress can be monitored. Surveyors are required to send all their completed survey forms and photographs to their Supervisor for checking. Surveyors are also required to discuss, at least weekly, their progress with their supervisor.

### **Administrative Queries**

27. Surveyors should contact Ipsos MORI with any administrative queries in the field, e.g. requests for stationery, difficulty in locating an address, or queries about payment etc.

### **Photographs**

28. Surveyors are required to maintain a photographic record of each dwelling surveyed, using the digital camera supplied by Ipsos MORI. Typically, four photographs as specified by Ipsos MORI, will be needed for each address. The photographs for each property should be contained on one disk which should be returned to the Supervisor with the survey form. Surveyors will be supplied with all the necessary photographic equipment, i.e. camera, battery pack, battery charger, case and instructions, along with the diskettes, and uniquely coded address labels. Surveyors are required to sign-out each camera and all equipment, and surveyors are then liable for any damage that may arise from their use in the field. Any surveyor not returning the camera and equipment in full working order at the end of the survey (excluding reasonable allowance for wear and tear, and excluding manufacturing defects) will be liable for the full cost of replacing the camera and accessories.

### **Logging Progress**

29. At the end of each day's work, completed survey forms and floppy disks of photographs must be sent to Supervisors in the envelopes provided, together with any survey documentation required by Ipsos MORI.

## **Equipment**

30. Surveyors must provide themselves with the necessary surveying equipment to complete the survey forms satisfactorily. This will normally comprise:

- a metric measuring tape/rod
- a portable ladder
- a torch
- a pair of binoculars
- maps

31. Every surveyor must also provide a car for his/her own use during the survey period, insured for business use. Ipsos MORI must be informed of the registration number of every car used for survey work. If for any reason the car becomes unavailable, it is the responsibility of the surveyor to provide an alternative vehicle. Ipsos MORI should be informed immediately of any new car registration number.

## **Insurance**

32. Surveyors are expected to be fully insured against liability to third parties for personal injury and damage to property, and may be required to provide Ipsos MORI with evidence of this insurance. Whilst surveyors are expected to fully exercise their professional judgement in all matters, no professional indemnity is required in respect of any technical assessments made.

### **Sick Leave**

33. If a surveyor is unable to work regularly during the survey due to sickness or some other reason, it is essential that the Supervisor is contacted immediately. If it is not possible for a surveyor to complete the work over the contract period, then it may be necessary to give some or all of the surveyor's workload to another surveyor. If this is the case, then the surveyor's contract may be terminated. Any re-allocation of addresses will be undertaken by Ipsos MORI. The surveyor will not be permitted to pass addresses on to any other individual.

### **Debriefing Questionnaire**

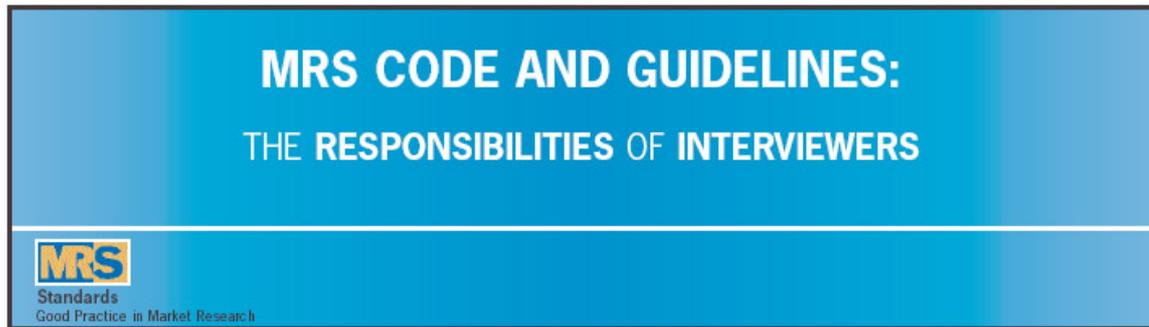
34. Surveyors may be required to complete a debriefing questionnaire at the end of their survey work, detailing their views on the survey and survey processes.

### **Return of Survey Materials**

35. All digital cameras and survey materials left over at the end of survey fieldwork must be returned to Ipsos MORI no later than one week after the surveyor's final survey has been completed, and no later than 28<sup>th</sup> November 2008. All personal survey address information that surveyors have been provided with throughout the course of the survey must be destroyed or returned to Ipsos MORI on completion of the work.

## Appendix 1

Ipsos MORI adheres to the principles and Code of Conduct of the Market Research Society, MRS. Please read the following section carefully as surveyors are required to abide by the same principles.



## The Market Research Society Revised November 2005

### INTRODUCTION

This statement of the responsibilities of research interviewers towards the people they interview, and the clients who commission the surveys on which they work, is based on the detailed Code of Conduct, issued by: **The Market Research Society (MRS)**

It is intended for:

- New interviewers – to help with learning the key DOs and DON'Ts of the job; and
- Experienced interviewers – as a quick reference guide.

MRS has issued this as part of its policy of supporting people in the profession, so that they are able to maintain the reputation of market research and ensure that it prospers by the professionalism they bring to their work.

The formal code is supplemented by a '**Code of Commonsense**' for interviewers – something suggested by experienced market researchers who were consulted when this version was in preparation.

### MARKET AND SOCIAL RESEARCH PRINCIPLES

These are the principles which **market and social research** seeks to follow:

- It must be based on willing co-operation between the public and business organizations.
- Both parties must be able to have confidence that the research is carried out honestly and objectively, without intruding on the people who take part, or harming them.
- Its purpose is to collect and analyse information, not to sell, and not to influence opinions of those taking part.
- The rights of privacy must be respected; people who take part must not be identified without their agreement; and they must not be harmed or embarrassed as a result of taking part.
- Wherever possible, those who take part must be told the purpose of the research.
- The findings must be reported accurately and must never be used to mislead.



## **The people concerned**

Four sets of people are primarily concerned in market and social research;

1. The clients who commission research;
2. The researchers who carry it out: interviewers, their managers, the companies that employ them;
3. The people they interview; and
4. The public who see interviewers at work and the wider public in general.

## **BEFORE YOU BEGIN A PROJECT**

You must be properly trained so that you fully comply with the Code and all legal requirements. You must also be briefed on the particular job to enable you to understand the project. This may include the following issues:

### **Client supplied lists (B7)**

Knowing whether the client supplied the sample list. In this instance, if requested by the respondent, the client's identity must be revealed at some point in the research.

### **Confidentiality vs. non-confidentiality**

Understanding whether the research you are administering is **confidential** or **non-confidential** as this will affect what you say to the respondent in the introduction.

### **What is confidential research? (B8)**

Confidential survey research means research projects based on the anonymity of the people who supply information; in which their identity and personal details are used only with their consent, and only for purposes of the research project in which they take part.

### **What is non-confidential research? (B9, B10)**

Non-confidential research means research projects that require personal details to be passed back to the client for a particular reason. You must get permission from the respondents to be able to do this and the permission statement must include what the client wishes to do with this data and who (in general) is likely to see it.

## **WHEN INTRODUCING A SURVEY (B15, B17, B18, B21, B22)**

- Don't mislead or pressurise a respondent when asking them to take part.
- State your name and the name of the research supplier.
- Show your Interviewer Identity card.
- Make it clear that the interview will be carried out according to the MRS Code of Conduct.
- State what the interview is about.
- If asked, state how long it will take.
- Tell them where you got their name from (if appropriate).
- If the respondent is to be monitored during the research let them know so they can make an informed decision whether to continue (unless it is for internal quality control/supervision purposes in which case you do not need to tell respondents they are being monitored).

## **DURING THE PROJECT (A3, A6, A8, A10, B17)**

### **Your responsibility to the people you interview**

The following responsibilities must be adhered to:

- Researchers must take all reasonable precautions to ensure that respondents are not directly harmed or adversely affected as a result of participating in a research project.
- Any assurances you give about the interview including how long it will take must be factually correct.
- If you promise an incentive to respondents this promise must be honoured.
- Avoid criticism or disparagement of other researchers.
- Tell the truth about your own skills and experience and about the organization you work for and never make false claims.
- Always act to maintain the good name of market and social research, and public confidence in it.

## **AFTER THE PROJECT (B62-B64)**

If you are storing the data for any length of time you must keep this data secure. If anything were to happen to the data in your care the Office of the Information Commissioner (the body responsible for data protection legislation in the UK) would expect that the data was kept adequately secure.

If you are keeping the data for any length of time and reusing the data you may need to register with the Information Commissioner as a registered data controller.

## **CODE OF COMMON SENSE**

### **Preparing for research interviewing**

Don't be afraid to ask your supervisor about anything that isn't clear in the instructions for the research. If you understand fully, you will work with confidence and that communicates itself to the people you interview and will make the experience more successful for both them and for you.

### **Seeking interviews**

Approach people courteously when you request an interview: show your identity card, and introduce yourself as a market or social research interviewer and give the name of your company.

Respect their convenience: in the street, don't force them to step into the road, or stop anyone who is about to go into a shop or get on to a bus.

Accept a refusal without question, at once, and with a smile

### **Courtesy to the general public**

Show good manners to other street users: don't obstruct the pavement, or block access to shop windows or entrances.

Look good: dress appropriately for the place and circumstances where you are working, don't eat or smoke on the street.

## **Taking care of yourself**

Take commonsense precautions for your own security: always tell your family and /or the company where you are going before starting work on interviews.

Leave your bag/wallet at home, and carry the minimum of essential possessions and cash.

Keep your car keys in your pocket.

## Appendix 2

### Living in Wales Identity Card Scheme

#### Rules for Surveyors

The Surveyor:

1. Should do everything possible to ensure a continuing climate of good will, responsibility and trust and should leave respondents disposed to receive future contacts on research projects.
2. Must not mislead any respondent by giving inaccurate information.
3. Must not disclose any information given in confidence during the survey to any person other than those needing it to check the validity of the data or those engaged in processing them.
4. Must be polite and courteous at all times and allow respondents to withdraw at any stage of the survey, if they so wish.
5. Must always follow the instructions given by Ipsos MORI/BRE or Supervisors.
6. Must always show the Living in Wales Identity Card at the outset of the survey.
7. Must, if asked by the household, give:
  - the name of the person at Ipsos MORI responsible for the project
  - an explanation of why the household has been approached (e.g. the household's address is part of a representative sample.)
8. Should not call in person or by telephone a household before 9.00am weekdays, 10.00am Sundays, or after 9.00pm any day, unless by appointment.
9. Must maintain strict confidentiality of all data collected, which must not be used for any other purpose. The surveyor may not retain records of addresses or persons visited beyond the requirements of completing this work, and must not disclose such details to any other person or organisation.

## Appendix 3

### Surveyor Declaration

I declare that I have read and understood the above Rules for Surveyors and I agree to abide by them.

I understand that all surveys undertaken as part of the Living In Wales Survey are purely for statistical purposes and that any information will not be acted on in a professional capacity.

Signature: \_\_\_\_\_

Name of Surveyor (BLOCK CAPITALS): \_\_\_\_\_

Date: \_\_\_\_\_

**Ipsos MORI**



## **Appendix 9 Surveyor contract (non-VAT)**

## Living in Wales 2008 Property Survey Contract for Surveyors

1. This contract is made between Ipsos MORI and <<Name>> "The Contractor" (name of the Employer providing Surveyor or name of the individual if surveyor is self employed).
2. Throughout this contract the term "surveyor" and/or "surveyors" shall mean the Contractor where the context allows.

### The Programme of Work

3. The Contractor agrees to carry out the Programme of Work and produce outputs (together referred to as "the work") specified in Schedule 1 of this contract.

### The Designated Person

4. The person designated to undertake the work on behalf of the Contractor is <<Surveyor name>> (name of surveyor provided by the contractor for the duration of the survey) and no other person shall undertake the work designated.

### Timetable

5. The work will start in September 2008 and will be completed no later than October 2008, as follows:

Pre-briefing distance learning exercise	July-August 2008
Main Briefing exercise (6-days)	between September 9th-15th
Surveys	between September and October 2008 (or as specified by Ipsos MORI)

### Payment

6. Ipsos MORI agrees to make payment to the Contractor in accordance with the terms of this contract, and within six weeks of receipt of the Contractor's invoices, submitted in accordance with paragraph 34.

### Financial Risk

7. For the avoidance of doubt, Ipsos MORI will have no contractual or other financial relationship with surveyors employed by the Contractor.
8. The Contractor will remain solely responsible for the surveyor's remuneration and the surveyor will not be entitled to receive holiday pay or other absence pay, or any other benefits from Ipsos MORI. Any reasonable expenses incurred by the surveyor in performing the work (provided they are incurred with the prior written consent of Ipsos MORI and in accordance with this contract) will be reimbursed by Ipsos MORI.

### Non-exclusive Services

9. The Contractor will, at all times, represent itself, and will, if relevant, procure that each surveyor will represent him/herself, as an independent business and will not represent itself or him/herself or hold itself or him/herself out as a representative of Ipsos MORI.

10. The Contractor is free to undertake other contracts, client services and other work for other organisations at any time, either before, after or concurrently with the work.
11. Nothing in this contract shall oblige Ipsos MORI to provide work to the Contractor at any time whatsoever and it is hereby agreed that where no such work is provided, Ipsos MORI shall not be liable to the Contractor or the surveyor for any claims or costs arising from such failure to provide such work.
12. At no time is Ipsos MORI obliged to offer any ongoing contracts or further work to the Contractor.

### **Intention of the Parties**

13. The Contractor and Ipsos MORI agree that this is a contract for services in respect of the surveys to be undertaken and completed by the surveyor. In entering into this contract the parties do not intend to create any relationship, whether of employer and employee or otherwise between Ipsos MORI and the surveyor, or any relationship other than this contract between Ipsos MORI and the Contractor.

### **Tax Liabilities**

14. It is the intention of the parties that the Contractor is a separate and independent business and, as such, is responsible for all Income Tax liabilities and National Insurance or similar contributions in respect of any payments made by it to the Contractor. The Contractor hereby indemnifies Ipsos MORI in respect of any claims that may be made by the relevant authorities against Ipsos MORI for Income Tax or National Insurance, or similar contributions relating to the fees paid by Ipsos MORI for the surveys or any payments made by Ipsos MORI to the Contractor.

### **Fees**

15. There are two elements to the fee structure for this Contract. The first element is a fixed fee for successful attendance at the 6-day residential briefing exercise, and the second element is a variable payment based on performance on surveys achieved. Full details are set out in Schedule 1, however a summary of the work and the fee structure is as follows:

- Application exercise – no fee
- Pre-briefing qualification exercise – no fee
- Main briefing exercise – fixed fee based on duration of briefing and dependent upon successful completion of survey fieldwork
- Survey fieldwork – variable fee, performance related

Ipsos MORI shall pay the Contractor for the above at the rates set out in paragraphs 16 - 28 in this contract (exclusive of Value Added Tax).

## Fixed Fees

### Pre-Briefing Exercise

16. No payment will be made to surveyors for completing the pre-briefing exercise, which includes:
- reading the briefing manuals
  - completing a survey of a flat in a block
  - completion of seven specified exercises
  - postage of the completed survey form to the Supervisor
  - discussion with the Supervisor via phone/email prior to the residential briefing

### Main Briefing Exercise

17. Ipsos MORI will pay £190 per day, totalling £1140 for attendance at, and successfully completing the 6-day briefing. No payment will be made for attendance at the briefing if a surveyor does not subsequently work on the survey. A minimum of **twenty** allocated surveys must be completed for payment (fees and expenses) to be made for the briefing exercise. If twenty allocated addresses are not subsequently completed, then the equivalent sum £1140 of survey payment will be withheld. Whilst surveyors are attending the briefing exercise, Ipsos MORI's survey partners, the Building Research Establishment (BRE) will provide hotel accommodation and meals, but the following items will not be reimbursed by Ipsos MORI /BRE:
- use of telephones
  - drinks at the bar
  - laundry services
  - any other costs incurred

### Travel Costs to and from the Briefing Exercise

18. Travel costs to and from the main briefing exercise will be paid at £0.40 per mile for car travel, or standard class rail travel, and taxi to and from Swansea railway station to the Swansea Marriot Hotel, paid at cost with receipts supplied.

## Variable Costs

### Rates of Pay for Surveys

19. The payment system for survey work on the 2008 Living in Wales Property Survey is based on results. There are two basic rates of pay for all properties visited on Ipsos MORI's instructions, one for a fully completed internal and external inspection - a "Full survey"; and the other for a "Non-survey" (as defined in paragraph 22). No further sums will be paid for subsistence or consumables for survey work, except where detailed below, or otherwise agreed in writing by Ipsos MORI.
20. Payment will only be made for forms returned and booked-in by the Supervisor or at Ipsos MORI, accompanied by appropriate photographs (for full surveys only) for each dwelling. The basic rate of pay for full surveys and non-surveys will be as follows:

	Non-VAT registered	VAT registered
Full Survey	£85	£95
Non Survey	£12	£15

The following items are covered in the basic set fee, i.e. no additional payment will be made for the following:

- maps
- telephone calls
- stationary
- accommodation (unless agreed in advance with Ipsos MORI)

Any additional expenses, such as bridge tolls within Wales, must be agreed in advance with Ipsos MORI.

For the purposes of payment, the definitions are outlined below.

### **Full Survey**

21. For payment to be made on a full survey, the following definition applies: all relevant sections of the survey form are complete, i.e. full internal and external inspections and an inspection of the local area. The form must be completed to an acceptable standard, and must be accompanied with an appropriate number of photographs for the dwelling (as specified by Ipsos MORI/BRE). Both forms and photographs must be booked-in onto Ipsos MORI's Survey Management System either by the Supervisor or by Ipsos MORI.

### **Non-Survey**

22. For payment to be made on a non-survey, the following definition applies: any form that is partially completed, i.e. anything short of a full survey, including any sort of partial survey, such as a survey where only the exterior has been completed. In most cases a non-survey will mean only the first two pages of the form will have been completed (sections 1– 4). Any other outcome apart from a full survey will be defined as a non-survey, i.e. no contact made; access refused to surveyor or other outcome. Where a surveyor has not gained access to a vacant property, and only the exterior has been completed, the survey will be defined as a non-survey. Payment will only be made with a form booked-in onto Ipsos MORI's Survey Management System either by the Supervisor or by Ipsos MORI. No photographs are required for non-surveys. In cases where no visit is made to an address, (e.g a telephone refusal to the surveyor or, where the householder has contacted Ipsos MORI directly to refuse), no payment will be made.

### **Additional Mileage Payments**

23. During survey fieldwork, surveyors will be entitled to claim for mileage travelled to each survey address, at a rate of £0.40 per mile. Mileage to each survey address will be monitored by Ipsos MORI, and the surveyor must record each days' mileage travelled on log sheets supplied by Ipsos MORI.
24. Surveyors will agree, in advance with Ipsos MORI, the area in Wales where they will be working. The addresses will, as far as possible be grouped in one area. If surveyors are working from England, mileage will be paid for travel from the Welsh border to their addresses.

### **Number of Surveys**

25. The addresses for the Property Survey will be a proportion of all addresses that have been issued for the Household Survey, which has been completed in advance of the Property Survey. The selection of addresses for the Property Survey will only come from those that have agreed to be re-contacted in the Household Survey. Ipsos MORI expects to give each surveyor a list of between 40 – 80 addresses from which to achieve the required number of Property Surveys.
26. Surveyors will need to maintain regular contact with Ipsos MORI's Survey Management Website to manage their allocation.
27. It is expected that each surveyor will complete an average of 40-60 full surveys over the fieldwork period, and no surveyor will complete more than 80 full surveys, and Ipsos MORI cannot guarantee a minimum number of surveys. Ipsos MORI reserves the right to change surveyors address allocations as necessary, e.g. where one particular surveyor allocation is too high and another is too low because of the pattern of addresses selected from the Household Survey.
28. Surveyors will be expected to achieve a full survey in almost all addresses issued for a Property Survey. Ipsos MORI will expect response rates of approximately 80% full surveys or higher. Although re-contact will have been agreed, surveyors will be required to persuade householders where necessary to agree to a survey. Any performance below the expected response rates will be subject to review by Supervisors, and a surveyor's contract may be terminated if response rates are unacceptably low.

### **Availability**

29. Surveyors need to ensure they are available to work on the survey immediately after the briefing exercise, this will include evenings and weekends. They will need to be accompanied by their Supervisor for one day (or as long as deemed appropriate by the Supervisor) within the first two weeks following the briefing exercise. Throughout the survey period - between September and October 2008, surveyors need to ensure they are regularly available to undertake the surveys, and surveyors must seek permission from Ipsos MORI to take any periods of leave from the survey. The surveyor's contract may be terminated if a regular flow of work is not maintained.

## Digital Camera

30. For the purposes of fulfilling this contract, surveyors will be provided at the briefing with a digital camera plus sufficient floppy disks. Surveyors will sign for safe receipt of the camera and will assume all responsibility for damage or loss until it is returned to Ipsos MORI upon contract completion. A charge of up to £280 + VAT will be made for non-return, or damage to the camera, or the equivalent sum withheld from final payment. Cameras that develop faults should be returned to Ipsos MORI as soon as possible for replacement, for which Ipsos MORI shall bear the costs.

## Internet Access

31. It is a requirement of this contract that surveyors regularly log-on to Ipsos MORI's Survey Management Website to manage their allocation. All surveyors need to provide their own access to appropriate equipment in which to do this, which will mean accessing a **secure** website. Surveyors also need to ensure they are contactable via mobile phone at all reasonable times throughout the survey period.

## Quality Control and Payment of Surveyors

32. Surveyor's performance will be monitored by Ipsos MORI, by calling back on a sample of the surveyor's addresses to ask the household about how the survey was conducted. Final invoices submitted by surveyors will only be paid if Ipsos MORI is satisfied with the performance based on the following criteria:
- performance of the surveyor as measured by the Supervisor (factors measured will include quality of survey forms – completeness and accuracy, response rates, and regular flow of work)
  - performance of the surveyor as measured by responses from householders (factors measured will include maintaining appointments, whether or not MRS Codes of Conduct have been adhered to, and length of time at the survey address)
  - performance of the surveyor as measured by Ipsos MORI in terms of keeping survey progress up to date and logging on to the Survey Management Website regularly
  - quality of forms returned in terms of accuracy, error rate and completeness
  - timeliness of forms returned

## Retention Sum

33. Ipsos MORI will retain half of the fee for the main briefing exercise until all issued work is completed and returned to Ipsos MORI, and Ipsos MORI are satisfied with the quality of work in terms of acceptable level of errors of validated forms, and all survey materials including the camera are returned.

## Invoicing

34. Regular statements will be generated by surveyors via the secure website providing details of the amount to be claimed for each completed, booked-in address. Surveyors will be able to generate the statements at intervals of around two weeks, and a minimum of ten completed full surveys. The statements will list the outcomes of all booked-in addresses, and the amount they are entitled to claim for each address. Surveyors will then be asked to invoice Ipsos MORI based on these statements, plus the mileage incurred for undertaking those surveys at the agreed mileage rates. Invoices will be paid by BACs transfer.

**Value Added Tax**

35. It is understood that the supply of goods and services by the surveyor under this Contract will not be subject to VAT charges.

36. This is a fixed term contract and surveyors are required to complete the minimum of 20 addresses, unless removed from the survey in accordance with the terms of this contract by Ipsos MORI.

**Law Applicable**

37. This Contract is governed by English Law and the English Courts shall have exclusive jurisdiction in deciding on matters relating to this contract.

Name:
-------

Signature.....

on behalf of the Contractor

Date .....

Name:
-------

Signature.....

On behalf of Ipsos MORI

Date .....

The following documents are attached:

- Schedule 1 Programme of Work
- Appendix 1 Market Research Society Code of Conduct
- Appendix 2 Living in Wales Identity Card Scheme
- Appendix 3 Surveyor Declaration

## Schedule 1 Programme of Work

### Introduction

1. Living in Wales, the 2008 Property Survey is the latest in a series of surveys that previously comprised both a household social survey and a linked physical inspection of dwellings to be known as the Property Survey. The last such survey in Wales was the 2004 Living in Wales Survey. The Living in Wales survey has two components: the first is a Household Survey conducted in person by Ipsos MORI and GfK NOP interviewers. For 2008 a total of 7,500 Household Surveys will be achieved; around 300 in each local authority area. A sample of the dwellings where an interview has taken place, and where they have given permission to be re-contacted, will then be selected for a Property Survey to be undertaken by surveyors. A total of 2,450 full Property Surveys must be received.

2. The Property Survey seeks to establish the condition of the housing stock in Wales by carrying out a full internal and external inspection of dwellings. The surveys provide a major source of information for the development and monitoring of housing policies directed at the repair, improvement and energy efficiency of the housing stock, in the private and public sectors. The Local Government Data Unit (LGDU) on behalf of the Welsh Assembly Government has commissioned Ipsos MORI to manage the survey process. Ipsos MORI will be responsible for the management and administration of the Property survey, and all surveyors employed on the survey. Ipsos MORI has appointed the Building Research Establishment (BRE) to be responsible for briefing surveyors and managing survey supervisors who will, in turn, oversee the work of surveyors.

3. Forty four surveyors will be employed to work on the survey, made up of a pool of professional MIEHO Environmental Health Officers, RICS Building Surveyors and Quantity Surveyors, and RIBA Architects. All surveyors will be allocated to one of four regionally based teams (11 surveyors per team) led by a Supervisor.

### The Property Survey Contact Arrangements

4. A sample of around 2,450 addresses will be achieved for the Property survey. These will consist of a range of tenures and dwelling types. All households where a Property Survey will take place will have undergone the Household Survey, which is used to determine the households' characteristics, including full details of their financial circumstances, their tenure, attitudes to their home and the environment. Surveyors will undertake full dwelling inspections at a sample of the addresses where an interview has taken place. Properties will be selected for inclusion in the

Property Survey on a random basis with greater weight being given to some characteristics recorded in the Household Survey.

Property Survey addresses will be selected from all those who have agreed to be re-contacted from the Household Survey. Prior to commencement of fieldwork all addresses selected for the Property Survey will be written to, notifying them when survey work will begin. The household will, therefore, know in advance that a surveyor will be calling but not the name of the surveyor. The first contact with the selected households will be initiated by the surveyor.

5. Surveyors will need to regularly log on to the Ipsos MORI Survey Management website to manage their allocation. Surveyors will be notified by telephone of any appointment cancellations or refusals received by Ipsos MORI.

6. Surveyors will be notified of all the addresses within their allocation, which will be approximately 60-80 addresses each, although this will vary considerably by region. Surveyors will therefore know in advance the areas and distances they will be expected to travel. Each surveyor will be expected to achieve approximately 40-60 Property Surveys.

7. All surveys will be completed within a time-period to be specified by Ipsos MORI, and information will be recorded on survey forms provided by Ipsos MORI.

### **The Surveys**

8. The survey is a non-intrusive visual inspection. Surveyors will undertake a physical assessment of the dwelling at each address provided. All surveys will involve a full internal and external inspection, in accordance with surveying procedures specified by BRE/Ipsos MORI, and will involve an inspection of three general purpose rooms, in addition to the main kitchen, bathroom and circulation space, and, where relevant, a loft inspection. The survey is a paper-based survey, and surveyors will be provided with survey forms to be completed for each address. Surveyors should expect to spend between 45 and 90 minutes to complete a full survey, although the duration will vary according to the type and condition of the property. The average length is expected to be 75 minutes for flats and 65 minutes for all other property types.

9. A Full Survey is defined as the completion of all relevant sections of the survey form as specified by Ipsos MORI/BRE. Anything other than this will be treated as a Non-Survey. (See paragraphs 21 and 22 of the contract).

## **The Survey Management System**

10. The Survey Management System for the survey will be handled centrally by Ipsos MORI.

Surveyors should regularly log onto the Survey Management Website to manage their allocation and generate invoice statements for work completed.

11. It is a requirement of this contract that surveyors have a mobile phone and on-line internet access for use throughout the survey period. There may be times where a surveyor will need to be notified of a short notice cancellation made through contact with Ipsos MORI.

