



# Application Form 2024

## Independent/Freelance Surveyor

## Which category is right for me?

Please read the following definitions to ascertain which category you fall within:

### Surveyor Members

**A Surveyor member is a professional who provides services to the domestic and/or commercial market within the sectors represented by the PCA.**

### Freelance Surveyor Member

A Freelance surveyor is an individual who offers a specialist surveying service but has a **declared Commercial Link** with one or more organisation or individual that derives profit or gain from the undertaking of building preservation work.

### Independent Surveyor Member

**An Independent surveyor** is an individual who offers a specialist surveying service and has **no Commercial Link** or interest with any organisation or individual that derives profit or gain from the undertaking of building preservation work.

**The annual cost of subscriptions for Independent/Freelance Surveyor categories of membership is £400 + VAT.**

## Criteria of membership

### **Independent/Freelance Surveyors must meet the following criteria;**

- ✓ Hold the relevant qualification(s) in the sector they wish to be involved in (further information on Page 4)
- ✓ Have a minimum of 5 years' relevant experience in the industry
- ✓ Hold Professional Indemnity (PI) insurance

**Independent/Freelance Surveyor membership is given to the individual only. If employed by a Surveying practice with more than one Surveyor, each individual Surveyor must undergo the application process in order to gain membership of the PCA.**

**Independent/Freelance Surveyor members must not undertake any remedial works and cannot apply for a separate Contractor membership.**

Following a sector meeting, it was agreed that from 2023 onwards Independent/Freelance Surveyors would undergo a biennial 'audit' to ensure standards are being maintained (as with Contractors) whereby he/she would submit a minimum of 2 x survey reports for review.

## Qualifications

**Applicants must hold the relevant qualification(s) in the sector(s) they wish to be involved in. These are as follows;**

### Timber and Damp

- Certificated Surveyor of Timber & Dampness in Buildings (CSTDB) (*previously the Certificated Surveyor in Remedial Treatments - CSRT*)

### Structural Waterproofing

- Certificated Surveyor in Structural Waterproofing (CSSW)

### Sprayed Foam

- Attendance at the PCA course '*Evaluating Sprayed Polyurethane Foam in Domestic Roofs*' and able to demonstrate technical competence in defects related to timber/dampness in buildings through relevant qualification (i.e CSTDB) or 5+ years' relevant experience.

### Invasive Weeds

- Certificated Surveyor in Japanese knotweed (CSJK)

### Flooding/Structural Repair/Residential Ventilation Sectors

There are currently no formal PCA related qualifications for the Flooding/Structural Repair or Residential Ventilation sectors so there is no provisional status for these sectors of membership. Surveyors must, however, demonstrate a minimum 5 years' experience in the industry.

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## Continuous Professional Development (CPD) Scheme

Independent/Freelance Surveyors are required to join the PCA CPD scheme to demonstrate their commitment to keeping their professional knowledge up to date, improve their capabilities and show that they are actively committed to their development.

Participants are required to achieve a minimum of 25 points each year which can be obtained through a variety of activities including training courses, meeting and events, networking, reading relevant publications or mentoring.

**The cost of the scheme is £30 + VAT per annum**

## Application Form

**Category you are applying for:**

Freelance Surveyor

Independent Surveyor

**Please tick the sectors of membership you are applying for:** (must have relevant qualification and/or experience as listed on Page 3 for each):

Timber

Damp

Structural Waterproofing

Invasive Weed

Residential Ventilation

Sprayed Foam Evaluation

Structural Repair

Flood Recovery/Protection

Full name of Applicant:

Company name:

Address (inc. postcode)

Phone:

Mobile:

Email:

Website:

