

DATA HANDLING POLICY

[General]

Purpose

This policy sets out how Artificial Intelligence (AI) systems may be used within the professional services provided by Propvisory Chartered Building Surveyors – as a practice regulated by the Royal Institution of Chartered Surveyors.

The purpose of this policy is to ensure that any use of AI:

- Supports professional efficiency and quality.
- Maintains professional judgement and accountability.
- Protects client confidentiality and data.
- Complies with professional and legal obligations.
- AI tools are used only as assistive technology and do not replace the professional judgement of the surveyor.

Scope

This policy applies to:

All AI tools used in the course of business operations.

Any automated or machine learning systems used to assist with:

- drafting text
- summarising documents
- research
- administrative tasks
- data analysis

This policy applies to both:

- cloud-based AI systems
- locally installed AI software.

Definition of Artificial Intelligence

For the purposes of this policy, Artificial Intelligence (AI) refers to computer systems capable of performing tasks that typically require human intelligence, including:

- generating text
- analysing data
- recognising patterns
- making predictions or recommendations.

Examples include large language models, document analysis tools, and automated data processing systems.

[Principles Governing Use of AI]

AI use within the practice must comply with the following principles.

Professional Responsibility

The chartered surveyor dealing with a matter remains fully responsible for all professional advice, reports and opinions.

AI outputs must never be relied upon without professional review and verification.

Professional Competence

AI tools may only be used where the surveyor has sufficient understanding of:

- the tool's purpose
- its limitations
- potential risks of error or bias.

Transparency

Where AI has materially assisted in producing a professional output, the surveyor will ensure transparency where appropriate, particularly if the use of AI could affect:

- client understanding
- reliability of the information
- professional advice.

Accuracy and Verification

All AI-generated outputs must be reviewed and checked before use.

Verification may include:

- reviewing underlying sources
- checking calculations or facts
- confirming consistency with professional knowledge.

Confidentiality and Data Protection

Client information must not be entered into AI systems unless:

- the system provides appropriate confidentiality safeguards, and
- doing so complies with data protection legislation including the UK General Data Protection Regulation and the Data Protection Act 2018.

Sensitive or identifiable client data must not be uploaded to public AI tools unless the platform is approved for secure professional use.

Avoidance of Bias and Error

AI tools may produce inaccurate, incomplete, or biased information.

All outputs must therefore be assessed critically using professional judgement.

Permitted Uses of AI

AI may be used to assist with the following tasks:

- drafting routine correspondence
- summarising legislation or case law
- preparing first drafts of reports or documents
- research assistance
- organising notes or information
- generating ideas or outlines
- analysing non-confidential datasets.

AI may also assist with administrative efficiency, provided that professional oversight is maintained.

Prohibited Uses

AI must not be used:

- to generate professional advice without review
- to replace professional judgement
- to produce valuation figures without independent verification
- to analyse confidential documents in unapproved systems
- in any way that would compromise professional integrity or client confidentiality

Human Oversight

All professional outputs must be:

- reviewed
- verified
- approved

by the chartered surveyor before being issued externally.

The surveyor remains responsible for:

- accuracy
- conclusions
- professional advice provided to clients.

Data Security

When using AI systems, the following precautions will be taken:

- avoid entering identifiable client data unless necessary
- use anonymisation where possible
- ensure platforms comply with security standards
- maintain secure storage of documents and outputs.

Record Keeping

Where AI materially contributes to professional work, the surveyor will retain:

- drafts or prompts where appropriate
- supporting sources used to verify outputs
- records demonstrating professional review.

This ensures that professional decisions can be explained if required.

Risk Management

The practice recognises the following potential risks associated with AI:

- factual inaccuracies ("hallucinations")
- hidden bias in training data
- confidentiality risks
- over-reliance on automated outputs.

These risks are mitigated through:

- professional review
- cautious use
- data protection controls.

Client Communication

Clients will be informed if the use of AI:

- materially affects the way services are delivered, or
- raises confidentiality considerations.

However, routine administrative use of AI tools does not require disclosure where professional judgement remains entirely human.

Review of Policy

This policy will be reviewed periodically to reflect:

- developments in AI technology
- updates to professional guidance from the Royal Institution of Chartered Surveyors
- changes in legal or regulatory requirements.

[Responsibility]

Vince Rimmer shall be the person responsible for this policy within the firm.