12. Surveyors must make at least six attempts to contact the occupants, (if occupants are not present at the time of the initial call or subsequent appointment times if these have been arranged), before abandoning the address as un-contactable. Where more than one call is necessary, these calls should be made, in person, at different times of the day, in at least two different weeks, and at least one should be in the evening and one during the weekend.

13. It is the responsibility of the surveyor to ensure that they visit the correct address to undertake the Property Survey, i.e. the address where the Household interview has been completed. Surveyors will usually be provided with address details together with the date the interview took place. If Ipsos MORI establishes that the survey has been undertaken at the wrong address no payment will be made for that survey, and the surveyor will be required to undertake the survey at the correct address. If the surveyor suspects that an interview has been undertaken at the wrong address they must contact Ipsos MORI and await further instruction from Ipsos MORI.

14. If there are circumstances where a surveyor is unable to make the appointment made with the household, it is essential that the surveyor telephones the householder themselves to re-arrange the appointment in the first instance.

## **Briefings and Training**

### **Pre-briefing Exercise**

15. For those surveyors working on the Living in Wales Property Survey for the first time, each surveyor will be required to complete a pre-briefing distance learning package, which will be despatched before the main briefing. This will include a full set of briefing manuals and a number of exercises, including a full survey of a flat in a block, to be discussed with the Supervisor. Satisfactory performance of this work is a necessary requirement to prepare for the residential briefing. No direct payment will be made for this, although it has been taken into account in the setting of the survey payment rate.

### **Main Briefing**

16. Surveyors will attend a fixed 6-day residential briefing at The Marriot Hotel Swansea, and no surveyor will be permitted to work on the survey if they have not attended the full briefing. The briefing will be undertaken by staff from the Building Research Establishment (BRE) and other specialists, and managed by BRE/Ipsos MORI. The briefings will consist of a mix of classroom lectures, practical fieldwork exercises and evening debriefing sessions.

17. Surveyors will be organised into regional groups of 11 surveyors headed up by a regional Supervisor. Surveyors will be accompanied at the briefing by their Supervisor. At the end of the briefing session, surveyors will be expected to meet the standards of work necessary to undertake Living in Wales survey work, as judged by their Supervisors and the BRE/Ipsos MORI staff. Whether the surveyor meets the required criteria will be judged on:

- their professional competence, as demonstrated at the briefing;
- grasp of the principles and concepts of the Living in Wales methodology;
- willingness to apply the standards set out by the professional instructors at the briefing;
- ability to complete all the required parts of the survey form in a correct and legible way in the time available;
- commitment, energy and enthusiasm for the survey.

The contract may be terminated if Supervisors and the BRE/Ipsos MORI staff agree that surveyors do not meet these requirements. Surveyors who do not subsequently work on the survey following the briefing will not be paid for their attendance at the briefing. This is defined by the successful completion of twenty full surveys.

### **Allocation of Addresses to Surveyors**

18. The address allocations for each surveyor will be fixed and non-negotiable. The addresses will be allocated in order to comply with the rules for the address allocation process, which are designed to ensure that no biases are brought into the survey by too few surveyors making judgements in one area. Another aim of the allocation process is to ensure that all surveyors get, as far as possible, equitable and fair work patterns. Ipsos MORI therefore reserves the right to change allocations as necessary, although this will be done only where absolutely necessary.

19. All survey addresses must be completed by the named surveyor to whom they are issued. Surveyors are not permitted to pass survey addresses on to any other surveyor, or any other individual, for completion. If, due to exceptional circumstances, a surveyor is unable to complete any part of their address allocation, then this must be discussed with the Supervisor and Ipsos MORI immediately. Ipsos MORI will be responsible for any re-allocation of survey addresses.

### **Confidentiality**

20. Surveyors may be allocated addresses within the local authority in which they work. Surveyors are required to sign an additional statement on the contract that states that the surveys undertaken in the Living in Wales Survey are purely for statistical purposes, and that any information revealed will not be acted on in a professional capacity. This is contained in Appendix 3.

21. Confidentiality of all addresses surveyed, and all information gathered is of the utmost importance. All surveyors will be required to undertake work in accordance with the Market Research Society Code of Conduct in this respect. This is contained in Appendix 1. Surveyors must not discuss the content of the survey results with the occupier or any other party. No copies of the completed form should be made or passed on to a third party. Any personal address information held by the surveyor must be destroyed by the surveyor, or returned to Ipsos MORI at the end of the survey. Ipsos MORI is the data Controller for all personal data collected or used for this survey, and the Contractor acts only as a Data Processor.

## **Work Patterns**

22. Surveyors will not be expected to work on the survey full time, although they will be expected to maintain regular progress during the survey fieldwork. Performance (in terms of completed forms and photographs on floppy disks booked-in at Ipsos MORI) will be monitored at all times. Surveyors may have their addresses reallocated to other surveyors unless a regular flow of work is returned.

23. Surveyors must be available to work during the day (although they will not be expected to work full time on the survey) in addition to evenings and weekends throughout the fieldwork period. It is essential that surveyors are also contactable at all reasonable times by mobile phone where information from householders need to be relayed.

## **Supervision and Assistance in the Field**

24. Surveyors will be assigned to a Supervisor who will act as a source of assistance in the field. During the first week in the field (or as close as possible to their first week), surveyors will be accompanied for one day (or as long as is deemed appropriate) by their Supervisor. The Supervisor will make a report on surveyor performance in the field. If, in agreement with the BRE/Ipsos MORI staff, surveyor performance is judged not to meet the required standards, in terms of accuracy of forms completed, accuracy of judgements made, regular completion of surveys etc. the contract may be terminated. Ipsos MORI reserves the right to terminate the contract of any surveyor whose performance at any time is not considered to reach the required standard. Any surveyor removed from the survey must return all materials associated with the survey within five working days of being notified as such.

25. Surveyors should seek assistance from their Supervisors in the first instance if they have technical queries in the field. If surveyors encounter any surveying queries or other difficulties while undertaking their survey work, they should report these directly to their Supervisor. Surveyors are expected to maintain close contact with their Supervisors throughout the survey period. Should a surveyor be unable to complete the address allocation for any reason, their Supervisor must be notified immediately.

### **Feedback to Supervisors**

26. The work of surveyors will be closely monitored throughout the period of the survey and Supervisors will make arrangements to keep in regular contact with their surveyors so that overall progress can be monitored. Surveyors are required to send all their completed survey forms and photographs to their Supervisor for checking. Surveyors are also required to discuss, at least weekly, their progress with their supervisor.

### **Administrative Queries**

27. Surveyors should contact Ipsos MORI with any administrative queries in the field, e.g. requests for stationery, difficulty in locating an address, or queries about payment etc.

### **Photographs**

28. Surveyors are required to maintain a photographic record of each dwelling surveyed, using the digital camera supplied by Ipsos MORI. Typically, four photographs as specified by Ipsos MORI, will be needed for each address. The photographs for each property should be contained on one disk which should be returned to the Supervisor with the survey form. Surveyors will be supplied with all the necessary photographic equipment, i.e. camera, battery pack, battery charger, case and instructions, along with the diskettes, and uniquely coded address labels. Surveyors are required to sign-out each camera and all equipment, and surveyors are then liable for any damage that may arise from their use in the field. Any surveyor not returning the camera and equipment in full working order at the end of the survey (excluding reasonable allowance for wear and tear, and excluding manufacturing defects) will be liable for the full cost of replacing the camera and accessories.

### **Logging Progress**

29. At the end of each day's work, completed survey forms and floppy disks of photographs must be sent to Supervisors in the envelopes provided, together with any survey documentation required by Ipsos MORI.

## **Equipment**

30. Surveyors must provide themselves with the necessary surveying equipment to complete the survey forms satisfactorily. This will normally comprise:

- a metric measuring tape/rod
- a portable ladder
- a torch
- a pair of binoculars
- maps

31. Every surveyor must also provide a car for his/her own use during the survey period, insured for business use. Ipsos MORI must be informed of the registration number of every car used for survey work. If for any reason the car becomes unavailable, it is the responsibility of the surveyor to provide an alternative vehicle. Ipsos MORI should be informed immediately of any new car registration number.

## **Insurance**

32. Surveyors are expected to be fully insured against liability to third parties for personal injury and damage to property, and may be required to provide Ipsos MORI with evidence of this insurance. Whilst surveyors are expected to fully exercise their professional judgement in all matters, no professional indemnity is required in respect of any technical assessments made.

### **Sick Leave**

33. If a surveyor is unable to work regularly during the survey due to sickness or some other reason, it is essential that the Supervisor is contacted immediately. If it is not possible for a surveyor to complete the work over the contract period, then it may be necessary to give some or all of the surveyor's workload to another surveyor. If this is the case, then the surveyor's contract may be terminated. Any re-allocation of addresses will be undertaken by Ipsos MORI. The surveyor will not be permitted to pass addresses on to any other individual.

### **Debriefing Questionnaire**

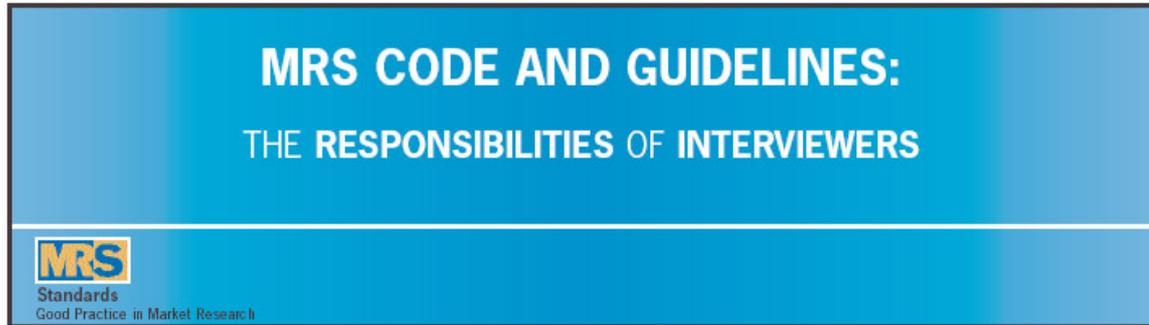
34. Surveyors may be required to complete a debriefing questionnaire at the end of their survey work, detailing their views on the survey and survey processes.

### **Return of Survey Materials**

35. All digital cameras and survey materials left over at the end of survey fieldwork must be returned to Ipsos MORI no later than one week after the surveyor's final survey has been completed, and no later than 28<sup>th</sup> November 2008. All personal survey address information that surveyors have been provided with throughout the course of the survey must be destroyed or returned to Ipsos MORI on completion of the work.

## Appendix 1

Ipsos MORI adheres to the principles and Code of Conduct of the Market Research Society, MRS. Please read the following section carefully as surveyors are required to abide by the same principles.



## The Market Research Society Revised November 2005

### INTRODUCTION

This statement of the responsibilities of research interviewers towards the people they interview, and the clients who commission the surveys on which they work, is based on the detailed Code of Conduct, issued by: **The Market Research Society (MRS)**

It is intended for:

- New interviewers – to help with learning the key DOs and DON'Ts of the job; and
- Experienced interviewers – as a quick reference guide.

MRS has issued this as part of its policy of supporting people in the profession, so that they are able to maintain the reputation of market research and ensure that it prospers by the professionalism they bring to their work.

The formal code is supplemented by a '**Code of Commonsense**' for interviewers – something suggested by experienced market researchers who were consulted when this version was in preparation.

### MARKET AND SOCIAL RESEARCH PRINCIPLES

These are the principles which **market and social research** seeks to follow:

- It must be based on willing co-operation between the public and business organizations.
- Both parties must be able to have confidence that the research is carried out honestly and objectively, without intruding on the people who take part, or harming them.
- Its purpose is to collect and analyse information, not to sell, and not to influence opinions of those taking part.
- The rights of privacy must be respected; people who take part must not be identified without their agreement; and they must not be harmed or embarrassed as a result of taking part.
- Wherever possible, those who take part must be told the purpose of the research.
- The findings must be reported accurately and must never be used to mislead.



## **The people concerned**

Four sets of people are primarily concerned in market and social research;

1. The clients who commission research;
2. The researchers who carry it out: interviewers, their managers, the companies that employ them;
3. The people they interview; and
4. The public who see interviewers at work and the wider public in general.

## **BEFORE YOU BEGIN A PROJECT**

You must be properly trained so that you fully comply with the Code and all legal requirements. You must also be briefed on the particular job to enable you to understand the project. This may include the following issues:

### **Client supplied lists (B7)**

Knowing whether the client supplied the sample list. In this instance, if requested by the respondent, the client's identity must be revealed at some point in the research.

### **Confidentiality vs. non-confidentiality**

Understanding whether the research you are administering is **confidential** or **non-confidential** as this will affect what you say to the respondent in the introduction.

### **What is confidential research? (B8)**

Confidential survey research means research projects based on the anonymity of the people who supply information; in which their identity and personal details are used only with their consent, and only for purposes of the research project in which they take part.

### **What is non-confidential research? (B9, B10)**

Non-confidential research means research projects that require personal details to be passed back to the client for a particular reason. You must get permission from the respondents to be able to do this and the permission statement must include what the client wishes to do with this data and who (in general) is likely to see it.

## **WHEN INTRODUCING A SURVEY (B15, B17, B18, B21, B22)**

- Don't mislead or pressurise a respondent when asking them to take part.
- State your name and the name of the research supplier.
- Show your Interviewer Identity card.
- Make it clear that the interview will be carried out according to the MRS Code of Conduct.
- State what the interview is about.
- If asked, state how long it will take.
- Tell them where you got their name from (if appropriate).
- If the respondent is to be monitored during the research let them know so they can make an informed decision whether to continue (unless it is for internal quality control/supervision purposes in which case you do not need to tell respondents they are being monitored).

## **DURING THE PROJECT (A3, A6, A8, A10, B17)**

### **Your responsibility to the people you interview**

The following responsibilities must be adhered to:

- Researchers must take all reasonable precautions to ensure that respondents are not directly harmed or adversely affected as a result of participating in a research project.
- Any assurances you give about the interview including how long it will take must be factually correct.
- If you promise an incentive to respondents this promise must be honoured.
- Avoid criticism or disparagement of other researchers.
- Tell the truth about your own skills and experience and about the organization you work for and never make false claims.
- Always act to maintain the good name of market and social research, and public confidence in it.

## **AFTER THE PROJECT (B62-B64)**

If you are storing the data for any length of time you must keep this data secure. If anything were to happen to the data in your care the Office of the Information Commissioner (the body responsible for data protection legislation in the UK) would expect that the data was kept adequately secure.

If you are keeping the data for any length of time and reusing the data you may need to register with the Information Commissioner as a registered data controller.

## **CODE OF COMMON SENSE**

### **Preparing for research interviewing**

Don't be afraid to ask your supervisor about anything that isn't clear in the instructions for the research. If you understand fully, you will work with confidence and that communicates itself to the people you interview and will make the experience more successful for both them and for you.

### **Seeking interviews**

Approach people courteously when you request an interview: show your identity card, and introduce yourself as a market or social research interviewer and give the name of your company.

Respect their convenience: in the street, don't force them to step into the road, or stop anyone who is about to go into a shop or get on to a bus.

Accept a refusal without question, at once, and with a smile

### **Courtesy to the general public**

Show good manners to other street users: don't obstruct the pavement, or block access to shop windows or entrances.

Look good: dress appropriately for the place and circumstances where you are working, don't eat or smoke on the street.

## **Taking care of yourself**

Take commonsense precautions for your own security: always tell your family and /or the company where you are going before starting work on interviews.

Leave your bag/wallet at home, and carry the minimum of essential possessions and cash.

Keep your car keys in your pocket.

## Appendix 2

### Living in Wales Identity Card Scheme

#### Rules for Surveyors

The Surveyor:

1. Should do everything possible to ensure a continuing climate of good will, responsibility and trust and should leave respondents disposed to receive future contacts on research projects.
2. Must not mislead any respondent by giving inaccurate information.
3. Must not disclose any information given in confidence during the survey to any person other than those needing it to check the validity of the data or those engaged in processing them.
4. Must be polite and courteous at all times and allow respondents to withdraw at any stage of the survey, if they so wish.
5. Must always follow the instructions given by Ipsos MORI/BRE or Supervisors.
6. Must always show the Living in Wales Identity Card at the outset of the survey.
7. Must, if asked by the household, give:
  - the name of the person at Ipsos MORI responsible for the project
  - an explanation of why the household has been approached (e.g. the household's address is part of a representative sample.)
8. Should not call in person or by telephone a household before 9.00am weekdays, 10.00am Sundays, or after 9.00pm any day, unless by appointment.
9. Must maintain strict confidentiality of all data collected, which must not be used for any other purpose. The surveyor may not retain records of addresses or persons visited beyond the requirements of completing this work, and must not disclose such details to any other person or organisation.

## Appendix 3

### Surveyor Declaration

I declare that I have read and understood the above Rules for Surveyors and I agree to abide by them.

I understand that all surveys undertaken as part of the Living In Wales Survey are purely for statistical purposes and that any information will not be acted on in a professional capacity.

Signature: \_\_\_\_\_

Name of Surveyor (BLOCK CAPITALS): \_\_\_\_\_

Date: \_\_\_\_\_

**Ipsos MORI**



## **Appendix 10 Surveyor contract (2-day briefing)**

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## Living in Wales 2008

### Property Survey Contract for Surveyors

1. This contract is made between Ipsos MORI and <<Name>> "The Contractor" (name of the Employer providing Surveyor or name of the individual if surveyor is self employed).
2. Throughout this contract the term "surveyor" and/or "surveyors" shall mean the Contractor where the context allows.

### The Programme of Work

3. The Contractor agrees to carry out the Programme of Work and produce outputs (together referred to as "the work") specified in Schedule 1 of this contract.

### The Designated Person

4. The person designated to undertake the work on behalf of the Contractor is <<Surveyor name>> (name of surveyor provided by the contractor for the duration of the survey) and no other person shall undertake the work designated.

### Timetable

5. The work will start in September 2008 and will be completed no later than October 2008, as follows:

Pre-briefing distance learning exercise	July-August 2008
Main Briefing exercise (2-days)	between September 12th-14th
Surveys	between September and October 2008 (or as specified by Ipsos MORI)

### Payment

6. Ipsos MORI agrees to make payment to the Contractor in accordance with the terms of this contract, and within six weeks of receipt of the Contractor's invoices, submitted in accordance with paragraph 34.

### Financial Risk

7. For the avoidance of doubt, Ipsos MORI will have no contractual or other financial relationship with surveyors employed by the Contractor.
8. The Contractor will remain solely responsible for the surveyor's remuneration and the surveyor will not be entitled to receive holiday pay or other absence pay, or any other benefits from Ipsos MORI. Any reasonable expenses incurred by the surveyor in performing the work (provided they are incurred with the prior written consent of Ipsos MORI and in accordance with this contract) will be reimbursed by Ipsos MORI.

### Non-exclusive Services

9. The Contractor will, at all times, represent itself, and will, if relevant, procure that each surveyor will represent him/herself, as an independent business and will not represent itself or him/herself or hold itself or him/herself out as a representative of Ipsos MORI.

10. The Contractor is free to undertake other contracts, client services and other work for other organisations at any time, either before, after or concurrently with the work.
11. Nothing in this contract shall oblige Ipsos MORI to provide work to the Contractor at any time whatsoever and it is hereby agreed that where no such work is provided, Ipsos MORI shall not be liable to the Contractor or the surveyor for any claims or costs arising from such failure to provide such work.
12. At no time is Ipsos MORI obliged to offer any ongoing contracts or further work to the Contractor.

#### **Intention of the Parties**

13. The Contractor and Ipsos MORI agree that this is a contract for services in respect of the surveys to be undertaken and completed by the surveyor. In entering into this contract the parties do not intend to create any relationship, whether of employer and employee or otherwise between Ipsos MORI and the surveyor, or any relationship other than this contract between Ipsos MORI and the Contractor.

#### **Tax Liabilities**

14. It is the intention of the parties that the Contractor is a separate and independent business and, as such, is responsible for all Income Tax liabilities and National Insurance or similar contributions in respect of any payments made by it to the Contractor. The Contractor hereby indemnifies Ipsos MORI in respect of any claims that may be made by the relevant authorities against Ipsos MORI for Income Tax or National Insurance, or similar contributions relating to the fees paid by Ipsos MORI for the surveys or any payments made by Ipsos MORI to the Contractor.

#### **Fees**

15. There are two elements to the fee structure for this Contract. The first element is a fixed fee for successful attendance at the 2-day residential briefing exercise, and the second element is a variable payment based on performance on surveys achieved. Full details are set out in Schedule 1, however a summary of the work and the fee structure is as follows:

Application exercise – no fee

Pre-briefing qualification exercise – no fee

Main briefing exercise – fixed fee based on duration of briefing and dependent upon successful completion of survey fieldwork

Survey fieldwork – variable fee, performance related

Ipsos MORI shall pay the Contractor for the above at the rates set out in paragraphs 16 - 28 in this contract (exclusive of Value Added Tax).

## Fixed Fees

### Pre-Briefing Exercise

16. No payment will be made to surveyors for completing the pre-briefing exercise, which includes:
- reading the briefing manuals
  - completing a survey of a flat in a block
  - completion of seven specified exercises
  - postage of the completed survey form to the Supervisor
  - discussion with the Supervisor via phone/email prior to the residential briefing

### Main Briefing Exercise

17. Ipsos MORI will pay £190 per day, totalling £380 for attendance at, and successfully completing the 2-day briefing. No payment will be made for attendance at the briefing if a surveyor does not subsequently work on the survey. A minimum of **twenty** allocated surveys must be completed for payment (fees and expenses) to be made for the briefing exercise. If twenty allocated addresses are not subsequently completed, then the equivalent sum £380 of survey payment will be withheld. Whilst surveyors are attending the briefing exercise, Ipsos MORI's survey partners, the Building Research Establishment (BRE) will provide hotel accommodation and meals, but the following items will not be reimbursed by Ipsos MORI /BRE:
- use of telephones
  - drinks at the bar
  - laundry services
  - any other costs incurred

### Travel Costs to and from the Briefing Exercise

18. Travel costs to and from the main briefing exercise will be paid at £0.40 per mile for car travel, or standard class rail travel, and taxi to and from Swansea railway station to the Swansea Marriot Hotel, paid at cost with receipts supplied.

## Variable Costs

### Rates of Pay for Surveys

19. The payment system for survey work on the 2008 Living in Wales Property Survey is based on results. There are two basic rates of pay for all properties visited on Ipsos MORI's instructions, one for a fully completed internal and external inspection - a "Full survey"; and the other for a "Non-survey" (as defined in paragraph 22). No further sums will be paid for subsistence or consumables for survey work, except where detailed below, or otherwise agreed in writing by Ipsos MORI.
20. Payment will only be made for forms returned and booked-in by the Supervisor or at Ipsos MORI, accompanied by appropriate photographs (for full surveys only) for each dwelling. The basic rate of pay for full surveys and non-surveys will be as follows:

	Non-VAT registered	VAT registered
Full Survey	£85	£95
Non Survey	£12	£15

The following items are covered in the basic set fee, i.e. no additional payment will be made for the following:

- maps
- telephone calls
- stationary
- accommodation (unless agreed in advance with Ipsos MORI)

Any additional expenses, such as bridge tolls within Wales, must be agreed in advance with Ipsos MORI.

For the purposes of payment, the definitions are outlined below.

### **Full Survey**

21. For payment to be made on a full survey, the following definition applies: all relevant sections of the survey form are complete, i.e. full internal and external inspections and an inspection of the local area. The form must be completed to an acceptable standard, and must be accompanied with an appropriate number of photographs for the dwelling (as specified by Ipsos MORI/BRE). Both forms and photographs must be booked-in onto Ipsos MORI's Survey Management System either by the Supervisor or by Ipsos MORI.

### **Non-Survey**

22. For payment to be made on a non-survey, the following definition applies: any form that is partially completed, i.e. anything short of a full survey, including any sort of partial survey, such as a survey where only the exterior has been completed. In most cases a non-survey will mean only the first two pages of the form will have been completed (sections 1– 4). Any other outcome apart from a full survey will be defined as a non-survey, i.e. no contact made; access refused to surveyor or other outcome. Where a surveyor has not gained access to a vacant property, and only the exterior has been completed, the survey will be defined as a non-survey. Payment will only be made with a form booked-in onto Ipsos MORI's Survey Management System either by the Supervisor or by Ipsos MORI. No photographs are required for non-surveys. In cases where no visit is made to an address, (e.g a telephone refusal to the surveyor or, where the householder has contacted Ipsos MORI directly to refuse), no payment will be made.

### **Additional Mileage Payments**

23. During survey fieldwork, surveyors will be entitled to claim for mileage travelled to each survey address, at a rate of £0.40 per mile. Mileage to each survey address will be monitored by Ipsos MORI, and the surveyor must record each days' mileage travelled on log sheets supplied by Ipsos MORI.
24. Surveyors will agree, in advance with Ipsos MORI, the area in Wales where they will be working. The addresses will, as far as possible be grouped in one area. If surveyors are working from England, mileage will be paid for travel from the Welsh border to their addresses.

### **Number of Surveys**

25. The addresses for the Property Survey will be a proportion of all addresses that have been issued for the Household Survey, which has been completed in advance of the Property Survey. The selection of addresses for the Property Survey will only come from those that have agreed to be re-contacted in the Household Survey. Ipsos MORI expects to give each surveyor a list of between 40 – 80 addresses from which to achieve the required number of Property Surveys.
26. Surveyors will need to maintain regular contact with Ipsos MORI's Survey Management Website to manage their allocation.
27. It is expected that each surveyor will complete an average of 40-60 full surveys over the fieldwork period, and no surveyor will complete more than 80 full surveys, and Ipsos MORI cannot guarantee a minimum number of surveys. Ipsos MORI reserves the right to change surveyors address allocations as necessary, e.g. where one particular surveyor allocation is too high and another is too low because of the pattern of addresses selected from the Household Survey.
28. Surveyors will be expected to achieve a full survey in almost all addresses issued for a Property Survey. Ipsos MORI will expect response rates of approximately 80% full surveys or higher. Although re-contact will have been agreed, surveyors will be required to persuade householders where necessary to agree to a survey. Any performance below the expected response rates will be subject to review by Supervisors, and a surveyor's contract may be terminated if response rates are unacceptably low.

### **Availability**

29. Surveyors need to ensure they are available to work on the survey immediately after the briefing exercise, this will include evenings and weekends. They will need to be accompanied by their Supervisor for one day (or as long as deemed appropriate by the Supervisor) within the first two weeks following the briefing exercise. Throughout the survey period - between September and October 2008, surveyors need to ensure they are regularly available to undertake the surveys, and surveyors must seek permission from Ipsos MORI to take any periods of leave from the survey. The surveyor's contract may be terminated if a regular flow of work is not maintained.

## Digital Camera

30. For the purposes of fulfilling this contract, surveyors will be provided at the briefing with a digital camera plus sufficient floppy disks. Surveyors will sign for safe receipt of the camera and will assume all responsibility for damage or loss until it is returned to Ipsos MORI upon contract completion. A charge of up to £280 + VAT will be made for non-return, or damage to the camera, or the equivalent sum withheld from final payment. Cameras that develop faults should be returned to Ipsos MORI as soon as possible for replacement, for which Ipsos MORI shall bear the costs.

## Internet Access

31. It is a requirement of this contract that surveyors regularly log-on to Ipsos MORI's Survey Management Website to manage their allocation. All surveyors need to provide their own access to appropriate equipment in which to do this, which will mean accessing a **secure** website. Surveyors also need to ensure they are contactable via mobile phone at all reasonable times throughout the survey period.

