

Edwards Genesis (Chartered Surveyors) & Brownlow Associates (Chartered Surveyors) Protocol for physical inspections for the purpose of residential (and commercial) valuations and condition-based surveys during COVID-19 (England) – Version 1 - 16th May 2020. This Protocol will be kept under constant review.

based on

RICS recommendations on physical inspections for the purpose of residential valuations and condition-based surveys during COVID-19 (England) – version 1 issued 15th May 2020

and

RICS recommendations on inspections and visits for non-domestic properties COVID-19 (England) – version 1 issued 15th May 2020

1. Introduction and general considerations

The purpose of this policy is to enable Edwards Genesis (Chartered Surveyors) & Brownlow Associates (Chartered Surveyors) as RICS professionals and RICS regulated firms to deliver services to clients safely, consistently and in line with UK government guidelines where it is deemed practical to do so.

It is critical that before any inspections are undertaken RICS professionals and regulated firms consider and assess the most up to date government guidance.

RICS professionals and regulated firms delivering services to clients in England are reminded of the following recently published UK government and industry documents:

- [COVID-19 recovery strategy](#), setting out the timetable for lifting restrictions. The changes to policy in step one came into effect on Wednesday 13 May 2020 in England, and the government has advised that workers who cannot work from home should travel to work if their workplace is open
- the UK government, in consultation with industry, has produced [guidance](#) to help ensure workplaces are as safe as possible, **including specific guidance for [professionals working in other people's homes](#)**
- MHCLG has also updated [guidance on home moving during COVID-19](#)
- Public Health England has issued government guidance on [COVID-19 vulnerable groups](#)
- RICS, alongside UK residential property professional organisations and trade bodies, has been working collaboratively with government to support a safe re-opening of the home moving market while ensuring the safety of everyone involved in it. On Wednesday 13 May 2020, RICS

Edwards Genesis (Chartered Surveyors) & Brownlow Associates (Chartered Surveyors) Protocol for physical inspections for the purpose of residential (and commercial) valuations and condition-based surveys during COVID-19 (England) – Version – 16th May 2020

collectively published [pan-industry practical recommendations](#) for professionals and consumers.

This RICS document builds on government guidelines and focuses on physical inspections where RICS members need to come into contact with people and enter private residential properties for the purpose of a valuation and/or a condition-based survey. **We will also follow the same principles when we carry out any inspections of commercial property.**

RICS professionals and staff in RICS regulated firms need to ensure they continue to provide the highest levels of service while maintaining current social distancing guidelines and that they comply with public health guidance (PHG) issued by the relevant public health body for the location of the services undertaken.

In certain situations, valuations can be done remotely. Where a physical inspection for valuation purposes is required, this can now take place in accordance with government and Public Health England (PHE) social distancing guidelines.

For valuation of properties that are newly built or occupied for the first time, RICS professionals and RICS regulated firms should be aware of the Home Builders Federation [Charter for safe working practice – COVID-19](#).

Any **condition-based survey** will require a physical inspection of the subject property in line with social distancing and PHE guidelines.

In line with recent UK government [guidance for professionals working in other people's homes](#), RICS professionals and RICS regulated firms must ensure that the risk assessment for the business addresses the risks around COVID-19. For firms with fewer than five workers, or for self-employed RICS professionals, there is no obligation to write anything down as part of the risk assessment. There are interactive tools from the Health and Safety Executive ([HSE](#)) available to support firms.

If it is not possible to inspect the property safely (**noting that the “property” is the surveyor’s or valuer’s “workplace” for the duration of any visit**) to the extent required to provide an opinion of value and/or condition on a restricted basis it may be necessary to decline the instruction. If the instruction is accepted, any restrictions to the inspection need to be recorded, agreed where appropriate and highlighted in the report. Where possible, a disclaimer should be included in both the terms and conditions and the report relating to any errors or omissions in the report caused by any inability to inspect relevant areas.

RICS professionals and RICS regulated firms should always consider their safety and the well-being of their employees in their decision-making process.

As the situation and guidance in this area is constantly evolving RICS will update this information regularly.

2. Recommendations before the inspection

RICS professionals and RICS regulated firms should:

- act in a transparent and professional manner with all parties involved
- be clear with the client/occupier about their service and any restrictions to the service as a result of COVID-19 and social distancing guidelines from the government or PHE
- ensure that the obligations in relation to client/consumer confidentiality and GDPR-compliant safe storage of client/consumer information continue to apply, even though some or all staff may be working remotely

Edwards Genesis (Chartered Surveyors) & Brownlow Associates (Chartered Surveyors) Protocol for physical inspections for the purpose of residential (and commercial) valuations and condition-based surveys during COVID-19 (England) – Version – 16th May 2020

