

Clear for publication

12 June 2018

With various requirements in play for home surveys, Graham Ellis outlines work on a new standard that will clarify the process

Comments from RICS members undertaking home surveys suggest that the market for enquiries and instructions is buoyant, and these often come directly from potential clients.

This is testament to RICS making consumers, stakeholders and the media aware that the valuation is not a survey, along with increased consciousness of, and impending changes in, the way the market operates; for example, last year RICS answered a government call for evidence about [improving the homebuying and selling process](#) .

Surveys have traditionally been a by-product of mortgage valuation applications, with the same practitioner often undertaking the dual role of mortgage valuer and home surveyor. But although these roles require some of the same skills, in practice they have separate rules requiring different approaches.

The most striking is that the client for a mortgage valuation is the lender, and an instruction is mandated by the [RICS Red Book](#) or lender requirements. However, a homebuyer is the client for a home survey that, depending on the service offered, could be governed by a plethora of mandatory and optional guidance.

For example, [RICS? Surveys of residential property](#) is only a guidance note, while the mandatory professional statements only apply to subscribed licence-holders undertaking RICS Condition Reports, HomeBuyer Reports and Building Surveys. Meanwhile, members in Scotland undertake Single Survey work to guidance produced by RICS Scotland that includes mandatory requirements.

This situation not only runs the risk of confusing clients, practitioners and others ? with the potential for complaints ? but the new-found confidence in home surveys could easily unravel. In line with RICS? message of ensuring confidence through professional standards, it is now time to review and reorganise our documentation.

A new standard

Informal feedback from members supports creating a new standard while avoiding further confusion. Consequently, a working group of home survey practitioners met in February to scope out the project and look at consolidating current guidance and information into a single document akin to the Red Book.

Creating the new standard will allow RICS to regulate the sector more effectively against a set of defined principles, while also ensuring surveyors have the flexibility to offer services that suit

their clients and meet their expectations in a consistent way. This is at the heart of the Royal Charter that requires RICS to promote the usefulness of the profession for the advantage of the public in the UK and other parts of the world.

Whether completed in an individual's own format or under an endorsed company or a commercial scheme such as RICS Home Surveys, a home survey report is a product whereas the standard is not, and understanding this difference is key. The new standard will strive to ensure that any home survey by an RICS member or other professional is undertaken to professionally agreed principles, which is important given the renewed government interest in homebuying and selling.

Items for discussion by the working group include the three survey levels in the current RICS guidance note, against which the [RICS Home Surveys](#) services are benchmarked. Are these appropriate for the market? Are home surveyors competent to fulfil them, especially with respect to detailed building surveys? Also to be considered is the alignment of traditional methodologies with new technology, such as hand-held tablets, and up-to-date technical guidance, such as isurv, all supported by requisite CPD and training.

the market for enquiries and instructions is buoyant, and these often come directly from potential clients

The most important factor is the relationship between the client and the home surveyor. Instructions sourced through third parties such as panel management companies will be under particular scrutiny to ensure consumers are best served.

Stakeholder engagement inside and outside RICS is vital to this and will involve corporate and individual home surveyors, RICS departments, portal and panel managers, and consumer organisations. The demand for this new standard comes from our members, and the push to provide quality home surveying services is also evidenced by record numbers of members who have booked for the annual programme of [RICS Surveys in Practice UK](#) roadshows. A series of [RICS Regional Home Survey Question Time](#) events has been organised as well.

The working group will create a document for consultation and publication, and is keen for this to be viewed in valuation circles in the same light as the Red Book is. Work on the document will be proactively led by RICS to serve the UK market, but with the potential to extend into emerging international markets.

[Graham Ellis](#) is the RICS UK Residential Associate Director

Further information

- Related competencies include: [Building pathology](#) , [Inspection](#) , [Valuation](#)
- This feature was taken from [RICS Property Journal](#) (May/June 2018)
- Related categories include: [Building surveying](#)