## Quality Control and Payment of Surveyors

32. Surveyor's performance will be monitored by Ipsos MORI, by calling back on a sample of the surveyor's addresses to ask the household about how the survey was conducted. Final invoices submitted by surveyors will only be paid if Ipsos MORI is satisfied with the performance based on the following criteria:
- performance of the surveyor as measured by the Supervisor (factors measured will include quality of survey forms – completeness and accuracy, response rates, and regular flow of work)
  - performance of the surveyor as measured by responses from householders (factors measured will include maintaining appointments, whether or not MRS Codes of Conduct have been adhered to, and length of time at the survey address)
  - performance of the surveyor as measured by Ipsos MORI in terms of keeping survey progress up to date and logging on to the Survey Management Website regularly
  - quality of forms returned in terms of accuracy, error rate and completeness
  - timeliness of forms returned

## Retention Sum

33. Ipsos MORI will retain half of the fee for the main briefing exercise until all issued work is completed and returned to Ipsos MORI, and Ipsos MORI are satisfied with the quality of work in terms of acceptable level of errors of validated forms, and all survey materials including the camera are returned.

## Invoicing

34. Regular statements will be generated by surveyors via the secure website providing details of the amount to be claimed for each completed, booked-in address. Surveyors will be able to generate the statements at intervals of around two weeks, and a minimum of ten completed full surveys. The statements will list the outcomes of all booked-in addresses, and the amount they are entitled to claim for each address. Surveyors will then be asked to invoice Ipsos MORI based on these statements, plus the mileage incurred for undertaking those surveys at the agreed mileage rates. Invoices will be paid by BACs transfer.

**Value Added Tax**

35. It is understood that the supply of goods and services by the surveyor under this Contract will not be subject to VAT charges.

36. This is a fixed term contract and surveyors are required to complete the minimum of 20 addresses, unless removed from the survey in accordance with the terms of this contract by Ipsos MORI.

**Law Applicable**

37. This Contract is governed by English Law and the English Courts shall have exclusive jurisdiction in deciding on matters relating to this contract.

Name:
-------

Signature.....

on behalf of the Contractor

Date .....

Name:
-------

Signature.....

On behalf of Ipsos MORI

Date .....

The following documents are attached:

- Schedule 1 Programme of Work
- Appendix 1 Market Research Society Code of Conduct
- Appendix 2 Living in Wales Identity Card Scheme
- Appendix 3 Surveyor Declaration

## Schedule 1 Programme of Work

### Introduction

1. Living in Wales, the 2008 Property Survey is the latest in a series of surveys that previously comprised both a household social survey and a linked physical inspection of dwellings to be known as the Property Survey. The last such survey in Wales was the 2004 Living in Wales Survey. The Living in Wales survey has two components: the first is a Household Survey conducted in person by Ipsos MORI and GfK NOP interviewers. For 2008 a total of 7,500 Household Surveys will be achieved; around 300 in each local authority area. A sample of the dwellings where an interview has taken place, and where they have given permission to be re-contacted, will then be selected for a Property Survey to be undertaken by surveyors. A total of 2,450 full Property Surveys must be received.

2. The Property Survey seeks to establish the condition of the housing stock in Wales by carrying out a full internal and external inspection of dwellings. The surveys provide a major source of information for the development and monitoring of housing policies directed at the repair, improvement and energy efficiency of the housing stock, in the private and public sectors. The Local Government Data Unit (LGDU) on behalf of the Welsh Assembly Government has commissioned Ipsos MORI to manage the survey process. Ipsos MORI will be responsible for the management and administration of the Property survey, and all surveyors employed on the survey. Ipsos MORI has appointed the Building Research Establishment (BRE) to be responsible for briefing surveyors and managing survey supervisors who will, in turn, oversee the work of surveyors.

3. Forty four surveyors will be employed to work on the survey, made up of a pool of professional MIEHO Environmental Health Officers, RICS Building Surveyors and Quantity Surveyors, and RIBA Architects. All surveyors will be allocated to one of four regionally based teams (11 surveyors per team) led by a Supervisor.

### The Property Survey Contact Arrangements

4. A sample of around 2,450 addresses will be achieved for the Property survey. These will consist of a range of tenures and dwelling types. All households where a Property Survey will take place will have undergone the Household Survey, which is used to determine the households' characteristics, including full details of their financial circumstances, their tenure, attitudes to their home and the environment. Surveyors will undertake full dwelling inspections at a sample of the addresses where an interview has taken place. Properties will be selected for inclusion in the

Property Survey on a random basis with greater weight being given to some characteristics recorded in the Household Survey.

Property Survey addresses will be selected from all those who have agreed to be re-contacted from the Household Survey. Prior to commencement of fieldwork all addresses selected for the Property Survey will be written to, notifying them when survey work will begin. The household will, therefore, know in advance that a surveyor will be calling but not the name of the surveyor. The first contact with the selected households will be initiated by the surveyor.

5. Surveyors will need to regularly log on to the Ipsos MORI Survey Management website to manage their allocation. Surveyors will be notified by telephone of any appointment cancellations or refusals received by Ipsos MORI.

6. Surveyors will be notified of all the addresses within their allocation, which will be approximately 60-80 addresses each, although this will vary considerably by region. Surveyors will therefore know in advance the areas and distances they will be expected to travel. Each surveyor will be expected to achieve approximately 40-60 Property Surveys.

7. All surveys will be completed within a time-period to be specified by Ipsos MORI, and information will be recorded on survey forms provided by Ipsos MORI.

### **The Surveys**

8. The survey is a non-intrusive visual inspection. Surveyors will undertake a physical assessment of the dwelling at each address provided. All surveys will involve a full internal and external inspection, in accordance with surveying procedures specified by BRE/Ipsos MORI, and will involve an inspection of three general purpose rooms, in addition to the main kitchen, bathroom and circulation space, and, where relevant, a loft inspection. The survey is a paper-based survey, and surveyors will be provided with survey forms to be completed for each address. Surveyors should expect to spend between 45 and 90 minutes to complete a full survey, although the duration will vary according to the type and condition of the property. The average length is expected to be 75 minutes for flats and 65 minutes for all other property types.

9. A Full Survey is defined as the completion of all relevant sections of the survey form as specified by Ipsos MORI/BRE. Anything other than this will be treated as a Non-Survey. (See paragraphs 21 and 22 of the contract).

## **The Survey Management System**

10. The Survey Management System for the survey will be handled centrally by Ipsos MORI.

Surveyors should regularly log onto the Survey Management Website to manage their allocation and generate invoice statements for work completed.

11. It is a requirement of this contract that surveyors have a mobile phone and on-line internet access for use throughout the survey period. There may be times where a surveyor will need to be notified of a short notice cancellation made through contact with Ipsos MORI.

12. Surveyors must make at least six attempts to contact the occupants, (if occupants are not present at the time of the initial call or subsequent appointment times if these have been arranged), before abandoning the address as un-contactable. Where more than one call is necessary, these calls should be made, in person, at different times of the day, in at least two different weeks, and at least one should be in the evening and one during the weekend.

13. It is the responsibility of the surveyor to ensure that they visit the correct address to undertake the Property Survey, i.e. the address where the Household interview has been completed. Surveyors will usually be provided with address details together with the date the interview took place. If Ipsos MORI establishes that the survey has been undertaken at the wrong address no payment will be made for that survey, and the surveyor will be required to undertake the survey at the correct address. If the surveyor suspects that an interview has been undertaken at the wrong address they must contact Ipsos MORI and await further instruction from Ipsos MORI.

14. If there are circumstances where a surveyor is unable to make the appointment made with the household, it is essential that the surveyor telephones the householder themselves to re-arrange the appointment in the first instance.

## **Briefings and Training**

### **Pre-briefing Exercise**

15. For those surveyors working on the Living in Wales Property Survey for the first time, each surveyor will be required to complete a pre-briefing distance learning package, which will be despatched before the main briefing. This will include a full set of briefing manuals and a number of exercises, including a full survey of a flat in a block, to be discussed with the Supervisor. Satisfactory performance of this work is a necessary requirement to prepare for the residential briefing. No direct payment will be made for this, although it has been taken into account in the setting of the survey payment rate.

### **Main Briefing**

16. Surveyors will attend a fixed 2-day residential briefing at The Marriot Hotel Swansea, and no surveyor will be permitted to work on the survey if they have not attended the full briefing. The briefing will be undertaken by staff from the Building Research Establishment (BRE) and other specialists, and managed by BRE/Ipsos MORI. The briefings will consist of a mix of classroom lectures, practical fieldwork exercises and evening debriefing sessions.

17. Surveyors will be organised into regional groups of 11 surveyors headed up by a regional Supervisor. Surveyors will be accompanied at the briefing by their Supervisor. At the end of the briefing session, surveyors will be expected to meet the standards of work necessary to undertake Living in Wales survey work, as judged by their Supervisors and the BRE/Ipsos MORI staff. Whether the surveyor meets the required criteria will be judged on:

- their professional competence, as demonstrated at the briefing;
- grasp of the principles and concepts of the Living in Wales methodology;
- willingness to apply the standards set out by the professional instructors at the briefing;
- ability to complete all the required parts of the survey form in a correct and legible way in the time available;
- commitment, energy and enthusiasm for the survey.

The contract may be terminated if Supervisors and the BRE/Ipsos MORI staff agree that surveyors do not meet these requirements. Surveyors who do not subsequently work on the survey following the briefing will not be paid for their attendance at the briefing. This is defined by the successful completion of twenty full surveys.

### **Allocation of Addresses to Surveyors**

18. The address allocations for each surveyor will be fixed and non-negotiable. The addresses will be allocated in order to comply with the rules for the address allocation process, which are designed to ensure that no biases are brought into the survey by too few surveyors making judgements in one area. Another aim of the allocation process is to ensure that all surveyors get, as far as possible, equitable and fair work patterns. Ipsos MORI therefore reserves the right to change allocations as necessary, although this will be done only where absolutely necessary.

19. All survey addresses must be completed by the named surveyor to whom they are issued. Surveyors are not permitted to pass survey addresses on to any other surveyor, or any other individual, for completion. If, due to exceptional circumstances, a surveyor is unable to complete any part of their address allocation, then this must be discussed with the Supervisor and Ipsos MORI immediately. Ipsos MORI will be responsible for any re-allocation of survey addresses.

### **Confidentiality**

20. Surveyors may be allocated addresses within the local authority in which they work. Surveyors are required to sign an additional statement on the contract that states that the surveys undertaken in the Living in Wales Survey are purely for statistical purposes, and that any information revealed will not be acted on in a professional capacity. This is contained in Appendix 3.

21. Confidentiality of all addresses surveyed, and all information gathered is of the utmost importance. All surveyors will be required to undertake work in accordance with the Market Research Society Code of Conduct in this respect. This is contained in Appendix 1. Surveyors must not discuss the content of the survey results with the occupier or any other party. No copies of the completed form should be made or passed on to a third party. Any personal address information held by the surveyor must be destroyed by the surveyor, or returned to Ipsos MORI at the end of the survey. Ipsos MORI is the data Controller for all personal data collected or used for this survey, and the Contractor acts only as a Data Processor.

## **Work Patterns**

22. Surveyors will not be expected to work on the survey full time, although they will be expected to maintain regular progress during the survey fieldwork. Performance (in terms of completed forms and photographs on floppy disks booked-in at Ipsos MORI) will be monitored at all times. Surveyors may have their addresses reallocated to other surveyors unless a regular flow of work is returned.

23. Surveyors must be available to work during the day (although they will not be expected to work full time on the survey) in addition to evenings and weekends throughout the fieldwork period. It is essential that surveyors are also contactable at all reasonable times by mobile phone where information from householders need to be relayed.

## **Supervision and Assistance in the Field**

24. Surveyors will be assigned to a Supervisor who will act as a source of assistance in the field. During the first week in the field (or as close as possible to their first week), surveyors will be accompanied for one day (or as long as is deemed appropriate) by their Supervisor. The Supervisor will make a report on surveyor performance in the field. If, in agreement with the BRE/Ipsos MORI staff, surveyor performance is judged not to meet the required standards, in terms of accuracy of forms completed, accuracy of judgements made, regular completion of surveys etc. the contract may be terminated. Ipsos MORI reserves the right to terminate the contract of any surveyor whose performance at any time is not considered to reach the required standard. Any surveyor removed from the survey must return all materials associated with the survey within five working days of being notified as such.

25. Surveyors should seek assistance from their Supervisors in the first instance if they have technical queries in the field. If surveyors encounter any surveying queries or other difficulties while undertaking their survey work, they should report these directly to their Supervisor. Surveyors are expected to maintain close contact with their Supervisors throughout the survey period. Should a surveyor be unable to complete the address allocation for any reason, their Supervisor must be notified immediately.

### **Feedback to Supervisors**

26. The work of surveyors will be closely monitored throughout the period of the survey and Supervisors will make arrangements to keep in regular contact with their surveyors so that overall progress can be monitored. Surveyors are required to send all their completed survey forms and photographs to their Supervisor for checking. Surveyors are also required to discuss, at least weekly, their progress with their supervisor.

### **Administrative Queries**

27. Surveyors should contact Ipsos MORI with any administrative queries in the field, e.g. requests for stationery, difficulty in locating an address, or queries about payment etc.

### **Photographs**

28. Surveyors are required to maintain a photographic record of each dwelling surveyed, using the digital camera supplied by Ipsos MORI. Typically, four photographs as specified by Ipsos MORI, will be needed for each address. The photographs for each property should be contained on one disk which should be returned to the Supervisor with the survey form. Surveyors will be supplied with all the necessary photographic equipment, i.e. camera, battery pack, battery charger, case and instructions, along with the diskettes, and uniquely coded address labels. Surveyors are required to sign-out each camera and all equipment, and surveyors are then liable for any damage that may arise from their use in the field. Any surveyor not returning the camera and equipment in full working order at the end of the survey (excluding reasonable allowance for wear and tear, and excluding manufacturing defects) will be liable for the full cost of replacing the camera and accessories.

### **Logging Progress**

29. At the end of each day's work, completed survey forms and floppy disks of photographs must be sent to Supervisors in the envelopes provided, together with any survey documentation required by Ipsos MORI.

## **Equipment**

30. Surveyors must provide themselves with the necessary surveying equipment to complete the survey forms satisfactorily. This will normally comprise:

- a metric measuring tape/rod
- a portable ladder
- a torch
- a pair of binoculars
- maps

31. Every surveyor must also provide a car for his/her own use during the survey period, insured for business use. Ipsos MORI must be informed of the registration number of every car used for survey work. If for any reason the car becomes unavailable, it is the responsibility of the surveyor to provide an alternative vehicle. Ipsos MORI should be informed immediately of any new car registration number.

## **Insurance**

32. Surveyors are expected to be fully insured against liability to third parties for personal injury and damage to property, and may be required to provide Ipsos MORI with evidence of this insurance. Whilst surveyors are expected to fully exercise their professional judgement in all matters, no professional indemnity is required in respect of any technical assessments made.

### **Sick Leave**

33. If a surveyor is unable to work regularly during the survey due to sickness or some other reason, it is essential that the Supervisor is contacted immediately. If it is not possible for a surveyor to complete the work over the contract period, then it may be necessary to give some or all of the surveyor's workload to another surveyor. If this is the case, then the surveyor's contract may be terminated. Any re-allocation of addresses will be undertaken by Ipsos MORI. The surveyor will not be permitted to pass addresses on to any other individual.

### **Debriefing Questionnaire**

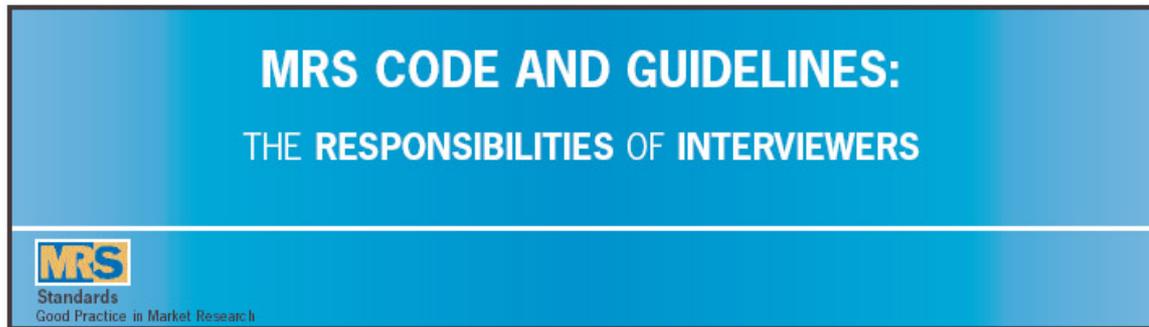
34. Surveyors may be required to complete a debriefing questionnaire at the end of their survey work, detailing their views on the survey and survey processes.

### **Return of Survey Materials**

35. All digital cameras and survey materials left over at the end of survey fieldwork must be returned to Ipsos MORI no later than one week after the surveyor's final survey has been completed, and no later than 28<sup>th</sup> November 2008. All personal survey address information that surveyors have been provided with throughout the course of the survey must be destroyed or returned to Ipsos MORI on completion of the work.

## Appendix 1

Ipsos MORI adheres to the principles and Code of Conduct of the Market Research Society, MRS. Please read the following section carefully as surveyors are required to abide by the same principles.



## The Market Research Society Revised November 2005

### INTRODUCTION

This statement of the responsibilities of research interviewers towards the people they interview, and the clients who commission the surveys on which they work, is based on the detailed Code of Conduct, issued by: **The Market Research Society (MRS)**

It is intended for:

- New interviewers – to help with learning the key DOs and DON'Ts of the job; and
- Experienced interviewers – as a quick reference guide.

MRS has issued this as part of its policy of supporting people in the profession, so that they are able to maintain the reputation of market research and ensure that it prospers by the professionalism they bring to their work.

The formal code is supplemented by a '**Code of Commonsense**' for interviewers – something suggested by experienced market researchers who were consulted when this version was in preparation.

### MARKET AND SOCIAL RESEARCH PRINCIPLES

These are the principles which **market and social research** seeks to follow:

- It must be based on willing co-operation between the public and business organizations.
- Both parties must be able to have confidence that the research is carried out honestly and objectively, without intruding on the people who take part, or harming them.
- Its purpose is to collect and analyse information, not to sell, and not to influence opinions of those taking part.
- The rights of privacy must be respected; people who take part must not be identified without their agreement; and they must not be harmed or embarrassed as a result of taking part.
- Wherever possible, those who take part must be told the purpose of the research.
- The findings must be reported accurately and must never be used to mislead.



## **The people concerned**

Four sets of people are primarily concerned in market and social research;

1. The clients who commission research;
2. The researchers who carry it out: interviewers, their managers, the companies that employ them;
3. The people they interview; and
4. The public who see interviewers at work and the wider public in general.

## **BEFORE YOU BEGIN A PROJECT**

You must be properly trained so that you fully comply with the Code and all legal requirements. You must also be briefed on the particular job to enable you to understand the project. This may include the following issues:

### **Client supplied lists (B7)**

Knowing whether the client supplied the sample list. In this instance, if requested by the respondent, the client's identity must be revealed at some point in the research.

### **Confidentiality vs. non-confidentiality**

Understanding whether the research you are administering is **confidential** or **non-confidential** as this will affect what you say to the respondent in the introduction.

### **What is confidential research? (B8)**

Confidential survey research means research projects based on the anonymity of the people who supply information; in which their identity and personal details are used only with their consent, and only for purposes of the research project in which they take part.

### **What is non-confidential research? (B9, B10)**

Non-confidential research means research projects that require personal details to be passed back to the client for a particular reason. You must get permission from the respondents to be able to do this and the permission statement must include what the client wishes to do with this data and who (in general) is likely to see it.

## **WHEN INTRODUCING A SURVEY (B15, B17, B18, B21, B22)**

- Don't mislead or pressurise a respondent when asking them to take part.
- State your name and the name of the research supplier.
- Show your Interviewer Identity card.
- Make it clear that the interview will be carried out according to the MRS Code of Conduct.
- State what the interview is about.
- If asked, state how long it will take.
- Tell them where you got their name from (if appropriate).
- If the respondent is to be monitored during the research let them know so they can make an informed decision whether to continue (unless it is for internal quality control/supervision purposes in which case you do not need to tell respondents they are being monitored).

## **DURING THE PROJECT (A3, A6, A8, A10, B17)**

### **Your responsibility to the people you interview**

The following responsibilities must be adhered to:

- Researchers must take all reasonable precautions to ensure that respondents are not directly harmed or adversely affected as a result of participating in a research project.
- Any assurances you give about the interview including how long it will take must be factually correct.
- If you promise an incentive to respondents this promise must be honoured.
- Avoid criticism or disparagement of other researchers.
- Tell the truth about your own skills and experience and about the organization you work for and never make false claims.
- Always act to maintain the good name of market and social research, and public confidence in it.

## **AFTER THE PROJECT (B62-B64)**

If you are storing the data for any length of time you must keep this data secure. If anything were to happen to the data in your care the Office of the Information Commissioner (the body responsible for data protection legislation in the UK) would expect that the data was kept adequately secure.

If you are keeping the data for any length of time and reusing the data you may need to register with the Information Commissioner as a registered data controller.

## **CODE OF COMMON SENSE**

### **Preparing for research interviewing**

Don't be afraid to ask your supervisor about anything that isn't clear in the instructions for the research. If you understand fully, you will work with confidence and that communicates itself to the people you interview and will make the experience more successful for both them and for you.

### **Seeking interviews**

Approach people courteously when you request an interview: show your identity card, and introduce yourself as a market or social research interviewer and give the name of your company.

Respect their convenience: in the street, don't force them to step into the road, or stop anyone who is about to go into a shop or get on to a bus.

Accept a refusal without question, at once, and with a smile

### **Courtesy to the general public**

Show good manners to other street users: don't obstruct the pavement, or block access to shop windows or entrances.

Look good: dress appropriately for the place and circumstances where you are working, don't eat or smoke on the street.

## **Taking care of yourself**

Take commonsense precautions for your own security: always tell your family and /or the company where you are going before starting work on interviews.

Leave your bag/wallet at home, and carry the minimum of essential possessions and cash.

Keep your car keys in your pocket.

## Appendix 2

### Living in Wales Identity Card Scheme

#### Rules for Surveyors

The Surveyor:

1. Should do everything possible to ensure a continuing climate of good will, responsibility and trust and should leave respondents disposed to receive future contacts on research projects.
2. Must not mislead any respondent by giving inaccurate information.
3. Must not disclose any information given in confidence during the survey to any person other than those needing it to check the validity of the data or those engaged in processing them.
4. Must be polite and courteous at all times and allow respondents to withdraw at any stage of the survey, if they so wish.
5. Must always follow the instructions given by Ipsos MORI/BRE or Supervisors.
6. Must always show the Living in Wales Identity Card at the outset of the survey.
7. Must, if asked by the household, give:
  - the name of the person at Ipsos MORI responsible for the project
  - an explanation of why the household has been approached (e.g. the household's address is part of a representative sample.)
8. Should not call in person or by telephone a household before 9.00am weekdays, 10.00am Sundays, or after 9.00pm any day, unless by appointment.
9. Must maintain strict confidentiality of all data collected, which must not be used for any other purpose. The surveyor may not retain records of addresses or persons visited beyond the requirements of completing this work, and must not disclose such details to any other person or organisation.

## Appendix 3

### Surveyor Declaration

I declare that I have read and understood the above Rules for Surveyors and I agree to abide by them.

I understand that all surveys undertaken as part of the Living In Wales Survey are purely for statistical purposes and that any information will not be acted on in a professional capacity.

Signature: \_\_\_\_\_

Name of Surveyor (BLOCK CAPITALS): \_\_\_\_\_

Date: \_\_\_\_\_

**Ipsos MORI**



## **Appendix 11 Banking details form**

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## Banking Details

Surveyor Name: .....

**Please complete the following details for the Supplier (Supplier = name of person or company supplying the surveyor, i.e. to whom payments should be made)**

Supplier Name and Address: .....

.....  
.....

Bank / Building Society address: .....

Account Number:   

Sort code:              -   -

Account Name: .....

Building Society Reference Number: .....

**Please return this form as soon as possible.**

---

## **Appendix 12 ID card**

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NAME / ENW



Byw yng Nghymru  
Living in Wales

Expiry date: end 12/08

Dyddiad dibennu: diwedd 12/08

ID - XX

**This survey is part of GENUINE RESEARCH. It does NOT involve selling in any way.** The surveyor shown on the front of this card is conducting surveys for Ipsos MORI as part of the Living in Wales Survey. This is carried out on behalf of the Welsh Assembly Government.

If you have any queries, or wish to check the validity of the survey, please contact Ipsos MORI, the company managing the survey, on the number shown below.

**Telephone 020 7347 3353**

**Ffôn 020 7347 3354**

Ipsos MORI, 79-81 Borough Road, London/Llundain., SE1 1FY

**Mae'r arolwg hwn yn rhan o YMCHWIL DDILYS. Nid yw'n ymwneud a gwerthu unrhyw beth o gwbl.** Mae'r arolygwr ar flaen y cerdyn hwn yn cynnal arolygon ar ran Ipsos MORI fel rhan o'r Arolwg Byw yng Nghymru. Caiff hyn ei gynnal ar ran Lywodraeth Cynulliad Cymru.

Os oes gennych gwestiynau, neu os hoffech wirio dilysrwydd yr arolwg, cysylltwch ag Ipsos MORI, y cwmni sy'n rheoli'r arolwg, ar y rhif uchod.

## **Appendix 13 Pay statement**

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## Living In Wales Property Survey 2008

Pay Statement For [REDACTED]

Statement No: 285

Address No	Address	Survey Fees	Amount
51119351	[REDACTED]		£85
51120081	[REDACTED]		£85
51121641	[REDACTED]		£85
51124041	[REDACTED]		£12
51124201	[REDACTED]		£85
51139071	[REDACTED]		£85
51139231	[REDACTED]		£85
51348951	[REDACTED]		£85
51349291	[REDACTED]		£85
51349521	[REDACTED]		£85
52811001	[REDACTED]		£85
52811591	[REDACTED]		£85
52811911	[REDACTED]		£85
52813571	[REDACTED]		£85
52813731	[REDACTED]		£85
53245611	[REDACTED]		£85
53246031	[REDACTED]		£85
53246111	[REDACTED]		£85
53246291	[REDACTED]		£85
53246371	[REDACTED]		£85
53246521	[REDACTED]		£85
53246781	[REDACTED]		£85
53246861	[REDACTED]		£85
			<b>Sub Total: £1,882</b>
			<b>Grand Total: £1,882</b>

## **Appendix 14 Instructions for test exercise**

## LIVING IN WALES 2008

### INSTRUCTIONS FOR THE DISTANCE LEARNING EXERCISE

#### Purpose of the distance learning exercise

The distance learning exercise builds on what you have already learnt in the pre-qualification exercise. The purpose of the exercise is to reinforce what you have learnt already and for you to get to know the parts of the form not covered in the pre-qualification exercise.

By the end of the distance learning exercise, we expect you to have achieved the following:

- You should be familiar with the content and layout of the whole form
- You should understand some of the more complex concepts/principles, in particular:
  - the differences between dwellings, houses, flats, modules and blocks and ageing dwellings.
  - construction methods
- You should know how to complete the green pages of the form on flats

We would like to remind you that we do not expect you to understand everything or to be able to apply the required Living in Wales Survey standards to your judgements. This is the purpose of the residential briefing.

#### Components of the distance learning pack

Please find enclosed:

- the complete briefing manual
- 1 blank survey form
- 5 test exercises

## **How to approach the distance learning exercise**

The distance learning exercise should take about ½ a day for you to work through.

1. Read through the following sections of the briefing manual (*approx. 1 hour*):
  - The differences between dwellings, houses, flats, modules and blocks and ageing dwellings (Sections 1.2, 1.3, 1.4, and 1.20)
  - Construction method and non-traditional building (Section 1.14)
  
2. Read the guidance on completing sections 9 to 13 of the form (Sections 1.8, 1.9, 1.10, 1.11, 1.12, and 1.13). Then complete these sections of the form (8 to 14) on pages 8, 9, 10, 11 and 12 on a complex block of flats (*approx. 2 to 2½ hours*). If you live in a complex block of flats, complete the form for your own block of flats. If you live in a house, please find the most complex block of flats in your local area to use through friends, relatives or your work.
  
3. Work through the 5 test exercises (*approx. 2 hours*):
  - Exercise 1. Room definition
  - Exercise 3. Shapes & views
  - Exercise 4. External elements
  - Exercise 5. Fenestration
  - Exercise 6. Construction date and age of amenities

Please bring your completed test exercises and form with you to the residential briefing in Swansea. On arrival please hand them to Chris Beer who will pass them on to your Supervisor.