- avoid physical contact with clients, and contact clients/consumers by telephone, e-mail or video conferencing platforms
- when liaising with other property professionals avoid physical contact and adhere to current social distancing measures at all times
- minimise physical contact during key handovers when possible and ensure keys are sanitised at each handover
- when organising an inspection of the subject property, check with clients/occupiers whether anyone is either in an [at-risk category or vulnerable group](#), [shielding](#), has or has had COVID-19 symptoms has not yet completed the required period of household self-isolation, or is awaiting test results. Note that this is likely to be sensitive health-related data and must be collected and stored in accordance with data protection legislation. The Information Commissioners Office has published this [guidance](#) for handling data during COVID-19
- secure as much information as possible from the client and/or occupier prior to the visit and as part of the pre-inspection research, including property use, occupancy, location, potential risk to occupants and any other relevant information required for the subject property and instruction; this includes carrying out a pre-inspection risk assessment with the occupier/client
- take all reasonable steps to ensure the client and property occupier is provided with as much information as possible about the visits and service in advance and ensure the inspection, service and arrangements are agreed by all parties prior to the physical inspection
- sanitise equipment in line with current PHG, periodically and as often as practical ask occupiers to prepare for the inspection and share the following recommendations. Please note that this is not an exhaustive list:
 - ✓ if they cannot be out of the property pets to be contained in one room or, if not possible, to be kept at a distance of two metres
 - ✓ when people/families are in occupation, they should maintain social distancing in line with government guidelines
 - ✓ ask the client/occupier to ensure all areas are open or easily accessible (e.g. cellars, lofts, doors and windows in the case of a home survey) to reduce contact with surfaces as much as possible
 - ✓ advise client/occupier the property will be left as presented/found at arrival.
- Examples of pre-inspection health-related questions for clients/occupiers are:
 - ✓ are you in an at-risk or vulnerable category as outlined by the government?
 - ✓ are you or is anyone in your household symptomatic?
 - ✓ have you or anyone in the household tested positive?
 - ✓ have you or anyone in your household been self-isolating in accordance with government and PHE guidelines?
 - ✓ are you able to leave the property for the duration of internal inspection?

More advice is contained within the pan-industry [guidance on safe home moving](#)

It would also help to ask the client, when appropriate, to advise the RICS professional or RICS regulated firm member of staff the questions below:

General -questions to be asked at the initial client enquiry/instruction stage

- ✓ Is the property occupied?
- ✓ What is the current and future use of the property?
- ✓ Are you aware of any issues in the property? If yes, please specify where.
- ✓ What is the broadband service and where is the connection point (if applicable)?

Access – prior to travelling to or immediately upon arrival at the property (ideally be telephone from the car)

- ✓ Where is the electric meter located in the property? The RICS professional will require access.
- ✓ Where is the gas meter located? The RICS professional will require access.
- ✓ Where is the water meter located? The RICS professional will require access.
- ✓ Where is the stopcock located? The RICS professional will require access.
- ✓ Where is the boiler located? The RICS professional will require access.
- ✓ Where is the cold-water storage tank located (if applicable)? The RICS professional will require access.
- ✓ Where is the hot water cylinder located (if applicable)? The RICS professional will require access.
- ✓ Are there any inaccessible areas?
- ✓ Do you have any certification regarding gas and electricity safety?
- ✓ Do you have any guarantees or warranties for windows, boilers, historical damp treatment, extensions?
- ✓ To minimise physical contact, can you share any relevant documents electronically?

3. Recommendations during the inspection

RICS professionals and RICS regulated firms should:

- consider health and safety aspects and any relevant current government advice in relation to travelling to the property, accessing the property, carrying out an inspection and delivering the service
- request that occupiers not be in the property if possible, in order to avoid physical contact and ensure compliance to existing social distancing measures. Consumer recommendations are set out within the [Appendix](#) to the pan-industry guidance on home moving
- adhere to PHE guidelines on cleaning hands thoroughly prior to and upon leaving the property
- comply with current PHE guidelines, ensuring appropriate personal protective equipment (PPE) is utilised prior to entering the property
- only take the equipment and tools actually required for the inspection into the property, according to the service delivered (**provision of a “safe space” for equipment – say in a garage or on a sheet – if available will be of assistance**)
- where the occupier has to be present, request that they follow the government social distancing guidelines
- aim for as minimal an amount of contact with surfaces when inspecting elements of the property as possible
- ensure you keep a record of inspection using appropriate recording equipment, including any limitations of the inspection as a result of restrictions
- ensure you take an adequate number of photographs/videos. These can be especially helpful for restricted/inaccessible areas.

4. Recommendations after the inspection

RICS professionals and RICS regulated firms should:

- wash/sanitise their hands thoroughly and sanitise their equipment
- appropriately dispose of any PPE used during inspection in line with government and PHE guidelines
- communicate the outcome/findings of the inspection appropriately with the client as per the instruction and agreed terms of engagement
- deliver reports in line with current RICS standards and guidance
- ensure that any restrictions of information/advice are made clear and stated in report(s)
- note any limitations to inspection/service delivered as a result of current social distancing measures and health and safety risks, and where possible, include a disclaimer relating to any errors or omissions arising from any limitations to the inspection or service delivered

- highlight any risks and hazards found during the inspection with the client, depending on the level of service.

5. Professional accountability and responsibility

RICS professionals and RICS regulated firms are expected to behave ethically and professionally, while taking adequate steps to consider health and safety at all times for all parties involved.

The government has set out enforcement measures to ensure compliance to social distancing measures. Professionals must adhere to government guidelines at all times.

Please note, in line with current government guidelines, people with symptoms going to work who cannot work from home, can apply to get a test. <https://www.gov.uk/guidance/coronavirus-covid-19-getting-tested>

