

RICS Practice Alert – UK Home Surveys

Issued by e mail June 2023

RICS is issuing this Practice Alert to **all** RICS members, Regulated Firms and candidates in the UK. Its purpose is to remind regulated members of their professional and regulatory obligations relating to undertaking Home Surveys for consumers, particularly in light of an increasing number of concerns being raised by clients about the quality of Home Surveys being undertaken, including by RICS members. Regulated members are referred to the mandatory Home Survey Standard – [Home survey standard \(rics.org\)](https://www.rics.org/standards-and-guidance/home-survey-standard) and [Rules of Conduct Rules of Conduct \(rics.org\)](https://www.rics.org/standards-and-guidance/rules-of-conduct) – some of the relevant passages are referred below.

What you need to do now

1. Ensure your clients understand the service they are purchasing, and you have appropriate Professional Indemnity Insurance (PII)
2. Ensure you have appropriate qualifications and experience to undertake Home Surveys
3. Ensure you have knowledge of the location of the property
4. Use RICS templates appropriately
5. Adhere to the Rules of Conduct

More detail on these five mandatory requirements is explained below.

1. Client Relations

RICS members and RICS regulated firms must:

- have a clear understanding of client needs
- have the appropriate knowledge (including that of the locality), skills and experience to provide the agreed service
- ensure potential clients understand the nature of and differences between the levels of service offered so they can make an informed choice
- agree the full details of the terms of engagement with the client before the service is delivered and

- ensure that they have adequate and appropriate professional indemnity insurance to protect consumers of Home Surveys.

2. Qualifications and Experience of RICS members undertaking Home Surveys

To ensure professionals provide a high level of service, RICS members **must be qualified, experienced and able to deliver services by:**

- having knowledge of the tasks to be undertaken and the risks involved
- possessing the experience and ability to carry out their duties in relation to the appropriate level of service and
- identifying their own limitations and taking appropriate action where their knowledge and experience is found to be inadequate.

Where trainee surveyors/students support inspections and contribute to RICS branded reports, they may only do so under the supervision of an RICS member. RICS members need to be able to satisfy themselves and be prepared to demonstrate to RICS that they have complied with all of the mandatory requirements of the Home Survey Standard Professional Statement and the RICS Rules of Conduct, when signing the surveyor's declaration on any RICS branded home survey report.

3. Knowledge of locality and nature of property

RICS members must be familiar with the nature and complexity of the subject property type, the region in which it is situated and relevance to the subject instruction, including:

- common and uncommon housing styles, materials and construction techniques. This is particularly important where services are offered for older and historic buildings where understanding the interaction of different building materials and techniques is essential
- current advice and guidance relating to asbestos and other common deleterious materials
- an awareness of the main principles of modern methods of construction
- environmental issues including publicly available information (see Appendix C of the [Home Survey Standard](#))
- the location of listed buildings and conservation areas/historic centres, the implications of these designations especially in relation to legislation that affects repair and improvement work

- a basic understanding of the type of tenure for the subject property. Where that property is held on a leasehold basis, the RICS member must meet the requirements set out in the Home Survey Standard
 - relevant requirements specified by local and regional government organisations and structures and
 - awareness of the social and industrial heritage relevant to the instruction.
 - although an RICS member with this knowledge may be able to provide all levels of service, those who provide Level Two services on older and/or complex properties, historic buildings and those in a neglected condition and all level three services will require a broader and deeper technical knowledge. Where appropriate, the RICS member **must** decline the instruction if the subject property type is beyond their knowledge and skill level.

4. Use of the RICS Home Survey Templates

The RICS Home Survey Templates are not a substitute or short cut for undertaking surveying observations and providing meaningful advice and recommendations for consumers.

Therefore:

- RICS members and RICS regulated firms are required to obtain [RICS Home Surveys Licences \(rics.org\)](https://www.rics.org) in order to produce RICS branded home surveys, regardless of the report format or template.
- RICS branded reports can only be produced by AssocRICS, MRICS or FRICS members of RICS, with the appropriate surveying experience.
- reports must be factual and unambiguous. It is not appropriate for RICS members and RICS regulated firms to create generic reports using standard phrases that are not relevant to the subject property or helpful to the consumer.
- reports must be property specific and clearly presented with a logical structure.

It is not appropriate to substitute a quality inspection with the inclusion of excessive recommendations for further investigations.

5. Adhere to the RICS Rules of Conduct

- Members and firms must be honest, act with integrity and comply with their professional obligation, including obligations to RICS.
- Members and firms must maintain their professional competence and ensure that services are provided by competent individuals who have the necessary expertise.

- Members and firms must provide good-quality and diligent service.
- Members and firms must treat others with respect and encourage diversity and inclusion.
- Members and firms must act in the public interest, take responsibility for their actions and act to prevent harm and maintain public confidence in the profession.

Why we are issuing this alert

RICS Regulation is seeing an increase in concerns relating to the quality of Home Surveys being undertaken by RICS members. We are also seeing an increase in Home Survey templates being used by non-RICS members which are unregulated by RICS.

Home Surveys are an important step for consumers to have the confidence to buy property, and they must be able to rely on RICS firms and members carrying out this activity to the highest professional standards. In the UK, the Home Survey is a service which many consumers most readily identify as involving an instruction to a RICS member. To ensure public confidence is maintained in the quality and professionalism of RICS members, all members *must* adhere to the [RICS Home Survey Standard](#) when carrying out this work.

If you have concerns about the practice of a RICS firm or member, please let us know by [reporting your concerns](#).

Good Practice Reminder: RICS Regulated Members have a professional duty to promptly disclose the details of any Regulated Member that you reasonably believe may have breached RICS standards. The duty to speak up is an important part of the profession's "moral compass". Think of it as protecting the reputation of your profession, by helping RICS to uphold the public interest.