The exercises will be marked by your Supervisor and will be returned to you at the residential briefing.

**Please do not hesitate to contact your Supervisor if you have any queries.**

8 August 2008  
Your Ref. Living in Wales Property Survey 2008

Dear

Please find enclosed the following documents:

- The full LIW 2008 Manual
- The LIW 2008 survey form
- Instructions for completing your distance learning exercises
- 5 distance learning exercises
- A list of equipment you need to bring to the training in Swansea
- A draft timetable of the briefing in Swansea

Please can you check you have all the above documents? You will need to complete your distance learning exercises and bring them with you to the residential briefing.

We understand that you will be attending the training at the Swansea Marriot from the X to X.

For the residential briefing you will also need to inform us by 29<sup>th</sup> August if you;

- have any special dietary requirements, otherwise no provision will be made.

If you would like us to provide special dietary requirements please can you call/email me on 01923 664325 or [beerc@bre.co.uk](mailto:beerc@bre.co.uk) and let me know.



BRE's Quality Management System is approved to BS EN ISO9001:2000,  
certificate number LRQ 4001063

When you come to the residential training please can you ensure that you bring with you all the equipment required for the training. You will need to arrive at the venue on X by the latest of 6.30pm. You will be given instructions by reception of what to do on your arrival.

We recommend that you bring a mobile phone with you if you need to make telephone calls, as the costs of calls from the hotel are expensive.

We look forward to meeting you at the briefing. If you do have any queries prior to the briefing please do not hesitate to contact me.

Yours sincerely

Chris Beer  
Housing Consultant  
For and on behalf of BRE  
Telephone: +44 (0)1923 664325  
E-mail: [beerc@bre.co.uk](mailto:beerc@bre.co.uk)

# **Appendix 15 Supervisor feedback form**

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**Living in Wales Survey 2008**  
**Proforma**

Surveyor Name .....

Surveyor Address .....

.....

.....

Date pre exercise pack returned .....

Professional competence Yes/No

Previous survey experience Yes/No

Present employment Part time/ Full Time / None

Technical Background EHO/ Surveyor / Architect / Other.....

Area North and Mid/ South West/ South Central/ South East/ Outside Wales

Other comments about surveyor .....

.....

**Final Scores**

Speed of return of Exercise (Max 10)

Previous Experience (Max 5)

Professional Competence (Max 5)

Location (Max 5)

Exercise Booklet (Max 50)

House Survey (Max 50)

Total (Max 125)

## Explanation of Marking System

Date pre exercise returned / postmarked	Before 30 <sup>th</sup> June	+10pts
	Before 4 <sup>th</sup> July	+8pts
	Before 7 <sup>th</sup> July	+6pts
	Before 10 <sup>th</sup> July	+4pts
	Before 13 <sup>th</sup> July	+2pts
	After 13 <sup>th</sup> July	Nil pts

Previous Experience- Up to a maximum 5 pts to be awarded where applicants have experience of stock condition survey work.

Professional Competence Up to a maximum of 5 marks can be allocated if applicant is a member of a relevant trade association, MCIEH, ARICS etc.

Location Due to the difficulties in finding surveyors for each of 4 regions, a weighting of upto 5pts can be given if applicants are living in an advantageous location

## Pre-Qualification Exercise Booklet marking

Starting with Maximum mark, deduct 1 mark for each obvious mistake or omission

	Correct Answers
Maximum Mark	40
Dwelling Description	
Kitchen Walls	
Kitchen Amenities	
Bathroom Amenities	
Wall Structure	
Roof Features	
Windows	
Doors	
Total	

Spotting Deliberate mistakes (+3)	
Understand Concept or Justification of Ans. (+7)	

Total (Max 50) .....

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## Home Survey

Starting with Maximum mark, deduct 1 mark for each obvious mistake or omission

Maximum Mark	40
Section 3	
Section 5 (interior)	
Section 5 (amenities)	
Section 6 (space heating)	
Section 6 (water heating)	
Section 12	
Section 13	
Section 14	
Section 15	
Section 16	
Section 17	
Section 18 (Page1)	
Section 18 (page 2)	
Section 18 (page 3)	
Section 19	
Section 21	
Section 22	

Bonus - Neat form (Max +5)	
- Clear Drawings (Max +5)	

Total (Max 50) .....

## **Appendix 16 Surveyor appointment card**

# Ipsos MORI



Reference No: \_\_ \_ \_ \_ \_

Ipsos MORI  
Ipsos MORI House  
79-81 Borough Road  
London  
SE1 1FY

Tel: 020 7347 3353  
Email: [liw@ipsos-mori.com](mailto:liw@ipsos-mori.com)  
Website: [www.ipsos-mori.com](http://www.ipsos-mori.com)

Our surveyor called today, \_\_\_\_/\_\_\_\_/2008, to conduct a survey of your home for the Living in Wales Survey 2008. To arrange an appointment for another time, please call \_\_\_\_\_ on telephone number \_\_\_\_\_

All our surveyors carry a photo Identity Card, please ask to see it.

Please contact Ipsos MORI using the adjacent details if you have any queries about the survey, quoting the reference number above.

# Ipsos MORI



Cyfeirnod: \_\_ \_ \_ \_ \_

Ipsos MORI  
Ipsos MORI House  
79-81 Borough Road  
Llundain  
SE1 1FY

Ffôn: 020 7347 3354  
Ebost: [bywcymru@ipsos-mori.com](mailto:bywcymru@ipsos-mori.com)  
Gwefan: [www.ipsos-mori.com](http://www.ipsos-mori.com)

Galwodd ein harolygwr heddiw, \_\_\_\_/\_\_\_\_/2008, i gynnal arolwg o'ch cartref ar gyfer yr Arolwg Byw yng Nghymru 2008. I drefnu apwyntiad arall, ffoniwch \_\_\_\_\_ os gwelwch yn dda ar rif ffôn \_\_\_\_\_

Mae'r arolygwyr i gyd yn cario cardiau ID â llun, gofynnwch i'w weld.

Cysylltwch ag Ipsos MORI trwy ddefnyddio'r manylion cyferbyn os oes gennych unrhyw gwestiynau am yr arolwg, gan nodi'r cyfeirnod uchod.

## **Appendix 17 Daily return slip**

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## **Appendix 18 Advance householder letter**

The Householder ref:

Reference:

Autumn 2008

Dear Householder,

Earlier in the year you, or a member of your household, participated in the *Living in Wales* Household Survey. At the time of the survey, the respondent agreed to be re-contacted about a follow-up Property Survey that forms the second part of *Living in Wales* this year. I am writing to let you know that your address has been selected for the Property Survey and to ask for your assistance to help make this a success. A leaflet is enclosed which explains more about the survey and answers some of the questions you may have. These national surveys are conducted by Ipsos MORI, the independent research organisation, on behalf of the Welsh Assembly Government.

The surveys are completely **confidential**. The Property Survey information collected will be anonymously linked to interview data from the same property. It will be used for statistical purposes only, and only anonymous information will be passed to the Welsh Assembly Government or others. Ipsos MORI is being assisted with the survey by the Building Research Establishment (BRE) and no-one outside Ipsos MORI/BRE will know any of the details collected.

Over the next few weeks a surveyor will visit to conduct the survey so there is no need to do anything at this stage. If you are out, they will call back at another time or you can arrange for the survey to be conducted when convenient for you. All surveyors working on the survey wear identification badges with their photograph. **Do not allow anyone into your home who is not carrying this official identification.**

If you would like more information, please contact Stephen Finlay at Ipsos MORI on telephone 020 7347 3353. You may also email [liw@ipsos-mori.com](mailto:liw@ipsos-mori.com) quoting the reference number above.

Thank you very much for your help. The survey is vital to gather information to monitor and help improve the housing stock in Wales and, to show our appreciation, you will receive a pack of energy saving light bulbs from our surveyor upon completion of the survey.

Yours faithfully



Gary Welch  
Living in Wales Project Manager



Llywodraeth Cynulliad Cymru  
Welsh Assembly Government

Perchennog y Cartref cyf:

Cyfeirnod:

Hydref 2008

Annwyl Perchennog y Cartref,

Yn gynharach y flwyddyn hon, fe wnaethoch chi neu aelod o'ch cartref, gymryd rhan yn yr Arolwg Cartref *Byw yng Nghymru*. Wrth gynnal yr arolwg, fe wnaeth yr ymatebwr gytuno y gallwn ni ail gysylltu â nhw i gynnal Arolwg Eiddo dilynol, sy'n ffurfio ail ran o'r *Arolwg Byw yng Nghymru* flwyddyn hon. Rwy'n ysgrifennu atoch i adael i chi wybod bod eich cyfeiriad chi wedi'i ddewis ar gyfer yr Arolwg Eiddo, ac i ofyn am eich cymorth i sicrhau fod hyn yn llwyddiant. Mae'r daflen gaeedig yn esbonio mwy am yr arolwg ac yn ateb rhai o'r cwestiynau sydd gennych. Mae'r arolygon gwladol yma yn cael eu cynnal gan Ipsos MORI, y sefydliad ymchwil annibynnol, ar ran Llywodraeth Cynulliad Cymru.

Mae'r arolygon yn hollol **gyfrinachol**. Fe fydd y wybodaeth sy'n cael ei chasglu yn yr Arolwg Eiddo yn cael ei chysylltu'n anhysbys â data o'r cyfweiliad a gafodd ei gynnal yn yr un eiddo. Caiff ei defnyddio ar gyfer pwrpasau ystadegol yn unig, a dim ond gwybodaeth anhysbys fydd yn cael ei phasio i Lywodraeth Cynulliad Cymru neu eraill. Mae'r *Building Research Establishment (BRE)* yn helpu Ipsos MORI gyda'r arolwg, ac ni fydd unrhyw un y tu allan i Ipsos MORI/BRE yn ymwybodol o'r manylion sydd yn cael ei gasglu.

Dros yr wythnosau nesaf fe fydd arolygwr yn galw er mwyn cynnal yr arolwg, felly nid oes angen i chi wneud unrhyw beth ar hyn o bryd. Os ydych allan neu'n brysur, fe fydd yr arolygwr yn trefnu amser mwy cyfleus. Mae'r arolygwyr i gyd yn cario cardiau ID â llun. **Peidiwch adael unrhyw un mewn i'ch cartref heb yr adnabyddiaeth swyddogol hon.**

Os hoffech mwy o wybodaeth, cysylltwch â Stephen Finlay yn Ipsos MORI ar 020 7347 3354. Cewch hefyd anfon e-bost at [bywcymru@ipsos-mori.com](mailto:bywcymru@ipsos-mori.com) gan nodi'r cyfeirnod uchod.

Diolch yn fawr am eich help. Mae'r arolwg yn holl bwysig i ni allu casglu gwybodaeth i fonitro a helpu gwella'r stoc tai yng Nghymru. I ddangos ein gwerthfawrogiad, fe fyddwch yn derbyn pecyn o fylbiau ynni isel gan ein harolygwr ar ôl iddynt gwblhau'r arolwg.

Yr eiddoch yn ffyddlon



Gary Welch

Rheolwr Prosiect Byw yng Nghymru



Llywodraeth Cynulliad Cymru  
Welsh Assembly Government

## **Appendix 19 Property Survey leaflet**

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## Living in Wales 2008 Property Survey

### ***What is the Living in Wales Survey?***

The Living in Wales survey is conducted annually by Ipsos MORI on behalf of the Welsh Assembly Government. This provides the main source of information on households and the condition of homes in Wales.

The 2008 survey is made up of an interview with the householder, (which you or a member of your household have already completed) and, for some respondents, a follow-up visit by a qualified surveyor to undertake a statistical property assessment of your home.

### ***What is the Property Survey?***

The survey collects data for the Welsh Assembly Government for their analysis to formulate housing-related policy and spending plans. This includes the nature and suitability of the nation's housing and also assessments of energy-efficiency, fuel poverty and the money required to improve the condition of housing. The survey covers houses and flats, both owned and rented, throughout Wales.

It is very different from a house survey that is undertaken when selling a home – no written report is produced on individual properties.

### ***What will the Property Survey involve?***

The surveyor will need to look at the inside and outside of your home. It is only a visual inspection; he or she will not need to move any furnishing or carpets. Your home will not be disturbed in any way, and the surveyor will not need to take up much of your time.

### ***How long will the Property Survey last?***

Around 40–50 minutes; most of this time will be spent outside – up to 20 minutes inside.

### ***How do I know the surveyor is genuine?***

All surveyors carry ID photocards with a freephone number enabling you to check that they are who they say they are.

### ***What if I am out or busy when the surveyor comes to visit?***

Over the next few weeks a surveyor will call on you to undertake the survey. If it is inconvenient for you at that time, the surveyor will arrange a more suitable time. If you are not in when the surveyor calls they will leave a calling card with their contact details. If you need to re-arrange any agreed appointment for a more convenient time you can either contact us or the surveyor directly.

### ***Is confidentiality guaranteed?***

YES. All information given to us is strictly confidential to Ipsos MORI. It will not be possible to identify any individual or home

from the results, and no identifiable information about you will be passed to any organisation or individual.

All staff working on the survey strictly adhere to the Code of Conduct of the Market Research Society which sets rigorous standards for the conduct of survey research.

### ***Further information***

If you would like further information about the Living in Wales Property Survey or have any queries, you can either:

- Write to Stephen Finlay at Ipsos MORI, 79–81 Borough Road, London, SE1 1FY
- Email: [liw@ipos-mori.com](mailto:liw@ipos-mori.com)
- Telephone: 020 7347 3353 or
- Visit the website:

<http://www.wales.gov.uk/livinginwalesurvey>

You can visit the Ipsos MORI website at [www.ipsos-mori.com](http://www.ipsos-mori.com) for further information about Ipsos MORI.



## Byw yng Nghymru 2008 Arolwg Eiddo

### *Beth yw Arolwg Byw yng Nghymru?*

Mae Arolwg Byw yng Nghymru yn cael ei gynnal yn flynyddol gan Ipsos MORI ar ran Llywodraeth Cynulliad Cymru. Hwn yw'r brif ffynhonnell gwybodaeth ar gartrefi a chyflwr cartrefi yng Nghymru.

Mae arolwg 2008 yn cynnwys cyfweiliad gyda deiliaid y cartref (wedi ei gwblhau gennych chi neu aelod o'ch cartref) ac i rai ymatebwyr, ymweliad dilynol gan arolygwr gymwys, i gynnal asesiad eiddo ystadegol o'ch cartref.

### *Beth yw'r Arolwg Eiddo?*

Mae'r arolwg yn casglu data ar gyfer Llywodraeth Cynulliad Cymru ar gyfer ei dadansoddiad i ffurfio polisiau sy'n gysylltiedig â thai a chynlluniau gwario. Mae hyn yn cynnwys natur ac addasrwydd tai'r genedl, a hefyd asesiadau ar effeithlonrwydd egni, tlodi tanwydd a'r arian sydd ei angen i wella cyflwr tai. Mae'r arolwg yn delio â thai, a fflatiau, boed wedi eu perchen ar, neu eu rhentu ar draws Cymru gyfan.

Mae'n hollol wahanol i arolwg tŷ sy'n cael ei gynnal wrth werthu tŷ - nis oes adroddiad ar bapur yn cael ei gynhyrchu ar eiddo unigol.

### *Beth fydd yn digwydd yn yr arolwg?*

Fe fydd rhaid i'r arolygwr edrych y tu mewn a thu allan i'ch cartref. Dim ond archwiliad *gweledol* fydd hyn; ni fydd angen iddo ef neu iddi hi symud unrhyw ddodrefn neu garpedi. Ni fydd unrhyw ymyrraeth i'ch cartref, ac ni fydd yr arolygwr yn gofyn llawer o'ch amser.

### *Am faint bydd yr Arolwg Eiddo yn para?*

Am oddeutu 40-50 munud; bydd rhan fwyaf o'r amser hwn yn cael ei dreulio y tu allan - hyd at 20 munud tu fewn.

### *Sut fyddai'n gwybod fod yr arolygwr yn ddilys?*

Mae'r arolygwyr i gyd yn cario cardiau ID â llun a rhif rhadffôn fel eich bod yn gallu sicrhau eu bod yn ddilys.

### *Beth os ydyw i allan neu'n brysur pan ddaw'r arolygwr i ymweld â fi?*

Dros yr wythnosau nesaf fe fydd arolygwr yn galw er mwyn cynnal yr arolwg. Os nad yw'n gyfleus i chi pryd hynny, fe fydd yr arolygwr yn trefnu amser mwy cyfleus. Os nad ydych ar gael pan ddaw'r arolygwr, fe fyddent yn gadael carden â manylion cyswllt i chi. Os oes angen i chi aildrefnu'r apwyntiad ar gyfer amser mwy cyfleus, cewch gysylltu â ni neu'r arolygwr yn uniongyrchol.

### *Gallwch chi sicrhau cyfrinachedd?*

GALLWN. Mae'r holl wybodaeth sy'n cael ei rhoi i ni yn holl gyfrinachol i Ipsos MORI. Ni fydd yn bosib adnabod unrhyw unigolyn neu gartref o'r canlyniadau, ac ni fydd gwybodaeth *ganfyddadwy* amdanoch chi yn cael ei phasio at unrhyw sefydliad nag unigolyn.

Mae'r holl staff sy'n gweithio ar yr arolwg yn cydlynu'n gaeth at God Ymddygiad y Gymdeithas Ymchwil Marchnata sy'n gosod safonau llym ar gyfer ymddygiad ymchwil trwy arolygon.

### *Gwybodaeth bellach*

Os hoffech fwy o wybodaeth ar Arolwg Eiddo Byw yng Nghymru, neu os oes gennych unrhyw gwestiynau, fe allech naill ai:

- Ysgrifennu at; Stephen Finlay yn Ipsos MORI, 79-81 Heol Borough, Llundain, SE1 1FY
- E-bost: [bywcymru@ipos-mori.com](mailto:bywcymru@ipos-mori.com)
- Ffôn: 020 7347 3354 neu
- Cyrchwch y gwefan:

[www.cymru.gov.uk/arolwgbywyngnghymru](http://www.cymru.gov.uk/arolwgbywyngnghymru)

Cewch ymweld hefyd â gwefan Ipsos MORI [www.ipsos-mori.com](http://www.ipsos-mori.com) am fwy o wybodaeth ar Ipsos MORI



## **Appendix 20 Dress rehearsal agenda**

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## Agenda for the Dummy Briefing for the Living in Wales Property Survey

5<sup>th</sup> August 2008

Venue: Room 16/107 BRE

09.30 – 10.00	Coffee/welcome	
10.00 - 10.20	Introduction	ES-H
10.20 - 10.50	WHQS	ES-H
10.50 – 11.20	Basic Principles	MD, KW
11.20 – 12.20	Interior	ER
12.20 – 13.30	Services, heating, energy	JR, MC
13.30 – 14.00	Lunch	
14.00 – 15.00	External faults	RF, VM
15.00 - 16.30	HHSRS (excl. discussion)	SN, VM, RF
16.30 – 17.00	Tea/discussion	All

## **Appendix 21 Briefing timetable**

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**LIW BRIEFING PROGRAMME SEP 2008, MARRIOT HOTEL SWANSEA (Group 1 surveyors)**



**Group 1**

Sep-09		
20.30-21.15	Welcome/Introduction	SN,SF,ESH

Sep-10		
08.20-09.00	Basic principles	MD,KW
09.00-10.15	Interior	ER
10.15-10.30	Break	
10.30-10.55	Amenities	VM
10.55-12.15	Services,heating, energy	JR,TN
12.15-12.30	Exercise (energy)	TN,CB
12.30-13.30	Lunch	
13.30-14.45	Interior/amenities faults	ER,VM
14.45-15.00	Break	
15.00-18.00	Fieldwork/debriefing	VM SN Supr's
18.00-19.00	Free	
19.00-20.30	Dinner	
20.30-21.00	Dwelling construction	SN
21.00-21.30	Energy exercise answers/CWI	TN,CB
21.30-	Free	

Sep-12		
08.30-10.15	Fitness	RF
10.15-10.30	Break	
10.30-11.30	Fitness cont'd	RF
11.30-11.45	Recording fitness	ER
11.45-12.15	Fitness exercise	ER,CB
12.15-12.45	S1-4 of form	MD
12.45-13.45	Lunch	
14.00-18.00	Fieldwork	RF,ER Supr's
18.00-19.00	Free	
19.00-20.30	Dinner	
20.30-21.30	Debriefing	RF,ER Supr's
21.30-	Free	

Sep-14		
08.30-10.45	HHSRS	SN,VM
10.45-11.00	Coffee	
11.00-11.30	Solutions to HHSRS problems	VM,SN
11.30-13.00	HHSRS worked examples exercise	SN,VM
13.00-14.00	Lunch	
14.00-18.00	HHSRS Fieldwork/ debriefing in field at first house	SN,VM Supr's
18.00-19.00	Free	
19.00-20.30	Dinner	
20.30-21.30	Debriefing on remaining dwgs	SN,VM Supr's
21.30-	Free	

Sep-11		
08.30-09.30	Shape, measurement,views	MD
09.30-10.30	Exterior/plot	MD,ER
10.30-10.45	Break	
10.45-11.00	Ageing elements	CB
11.00-12.15	External faults	RF,VM
12.15-12.45	Structural faults	SN
12.45-14.00	Lunch	
14.00-18.00	Fieldwork	VM,ER Supr's
18.00-19.00	Free	
19.00-20.30	Dinner	
20.30-21.30	Fieldwork debriefing	RF,ER,VM
21.30-	Free	

Sep-13		
08.30-09.15	Module/flat surveys	KW
09.15-10.00	Common parts	RF
10.00-10.30	Shared facilities	KW
10.30-10.45	Break	
10.45-11.25	Common areas/shared facils faults	RF
11.25-11.45	Review flat surveys	SN
11.45-12.30	Block/area	MD
12.45-13.45	Lunch	
14.00-18.00	Fieldwork / debriefing in field	RF,MD Supr's
18.00-19.00	Free	
19.00-20.30	Dinner	
20.30+	Free	

Sep-15		
8.30-09.00	Check out of rooms	
09.00-12.30	Fieldwork: complete survey (converted flat) Debriefing in field	VM, ER Supr's
13.00-14.00	Lunch	
14.00-15.00	Critical issues/validation	SN,MD,JR
15.00-15.15	Tea	
15.15-17.00	Survey admin	Ipsos MORI SF, HA
17.00+	Surveyors collect allocations/ leave	HA

## **Appendix 22 Briefing houses specification**

LIW Property Survey Schedule – Sept 2008

Date	Surveyors group 1		Surveyors Group 2	
	Day	Property	Day	Property
Mon 8th				
Tue 9th	0			
Wed 10th	1	[interior] Large empty 17, Glenmore Crescent Linkside?		
Thur 11th	2	[exterior] same large 17, Glenmore Crescent Linkside? [exterior] Structural problems 37, Sterry Rd, Gowerton Sterry Road/61 Dyfatty? (2 groups)	0	
Fri 12th	3	[Fitness X 3] (2 groups for take off) 37, Sterry Rd 17b, Glenmore Crescent 10, Stanley Sterry Road/61 Dyfatty Stanley	1	interior] Large empty
Sat 13th	4	H Block [Flats]  A high rise at Dyffatty	2	[exterior] same large empty  [exterior] Structural problems  (2 groups)
Sun 14th	5	[HHSRS 5 old X3] (2 groups for take off) 10, Stanley, Mount Pleasant 5B Cimla Rd 2, Pen-y craig Stanley Pen-y-craig Cimla/61 Dyfatty?	3	[Fitness X 3] (2 groups for take off)
Mon 15th	6	Full Survey amX2 groups 57, Dyfatty 61, Dyfatty Glenmore Cres	4	H Block [Flats]
Tue 16th			5	[HHSRS 5 old X3] (2 groups for take off)
Wed 17th			6	Full Survey am X2 groups

All surveys pm except where marked

## **Appendix 23 Briefing pack check list**

## LIVING IN WALES PROPERTY SURVEY 2008 SURVEYOR PACK CHECK LIST

<i>Item</i>	✓
Clipboard	<input type="checkbox"/>
Camera	<input type="checkbox"/>
Camera instructions	<input type="checkbox"/>
Floppy disks	<input type="checkbox"/>
Padded envelopes (for return of disks)	<input type="checkbox"/>
Id badge and cover	<input type="checkbox"/>
Laminated household letters (x2)	<input type="checkbox"/>
Low energy lightbulbs	<input type="checkbox"/>
Calling cards	<input type="checkbox"/>
Property leaflets	<input type="checkbox"/>
Supervisor BRE envelopes	<input type="checkbox"/>
Daily return slips (x2 pads)	<input type="checkbox"/>
Expense claim forms (x2 pads)	<input type="checkbox"/>
Surveyor fieldwork manual	<input type="checkbox"/>
Surveyor forms	<input type="checkbox"/>
Sample allocation	<input type="checkbox"/>
Username and password information (in white envelope)	<input type="checkbox"/>

# **Appendix 24 Ipsos MORI administration briefing slides**

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Ipsos MORI

# Living in Wales Property Survey 2008 Surveyor Briefing

## Survey Administration



Stephen Finlay  
Associate Director  
Ipsos MORI Social Research Institute  
September 2008



- Ipsos MORI's role
- The front of the survey form
- The addresses
- Workload and planning
- Surveyor Management System
- Fieldwork issues
- Surveyor packs and cameras
- Payment
- Quality control and personal safety
- Any questions

# Ipsos MORI's Role

- Household Survey
- Ipsos MORI and NOP Interviewers
- Employment of Surveyors
- BRE
  - Briefing
  - Supervisors
- Allocation of addresses
- Administration of the survey
- Validation of data
- Data outputs

# The Front of the Survey Form

# The Front of the Survey Form

## ■ Address label

Please affix  
Address Label here

**Surveyor Name**

**Surveyor ID**

**OFFICE USE ONLY**

Checked by Supervisor	Y	N
Returned to Surveyor	Y	N
Re-checked by Supervisor	Y	N

**NOTES:** Name / Phone numbers / Directions, etc

**CHECK YOU ARE AT THE  
CORRECT ADDRESS**

DO NOT WRITE PERSONAL DETAILS BELOW THIS LINE

# The Front of the Survey Form

Please affix  
Address Label here

**Surveyor Name**

**Surveyor ID**

**OFFICE USE ONLY**

Checked by Supervisor	Y	N
Returned to Surveyor	Y	N
Re-checked by Supervisor	Y	N

NOTES: Name / Phone numbers / Directions, etc

CHECK YOU ARE AT THE  
CORRECT ADDRESS

DO NOT WRITE PERSONAL DETAILS BELOW THIS LINE

- Address label
- Survey Name
- ID Number

# The Front of the Survey Form

Please affix  
Address Label here

**Surveyor Name**

**Surveyor ID**

**OFFICE USE ONLY**

Checked by Supervisor	Y	N
Returned to Surveyor	Y	N
Re-checked by Supervisor	Y	N

NOTES: Name / Phone numbers / Directions, etc

**CHECK YOU ARE AT THE  
CORRECT ADDRESS**

DO NOT WRITE PERSONAL DETAILS BELOW THIS LINE

- Address label
- Survey Name
- ID Number
- Office Use Only

# The Front of the Survey Form

Please affix  
Address Label here

**CHECK YOU ARE AT THE  
CORRECT ADDRESS**

**Surveyor Name**

**Surveyor ID**

<b>OFFICE USE ONLY</b>	Checked by Supervisor	Y	N
	Returned to Surveyor	Y	N
	Re-checked by Supervisor	Y	N

**NOTES: Name / Phone numbers / Directions, etc**

**DO NOT WRITE PERSONAL DETAILS BELOW THIS LINE**

- Address label
- Survey Name
- ID Number
- Office Use Only
- Notes

# The Front of the Survey Form

Please affix  
Address Label here

**Surveyor Name**

**Surveyor ID**

<b>OFFICE USE ONLY</b>	Checked by Supervisor	Y	N
	Returned to Surveyor	Y	N
	Re-checked by Supervisor	Y	N

