

# INSPECTION METHODOLOGY

by

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No one can be an expert in all aspects of home construction, but you can be a specialist in the inspection process. By following a logical sequence of events one can reduce the risk of omission while remaining economical in terms of time and effort on the job. The methodology or field procedures you establish and follow through habit should insure through consistency that every system and component is inspected with the same level of concern. Consider the similarities of the following two definitions as you read this article:

**Standards of Practice:** An established procedure to be followed for a given operation or situation.

**Methodology:** The system of principles, practices, and procedures applied to a specific branch of knowledge.

The methodology we use to apply of our knowledge must mirror the standards for each aspect of the inspection. Let me explain. As home inspectors, we go about our profession with delighted interest. Each house presents a similar set of circumstances and a unique opportunity for discovery. We demonstrate to our clients that an organized approach has great value and is the key to not over-looking something important. But, did you ever step back and contemplate just what your approach is? Is your approach the best way? What does the other guy do?

What you actually do, where you go next, in what order you observe and what items you evaluate and report on constitutes a "methodology" worth review and constant improvement. A good inspector is one who has established a sound methodology but is not afraid to change with further training. He has the ability to observe, to apply his knowledge and to report accurately what he sees; but he is not inflexible when presented with a better approach. No inspector can be an expert in every area of home construction, but you can be a specialist in the inspection process if your methodology continues to grow and evolve.

One of the purposes of the "Standards of Practice" is to "**provide inspection guidelines**". However, the standards of practice do not necessarily provide a methodology for consistent field practice when performing a home inspection. The standards are simply minimum guidelines that require the inspector to observe and report on minimal specified systems or components. How you apply the standards of practice while on-the-job is you're individual methodology or field practice. Most of us, by choice, utilize a methodology that far exceeds the standards.

A methodology is a system of principles, practices and procedures applied to a specific branch of knowledge. Seasoned home inspectors follow an established methodology or standard approach when inspecting a building and applying their knowledge. Call it a habit, field practice or routine

## INSPECTION METHODOLOGY

approach, but each of us follow a set procedure by conscious or sub-conscious preference. The trick is to establish a procedure for each operation or situation while adhering to the guidelines outlined in the standards of practice. To achieve this objective, an organized approach is needed following worksheets and established methods. Such practiced methodology will insure that items of consequence are observed, evaluated and reported with consistency. Preoccupation and distraction can easily lead an inspector astray, but sticking to the pathway of practiced methodology will insure that contractual agreements are fulfilled and limit the risk of liability caused by negligent omission.

Establishing a sound methodology requires on-site training and continuing education. ASHI, New England educational seminars and on-site report writing workshops offered by Mel Chalfan provide members with great opportunity to both learn and compare and contrast methodology. I urge you to refine your methodology through conscious scrutiny, education and sharing with other ASHI members.

To develop a sound methodology, one must learn to ask yourself pertinent questions about each observation and must recognize the "red flags" of tell-tale problems. Methodology can be imposing unless the inspection process is organized and sub-divided. For example, each house, regardless of size, can be easily inspected with similar methodology if it is divided into its component parts, such as those items listed in the "standards of practice" (i.e. exterior, roof, mechanical systems, structure etc.) Inspect those items that are absolutely essential but remember that nothing is unimportant. Train yourself where to look.

Some "**rules of thumb**" for establishing a sound inspection methodology include:

1. Case the neighborhood. Inspect the exterior of the home first. Get the over-all "big picture" of the building and you will better understand the cause of exterior and interior problems.
2. Inspect by following the original sequence of construction, from the ground up and from first mechanical system installed to last installed.
3. Inspect mechanical systems by starting at the fuel source and following the system to its termination point. Follow a check-list and perform a safety evaluation - CYA.
4. Engage in meaningful discussion with your client whenever necessary and answer all questions, but then return and maintain control of the inspection process where you left off. Talk slowly and concisely and your client will listen.
5. The final written report should mirror the inspection sequence and should document your observations regarding those systems & components required in the standards.
6. Observe, think, write and speak in that order.
7. Maintain a steady speed. Your client is the boss, but you are the professional on-site.

## INSPECTION METHODOLOGY

8. Give the house a physical exam and be critical of what you look at.
9. Document what you can and can't observe and why, plus what you suspect.
10. Be true to your profession! If you don't know, SAY SO! Give your client direction and refer them to the applicable professional when the situation warrants.

In closing, I urge you to stop and think about what you do on-site, what order you do it in and how you can improve your methodology to become a better professional. Perhaps other ASHI members with areas of specialization would care to author an article describing their methodology so that we can all compare & contrast and improve together.

[Back HOME](#)