NOTES: Name / Phone numbers / Directions, etc

**DO NOT WRITE PERSONAL DETAILS BELOW THIS LINE**

CHECK YOU ARE AT THE  
CORRECT ADDRESS

- Address label
- Survey Name
- ID Number
- Office Use Only
- Notes
- Do not write personal details below this line

# Survey Record

## 1. Survey record

	Visit 1	Visit 2	Visit 3	Visit 4	Visit 5	Visit 6
Visit made	<input checked="" type="radio"/> Y <input type="radio"/> N	<input type="radio"/> Y <input type="radio"/> N				
	Day Month	Day Month	Day Month	Day Month	Day Month	Day Month
Record date of this call	2   0   0   9					
(24 hour clock)	Hr mm	Hr mm	Hr mm	Hr mm	Hr mm	Hr mm
Start time	1   0   4   0					
Finish time	1   1   4   4					

- Important for tracking progress of survey
- Six attempts to make contact
- Record date visited and time spent
- Time important for planning further surveys

# Survey Record

<b>Outcome</b>						
Full/completed survey	1	①	1	1	1	1
Non-survey	②	2	2	2	2	2
Partial survey	3	3	3	3	3	3
<b>Reason for non-survey</b>						
Refusal on doorstep	1	1	1	1	1	1
Refusal during survey	2	2	2	2	2	2
Refusal by phone with surveyor	3	3	3	3	3	3
Refusal notified by Ipsos MORI	4	4	4	4	4	4
No contact	⑤	5	5	5	5	5
Contact made - survey rescheduled	6	6	6	6	6	6
Too dark to complete	7	7	7	7	7	7
Other	8	8	8	8	8	8

■ Record extent of inspection achieved each visit

■ Reason for non-surveys

- Refusal (Doorstep, during survey, by phone, notified by Ipsos MORI)
- No contact
- Contact made – survey rescheduled
- Too dark to complete
- Other

# Survey Record – Partial survey

<b>Outcome</b>						
Full/completed survey	1	1	1	1	1	1
Non-survey	2	2	2	2	2	2
<b>Partial survey</b>	3	3	3	3	3	3
<b>Reason for non-survey</b>						
Refusal on doorstep	1	1	1	1	1	1
Refusal during survey	2	2	2	2	2	2
Refusal by phone with surveyor	3	3	3	3	3	3
Refusal notified by Ipsos MORI	4	4	4	4	4	4
No contact	5	5	5	5	5	5
Contact made - survey rescheduled	6	6	6	6	6	6
Too dark to complete	7	7	7	7	7	7
Other	8	8	8	8	8	8

- Might be internal ie survey is aborted (but not refused)
- Might be external and returning to gain internal access
- **ALL PARTIALS, INTERNAL OR EXTERNAL, ARE TREATED AS A NON-SURVEY**

# Photographs Taken

Write in photograph number:

WRITE IN 0 FOR 'NOT TAKEN'  
AND X IF REFUSED PERMISSION

Front of dwelling	Back of dwelling	Up road	Down road
1	2	4	3

- Required for FULL SURVEYS ONLY
- Front, back, up the road and down the road
- Write in photograph number

**BUT REMEMBER ALWAYS SEEK  
PERMISSION FIRST**

# Photographs Taken

Write in photograph number:

WRITE IN 0 FOR 'NOT TAKEN'  
AND X IF REFUSED PERMISSION

Front of dwelling	Back of dwelling	Up road	Down road
X	X	X	X

## ■ “X” if REFUSED PERMISSION

Write in photograph number:

WRITE IN 0 FOR 'NOT TAKEN'  
AND X IF REFUSED PERMISSION

Front of dwelling	Back of dwelling	Up road	Down road
1	0	2	3

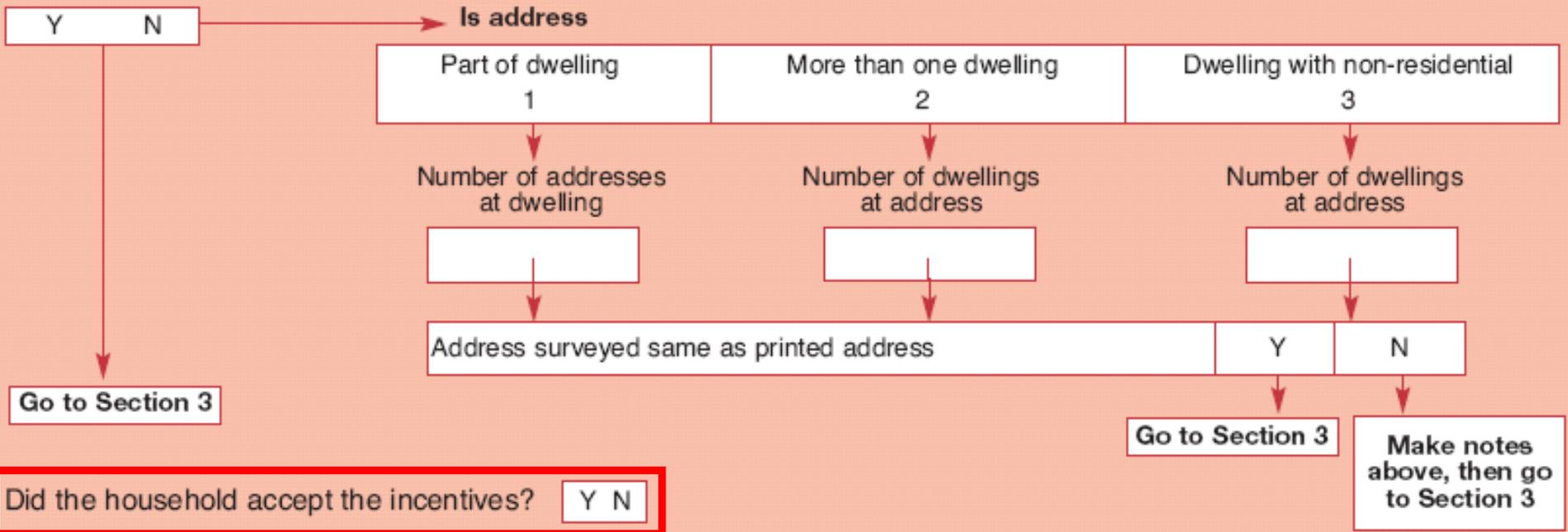
## ■ “0” for NOT TAKEN

## ■ Can't take more than FOUR photos

## ■ If need to take two photos of front or back, omit one of environment

## 2. Dwelling identification

Is address a single dwelling?



- To monitor take up of incentives please ensure question is coded

# Property Survey Sample Addresses

# The Addresses – An Overview

- Selection for Property Survey follows conduct of household survey
- All given permission to be re-contacted (c4,800)
- From this selection informed by condition assessment:
  - Good - No repairs needed
  - Bad - One moderate repair element (roof, doors, windows, walls)
  - Ugly – More than one moderate or major repair
- Selection also varies by region and tenure
- Sample size of c2,500 – around 55 per surveyor
- Around 60-75 minutes per survey

# Your sample allocation

## ■ Will look like this

 5 2 3 0 0 1 6 1 5230016 Address 1 Address 2 Address 3 Address 4 Address 5 Postcode Grid ref: ST097967 (30971,19673) Interview date: 18 June 2008 15	 5 2 3 0 0 1 6 1 5230016 Address 1 Address 2 Address 3 Address 4 Address 5 Postcode Grid ref: ST097967 (30971,19673) Interview date: 18 June 2008 15	 5 2 3 0 0 1 6 1 5230016 Address 1 Address 2 Address 3 Address 4 Address 5 Postcode Grid ref: ST097967 (30971,19673) Interview date: 18 June 2008 15
--	---	--

**Full address details**

**Property ID number**

**Grid reference & date of interview**

- 3 address labels – 1 for form, 1 for disk and 1 spare

# Ensure Correct Address

- Essential to undertake survey at **same address** as interviewer and **unit of accommodation** you include is the household interviewed by Ipsos MORI/NOP
- No substitutions may be made
- Check description / location
- If any do not match - **check you are actually at the correct address**
- Call Ipsos MORI office if unclear (020 7347 3353)

# Reasons for Discrepancies Between Surveys

- Occupier may have changed ✓ **Survey if correct address**
- Interview with different household member ✓ **Survey if correct address**
- Address converted to other dwelling ⇔ **Confirm correct address and contact Ipsos MORI**
- **DO NOT undertake a survey if you are sure interview has been undertaken at the wrong address**
- **If in doubt telephone Ipsos MORI (020 7347 3353)**

# Workload and planning

# Workload and Planning

- Locate dwellings – use maps, OS grid reference
- Internet sources – both [www.multimap.com](http://www.multimap.com) and [www.streetmap.co.uk](http://www.streetmap.co.uk) pinpointing the centre of any postcode and [www.royalmail.co.uk/paf](http://www.royalmail.co.uk/paf) - listings of all properties in a postcode
- Non contacts – call back at different weeks and different times of days, evenings and weekends
- Remember the Ipsos MORI Property Survey website is there to help manage and track progress with your allocation

<https://liwpropertysurvey2008.ipsos-mori.com>

# Surveyor Management System

# Surveyor Management System

<https://liwpropertysurvey2008.ipsos-mori.com>

**2008 Property Survey  
Ipsos Mori Surveyor Management System**

User name

Password

- User name and Password included in your surveyor pack

**2008 Property Survey  
Ipsos Mori Surveyor Management System**

[Address Status Report](#) [Survey Progress](#) [Outstanding Transactions](#) [Statements](#) [Log Out](#)

You are logged in as "[REDACTED]" ([REDACTED])  
You Last logged into the system at **07:22** on **12 September 2008**.

# SMS – Address Status Report

- Full surveys – booked in
- Non-surveys – booked in
- Returned to surveyor
- Property Survey not required
- Outstanding

# SMS – Address Status Report



## Living In Wales Property Survey 2008

Status of Addresses for [REDACTED]

### Outstanding

	Address No	Details	Interviewed
1.	51107881	[REDACTED]	1 <sup>st</sup> January 2008
2.	51109941	[REDACTED]	1 <sup>st</sup> January 2008
3.	51110001	[REDACTED]	1 <sup>st</sup> January 2008
4.	51110751	[REDACTED]	1 <sup>st</sup> January 2008
5.	51133111	[REDACTED]	1 <sup>st</sup> January 2008
6.	51146571	[REDACTED]	1 <sup>st</sup> January 2008
7.	51146811	[REDACTED]	1 <sup>st</sup> January 2008
8.	51146991	[REDACTED]	1 <sup>st</sup> January 2008

[Link to multimap.com](http://multimap.com)

# SMS – Survey Progress

## 2008 Property Survey Ipsos Mori Surveyor Management System

Address Status Report   Survey Progress   Outstanding Transactions   Statements   Log Out

### Survey Progress

All Completed   Full Survey   Non Survey   Blank Form   Returned to Surveyor   **Outstanding**

Address No	Address
51107881	115 Woodland Terrace, Aberbeeg, ABERTILLERY NP13 2EN
51109941	15 Griffin Street, Six Bells, ABERTILLERY NP13 2NE
51110001	33 Upper Arail Street, Six Bells, ABERTILLERY NP13 2NG
51110751	17 Coronation Road, Six Bells, ABERTILLERY NP13 2PJ
51133111	2 Gibbons Villas, EBBW VALE NP23 5AD
51146571	54 Curre Street, Cwm, EBBW VALE NP23 5AD
51146811	15 Canning Street, Cwm, EBBW VALE NP23 5AD
51146991	13 Cwm Terrace, Cwm, EBBW VALE NP23 5AD
51147151	14 Cendl Terrace, Cwm, EBBW VALE NP23 5AD
51147231	31 Emlyn Road, Cwm, EBBW VALE NP23 5AD
51147491	114 King Street, Cwm, EBBW VALE NP23 5AD
51147801	78 Marine Street, Cwm, EBBW VALE NP23 5AD
51148221	29 Stanfield Street, Cwm, EBBW VALE NP23 5AD
51148971	23 Brecon Heights, Victoria, EBBW VALE NP23 5AD
51300261	3 Shingrig Road, Nelson, TREHARIEL NP23 5AD
51300421	12 Llancaiach Court, Nelson, TREHARIEL NP23 5AD
51300591	33 Lhwyncelyn Terrace, Nelson, TREHARIEL NP23 5AD
51300671	87 Bryncelyn, Nelson, TREHARIEL NP23 5AD

Summary of all booked in forms

## 2008 Property Survey Ipsos Mori Surveyor Management System

Address Status Report   Survey Progress   Outstanding Transactions   Statements   Log Out

### Survey Progress

All Completed   Full Survey   **Non Survey**   Blank Form   Returned to Surveyor   Outstanding

Address No	Address	Booked in By MORI
<b>Total Non Surveys: 0</b>		

## ■ CONFIDENTIAL DATA – you must log out

The screenshot shows the user interface for the 2008 Property Survey Ipsos Mori Surveyor Management System. At the top, a dark blue header contains the title "2008 Property Survey Ipsos Mori Surveyor Management System". Below this is a navigation bar with several menu items: "Address Status Report", "Survey Progress", "Outstanding Transactions", "Statements", and "Log Out". The "Log Out" button is highlighted with a red circle. Below the navigation bar, the "Survey Progress" section is active, showing a series of tabs: "All Completed", "Full Survey", "Non Survey" (highlighted in green), "Blank Form", "Returned to Surveyor", and "Outstanding". Below the tabs, there is a table with columns for "Address No", "Address", and "Booked in By MORI". A summary row at the bottom of the table indicates "Total Non Surveys: 0".

Address No	Address	Booked in By MORI
<b>Total Non Surveys: 0</b>		

# Fieldwork Issues

# Appointments and Revisits

- You should NOT call before 9am (10am on Sunday) or after 9pm unless requested to
- Calling cards are provided should initial face-to-face contact not be possible
- Up to six attempts should be made before considered a Non-survey
- The responsibility for organising and re-arranging appointment rests with surveyors
- Ipsos MORI will contact surveyors directly by telephone about cancellations, re-arrangements

# Supervision in the Field and Progress

- One day accompaniment - arrange with supervisor
- Weekly monitoring of progress - you must telephone your supervisor
  - Response rates will be monitored
- Technical queries/help/advice
- Supervisors will make written assessment of each surveyor
- Send all forms and photos to supervisor - or as many as requested

# Returning Forms and Photographs

- Return fully completed survey forms WITH photo disk

DAILY – SOONER BOOKED IN THE QUICKER YOU CAN BE PAID

- One survey form back for every address issued, labelled with the minimum of pages 1 and 2 complete
- Use return envelopes addressed to supervisor
- Complete and return Daily Return Slip - duplicate for your records

# On the Doorstep

- Have ID card prominently displayed
- Use LIW clipboard to show survey logo
- Have copy of letter & leaflet to hand
- BE CONFIDENT & SMILE
- But be prepared to back-off if inconvenient - avoid forcing a refusal
- Start by introducing yourself and then.....

# Explain the Survey

- Mention household interview and explanatory leaflet (have copy to hand)
- Importance of LiW survey – nationally representative, once every few years, all tenures and types
- Need their help to ensure the survey is representative
- Explain what you will do
- ... and what you will not do
- Try to be brief unless prompted or you may talk yourself out of a survey

# Be Prepared to Answer questions

- What is the Living In Wales Survey?
- Why has my home been chosen?
- How do I know the surveyor is genuine?
- Should I let my landlord know I am taking part?
- How long will the survey last?
- Is the information confidential?
- What will you the surveyor do?
- How is the survey used?

# Persuading Potential Refusals

- “I never do surveys” - Major national survey, important, come back at suitable time?
- “I’m too busy” - Can call back whenever you like
- “Nothing ever changes as a result” - Individual results are confidential but ensures policy & spending is directed to where most needed
- “Nothing to do with me, I own my own home” - covers all housing types, vital to ensure survey is representative
- “Why don’t you try next door” - address specifically selected to provide representative results

## But remember.....

- Look and listen for body language and signals
- Sometimes best not to press on - withdraw before you get an outright refusal

## And lastly.....

- Do not conduct a survey if only children are present; call back another time
- For elderly and vulnerable people
  - Adjust to their pace
  - Respect their worries
  - Call back at another time when relative, friend, warden can be present if wished

# Surveyor Packs

# Surveyor Packs

- Survey forms
- Camera, case and floppy disks
- Prepaid return envelopes (to Supervisor) and Jiffy bags
- Daily return slips
- Expenses forms (these are not invoices)
- Administration manual – please read!
- Copies of household letters and leaflets
- Calling cards
- ID card
- Address labels

## Packs also include incentives

- 2 energy saving light bulbs per full survey
- Half distributed at surveyor briefing – rest sent later on request
- Your responsibility to carry sufficient supply
- And remember take up should be logged on the Survey Form

# Cameras

# Photographs

- Ask occupant first
- Full surveys including vacants
- Only four per dwelling – and NO MORE
  - front view
  - back view
  - “up the road”
  - “down the road”
- Occupant must NOT be in the picture
- If need to take two photos of front or back, omit one of environment

- Landscape, not portrait - where possible
- One disk per dwelling
- Label disk (labels provided)
- Return disks in pre-paid envelopes with survey forms -  
**DAILY**

- Digital camera - (you must sign for it) - your responsibility!
- Camera case
- 1 battery
- 1 charger unit and cable
- Written instructions
- Floppy disks

**Remember!**

**ONE DISK PER  
DWELLING**

# And If You Forget.....

- Save image on camera
- Remove wrong disk and insert correct disk
- Save correct image on correct disk
- Delete wrong image

## Useful hints:

- Label all your disks at beginning of each day
- Switch off when not using
- Remember to check battery charge before going into field

# Taking a Photograph is Easy!

- Turn on the power by sliding the power button down
- Insert floppy disk
- Ensure **PLAY/STILL** is set to **STILL**
- Press the shutter button halfway down to lock auto focus, auto white balance and auto exposure
- Press the shutter button down fully
- The image is then recorded on the disk

# Payments

# Payment Details

- We only pay for Full survey and Non-survey once booked-in
- At least 20 surveys back before payment for briefing is made
- Generate statements every 2 weeks using SMS
- You invoice Ipsos MORI based on statements
- Complete weekly expense form for mileage

# Travel and Expenses

Ipsos MORI

## Living in Wales Property Survey 2008 Surveyor Expenses Claim Form



Surveyor Name:

Surveyor Number:

Dates: (week ending)

### Surveys + Other Addresses Visited (List Address Reference Numbers)

	MON	TUES	WEDS	THURS	FRI	SAT	SUN
1	5280081						
2	5280082						
3	5280083						
4	5280084						
5							
6							
7							
8							
9							
10							

### Mileage

Start

10000

- Finish

10005

= Daily mileage

5

	MON	TUES	WEDS	THURS	FRI	SAT	SUN
Start	10000						
- Finish	10005						
= Daily mileage	5						

# Travel and Expenses

Ipsos MORI

## Living in Wales Property Survey 2008 Surveyor Expenses Claim Form



<b>Surveyor Name:</b>	<b>Surveyor Number:</b>	<b>Dates: (week ending)</b>
-----------------------	-------------------------	-----------------------------

**Surveys + Other Addresses Visited (List Address Reference Numbers)**

	MON	TUES	WEDS	THURS	FRI	SAT	SUN
1	5280081	5280085	5280091	5290071	5290078	5290085	5300081
2	5280082	5280086	5280092	5290072	5290079	5290086	5300082
3	5280083	5280087	5280093	5290073	5290080	5290087	5300083
4	5280084	5280088	5280094	5290074	5290081	5290088	5300084
5		5280089	5280095	5290075	5290082	5290089	
6		5280090	5280096	5290076	5290083	5290090	
7			5280097	5290077	5290084	5290091	
8						5290092	
9						5290093	
10							

**Mileage**

	MON	TUES	WEDS	THURS	FRI	SAT	SUN
Start	10000	10005	10012	10022	10032	10042	10055
- Finish	10005	10012	10022	10032	10042	10055	10060
= Daily mileage	5	7	10	10	10	13	5

Total mileage  
= 60 miles

# Travel and Expenses

Expenses Claim	£	p	Notes
<u>60</u> miles @ £0.40 per mile (as allowed)	24	00	
Others (specify) 1 Toll bridge	3	50	
2			
3			
Expenses	27	50	
VAT (is applicable-VAT invoice required)	-	-	
Total Expenses	27	50	

Signature of Surveyor:

Date:

For Ipsos MORI use only

Authorised by:

J31845 Date:

# Invoicing Ipsos MORI

- Statements will be generated via the secure website
- Intervals of around two weeks, and a minimum of ten completed full surveys
- The statements will list the outcomes of all booked-in addresses, and the amount you are entitled to claim for each address
- Invoice Ipsos MORI based on these statements, plus the mileage incurred for undertaking those surveys at the agreed mileage rates
- The first invoice will include first part payment for the main briefing
- Invoices will be paid by BACs transfer

# SMS – Outstanding Transactions & Statements

<https://liwpropertysurvey2008.ipsos-mori.com>

2008 Property Survey Ipsos Mori Surveyor Management System				
Address Status Report	Survey Progress	Outstanding Transactions	Statements	Log Out
<b>Outstanding Transactions</b>				
Address No	Address	Status	Survey Fee	
Total Full Surveys: 0			Sub Total: £0.00	
Total Non Surveys: 0				
Total Blank Forms: 0				
<b>Adjustments</b>				
Address No	Address	Description	Adjustment	
			Sub Total: £0.00	
			GRAND TOTAL: £0.00	

Generate statements from here

# SMS – Outstanding Transactions & Statements

<https://liwpropertysurvey2008.ipsos-mori.com>

**2008 Property Survey  
Ipsos Mori Surveyor Management System**

Address Status Report   Survey Progress   **Outstanding Transactions**   **Statements**   Log Out

**Outstanding Transactions**

Address No	Address	Status	Survey Fee
<b>Total Full Surveys: 0</b>			<b>Sub Total: £0.00</b>
<b>Total Non Surveys: 0</b>			
<b>Total Blank Forms: 0</b>			

**Adjustments**

Address No	Address	Description	Adjustment
			<b>Sub Total: £0.00</b>
			<b>GRAND TOTAL: £0.00</b>

And view statement log from here

Generate statements from here

# Quality Control and Personal Safety

- Telephone back-check on performance at individual addresses
- Supervisor report
  - quality of form completion
  - response rate
  - regular flow of work
- Quality of forms – Ipsos MORI validation
- Regular return of forms

# MRS Code of Conduct

## ■ Identity Card Scheme

## ■ Ensure continuing climate of goodwill

## ■ Do not call

- before 9.00am weekdays and 10.00am on Sundays
- or after 9.00pm (unless by appointment)

## ■ Confidentiality

- must not discuss the content of the survey results with the occupier or any other party
- no copies of the completed form should be made or passed on to a third party
- any personal address information held by the surveyor must be destroyed by the surveyor, or returned to Ipsos MORI at the end of the survey

# Personal Safety

- Take common sense precautions for your own security
- Always tell someone where you are going before starting work
- Leave your wallet/handbag at home
- Carry the minimum of essential possessions
- Keep your car keys in your pocket
- Ask your supervisor for accompaniment if you feel unsafe

And lastly.....

**GOOD LUCK!**

**And any queries  
please call**

**020 7347 3353**

**Any Questions?**

## Appendix 25 Summary of sample approach

# 2008 LIW Property Survey sampling approach

## Living in Wales Property Survey 2008 sampling

	Total Welsh House Condition Survey costs 2004	Permission granted at 02 July 2008 & allocating				Presumed response rate=		67%		Minimum= 130		Achieved minimum per auth.= 87					Total sample of bad & ugly and good ALL RENTERS		Adjusted actual sample of good OWNERS to achieve minimum per auth.		Enough owners check		FINAL adjusted sample of good OWNERS		FINAL adjusted total sample	
		Mean	Good	Bad	Ugly	Total	S1	S3	S3	S3	S4	S2	S4	S4	S5	S6	S7	S8								
		Base sample= Bad+Ugly	Base sample achieves, given above response rate	Good base - SOCIAL RENTED	Achieved social rented sample given above response rate	Good base - PRIVATE RENTED	Achieved private rented sample given above response rate	Good base - ALL RENTERS	Remaining good OWNERS	Preferred sample of Good	Preferred remaining sample of good OWNERS	Possible actual sample of good OWNERS	Adjusted sample of good OWNERS	total sample	Adjusted actual sample of good OWNERS to achieve minimum per auth.	Enough owners check	FINAL adjusted sample of good OWNERS	FINAL adjusted total sample								
Blaenau Gwent	1,025	169	10	2	182	12	8	42	28	12	8	54	115	203	149	115	104	66	170	104	OK	104	170			
Bridgend	828	178	9	7	194	16	10	25	16	13	8	38	140	164	126	126	114	54	168	114	OK	114	168			
Caerphilly	1,436	175	14	5	194	19	12	46	30	9	6	55	120	285	230	120	109	74	183	109	OK	109	183			
Cardiff	799	329	22	5	360	27	18	65	43	39	26	104	225	158	54	54	49	131	180	49	OK	75	206			
Carmarthenshire	1,083	211	20	14	247	34	22	48	32	14	9	62	149	214	152	149	135	96	231	135	OK	135	231			
Ceredigion	953	178	15	9	202	24	16	22	14	20	13	42	136	189	147	136	123	66	189	123	OK	123	189			
Conwy	653	138	18	16	174	34	22	15	10	14	9	29	109	129	100	100	91	63	154	91	OK	91	154			
Denbighshire	660	181	18	2	201	20	13	24	16	21	14	45	136	131	86	86	78	65	143	78	OK	78	143			
Flintshire	355	144	6	4	154	10	6	32	21	3	2	35	109	70	35	35	32	45	77	85	OK	85	130			
Gwynedd	1,301	144	10	11	165	21	14	20	13	15	10	35	109	258	223	109	99	56	155	99	OK	99	155			
Isle of Anglesey	556	174	9	6	190	15	10	33	22	12	8	45	129	110	65	65	59	60	119	70	OK	70	130			
Merthyr Tydfil	1,858	154	12	7	173	19	12	43	28	11	7	54	100	368	314	100	91	73	164	91	OK	91	164			
Monmouthshire	465	217	4	3	225	7	4	33	22	16	10	49	168	92	43	43	39	56	95	74	OK	74	130			
Neath Port Talbot	1,420	217	17	9	243	26	17	60	40	14	9	74	143	281	207	143	130	100	230	130	OK	130	230			
Newport	549	220	15	2	237	17	11	44	29	17	11	61	159	109	48	48	44	78	122	52	OK	53	131			
Pembrokeshire	2,059	193	12	9	214	21	14	34	22	13	8	47	146	408	361	146	133	68	201	133	OK	133	201			
Powys	1,319	166	14	5	185	19	12	32	21	10	6	42	124	261	219	124	113	61	174	113	OK	113	174			
Rhondda, Cynon, Taf	850	301	8	10	319	18	12	54	36	24	16	78	223	168	90	90	82	96	178	82	OK	82	178			
Swansea	1,402	275	19	13	309	32	21	62	41	23	15	85	190	278	193	190	172	117	289	172	OK	172	289			
The Vale of Glamorgan	593	184	9	2	195	11	7	27	18	20	13	47	137	118	71	71	64	58	122	72	OK	72	130			
Torfaen	1,129	214	7	3	224	10	6	56	37	8	5	64	150	224	160	150	136	74	210	136	OK	136	210			
Wrexham	475	167	15	11	193	26	17	36	24	14	9	50	117	94	44	44	40	76	116	54	OK	54	130			
<b>Total</b>	<b>990</b>	<b>4329</b>	<b>283</b>	<b>155</b>	<b>4767</b>	<b>438</b>	<b>284</b>	<b>853</b>	<b>563</b>	<b>342</b>	<b>222</b>	<b>1195</b>	<b>3134</b>	<b>4312</b>	<b>3117</b>	<b>2244</b>	<b>2037</b>	<b>1633</b>	<b>3670</b>	<b>2166</b>		<b>2193</b>	<b>3826</b>			

## **Appendix 26 Sample address list**

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## Living In Wales Property Survey 2008

Status of Addresses for [REDACTED]

### Full Survey

Address No Details		Interviewed
1.	51306611	Wed 5 Mar 2008
2.	51306951	Sun 13 Apr 2008
3.	51307111	Fri 21 Mar 2008
4.	51307451	Thu 6 Mar 2008
5.	51307941	Wed 5 Mar 2008
6.	51309011	Sat 8 Mar 2008
7.	51310161	Wed 5 Mar 2008
8.	51312061	Mon 3 Mar 2008
9.	51312141	Thu 14 Feb 2008
10.	51312481	Fri 8 Feb 2008
11.	51315031	Sat 12 Apr 2008
12.	51316361	Thu 28 Feb 2008
13.	51316931	Thu 13 Mar 2008
14.	51317351	Sat 24 May 2008
15.	51317681	Wed 19 Mar 2008
16.	51317761	Tue 18 Mar 2008
17.	51318911	Sun 11 May 2008
18.	51319091	Wed 5 Mar 2008
19.	51319171	Thu 15 May 2008
20.	51321211	Sat 24 May 2008
21.	51322531	Wed 28 May 2008
22.	51323291	Fri 28 Mar 2008
23.	51323781	Fri 7 Mar 2008
24.	51324021	Fri 7 Mar 2008
25.	51324361	Fri 21 Mar 2008
26.	51324851	Tue 10 Jun 2008

## Appendix 27 Address label

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## **Appendix 28 Police letter**

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«Title» «First\_name» «Surname»  
«Authority»  
«Addres\_1»  
«Addres\_2»  
«Addres\_3»  
«Addres\_4»  
«Postcode»

August 2008

Dear Chief Constable,

You may remember we wrote to you earlier in the year to inform you about the Living in Wales Survey currently being conducted by Ipsos MORI, the independent research organisation, on behalf of the Welsh Assembly Government.

The Living in Wales survey provides the main source of information about the nation's houses and households. Interviewers have been working in your area since January 2008 and this phase of the survey is now complete. This letter details the next phase: a Property Survey; which is the final part of the Living in Wales Survey in 2008. This letter provides basic information about the survey along with appropriate contact details so that, should you receive enquiries about it, your staff will be able to reassure householders that the survey is genuine. You may want to pass this letter on to Lead Officers in your Basic Command Units within your area.

The Property Survey takes place every four years and consists of a visual inspection of the home by a trained surveyor. A total of 2,500 dwellings will be surveyed across Wales. No local authority will have more than 500 properties included in the sample which will be selected at random, to ensure representative coverage of both public and private sector dwellings for the range of property types.

The survey will generally take less than an hour and most of that time will be spent outside the home. Surveyors will be working within your area between September and November and all will carry photo-card identification.

The survey is completely confidential and no written report is produced on individual properties. The information will be used for statistical purposes only and no identifiable information will be passed to the Welsh Assembly Government or others. Results will identify the nature and suitability of the nation's housing as well as inform estimates of energy efficiency, fuel, poverty, and the funding needed to improve the condition of housing. A leaflet is enclosed explaining more about the survey and answers some typical questions. This is the same leaflet that is sent to all the households in the sample.

If you would like more information, please contact Hannah Atherton at Ipsos MORI on telephone 020 7347 3353. You can also e-mail [liw@ipsos-mori.com](mailto:liw@ipsos-mori.com)

Yours faithfully



Gary Welch  
Living in Wales Project Manager



Llywodraeth Cynulliad Cymru  
Welsh Assembly Government

«Title» «First\_name» «Surname»  
«Authority»  
«Addres\_1»  
«Addres\_2»  
«Addres\_3»  
«Addres\_4»  
«Postcode»

Awst 2008

Annwyl Prif Gwnstabl,

Efallai eich bod yn cofio fy mod wedi ysgrifennu atoch yn ystod y flwyddyn i'ch hysbysu am arolwg pwysig sy'n cael ei gynnal gan Ipsos MORI, y sefydliad ymchwil annibynnol, ar ran Llywodraeth Cynulliad Cymru.

Arolwg Byw yng Nghymru yw'r brif ffynhonnell gwybodaeth am gartrefi a thai'r genedl. Mae cyfwelwyr wedi bod yn gweithio yn eich ardal ers Ionawr 2008 ac mae rhan yma o'r arolwg wedi ei chwblhau. Mae'r llythyr hwn yn rhoi manylion am y rhan nesaf, yr Arolwg Eiddo, sef rhan olaf Arolwg Byw yng Nghymru yn 2008. Mae'r wybodaeth yn y llythyr hwn yn rhoi gwybodaeth sylfaenol am yr arolwg ynghyd â'r manylion cyswllt priodol, rhag ofn i chi dderbyn ymholiadau amdano, fe fydd eich staff yn gallu sicrhau perchenogion y cartref am ddilysrwydd yr arolwg. Efallai y byddwch chi eisiau anfon y llythyr hwn ymlaen i'ch Prif Swyddogion a'ch Unedau Rheoli Sylfaenol yn eich ardal.

Mae'r Arolwg Eiddo yn cael ei gynnal pob pedwar blynedd ac yn cynnwys archwiliad gweledol o'r cartref gan syrfewr hyfforddedig. Fe fydd cyfanswm o 2,500 o anheddau yn cael eu harolygu ar draws Cymru. Ni fydd mwy na 500 o gartrefi ar gyfer pob un awdurdod yn cael eu cynnwys yn y sampl, a fydd yn cael eu dewis ar hap, i sicrhau ymdriniaeth gynrychiadol o anheddau cyhoeddus a phreifat ar gyfer yr amrywiaeth yn y mathau o eiddo.

Fe fydd yr arolwg fel arfer yn cymryd llai nag awr, ac fe fydd rhan fwyaf o'r amser yn cael ei dreulio tu fas i'r cartref. Fe fydd syrfewr yn cynnal y gwaith yma rhwng Medi a Thachwedd ac fe fydd gan bob un cerdyn adnabod.

Mae'r arolwg yn hollol gyfrinachol ac nid oes unrhyw adroddiad ysgrifenedig yn cael ei gynhyrchu ar eiddo unigol. Fe fydd yr wybodaeth dim ond yn cael ei defnyddio am bwrpasau ystadegol ac ni fydd unrhyw wybodaeth ganfyddadwy yn cael ei phasio i Lywodraeth Cynulliad Cymru neu eraill. Fe fydd y canlyniadau yn canfod natur a sefydlogrwydd tai'r genedl a hefyd yn hysbysu amcangyfrifon effeithlonrwydd ynni, tanwydd, tlodi a'r arian sydd angen er mwyn gwella cyflwr tai. Mae yna daflen yn amgaeedig sydd yn esbonio mwy am yr arolwg ac yn ateb rhai cwestiynau tebygol. Dyma'r un daflen sy'n cael ei hanfon i'r holl gartrefi yn y sampl.

Os hoffech fwy o wybodaeth, cysylltwch â Hannah Atherton yn Ipsos MORI ar 020 7347 3353. Cewch hefyd anfon ebost os ydych yn dymuno liw@ipsos-mori.com

Yr eiddoch yn ffyddlon



Gary Welch  
Rheolwr Prosiect Byw yng Nghymru



Llywodraeth Cynulliad Cymru  
Welsh Assembly Government

## Appendix 29 LA letter

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«Title» «First\_name» «Surname»  
«Job\_Title»  
«Authority»  
«Addres\_1»  
«Addres\_2»  
«Addres\_3»  
«Addres\_4»  
«Postcode»

August 2008

Dear «Title» «Surname»

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Yours faithfully



Gary Welch  
Living in Wales Project Manager



«Title» «First\_name» «Surname»  
«Job\_Title»  
«Authority»  
«Addres\_1»  
«Addres\_2»  
«Addres\_3»  
«Addres\_4»  
«Postcode»

Awst 2008

Annwyl «Title» «Surname»

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Yr eiddoch yn ffyddlon



Gary Welch

Rheolwr Prosiect Byw yng Nghymru



Llywodraeth Cynulliad Cymru  
Welsh Assembly Government

Ipsos MORI

Ipsos MORI House, 77-81 Borough Road, Llundain, SE1 1FY

Swyddfa Gofrestredig: Fel nodwyd uchod. Cofrestrwyd yng Nghymru a Lloegr rhif cofrestri 948470

## **Appendix 30 CHO/ CEHO letter**

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«Title» «First\_name» «Surname»  
«Job\_Title»  
«Authority»  
«Addres\_1»  
«Addres\_2»  
«Addres\_3»  
«Addres\_4»  
«Postcode»

August 2008

Dear «Title» «Surname»

I am writing to let you know about an important survey that is being conducted by Ipsos MORI, the independent research organisation, on behalf of the Welsh Assembly Government.

The Living in Wales survey provides the main source of information about the nation's houses and households. Interviewers have been working in your area since January 2008 and this phase of the survey is now complete. This letter details the next phase: a Property Survey; which is the final part of the Living in Wales Survey in 2008. This letter provides basic information about the survey along with appropriate contact details so that, should you receive enquiries about it, your staff will be able to reassure householders that the survey is genuine. You may want to pass this letter on to other appropriate departments within your authority.

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Yours faithfully



Gary Welch  
Living in Wales Project Manager



Llywodraeth Cynulliad Cymru  
Welsh Assembly Government

«Title» «First\_name» «Surname»  
«Job\_Title»  
«Authority»  
«Addres\_1»  
«Addres\_2»  
«Addres\_3»  
«Addres\_4»  
«Postcode»

Awst 2008

Annwyl «Title» «Surname»

Rwy'n ysgrifennu atoch i'ch hysbysu am arolwg pwysig sy'n cael ei gynnal gan Ipsos MORI, y sefydliad ymchwil annibynnol, ar ran Llywodraeth Cynulliad Cymru.

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Yr eiddoch yn ffyddlon



Gary Welch, Rheolwr Prosiect Byw yng Nghymru



«Title» «First\_name» «Surname»  
«Job\_Title»  
«Authority»  
«Addres\_1»  
«Addres\_2»  
«Addres\_3»  
«Addres\_4»  
«Postcode»



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Yours faithfully

Gary Welch  
Living in Wales Project Manager



Llywodraeth Cynulliad Cymru  
Welsh Assembly Government

«Title» «First\_name» «Surname»  
«Job\_Title»  
«Authority»  
«Addres\_1»  
«Addres\_2»  
«Addres\_3»  
«Addres\_4»  
«Postcode»

Awst 2008

Annwyl «Title» «Surname»

Efallai eich bod yn cofio fy mod wedi ysgrifennu atoch yn ystod y flwyddyn i'ch hysbysu am arolwg pwysig sy'n cael ei gynnal gan Ipsos MORI, y sefydliad ymchwil annibynnol, ar ran Llywodraeth Cynulliad Cymru.

Arolwg Byw yng Nghymru yw'r brif ffynhonnell gwybodaeth am gartrefi a thai'r genedl. Mae cyfwelwyr wedi bod yn gweithio yn eich ardal ers Ionawr 2008 ac mae rhan yma o'r arolwg wedi ei chwblhau. Mae'r llythyr hwn yn rhoi manylion am y rhan nesaf, yr Arolwg Eiddo, sef rhan olaf Arolwg Byw yng Nghymru yn 2008. Mae'r wybodaeth yn y llythyr hwn yn rhoi gwybodaeth sylfaenol am yr arolwg ynghyd â'r manylion cyswllt priodol, rhag ofn i chi dderbyn ymholiadau amdano, fe fydd eich staff yn gallu sicrhau perchenogion y cartref am ddilysrwydd yr arolwg. Efallai y byddwch chi eisiau anfon y llythyr hwn ymlaen i'r adrannau eraill perthnasol yn eich awdurdod.

Mae'r Arolwg Eiddo yn cael ei gynnal pob pedwar blynedd ac yn cynnwys archwiliad gweledol o'r cartref gan syrfewr hyfforddedig. Fe fydd cyfanswm o 2,500 o anheddau yn cael eu harolygu ar draws Cymru. Ni fydd mwy na 500 o gartrefi ar gyfer pob un awdurdod yn cael eu cynnwys yn y sampl, a fydd yn cael eu dewis ar hap, i sicrhau ymdriniaeth gynrychiadol o anheddau cyhoeddus a phreifat ar gyfer yr amrywiaeth yn y mathau o eiddo.

Fe fydd yr arolwg fel arfer yn cymryd llai nag awr, ac fe fydd rhan fwyaf o'r amser yn cael ei dreulio tu fas i'r cartref. Fe fydd syrfewyr yn cynnal y gwaith yma rhwng Medi a Thachwedd ac fe fydd gan bob un cerdyn adnabod.

Mae'r arolwg yn hollol gyfrinachol ac nid oes unrhyw adroddiad ysgrifenedig yn cael ei gynhyrchu ar eiddo unigol. Fe fydd yr wybodaeth dim ond yn cael ei defnyddio am bwrpasau ystadegol ac ni fydd unrhyw wybodaeth ganfyddadwy yn cael ei phasio i Lywodraeth Cynulliad Cymru neu eraill. Fe fydd y canlyniadau yn canfod natur a sefydlogrwydd tai'r genedl a hefyd yn hysbysu amcangyfrifon effeithlonrwydd ynni, tanwydd, tlodi a'r arian sydd angen er mwyn gwella cyflwr tai. Mae yna daflen yn amgaeedig sydd yn esbonio mwy am yr arolwg ac yn ateb rhai cwestiynau tebygol. Dyma'r un daflen sy'n cael ei hanfon i'r holl gartrefi yn y sampl.

Os hoffech fwy o wybodaeth, cysylltwch â Hannah Atherton yn Ipsos MORI ar 020 7347 3353. Cewch hefyd anfon ebost os ydych yn dymuno liw@ipsos-mori.com

Yr eiddoch yn ffyddlon



Gary Welch

Rheolwr Prosiect Byw yng Nghymru



Llywodraeth Cynulliad Cymru  
Welsh Assembly Government

Ipsos MORI

Ipsos MORI House, 77-81 Borough Road, Llundain, SE1 1FY

Swyddfa Gofrestredig: Fel nodwyd uchod. Cofrestrwyd yng Nghymru a Lloegr rhif cofrestri 948470

«Title» «First\_name» «Surname»  
«Job\_Title»  
«Authority»  
«Addres\_1»  
«Addres\_2»  
«Addres\_3»  
«Addres\_4»  
«Postcode»

Autumn 2008

Dear «Title» «Surname»

I am writing to let you know about an important survey that is being conducted by Ipsos MORI, the independent research organisation, on behalf of the Welsh Assembly Government.

The Living in Wales survey provides the main source of information about the nation's houses and households. Interviewers have been working in your area since January 2008 and this phase of the survey is now complete. This letter details the next phase: a Property Survey; which is the final part of the Living in Wales Survey in 2008. The information in this letter provides the basic information about the survey along with appropriate contact details so that, should you receive enquiries about it, your staff will be able to reassure householders that the survey is genuine. You may want to pass this letter on to other appropriate departments within your authority.

The Property Survey takes place every four years and consists of a visual inspection of the home by a trained surveyor. A total of 2,500 dwellings will be surveyed across Wales. No local authority will have more than 500 properties included in the sample which will be selected at random, to ensure representative coverage of both public and private sector dwellings for the range of property types.

The survey will generally take less than an hour and most of that time will be spent outside the home. Surveyors will be carrying out this work between September and November and all will carry photo-card identification.

The survey is completely confidential and no written report is produced on individual properties. The information will be used for statistical purposes only and no identifiable information will be passed to the Welsh Assembly Government or others. Results will identify the nature and suitability of the nation's housing as well as inform estimates for energy efficiency, fuel, poverty, and the funding needed to improve the condition of housing. A leaflet is enclosed explaining more about the survey and answers some typical questions. This is the same leaflet that is sent to all the households in the sample.

If you would like more information, please contact Hannah Atherton at Ipsos MORI on telephone 020 7347 3353. You can also e-mail [liw@ipsos-mori.com](mailto:liw@ipsos-mori.com)

Yours faithfully



Gary Welch  
Living in Wales Project Manager



Llywodraeth Cynulliad Cymru  
Welsh Assembly Government

«Title» «First\_name» «Surname»  
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«Authority»  
«Addres\_1»  
«Addres\_2»  
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«Postcode»

Awst 2008

Annwyl «Title» «Surname»

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Yr eiddoch yn ffyddlon



Gary Welch

Rheolwr Prosiect Byw yng Nghymru

Ipsos MORI

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Swyddfa Gofrestredig: Fel nodwyd uchod. Cofrestrwyd yng Nghymru a Lloegr rhif cofrestri 948470



Llywodraeth Cynulliad Cymru  
Welsh Assembly Government

## Appendix 31 HA letter

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«Title» «First\_name» «Surname»  
«Job\_Title»  
«Authority»  
«Addres\_1»  
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«Addres\_3»  
«Addres\_4»  
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August 2008

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Yours faithfully



Gary Welch  
Living in Wales Project Manager



Llywodraeth Cynulliad Cymru Cymru  
Welsh Assembly Government Government

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Fe fydd yr arolwg fel arfer yn cymryd llai nag awr, ac fe fydd rhan fwyaf o'r amser yn cael ei dreulio tu fas i'r cartref. Fe fydd syrfewyr yn cynnal y gwaith yma rhwng Medi a Thachwedd ac fe fydd gan bob un cerdyn adnabod.

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Yr eiddoch yn ffyddlon



Gary Welch

Rheolwr Prosiect Byw yng Nghymru



Llywodraeth Cynulliad Cymru Cymru  
Welsh Assembly Government Government

Ipsos MORI

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Swyddfa Gofrestredig: Fel nodwyd uchod. Cofrestrwyd yng Nghymru a Lloegr rhif cofrestri 948470

## **Appendix 32 Scanning specification**

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## 2008 LIVING IN WALES PROPERTY SURVEY

### SCANNING SPECIFICATION

#### SURVEY FORMS

##### Numbers:

Please quote for 2,500 forms and then for every 100 above this

##### Size/specification:

Form will be 23 pages long  
Single sided  
Pages are A4 width, but 1.6cm longer than A4  
Printed portrait

##### Please quote for:

One multi-page TIF image for the 23 pages  
Images to be black and white  
150dpi  
Read barcode in top left of page 1 (type in when hand-written) – index the forms using this number

##### Please advise on:

Turnaround time (quick turnaround is essential)

##### TIMESCALE:

Scanning between October and December  
Scan batches of 25 (sent to you by courier)

## **Appendix 33 Validation programme updates**

## Health and safety rating

If “are any of the following five safety hazards significantly worse than those found in average dwellings of their age and type” is blank but other parts of this section have been filled in then set to “Y”

If “are any of the following five safety hazards significantly worse than those found in average dwellings of their age and type” is blank and no other parts of this section have been filled in then set to “N”

If “are any of the following five safety hazards significantly worse than those found in average dwellings of their age and type” = “Y” but “falls on stairs : worse than average” = “N” and “falls on the level : worse than average”(p22) = “N” and “falls between levels : worse than average”(p22) = “N” and “Fire : worse than average”(p23) = “N” and “hot surfaces : worse than average”(p23) = “N” then report error.

If “are any of the following five safety hazards significantly worse than those found in average dwellings of their age and type” = “N” but “falls on stairs : worse than average” = “Y” or “falls on the level : worse than average”(p22) = “Y” or “falls between levels : worse than average”(p22) = “Y” or “Fire : worse than average”(p23) = “Y” or “hot surfaces : worse than average”(p23) = “Y” then report error.

*Repeat the next check for “falls on the level, falls between levels, fire and flames and hot surfaces as well.*

If “falls on stairs : worse than average” is missing and “Falls on stairs : likelihood of a person over 60 having a fall” leading to harm >320 then “falls on stairs : worse than average”=“Y”

\* Use 100 for falls on the level, 1800 for falls between levels, 5600 for fire and 180 for flames, hot surfaces etc.

if “falls on stairs : likelihood of a person 60 or over having a fall” = “1800”, “1000” or “560” then double check form to confirm.

if “falls on the level : likelihood of a person 60 or over having a fall” = “1000”, “560” or “320” then double check form to confirm.

if “falls between levels : likelihood of a child under 5 having a fall” = “5600” then double check form to confirm.

if “hot surfaces : likelihood of a child under five being burnt/scalded” = “1000” or “560” then double check form to confirm.

*Repeat the next eight checks for “falls on the level, falls between levels, flames and hot surfaces and fire as well*

If “falls on stairs : worse than average” is missing and “Falls on stairs : Class 1 Extreme %” is not missing then “falls on stairs : worse than average”=“Y”

If “falls on stairs : worse than average” is missing and “Falls on stairs : Class 2 Severe %” is not missing then “falls on stairs : worse than average”=“Y”

If “falls on stairs : worse than average” is missing and “Falls on stairs : Class 3 Serious %” is not missing then “falls on stairs : worse than average”=“Y”

If "falls on stairs : worse than average" is "Y" and "Falls on stairs : likelihood of a person over 60 having a fall" >320 then "falls on stairs : worse than average"="Y"

If "falls on stairs : worse than average" is "Y" and "Falls on stairs : Class 1 Extreme %" is blank then leave blank

If "falls on stairs : worse than average" is "Y" and "Falls on stairs : Class 2 Severe %" is blank then leave blank

If "falls on stairs : worse than average" is "Y" and "Falls on stairs : Class 3 Serious %" is blank then leave blank

If "falls on stairs : class 1 Extreme" + "Falls on stairs : Class 2 Severe %" + "Falls on stairs : Class 3 Serious %" > 100.2 then double check all three figures on the form. If still > 100.2, report error.

*For each of the five hazards (falls on stairs, falls on the level, falls between levels, hot surfaces and fire), if "worse than average" = "Y" then for each possible action associated with that hazard, repeat the following five checks. If "worse than average"= "N" or is blank then set all "action required", "described elsewhere" and "quantity" to not applicable for that hazard.*

If "action required" = "Y" and "Described elsewhere" is blank then leave blank

If "action required" is blank and "Described elsewhere" is blank then set described elsewhere to not applicable.

If "action required" is blank and "Described elsewhere" = "Y" or "N" then set "action required" to "Y".

If "Described elsewhere" = "N" and "quantity" is blank then set quantity to missing.

If "Described elsewhere" = "Y" and "quantity" is blank then set quantity to not applicable.

## Changes to the Living in Wales physical survey form

This document details the differences between the 2004 and 2008 Living in Wales physical survey form, and the additional validation checks necessary to accommodate any new data.

Each page of the form is dealt with in turn.

Because the health and safety rating system is entirely new, the variables in question have been detailed in a separate spreadsheet, and the checks required detailed in a separate health and safety document.

### Page 1

Any changes made to page 1 of the form were carried out at Ipsos MORI's request. It will be left to Ipsos MORI to decide how to code the additional questions here as they are the primary users of this data.

### Page 2

Additional question : actual construction date

Variable name : FODCONSA

Variable label : "Actual date of construction"

File : Firstimp

Preceding variable : FODDTYPE

Value labels :

9999 "Unknown"

Missing value : 9999

Checks :

-Ensure that the construction date falls within the band specified by FODCONST. If not report error ("age band and exact date of construction do not agree)

-Ensure that the construction date is not after any other exact date given e.g. FINKITRE, FINBATRE (amenity.sav).

Revised question : Construction date

New Value labels :

1 "Pre 1850"

2 "1850 – 1899"

3 "1900 – 1918"

4 "1919 – 1944"

5 "1945 – 1964"

6 "1965 – 1974"

7 "1975 – 1980"

8 "1981 – 1990"

9 "1991 – 1995"

10 "1999 – 2002"

11 "post 2002"

*Note that you may need to adjust any other checks that relate to this variable due to the altered banding of the ages.*

Question removed : If occupied how long have the occupants lived here - years  
Variable name : Fodlivey  
File : Firstimp

Question removed : If occupied how long have the occupants lived here - months  
Variable name : Fodlivem  
File : Firstimp

Question removed : If vacant how long has the dwelling been vacant - years  
Variable name : Fodvacny  
File : Firstimp

Question removed : If vacant how long has the dwelling been vacant - months  
Variable name : Fodvacnm  
File : Firstimp

Question removed : Is the dwelling boarded up / secure  
Variable name : Fodboard  
File : Firstimp

Question removed : If occupants have moved in within the last 3 months, ask for date  
- day  
Variable name : Fodexday  
File : Firstimp

Question removed: If occupants have moved in within the last 3 months, ask for date  
- month  
Variable name : Fodexmon  
File : Firstimp

Question removed : If occupants have moved in within the last 3 months, ask for date  
- years  
Variable name : Fodexyrs  
File : Firstimp

Page 3

Additional question: Walls – internal insulation?  
Variable name : FINWLSIN  
Variable label : WALLS - internal insulation present  
File : introoms  
Preceding variable : FINWLSDL  
Value labels :  
1 "Yes"  
2 "No"  
8 "Question not applicable"  
9 "Unknown"  
Missing values : 8, 9

Question removed : Unsafe staircase  
Variable name : FINIDDUS  
File : interior

Question removed : Trip steps/hazards  
Variable name : FINIDDTR  
File : interior

Question removed : dangerous windows/landings/balconies  
Variable name : FINIDDDW  
File : interior

Revised question : entrance door leads directly into living room  
Variable name : FINIDDED  
File : interior  
Old location : after FINIDDDW  
New location : after FINSECSD  
Value labels :  
1 "Yes"  
2 "No"  
8 "Question not applicable"  
9 "Unknown"  
Missing values : 8, 9

Additional question : Falls on stairs  
Variable name : FINHSRST  
Variable label : "HEALTH AND SAFETY - falls on stairs"  
File : interior  
Preceding variable : FINSTRRP  
Value labels :  
1 "Significantly lower than average"  
2 "Average risk"  
3 "Significantly higher than average"  
8 "question not applicable"  
9 "unknown"  
Missing values : 8,9

#### Checks

-If FINHSRST=3 then "falling on stairs : significantly higher than average" on p20 should be equal to 1 ("yes") and the rest of the "falling on stairs" section on that page should be filled in as appropriate.

Additional question : Falls on the level  
Variable name : FINHSRON  
Variable label : "HEALTH AND SAFETY - falls on the level"  
File : interior  
Preceding variable : FINHSRST  
Value labels :  
1 "Significantly lower than average"  
2 "Average risk"  
3 "Significantly higher than average"  
8 "question not applicable"  
9 "unknown"  
Missing values : 8,9

#### Checks

-If FINHSRON =3 then “falling on level surfaces, etc : significantly higher than average” on p21 should be equal to 1 (“yes”) and the rest of the “falling on level surfaces” section on that page should be filled in as appropriate.

Additional question : Falls between levels

Variable name : FINHSRBE

Variable label : “HEALTH AND SAFETY - falls between levels”

File : interior

Preceding variable : FINHSRON

Value labels :

1 “Significantly lower than average”

2 “Average risk”

3 “Significantly higher than average”

8 “question not applicable”

9 “unknown”

Missing values : 8,9

#### Checks

-If FINHSRBE=3 then “falling between levels : significantly higher than average” on p21 should be equal to 1 (“yes”) and the rest of the “falling between levels” section on that page should be filled in as appropriate.

Additional question : Fire

Variable name : FINHSRFI

Variable label : “HEALTH AND SAFETY - fire”

File : interior

Preceding variable : FINHSRBE

Value labels :

1 “Significantly lower than average”

2 “Average risk”

3 “Significantly higher than average”

8 “question not applicable”

9 “unknown”

Missing values : 8,9

#### Checks

-If FINHSRFI=3 then “fire : significantly higher than average” on p22 should be equal to 1 (“yes”) and the rest of the “fire” section on that page should be filled in as appropriate.

Additional question : Hot surfaces

Variable name : FINHSRHO

Variable label : “HEALTH AND SAFETY – hot surfaces”

File : interior

Preceding variable : FINHSRFI

Value labels :

1 “Significantly lower than average”

2 “Average risk”

3 “Significantly higher than average”

8 “question not applicable”

9 “unknown”

Missing values : 8,9

## Checks

-If FINHSRHO =3 then “flames, hot surfaces, etc : significantly higher than average” on p22 should be equal to 1 (“yes”) and the rest of the “flames, hot surface” section on that page should be filled in as appropriate.

Revised question : Flush threshold

Variable name : FINFLUSH

Variable label : “Accessibility : flush threshold < 15mm?”

File : Interior

Preceding variable : FINESCAP

Missing values : 8, 9

Additional question : Room on entrance level suitable for bedroom

Variable name : FINROOML

Variable label : “Accessibility : room on entrance level suitable for bedroom?”

File : Interior

Preceding variable : FINFLUSH

Value labels :

1 “Yes”

2 “No”

8 “Question not applicable”

9 “Unknown”

Missing value : 8, 9

Question removed : Level access

Variable name : FINLEVAC

File : interior

Question removed : Level access

Variable name : FINBATH

File : interior

Additional question : WC at entrance level

Variable name : FINWCENT

Variable label : “Accessibility : bathroom at entrance level?”

File : interior

Preceding variable : FINBATH

Value labels :

1 “Yes”

2 “No”

8 “Question not applicable”

9 “Unknown”

Missing value : 8, 9

## Checks

-Refer to either FSHENTRY (shape.sav) if a house or FDFENTRY (flatdets.sav) if a flat in order to find the main entrance level for the dwelling, then check FINBATLE, FINEX1LE, FINEX2LE, FINEX3LE, FINEX4LE, FINEX5LE, FINEX6LE, and FINEX7LE (interior.sav) to see whether there is a room on that level which has been coded as a bathroom. If not, report an error (“no bathroom / WC on entry level”).

Additional question : Wheelchair accessible WC at entrance level  
Variable name : FINWCWHE  
Variable label : "Accessibility : Wheelchair accessible WC at entrance level?"  
File : interior  
Preceding variable : FINWCENT  
Value labels :  
1 "Yes"  
2 "No"  
8 "Question not applicable"  
9 "Unknown"  
Missing value : 8, 9

#### Checks

-If this variable is coded 1 ("yes") then FINWCENT should also be 1. If not then report error ("no WC on entry level")  
-Refer to either FSHENTRY (shape.sav) if a house or FDFENTRY (flatdets.sav) if a flat in order to find the main entrance level for the dwelling, then check FINBATLE, FINEX1LE, FINEX2LE, FINEX3LE, FINEX4LE, FINEX5LE, FINEX6LE, and FINEX7LE (interior.sav) to see whether there is a room on that level which has been coded as a bathroom. If not, report an error ("no bathroom / WC on entry level").

Additional question : Change in floor level / trip steps at entrance level  
Variable name : FINLEVAC  
Variable label : "Accessibility : change in floor level / trip steps at entrance level?"  
File : interior  
Preceding variable : FINWCWHE  
Value labels :  
1 "Yes"  
2 "No"  
8 "Question not applicable"  
9 "Unknown"  
Missing value : 8, 9

Additional question : Doorsets and circulation meet part M?  
Variable name : FINCIRCU  
Variable label : "Accessibility : doorsets and circulation meet part M?"  
File : interior  
Preceding variable : FINLEVAC  
Value labels :  
1 "Yes"  
2 "No"  
8 "Question not applicable"  
9 "Unknown"  
Missing value : 8, 9

Additional question : straight stairs with landings > 900mm?  
Variable name : FINLANDS  
Variable label : "Accessibility : straight stairs with landings > 900mm?"  
File : interior  
Preceding variable : FINCIRCU  
Value labels :  
1 "Yes"  
2 "No"  
8 "Question not applicable"  
9 "Unknown"  
Missing value : 8, 9

If this has been coded 1 or 2 ("yes" or "no") then check number of stories in the module (the maximum of FDHMFLRS and FDHAFLRS from shape.sav) is greater than 1. if it is not, report error ("dwelling has straight stairs with landings but dwelling is only 1 storey")

Additional question : Adequate internal storage space  
Variable name : FINSTOSP  
Variable label : "Storage : Adequate internal storage space?"  
File : interior  
Preceding variable : FINELECM  
Value labels :  
1 "Yes"  
2 "No"  
8 "Question not applicable"  
9 "Unknown"  
Missing value : 8, 9

Additional question : rubbish / pests inside dwelling?  
Variable name : FINRUBAP  
Variable label : "rubbish / pests inside dwelling?"  
File : interior  
Preceding variable : FFFHETFA  
Value labels :  
1 "None"  
2 "Minor"  
3 "Major"  
8 "question not applicable"  
9 "unknown"  
Missing value : 8, 9

Page 4:

Additional question : Number of high level units  
Variable name : FINHLUNI  
Variable label : "Cupboards : Number of high level units"  
File : Amenities  
Preceding variable : FINKITDU  
Value labels :  
88 "question not applicable"  
99 "unknown"  
Missing value : 88, 99

Check

-If greater than 0 but FINCUPPR <> 1 then report error ("cupboards counted but cupboards not present")

Additional question : Number of base level units

Variable name : FINBLUNI

Variable label : "Cupboards : Number of base level units"

File : Amenities

Preceding variable : FINHLUNI

Value labels :

88 "question not applicable"

99 "unknown"

Missing value : 88, 99

Check

-If greater than 0 but FINCUPPR <> 1 then report error ("cupboards counted but cupboards not present")

Revised question : Length of worktop (m)

Variable name : FINWORKT

Variable label : "Length of worktop (m)"

File : Amenities

Preceding variable : FINLSHAP

Value labels :

88 "question not applicable"

99 "unknown"

Missing value : 88, 99

Check

-If greater than 0 but FINWRKPR <> 1 then report error ("worktop measured but worktop not present")

Additional question : L shaped?

Variable name : FINLSHAP

Variable label : "Worktop L shaped?"

File : Amenities

Preceding variable : FINBLUNI

Value labels :

1 "Yes"

2 "No"

88 "question not applicable"

99 "unknown"

Missing value : 88, 99

Check

-If 1 or 2 but FINWRKPR <> 1 then report error ("worktop shape described but worktop not present")

Additional question : number of convenient power sockets  
Variable name : FINPOWSO  
Variable label : "number of convenient power sockets"  
File : amenity  
Preceding variable : FINWORKT  
Value labels :  
99 "unknown"  
Missing value : 99

Additional question : Bathroom wheelchair accessible  
Variable name : Finbatwa  
Variable label : "Bathroom wheelchair accessible"  
File : amenity  
Preceding variable : Finbatdu  
Value labels :  
1 "yes"  
2 "no"  
8 "question not applicable"  
9 "unknown"  
Missing value : 8, 9

Additional block : Second shower / not in bathroom  
These questions should be formatted and validated in the same way as the block above, second bath.

Revised question : KITCHEN Amenities last refurbished  
New Value labels :  
1 "Pre 1960"  
2 "1960s"  
3 "1970s"  
4 "1980s"  
5 "1990s"  
6 "2000s"  
7 "In Progress"  
8 "Original"  
*Note that you may need to adjust any other checks that relate to this variable due to the altered banding of the ages.*

Revised question : BATHROOM Amenities last refurbished  
New Value labels :  
1 "Pre 1960"  
2 "1960s"  
3 "1970s"  
4 "1980s"  
5 "1990s"  
6 "2000s"  
7 "In Progress"  
8 "Original"  
*Note that you may need to adjust any other checks that relate to this variable due to the altered banding of the ages.*

Revised question : WC Amenities last refurbished

New Value labels :

1 "Pre 1960"

2 "1960s"

3 "1970s"

4 "1980s"

5 "1990s"

6 "2000s"

7 "In Progress"

8 "Original"

*Note that you may need to adjust any other checks that relate to this variable due to the altered banding of the ages.*

Additional question : Second shower/not in main bathroom - present

Variable name : FIN2SHPR

Variable label : Is there a second shower not in main bathroom

File : services

Preceding variable : FIN2BTES

Value labels :

1 "yes

2 "no"

8 "question not applicable"

9 "unknown"

Missing value : 8, 9

Page 5

Additional question : Is there a heat recovery system in the dwelling?

Variable name : FINHEATR

Variable label : "Is there a heat recovery system in the dwelling?"

File : services

Preceding variable : FINELEAC

Value labels :

1 "yes

2 "no"

8 "question not applicable"

9 "unknown"

Missing values : 8, 9

Additional question : Is there any evidence of cavity wall insulation in/around the electricity or gas meters?

Variable name : FINCAVWI

Variable label : "Evidence of CWI in electricity or gas meters?"

File : services

Preceding variable : FINHEATR

Value labels :

1 "yes

2 "no"

8 "question not applicable"

9 "unknown"

Missing values : 8, 9

Note:

For FINCAVWI missing values should be coded as 9, unless FINELEMS = N, or FINELEDC = 5, when missing values should be 8.

Additional question : Total number of open fireplaces

Variable name : FINOPFIRE

Variable label : "Total number of open fireplaces"

File : services

Preceding variable : FINCAVWI

Value labels :

88 "question not applicable"

99 "unknown"

Missing values : 88, 99

Page 6

Revised question : Primary heating fuel

Variable name: FINCHTYP

New Value labels :

1 "Gas - Mains"

2 "Gas - Bulk/LPG"

3 "Gas - bottled"

4 "Oil"

5 "Solid fuel - coal"

6 "Solid fuel - smokeless fuel"

7 "Solid fuel - anthracite"

8 "Solid fuel - wood"

9 "Electricity - standard"

10 "Electricity - 7hr tariff"

11 "Electricity - 10hr tariff"

12 "Electricity - 24hr tariff"

13 "Communal - CHP/Waste heat"

14 "Communal - from boiler"

15 "Other fuels - Biomass"

16 "Other fuels - Other renewable"

88 "Question Not Applicable"

99 "Unknown"

Additional question : Describe main renewable heating

Variable name : FINCHDES

Variable label : "Main renewable heating description"

File : services

Preceding variable : FINCHTYP

Value labels :

8 "question not applicable"

9 "unknown"

Missing values : 8, 9

Check:

If a description is entered here, FINCHDES should = 16 (Other fuels - Other renewables). If not, report error: (Renewable fuel described, but non-renewable primary fuel coded).

Revised question : OTHER HEATING: Type of system

Variable name: FINOHTYP

New Value labels :

- 1 "Mains gas - open flue"
- 2 "Mains gas - balances flue"
- 3 "Mains gas - fan assisted"
- 4 "Mains gas - condensing"
- 5 "Mains gas - live effect - sealed to chimney"
- 6 "Mains gas - live effect - fan assisted flue"
- 7 "Mains gas - decorative - open to chimney"
- 8 "Mains gas - flueless"
- 9 "Mains gas - unknown"
- 10 "LPG - fixed heaters"
- 11 "Electric heaters - panel/convector or radiant heater"
- 12 "Electric heaters - portable"
- 13 "Electric heaters - individual storage heater"
- 14 "Solid fuel heaters - open fire"
- 15 "Solid fuel heaters - stove/space heater"
- 16 "Paraffin - portable heaters"
- 17 "Other renewable"
- 88 "Question Not Applicable"
- 99 "Unknown"

Additional question : Describe other renewable heating

Variable name : FINOHDES

Variable label : "Other renewable heating description"

File : services

Preceding variable : FINOHTYP

Value labels :

- 8 "question not applicable"
- 9 "unknown"

Missing values : 8, 9

Check:

If a description is entered here, FINOHTYP should = 17(Other renewable). If not, report error, (Renewable type described, but non-renewable other type coded).

Page 7:

Revised question : HOT WATER Cylinder insulation thickness

Variable name: FINWHINT

New Value labels :

- 1 "0"
- 2 "12.5mm"
- 3 "25 mm"
- 4 "38 mm"
- 5 "50 mm"
- 6 "75 mm"
- 7 "100 mm"
- 8 "150 mm"
- 88 "Question Not Applicable"
- 99 "Unknown"

Additional question : Is there any evidence of cavity wall insulation in the loft?

Variable name : FLICAVWI

Variable label : "Evidence of CWI in loft?"

File : services

Preceding variable : FLIPROBS

Value labels :

1 "yes

2 "no"

8 "question not applicable"

9 "unknown"

Missing values : 8, 9

Note:

For FLICAVWI missing values should be coded as 9, unless FLIHOFLLT = 3, 4 or 5, or FLITYPES = 4, when missing values should be 8.

Page 9

Additional question : Lift controls accessible to wheelchair user?

Variable name : FCPLFAWU

Variable label : "Lift controls accessible to wheelchair user?"

File : common

Preceding variable : FCPLFTWK

Value labels :

1 "yes"

2 "no"

8 "question not applicable"

9 "unknown"

Missing value : 8, 9

Check

-If equal to 1 should equal 1. If it does not, report error ("lift recorded as having wheelchair accessible controls but lift does not exist")

Additional question : Lift controls accessible to a visually impaired user?

Variable name : FCPSUVIU

Variable label : "Lift controls accessible to a visually impaired user?"

File : common

Preceding variable : FCPLFAWU

Value labels :

1 "yes"

2 "no"

8 "question not applicable"

9 "unknown"

Missing value : 8, 9

Question removed : Distance of travel

Variable name : FCPFSDIS

File : common

Question removed : state of repair

Variable name : FCPFSREP

File : common

Question removed : type of finishes  
Variable name : FCPFSFIN  
File : common

Question removed : overall safety  
Variable name : FCPFSOVE  
File : common

Additional question : Falls on stairs  
Variable name : FCPHSRST  
Variable label : "HEALTH AND SAFETY - falls on stairs"  
File : common  
Preceding variable : FCPALMPR  
Value labels :  
1 "Significantly lower than average"  
2 "Average risk"  
3 "Significantly higher than average"  
8 "question not applicable"  
9 "unknown"  
Missing values : 8,9

#### Check

-If answer is 3 then "falling on stairs : significantly higher than average" on p20 should be equal to 1 ("yes") and the rest of the "falling on stairs" section on that page should be filled in as appropriate.

Additional question : Falls on the level  
Variable name : FCPHSRON  
Variable label : "HEALTH AND SAFETY - falls on the level"  
File : common  
Preceding variable : FCPHSRST  
Value labels :  
1 "Significantly lower than average"  
2 "Average risk"  
3 "Significantly higher than average"  
8 "question not applicable"  
9 "unknown"  
Missing values : 8,9

#### Check

-If answer is 3 then "falling on level surfaces, etc : significantly higher than average" on p21 should be equal to 1 ("yes") and the rest of the "falling on level surfaces" section on that page should be filled in as appropriate.

Additional question : Falls between levels  
Variable name : FCPHSRBE  
Variable label : "HEALTH AND SAFETY - falls between levels"  
File : common  
Preceding variable : FCPHSRON  
Value labels :  
1 "Significantly lower than average"  
2 "Average risk"  
3 "Significantly higher than average"  
8 "question not applicable"  
9 "unknown"  
Missing values : 8,9

Check

-If answer is 3 then "falling between levels : significantly higher than average" on p21 should be equal to 1 ("yes") and the rest of the "falling between levels" section on that page should be filled in as appropriate.

Additional question : Fire  
Variable name : FCPHSRFI  
Variable label : "HEALTH AND SAFETY - fire"  
File : common  
Preceding variable : FCPHSRBE  
Value labels :  
1 "Significantly lower than average"  
2 "Average risk"  
3 "Significantly higher than average"  
8 "question not applicable"  
9 "unknown"  
Missing values : 8,9

Check

-If answer is 3 then "fire : significantly higher than average" on p22 should be equal to 1 ("yes") and the rest of the "fire" section on that page should be filled in as appropriate.

Additional question : Hot surfaces  
Variable name : FCPHSRHO  
Variable label : "HEALTH AND SAFETY – hot surfaces"  
File : common  
Preceding variable : FCPHSRFI  
Value labels :  
1 "Significantly lower than average"  
2 "Average risk"  
3 "Significantly higher than average"  
8 "question not applicable"  
9 "unknown"  
Missing values : 8,9

Check

-If answer is 3 then "flames, hot surfaces, etc : significantly higher than average" on p22 should be equal to 1 ("yes") and the rest of the "flames, hot surface" section on that page should be filled in as appropriate.

Page 10 – No changes

Page 11

Additional question : number of steps from pavement to entrance of module?

Variable name : FFCSTEPS

Variable label : "ACCESSIBILITY : number of steps from pavement to entrance of module?"

File : shared

Preceding variable : FFCLITTR

Value labels :

1 "1 step"

2 "2 step"

3 "3 steps or more"

7 "No step but slop > 1:20"

8 "level access"

9 "unknown"

Missing value : 8, 9

Check

-If answer is 1, 2 or 3 then the following question (FFCRAMPS) should be answered 1 or 2.

-If answer is 7 or 8 then the following question (FFCRAMPS) should be set to 8 ("question not applicable").

Additional question : space for ramp

Variable name : FFCRAMPS

Variable label : "ACCESSIBILITY : space for ramp?"

File : shared

Preceding variable : FFCSTEPS

Value labels :

1 "yes"

2 "no"

8 "question not applicable"

9 "unknown"

Missing value : 8, 9

Additional question : is path firm and even?

Variable name : FFCPATHS

Variable label : "ACCESSIBILITY : is path firm and even?"

File : shared

Preceding variable : FFCRAMPS

Value labels :

1 "yes"

2 "no"

8 "question not applicable"

9 "unknown"

Missing value : 8, 9

Additional question : is entrance adequately lit?

Variable name : FFCENTRA

Variable label : "ACCESSIBILITY : is entrance adequately lit?"

File : shared

Preceding variable : FFCPATHS

Value labels :

1 "yes"

2 "no"

8 "question not applicable"

9 "unknown"

Missing value : 8, 9

Additional question : is entrance covered?

Variable name : FFCCOVER

Variable label : "ACCESSIBILITY : is entrance covered?"

File : shared

Preceding variable : FFCENTRA

Value labels :

1 "yes"

2 "no"

8 "question not applicable"

9 "unknown"

Missing value : 8, 9

Additional question : Falls on stairs

Variable name : FFCHSRST

Variable label : "HEALTH AND SAFETY - falls on stairs"

File : common

Preceding variable : FFCCOVER

Value labels :

1 "Significantly lower than average"

2 "Average risk"

3 "Significantly higher than average"

8 "question not applicable"

9 "unknown"

Missing values : 8,9

Check

-If answer is 3 then "falling on stairs : significantly higher than average" on p20 should be equal to 1 ("yes") and the rest of the "falling on stairs" section on that page should be filled in as appropriate.

Additional question : Falls on the level

Variable name : FFCHSRON

Variable label : "HEALTH AND SAFETY - falls on the level"

File : common

Preceding variable : FFCHSRST

Value labels :

1 "Significantly lower than average"

2 "Average risk"

3 "Significantly higher than average"

8 "question not applicable"

9 "unknown"

Missing values : 8,9

Check

-If answer is 3 then “falling on level surfaces, etc : significantly higher than average” on p21 should be equal to 1 (“yes”) and the rest of the “falling on level surfaces” section on that page should be filled in as appropriate.

Additional question : Falls between levels

Variable name : FFCHSRBE

Variable label : “HEALTH AND SAFETY - falls between levels”

File : common

Preceding variable : FFCHSRON

Value labels :

1 “Significantly lower than average”

2 “Average risk”

3 “Significantly higher than average”

8 “question not applicable”

9 “unknown”

Missing values : 8,9

Check

-If answer is 3 then “falling between levels : significantly higher than average” on p21 should be equal to 1 (“yes”) and the rest of the “falling between levels” section on that page should be filled in as appropriate.

Page 12 – no changes

Page 13

Acceptable ranges and value labels have changed for the first thirteen questions.

Value labels :

1 “None”

2 “Pre 1945”

3 “1945-1964”

4 “1965-1984”

5 “1985-1990”

6 “1991-1995”

7 “1996-2008”

8 “in progress”

9 “unknown”

Missing value : 9

*Note that the alteration of the bands for these questions may require you to update any checks that relate to these questions.*

Additional question : Exact year of loft conversion

Variable name : FALLOFYR

Variable label : “Exact year of loft conversion”

File : shape

Preceding variable : FALLOFTS

Value labels :

Missing value : 8888, 9999

Check

-The year indicated should agree with the banded year of loft conversion (FALLOFTS). If not report error ("exact date of loft conversion does not agree with banded date of loft conversion")

Additional question : PV panels - front

Variable name : FELPVFFF

Variable label : "FRONT FACE – PV panels"

File : elevate

Preceding variable : FELSOLFF

Value labels :

1 "yes"

2 "no"

8 "question not applicable"

9 "unknown"

Missing value : 8, 9

Additional question : PV panels - left

Variable name : FELPVPLF

Variable label : "LEFT FACE – PV panels"

File : elevate

Preceding variable : FELSOLLF

Value labels :

1 "yes"

2 "no"

8 "question not applicable"

9 "unknown"

Missing value : 8, 9

Additional question : PV panels - right

Variable name : FELPVPRF

Variable label : "RIGHT FACE – PV panels"

File : elevate

Preceding variable : FELSOLRF

Value labels :

1 "yes"

2 "no"

8 "question not applicable"

9 "unknown"

Missing value : 8, 9

Additional question : PV panels - back

Variable name : FELVVPBF

Variable label : "BACK FACE – PV panels"

File : elevate

Preceding variable : FELSOLBF

Value labels :

1 "yes"

2 "no"

8 "question not applicable"

9 "unknown"

Missing value : 8, 9

Additional question : Wind turbines - front  
Variable name : FELWTBFF  
Variable label : "FRONT FACE – wind turbines"  
File : elevate  
Preceding variable : FELVPVFF  
Value labels :  
1 "yes"  
2 "no"  
8 "question not applicable"  
9 "unknown"  
Missing value : 8, 9

Additional question : Wind turbines - left  
Variable name : FELWTBLF  
Variable label : "LEFT FACE – wind turbines"  
File : elevate  
Preceding variable : FELVPVPLF  
Value labels :  
1 "yes"  
2 "no"  
8 "question not applicable"  
9 "unknown"  
Missing value : 8, 9

Additional question : Wind turbines - right  
Variable name : FELWTBRF  
Variable label : "RIGHT FACE – wind turbines"  
File : elevate  
Preceding variable : FELVPVPRF  
Value labels :  
1 "yes"  
2 "no"  
8 "question not applicable"  
9 "unknown"  
Missing value : 8, 9

Additional question : Wind turbines - back  
Variable name : FELWTBBF  
Variable label : "BACK FACE – wind turbines"  
File : elevate  
Preceding variable : FELVPVBBF  
Value labels :  
1 "yes"  
2 "no"  
8 "question not applicable"  
9 "unknown"  
Missing value : 8, 9

Additional question : Is there any evidence from the air bricks of cavity wall insulation

Variable name : FELCAVWI

Variable label : "Evidence of CWI from the air bricks?"

File : elevate

Preceding variable : FELFENBN

Value labels :

1 "yes"

2 "no"

8 "question not applicable"

9 "unknown"

Missing values : 8, 9

Page 14 – no changes

Page 15

Additional question : Closable door between conservatory and dwelling?

Variable name : FEXCONDR

Variable label : "Conservatory - closable door"

File : Interior

Preceding variable : FEXDB2TM

Value labels :

1 "yes"

2 "no"

8 "question not applicable"

9 "unknown"

Missing value : 8, 9

Check

-If this question has been answered as 1 or 2 (yes or no) then either FEXDB1PR or FEXDB2PR (dormers.sav) should equal 1 (yes) *for conservatories* (i.e. type = 6). If both FEXDB1PR and FEXDB2PR are equal to 2 for conservatories, then report error ("Data recorded for conservatory, but conservatory not present").

Additional question : Footprint of conservatory

Variable name : FEXCONFT

Variable label : Conservatory - area in m2

File : Interior

Preceding variable : FEXCONDR

Value labels :

88 "question not applicable"

99 "unknown"

Missing value : 88, 99

Check

-If the answer to this question is > 0 but not 88 or 99 then either FEXDB1PR or FEXDB2PR (dormers.sav) should equal 1 (yes) *for conservatories* (i.e. type = 6). If both FEXDB1PR and FEXDB2PR are equal to 2 for conservatories, then report error ("Data recorded for conservatory, but conservatory not present").

Additional question : Conservatory window type  
Variable name : FEXCONWD  
Variable label : Conservatory - window type  
File : Interior  
Preceding variable : FEXCONFT  
Value labels :  
1 "Single glazed"  
2 "Double glazed"  
8 "question not applicable"  
9 "unknown"  
Missing value : 8, 9

#### Check

-If this question has been answered as 1 or 2 (Single glaze or double glaze) then either FEXDB1PR or FEXDB2PR (dormers.sav) should equal 1 (yes) *for conservatories* (i.e. type = 6). If both FEXDB1PR and FEXDB2PR are equal to 2 for conservatories, then report error ("Data recorded for conservatory, but conservatory not present").

Additional question : conservatory roof  
Variable name : FECCONRF  
Variable label : Conservatory - roof type  
File : Interior  
Preceding variable : FEXCONWD  
Value labels :  
1 "Glass"  
2 "poly"  
8 "question not applicable"  
9 "unknown"  
Missing value : 8, 9

#### Check

-If this question has been answered as 1 or 2 (glass or poly) then either FEXDB1PR or FEXDB2PR (dormers.sav) should equal 1 (yes) *for conservatories* (i.e. type = 6). If both FEXDB1PR and FEXDB2PR are equal to 2 for conservatories, then report error ("Data recorded for conservatory, but conservatory not present").

#### Page 16

Additional question : Are all external doors and windows adequately draft proofed  
Variable name : FEXDFDPR  
Variable label : "Windows & doors draft proofed?"  
File : interior  
Preceding variable : FEXDF2TM  
Value labels :  
1 "yes"  
2 "no"  
8 "question not applicable"  
9 "unknown"  
Missing values : 8, 9

Additional question : Type of plot (first question in the exterior – plot section)

Variable name : FEXPLOTE

Variable label : Type of Plot

File : Around

Preceding variable : addno

Value labels :

1 "private plot exists"

2 "No private or shared plot"

3 "shared plot only"

9 "unknown"

Missing value : 9

Check

-If answer =1 then the remainder of the plot section should be completed. If not, report error ("private plot exists but section not completed")

-If answer = 2 then only the Accessibility, HHSRS and WHQS sections should be completed. If any more than this has been filled in report error ("private plot does not exist but plot details given")

-If answer = 3 then the remainder of the plot section should not be filled in. If any other questions have been filled in report error ("private plot not present but private plot data filled in")

- If answer = 1 or 2 but Accessibility, HHSRS, or WHQS has not been filled in then report error ("Accessibility not filled in" / "HHSRS not filled in" / "WHQS not filled in")

Question removed : Private plot exists

Variable name : FEXPLOTE

File : Around

*This question has been replaced by Fexpltyp*

Additional question : number of steps from gate/pavement to entrance?

Variable name : FEXNOSTP

Variable label : "ACCESSIBILITY : number of steps from pavement/gate to entrance"

File : around

Preceding variable : FEXDFDPR

Value labels :

1 "1 step"

2 "2 step"

3 "3 steps or more"

7 "No step but slop > 1:20"

8 "level access"

9 "unknown"

Missing value : 8, 9

Check

-If Ffcastep = 1, 2 or 3 then the following question should be answered 1 or 2. If 7 or 8 then the following question should be set to 8 ("question not applicable").

Additional question : space for ramp  
Variable name : FEXSPARP  
Variable label : "ACCESSIBILITY : space for ramp?"  
File : around  
Preceding variable : FEXNOSTP  
Value labels :  
1 "yes"  
2 "no"  
8 "question not applicable"  
9 "unknown"  
Missing value : 8, 9

Additional question : is entrance covered?  
Variable name : FEXDESEC  
Variable label : "PATH : is entrance covered?"  
File : around  
Preceding variable : FEXDESFE  
Value labels :  
1 "yes"  
2 "no"  
8 "question not applicable"  
9 "unknown"  
Missing value : 8, 9

Additional question : Falls on stairs  
Variable name : FEXHSRST  
Variable label : "HEALTH AND SAFETY - falls on stairs"  
File : around  
Preceding variable : FEXSUITA  
Value labels :  
1 "Significantly lower than average"  
2 "Average risk"  
3 "Significantly higher than average"  
8 "question not applicable"  
9 "unknown"  
Missing values : 8,9

Check

-If answer r= 3 then "falling on stairs : significantly higher than average" on p20 should be equal to 1 ("yes") and the rest of the "falling on stairs" section on that page should be filled in as appropriate.

Additional question : Falls on the level  
Variable name : FEXHSRON  
Variable label : "HEALTH AND SAFETY - falls on the level"  
File : around  
Preceding variable : FEXHSRST  
Value labels :  
1 "Significantly lower than average"  
2 "Average risk"  
3 "Significantly higher than average"  
8 "question not applicable"  
9 "unknown"  
Missing values : 8,9

Check

-If answer = 3 then "falling on level surfaces, etc : significantly higher than average" on p21 should be equal to 1 ("yes") and the rest of the "falling on level surfaces" section on that page should be filled in as appropriate.

Additional question : Falls between levels

Variable name : FEXHSRBE

Variable label : "HEALTH AND SAFETY - falls between levels"

File : around

Preceding variable : FEXHSRON

Value labels :

1 "Significantly lower than average"

2 "Average risk"

3 "Significantly higher than average"

8 "question not applicable"

9 "unknown"

Missing values : 8,9

Check

-If answer = 3 then "falling between levels : significantly higher than average" on p21 should be equal to 1 ("yes") and the rest of the "falling between levels" section on that page should be filled in as appropriate.

Additional question : Provision for external drying line

Variable name : FEXEXDRY

Variable label : "Provision for external drying line"

File : around

Preceding variable : FEXEXSTO

Value labels :

1 "yes"

2 "no"

8 "question not applicable"

9 "unknown"

Missing value : 8, 9

Additional question : Is rear garden easy to maintain?

Variable name : FEXMAINT

Variable label : "rear garden : easy to maintain?"

File : around

Preceding variable : FEXEXIFP

Value labels :

1 "yes"

2 "no"

8 "question not applicable"

9 "unknown"

Missing value : 8, 9

Additional question : Is rear garden reasonably private  
Variable name : FEXPRIVA  
Variable label : "Rear garden : reasonably private?"  
File : around  
Preceding variable : FEXMAINT  
Value labels :  
1 "yes"  
2 "no"  
8 "question not applicable"  
9 "unknown"  
Missing value : 8, 9

Additional question : Is rear garden safe and suitable for children to play?  
Variable name : FEXSUITA  
Variable label : "Rear garden : safe and suitable for children to play?"  
File : around  
Preceding variable : FEXPRIVA  
Value labels :  
1 "yes"  
2 "no"  
8 "question not applicable"  
9 "unknown"  
Missing value : 8, 9

Additional question : "Is off plot parking located within 30m of the entrance to dwelling / module with an even access route of less than 1:12"  
Variable name : FCUOFFPP  
Variable label : "Is of plot parking within 30m with even access and <1:12 slope?"  
File : around  
Preceding variable : FCUSTR  
Value labels :  
1 "yes"  
2 "no"  
8 "question not applicable"  
9 "unknown"  
Missing value : 8, 9

Additional question : Cavity wall insulation summary - area around meters  
Variable name : FCUWIAR  
Variable label : "Cavity wall insulation summary - area around meters"  
File : around  
Preceding variable : FCUOFFPP  
Value labels :  
1 "yes"  
8 "question not applicable"  
Missing value : 8

Additional question : Cavity wall insulation summary – Loft space  
Variable name : FCUWILO  
Variable label : “Cavity wall insulation summary – Loft space”  
File : around  
Preceding variable : FCUWIAR  
Value labels :  
1 “yes”  
8 “question not applicable”  
Missing value : 8

Additional question : Cavity wall insulation summary – elevation features  
Variable name : FCUCWIEL fcwichef  
Variable label : “Cavity wall insulation summary – elevation features”  
File : around  
Preceding variable : FCUWILO  
Value labels :  
1 “yes”  
8 “question not applicable”  
Missing value : 8

Additional question : Cavity wall insulation summary – air bricks  
Variable name : FCUCWIAI  
Variable label : “Cavity wall insulation summary – air bricks”  
File : around  
Preceding variable : FCUCWIEL  
Value labels :  
1 “yes”  
8 “question not applicable”  
Missing value : 8

Additional question : Have you seen evidence of cavity wall insulation?  
Variable name : FCUCWIEV  
Variable label : “Have you seen evidence of cavity wall insulation?”  
File : around  
Preceding variable : FCUCWIAI  
Value labels :  
1 “yes”  
2 “no”  
8 “question not applicable”  
Missing value : 8.

Page 18 – no changes

Page 19 – no changes

Page 20 – 22

See the special documentation for the new Health and safety section

Page 23 (formerly page 20) – no changes

## **Appendix 34 Derived variables specification**

**Living in Wales Property Survey 2008 - Derived Variables**

Variable Name	Variable Label	Value Labels	Missing Values	Measurement Level	Specification
pr30	Time taken for survey (derived variable)	1 Under 30 mins 2 30 - 44 mins 3 45 - 59 mins 4 60 - 74 mins 5 75 mins or more 9 Unknown	9	Nominal	Compute time from each visit (visit1-6) - finish time minus start time (in minutes) Recode visit1-6 (missing to zeros) Combine visit variables into a single visit variable (allvisits) Recode allvisist variable into derived variable (pr30) using appropriate value labels and with missing values coded to 9
pr31	Number of items unfit (derived variable)	0 None 12 One or more not answered	12	Nominal	Compute new fitness variables (fitness1-11) based on fitness variables on survey form (fffvenfa, ffflitfa, fffhetfa, fffwatfa, fffodfa, fffbatfa, ffflooff, fffdraf, fffdisfa, fffdama, fffstafa). Recode new fitness variables - unfit = 1, everything else =0. Compute derived variable (pr31) based on the sum of fitness1-11
pr32	Number of items defective (derived variable)	0 None 12 One or more not answered	12	Nominal	Recode new fitness variables - defective = 1, everything else =0. Compute derived variable (pr32) based on the sum of fitness1-11
pr33	Number of items acceptable (derived variable)	0 None 12 One or more not answered	12	Nominal	Recode new fitness variables - acceptable = 1, everything else =0. Compute derived variable (pr33) based on the sum of fitness1-11
pr34	Number of items satisfactory (derived variable)	0 None 12 One or more not answered	12	Nominal	Recode new fitness variables - satisfactory = 1, everything else =0. Compute derived variable (pr34) based on the sum of fitness1-11 if sum of pr31 to pr34 is not equal to 11, and summary of fitness (ffunffa) indicates no unfitness, recode pr31 to 0. If ffunffa indicates unfitness and sum of pr31 to pr34 is not equal to 11, recode pr31 to 12. if sum of pr31 to pr34 is not equal to 11, recode pr32-34 into 12.
pr42	Number of renewable energies in use at property (derived variable)	0 0 1 1 2 2 3 3 4 4 5 5 6 6 7 7		Ordinal	Compute renewable1 for primary heating fuel (Finchtyp) - Biomass (15) and other renewable (16) =1, everything else =0 Compute renewable2 for other heating (Finohtyp) - other renewable (17) =1, everything else =0 Compute renewable3 for presence of solar panels (Felsol) - if solar panels present on front, back, left or right elevations = 1, 0 if not Compute renewable4 for presence of PV panels (Felpvp) - if PV panels present on front, back, left or right elevations = 1, 0 if not Compute renewable5 for presence of wind turbines (Felwtb) - if wind turbines present on front, back, left or right elevations = 1, 0 if not Compute pr42 = sum of renewable1 to renewable5

# Appendix 35 Property Survey weighting approach

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## 2008 LIW Property Survey: Weighting and Grossing Strategy

A grossing weight is only applied to properties which participated in the property survey. The weight, by default, of all other addresses is set to zero.

All properties are divided into 20 cells based on two criteria:

- (1) The condition of the property (whether good, bad, ugly or not visible)
- (2) The Tenure / Age of the property defined as follows:
  - a. If the householder owns the property and lives at home then the following categories are defined:
    - i. Properties built upto 1944
    - ii. Properties built between 1945 and 1964
    - iii. Properties build 1965 onwards
  - b. If the householder doesn't own the property or is not present, then two further categories are defined:
    - i. Properties built upto 1944
    - ii. Properties build 1945 onwards.

Therefore, five categories are defined:

1. Owner – property built before 1945
2. Owner – property built 1945 – 1964 (inclusive)
3. Owner – property built 1965 onwards
4. Renter – property built before 1945
5. Renter – property built 1945 onwards

These five categories combined with the condition of the property are used to define the 20 cells.

The final grossed estimates from the household survey grossing exercise are then summed within each cell for all properties included in the property survey and compared to the total grossed figure for *\*all\** households contained in the household survey (as a measure of the population). A correcting weight is then calculated for each cell on the following basis:

*Correcting weight = Sum of Grossing Weights for all households divided by Sum of Grossing Weights for all households included in the property survey*

For each of the 20 cells

This weight is then multiplied to the original final grossing weight for each household which participated in the property survey to give a final grossing weight for each property.

The sum of these weights is therefore equal to the sum of the grossing weights in the household survey (i.e. the population estimate).

## **Appendix 36 SPSS data file specification**

# Living in Wales Property Survey 2008

## Data Specification Document

*June 2008*

This document details the specification for the property data files to be supplied to the Data Unit by Ipsos MORI for the Living in Wales Property Survey 2008.

<b>Subject</b>	<b>Comments</b>
Data Structure	<p>Data to be supplied in 28 SPSS *.sav files:</p> <ul style="list-style-type: none"><li>• Amenities</li><li>• Around plot</li><li>• Chimney</li><li>• Common access</li><li>• Common parts</li><li>• Damp proof course</li><li>• Doors</li><li>• Dormers</li><li>• Elevation features</li><li>• First impression</li><li>• Fitness</li><li>• Flat details</li><li>• Interior</li><li>• Internal rooms</li><li>• Number of flats</li><li>• Plot levels</li><li>• Plot boundary wall</li><li>• Roof covering</li><li>• Roof features</li><li>• Roof structure</li><li>• Services</li><li>• Shape</li><li>• Shared facilities/services</li><li>• Structure</li><li>• Wall finish</li><li>• Wall structure</li><li>• Windows</li><li>• Derived variables*</li></ul> <p>The variables within each file should relate directly to the title of that file. They should be based on the 2004 files where possible. <i>The original 2004 files have been updated by the Data Unit. It is these files that the 2008 files should be based on.</i> The exact variables required in each file will be confirmed at the Data Output Specification stage of data delivery.</p> <p><i>* The Derived variable file is not a raw data file. The first supply will be after the main data files are cleared.</i></p>

File Structure

The following table specifies how many records per case each file will have. Also the filter variables for necessary files:

File name	Record(s) per case	Filter var name	Filter var title
Amenities	1		
Around plot	1		
Chimney	2	FEXCSTYPE	Chimney - type
Common access	3	FCPACCES	Common parts - accessway
Common parts	1		
Damp proof course	3	FEXDPTYPE	Damp proof course - type
Doors	3	FEXDFTYPE	Doors - type
Dormers	7	FEXDBTYPE	Dormers and bays - type
Elevation features	1		
First impression	1		
Fitness	1		
Flat details	1		
Interior	1		
Internal rooms	5	FINROOM	Interior - room
Number of flats	1		
Plot levels	2	FEXPVIEW	Plot - view of plot
Plot boundary wall	5	FEXBWTYPE	Boundary wall - type
Roof covering	8	FEXRCTYPE	Roof covering - type
Roof features	5	FEXRFTYPE	Roof features - type
Roof structure	4	FEXRSTYPE	Roof structure - type
Services	1		
Shape	1		
Shared facilities/services	1		
Structure	1		
Wall finish	7	FEXWFTYPE	Wall finish - type
Wall structure	8	FEXWSTYPE	Wall structure - type
Windows	7	FEXWNTYPE	Windows - type
Derived variables*	1		

File naming	<p>Files should be named according to the convention shown below. The filenames should include the draft number, survey year, subject, data stage (first X cases, initial, intermediate, grossed or final) and date of supply.</p> <p>For example: d1_amenities_initial_data_071231.sav</p> <p>The draft number will only become a version number when the stage of data is signed off.</p> <p>For example: v1_amenities_intermediate_data_080331.sav</p>								
Data output specification document	<p>Prior to the supply of the data files, a data output specification document will be supplied by Ipsos MORI. This will specify the variable names, labels, levels/measures and value labels to be used in each of the 28 SPSS *.sav files. The DoS will be in Excel format.</p>								
Data supply	<p>The data files are to be supplied as follows:</p> <p><b>First X cases</b> – First X cases for 27 data files. The derived variable file is not included at this stage.</p> <p><b>Initial data</b> – All cases for 27 data files. The derived variable file is not included at this stage.</p> <p><b>Intermediate data</b> – All cases for each of the 28 data files, including the derived variable file.</p> <p><b>Grossed data</b> - All cases for each of the 28 data files including merged variables and grossing factors.</p> <p><b>Final data</b> – Final signed off data for each of the 28 data files.</p>								
Standard merged variables	<p>The following variables are to be merged into each data file, excluding the Derived Variable file, at the 'grossed' level data supply.</p> <table border="1" data-bbox="445 1440 1402 1574"> <tr> <td>GR2</td> <td>Property survey grossing factor</td> </tr> <tr> <td>hv21r1</td> <td>Tenure (derived variable)</td> </tr> <tr> <td>FODCONST</td> <td>Dwelling description - construction date</td> </tr> <tr> <td>FFFUNFFA</td> <td>Summary of fitness</td> </tr> </table>	GR2	Property survey grossing factor	hv21r1	Tenure (derived variable)	FODCONST	Dwelling description - construction date	FFFUNFFA	Summary of fitness
GR2	Property survey grossing factor								
hv21r1	Tenure (derived variable)								
FODCONST	Dwelling description - construction date								
FFFUNFFA	Summary of fitness								

Specific merged variables

The following variables are to be merged into the Derived Variable file at the 'grossed' level data supply. This will enable relatively easy, and correct, merging between the Property and Household data.

Variable name	Variable label
GR2	Property survey grossing factor
av2	Overall condition of property (derived variable)
av4	Assembly Economic Fora Area (derived variable)
av6a	Urban/rural classification - morphology (derived variable)
av6b	Urban/rural classification - context (derived variable)
av6c	Urban/rural classification - combined (derived variable)
av7	Unitary Authority (geographical order) (derived variable)
av11	Postcode area (derived variable)
av12	Police region (derived variable)
av13	Fire brigade region (derived variable)
av14	Lower super output area (derived variable)
pv28	Status in household (derived variable)
hv15	Number of people in household aged under 5 (derived variable)
hv16r2	Number of dependent children in household aged under 16 or 16-18 in full-time education, including respondent (derived variable)
hv17	Vulnerable households (those with a child under 16 years or adult over 59 years or adult with long-term limiting illness) (derived variable)
hv21r1	Tenure (derived variable)
hv20r1	Bedroom standard (derived variable)
hv23r2	Type of household (derived variable)
hv30	Sex of household reference person (derived variable)
hv31	Age of household reference person (derived variable)
hv32	Combined age and sex of household reference person (derived variable)
hv105	Workless households (derived variable)
FODDTYPE	Dwelling description - dwelling type
FODCONST	Dwelling description - construction date
FFFUNFFA	Summary of fitness

<p>Standard variable names</p>	<p>Typically the variable names are derived from the position of the data item on the form.</p> <p>The preferred method of naming variables is as follows:</p> <ul style="list-style-type: none"> <li>• the first three characters denote the section of the form;</li> <li>• the next two provide a column reference; and</li> <li>• the last two provide a row reference.</li> </ul> <p>Obviously this is not an exact science and is determined by the formatting of each page of the form.</p> <p>Examples of variable names:</p> <table border="1" data-bbox="445 555 1401 730"> <thead> <tr> <th>Variable name</th> <th>Variable label</th> </tr> </thead> <tbody> <tr> <td>FEXWF1TE</td> <td>Wall finish: Front - area (tenths)</td> </tr> <tr> <td>GR2</td> <td>Property survey grossing factor</td> </tr> <tr> <td>FFFDAMP</td> <td>Summary of fitness: Unfit reasons - dampness</td> </tr> </tbody> </table> <p>Where the same data is collected for multiple views of a dwelling the variable names should basically be the same except for a differential number, denoting the view. This number should be before the row reference. 1 is usually Front, 2 Back.</p> <p>Examples of variable names with view:</p> <table border="1" data-bbox="445 956 1401 1097"> <thead> <tr> <th>Variable name</th> <th>Variable label</th> </tr> </thead> <tbody> <tr> <td>FEXWF1AG</td> <td>Wall finish: Front – age</td> </tr> <tr> <td>FEXWF2AG</td> <td>Wall finish: Back – age</td> </tr> </tbody> </table> <p>Most variable names are uppercase. Variable names <b>must</b> be unique.</p> <p>Variable names <b>should</b> be consistent with the revised 2004 files where questions appear in both years.</p>	Variable name	Variable label	FEXWF1TE	Wall finish: Front - area (tenths)	GR2	Property survey grossing factor	FFFDAMP	Summary of fitness: Unfit reasons - dampness	Variable name	Variable label	FEXWF1AG	Wall finish: Front – age	FEXWF2AG	Wall finish: Back – age
Variable name	Variable label														
FEXWF1TE	Wall finish: Front - area (tenths)														
GR2	Property survey grossing factor														
FFFDAMP	Summary of fitness: Unfit reasons - dampness														
Variable name	Variable label														
FEXWF1AG	Wall finish: Front – age														
FEXWF2AG	Wall finish: Back – age														
<p>Derived variable names</p>	<p>Derived variables are to be named prvX, where X is the differential number. This is a change from 2004, when property derived variables had the format pvX. This is being implemented to avoid confusion with the Household Survey person derived variables which also have the format pvX.</p> <p>Examples of how DVs are to be named:</p> <table border="1" data-bbox="445 1518 1401 1659"> <thead> <tr> <th>Variable name</th> <th>Variable label</th> </tr> </thead> <tbody> <tr> <td>prv37</td> <td>Poor ventilation (derived variable)</td> </tr> <tr> <td>prv40</td> <td>Unfitness and lack of amenity (derived variable)</td> </tr> </tbody> </table>	Variable name	Variable label	prv37	Poor ventilation (derived variable)	prv40	Unfitness and lack of amenity (derived variable)								
Variable name	Variable label														
prv37	Poor ventilation (derived variable)														
prv40	Unfitness and lack of amenity (derived variable)														

Standard variables	<p>Each file must contain the following variables.</p> <table border="1" data-bbox="443 253 1402 396"> <thead> <tr> <th data-bbox="443 253 695 327">Variable name</th> <th data-bbox="700 253 1402 327">Variable label</th> </tr> </thead> <tbody> <tr> <td data-bbox="443 333 695 362">addno</td> <td data-bbox="700 333 1402 362">Address number</td> </tr> <tr> <td data-bbox="443 369 695 396">hhno</td> <td data-bbox="700 369 1402 396">Household number</td> </tr> </tbody> </table>	Variable name	Variable label	addno	Address number	hhno	Household number
Variable name	Variable label						
addno	Address number						
hhno	Household number						
Variable formats	<p>Variables should be formatted to the minimum width necessary i.e. f1.0 if up to 9 answer values.</p> <p>Where variables are measured in square metres, cubic metres, tenths of area or percent there should not be any decimal places provided. Where variables are measured in m one decimal place is needed.</p>						

Variable labels	<p>Variable labels should describe the data they contain such that they appear as usable titles for data tables.</p> <p>Variable labels should start with a capital letter.</p> <p>Any additional text that appears after a colon i.e. after the section name should begin with a capital letter.</p> <p>Any additional text that appears after a hyphen should not start with a capital letter (unless it is an acronym or words that should always appear in upper case e.g. 'I'). For example:</p> <ul style="list-style-type: none"> <li>• Drinking water: Before stopcock – pipework seen</li> </ul> <p>Units of measure should be contained within brackets and should be denoted as follows (superscript is not possible in SPSS syntax):</p> <ul style="list-style-type: none"> <li>• Square metres - sq.m</li> <li>• Cubic m – cu.m</li> <li>• Tenths - tenths</li> <li>• Tenths of area – tenths of area</li> <li>• Metres - m</li> <li>• Litres - l</li> <li>• Percentages – per cent</li> <li>• Years - years</li> </ul> <p>A consistent approach should be taken with any further units of measure. This should be agreed in advance.</p> <p>Examples:</p> <table border="1" data-bbox="443 1093 1406 1339"> <thead> <tr> <th>Variable name</th> <th>Variable label</th> </tr> </thead> <tbody> <tr> <td>FINPIPEB</td> <td>Drinking water: Before stopcock – pipework seen</td> </tr> <tr> <td>FEXCS1PR</td> <td>Chimney: Front - present</td> </tr> <tr> <td>FINCLGRN</td> <td>Interior: Ceilings - take down &amp; renew (sq.m)</td> </tr> <tr> <td>FEXRS1TE</td> <td>Roof structure: Front - area (tenths)</td> </tr> <tr> <td>FFFUNFFA</td> <td>Summary of fitness</td> </tr> </tbody> </table> <p>For derived variables, there should be a '(derived variable)' suffix to the variable label. See examples below.</p> <table border="1" data-bbox="443 1464 1406 1608"> <thead> <tr> <th>Variable name</th> <th>Variable label</th> </tr> </thead> <tbody> <tr> <td>prv31</td> <td>Number of items unfit (derived variable)</td> </tr> <tr> <td>prv41</td> <td>WHQS pass (derived variable)</td> </tr> </tbody> </table>	Variable name	Variable label	FINPIPEB	Drinking water: Before stopcock – pipework seen	FEXCS1PR	Chimney: Front - present	FINCLGRN	Interior: Ceilings - take down & renew (sq.m)	FEXRS1TE	Roof structure: Front - area (tenths)	FFFUNFFA	Summary of fitness	Variable name	Variable label	prv31	Number of items unfit (derived variable)	prv41	WHQS pass (derived variable)
Variable name	Variable label																		
FINPIPEB	Drinking water: Before stopcock – pipework seen																		
FEXCS1PR	Chimney: Front - present																		
FINCLGRN	Interior: Ceilings - take down & renew (sq.m)																		
FEXRS1TE	Roof structure: Front - area (tenths)																		
FFFUNFFA	Summary of fitness																		
Variable name	Variable label																		
prv31	Number of items unfit (derived variable)																		
prv41	WHQS pass (derived variable)																		

Value labels	<p>Value labels start with a capital letter. Value labels are generally the answer options used by surveyors and are usually taken direct from the form.</p> <p>An example from 2004 is FINCLDAC, Kitchen: Cold water supply - action. The value labels include 1= None, 2= Minor repair, 3= Major repair, 4= Replace, 5= Install as denoted on the form.</p> <p>Value labels for yes/no questions should be 1 Yes and 2 No.</p> <p>An example from 2004 is FINHOTPR, Kitchen: Hot water - present. The value labels include 1= Yes and 2= No.</p> <p>To denote Section not applicable, Question not applicable or Unknown value labels 7, 8 and 9 respectively should be used. Where the variable has a width of more than one digit then each digit (before or after the decimal place) should be a 7,8 or 9. See examples below.</p> <p>7= Section not applicable  8= Question not applicable  9= Unknown</p> <p>77.7= Section not applicable  88.8= Question not applicable  99.9= Unknown</p>
"Not applicable"	Wherever necessary the term Not applicable should be used rather than N/A.

Variable levels / measures	<p>Nominal - A variable can be treated as nominal when its values represent categories with no intrinsic ranking.</p> <p>Example:  FINBATFL, Bathroom: Bath - location  01 – First floor  02 – Second floor  88 – Question not applicable  99 – Unknown  BB – Basement  GG - Ground</p> <p>Ordinal - A variable can be treated as ordinal when its values represent categories with some intrinsic ranking. Variables that deal with some orders should be categorised as such even if they contain some “not applicable” or “unknown” categories at one end of the list.</p> <p>Example:  FINWHSIZ, Hot water- Volume of cylinder (l)  1= 110  2= 140  3= 210  4= 245</p> <p>Scale - A variable can be treated as scale when its values represent ordered categories with a meaningful metric. This should be used anywhere where a variable will not be given value labels.</p> <p>Example:  FEXRC1RN, Roof covering front –renew (sq.m)  77.7= Section not applicable  88.8= Question not applicable  99.9= Unknown</p> <p>For each variable there is a common-sense aspect to the choice of variable level/measure. Some variables may lend themselves to more than one level/measure.</p>
Variable types	<p>Variables are numeric. The only exceptions are variables that record a location</p> <p>Example:  FINBATFL, Bathroom: Bath - location  01 – First floor  02 – Second floor  88 – Question not applicable  99 – Unknown  BB – Basement  GG - Ground</p>
Sort order	<p>Cases in all 28 data files should be sorted in ascending order by address number (addno).</p>

System missing	Data is set as system missing where a question has not been asked due to correct operation of routing.																								
Routing errors	<p>Data items missed due to error should have a particular value and have a label that describes the error. This value should, where possible, be consistent across each of the variables in the 28 data files.</p> <p>Example -9 = Not asked due to routing error</p>																								
Variable order	<p>The address number (addno) and household number (hhno) are to be the first two variables in each dataset.</p> <p>The subject variables should follow a logical order: initially grouped by subject and subsequently ordered by their position on the form and further groupings.</p> <p>Examples of order:</p> <table border="1" data-bbox="445 795 1404 1272"> <thead> <tr> <th data-bbox="448 799 719 869">Variable name</th> <th data-bbox="724 799 1401 869">Variable label</th> </tr> </thead> <tbody> <tr> <td data-bbox="448 875 719 904">FINLIVEX</td> <td data-bbox="724 875 1401 904">Interior: Living room - present</td> </tr> <tr> <td data-bbox="448 911 719 940">FINLIVLE</td> <td data-bbox="724 911 1401 940">Interior: Living room - level</td> </tr> <tr> <td data-bbox="448 947 719 976">FINLIVFU</td> <td data-bbox="724 947 1401 976">Interior: Living room - function</td> </tr> <tr> <td data-bbox="448 983 719 1012">FINLIVIN</td> <td data-bbox="724 983 1401 1012">Interior: Living room - inspected</td> </tr> <tr> <td data-bbox="448 1019 719 1048">FINLIVCL</td> <td data-bbox="724 1019 1401 1048">Interior: Living room - ceiling height (m)</td> </tr> <tr> <td data-bbox="448 1055 719 1084">FINLIVWI</td> <td data-bbox="724 1055 1401 1084">Interior: Living room - width (m)</td> </tr> <tr> <td data-bbox="448 1090 719 1120">FINLIVDE</td> <td data-bbox="724 1090 1401 1120">Interior: Living room - depth (m)</td> </tr> <tr> <td data-bbox="448 1126 719 1173">FINLIVSU</td> <td data-bbox="724 1126 1401 1173">Interior: Living room - serious underestimation of size</td> </tr> <tr> <td data-bbox="448 1180 719 1209">FFFVENFA</td> <td data-bbox="724 1180 1401 1209">Final fitness assessment - ventilation</td> </tr> <tr> <td data-bbox="448 1216 719 1245">FFFLITFA</td> <td data-bbox="724 1216 1401 1245">Final fitness assessment - lighting</td> </tr> <tr> <td data-bbox="448 1252 719 1281">FFFHETFA</td> <td data-bbox="724 1252 1401 1281">Final fitness assessment - heating</td> </tr> </tbody> </table> <p>Any derived variables in the files should be positioned after both the address identifiers and the normal subject variables.</p> <p>The standard merged variables are to be included at the end of each file. They should appear in the order specified in the 'Standard merged variables' table above.</p> <p>Any specific merged variables in a file should appear in the order specified in the 'Specific merged variables' table above.</p>	Variable name	Variable label	FINLIVEX	Interior: Living room - present	FINLIVLE	Interior: Living room - level	FINLIVFU	Interior: Living room - function	FINLIVIN	Interior: Living room - inspected	FINLIVCL	Interior: Living room - ceiling height (m)	FINLIVWI	Interior: Living room - width (m)	FINLIVDE	Interior: Living room - depth (m)	FINLIVSU	Interior: Living room - serious underestimation of size	FFFVENFA	Final fitness assessment - ventilation	FFFLITFA	Final fitness assessment - lighting	FFFHETFA	Final fitness assessment - heating
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