**Please sign below to confirm you will agree to the following:**

- ✓ **CODE OF ETHICS:** I have read and will abide by the PCA Code of Ethics (pages 14 – 16). I accept that violation of the Code of Ethics could mean my offer of membership may be withdrawn at any time.
- ✓ **PERFORMANCE STANDARD:** I agree to adhere to the requirements set out in the PCA Contractors' Performance Standards document (pages 11 – 13).
- ✓ **MEMORANDUM & ARTICLES OF ASSOCIATION:** I agree to abide by the terms set out in these documents (available as a separate document).
- ✓ **CPD SCHEME:** I agree to comply with the CPD requirements and submit an annual activity log (page 4).
- ✓ **SUBSCRIPTIONS:** I understand that if my application is successful, subscription fees are due on or before 1<sup>st</sup> January for that year (if joining part way through a year, subscriptions are invoiced pro rata). **The annual cost of subscriptions for Independent Surveyor categories of membership is £400 + VAT.**
- ✓ **MEMBERSHIP:** I understand that Independent/Freelance and membership is awarded to the individual only.
- ✓ **AUDIT:** I understand that I will need to submit reports every 2 years to ensure they remain compliant with current guidance/best practice.

**Signed:**

**Date:**

Please ensure the following documents are included with your application.  
Missing paperwork will delay your application.

Required documents:	✓ Tick
Signed Application form and application fee of £100 + VAT made payable to PCA	
Signed Terms and Conditions	
Proof of professional qualification in area of expertise (i.e., relevant higher educational qualification for Flood Protection/Recovery, CSSW for Structural Waterproofing, CSRT/CSTDB for Damp and Timber work, CSJK for Invasive Weed)	
A minimum of two recent survey reports (at least two reports are required for each of the membership sectors you are applying for, i.e., Damp, Timber, Structural Waterproofing, Invasive Weed Control, Sprayed Foam, Flood etc.)	
Copy of Professional Indemnity Insurance.	
Copy of Professional CV detailing minimum of 5 year's relevant work experience & qualifications.	

## Surveyor Definition

- S1. The Property Care Association (PCA) Freelance and Independent Surveyor membership category is available to qualified individuals who are not employed by a contracting company, organisation, manufacturer, supplier or service provider directly or indirectly associated with building preservation.
- S2. PCA Freelance and Independent Surveyor members have demonstrated to the PCA the necessary skill, knowledge and experience required to inspect, investigate and diagnose timber infestation, timber decay, damp and other related condition(s) in a building, prepare specifications for any remedial work deemed necessary and, if required, supervise the execution of that work.
- S3. PCA Freelance and Independent Surveyor members are required to declare to the PCA **any Commercial Link** they have that falls within the scope of the PCA definition of a *Commercial Link* applicable to the Surveyor membership category (see S6). The definitions in S4 and S5 below clarify the difference between an Independent Surveyor and a Freelance Surveyor.
- S4. A **'PCA Independent Surveyor'** is an individual who offers a specialist surveying service as described in S2 above and has *no Commercial Link*, as defined by the PCA (see S6), with any company, organisation or individual that derives profit or gain from any type of work, products or services associated with building preservation.
- S5. A **'PCA Freelance Surveyor'** is an individual who offers a specialist surveying service as described in S2 above but has a *declared Commercial Link(s)*, as defined by the PCA (see S6), with a company, organisation or individual that derive profit or gain from work, products or services associated with building preservation.
- S6. **PCA Freelance / Independent Surveyor member – Commercial Link Definition:**  
PCA Independent or Freelance Surveyor members are required to declare to the PCA any *Commercial Link(s)* they have with companies, organisations or individuals operating in the building preservation industry. The PCA definition of a Commercial Link for the surveyor membership category is set out below:



Individuals who are members of the PCA Surveyor membership category are deemed to have a **'Commercial Link'** when:

- a) *an amount greater than 20% of their annual income\* is received from or*
- b) *they own shares in or*
- c) *they receive a regular financial retainer from or*
- d) *they receive a commission, profit-share or other reward as a result of an introduction made by them or inspection conducted by them from -*

a company (*other than their own survey company*), product manufacturer, supplier, organisation or individual that derive profit or gain from any type of work, product or service associated with building preservation. It is obligatory for a PCA Surveyor member to declare to the PCA when a **'Commercial Link'** exists. Failure to do so may lead to the Surveyor's name being removed from the membership listing on the PCA website or other action deemed appropriate by the PCA Board.

*\* 'One off' single contracts excepted*

## Minimum Performance Standards

**This document sets out the minimum performance levels that are expected from all Surveyor members of the Association.**

### General

- A Surveyor must operate in accordance with the Property Care Association's Code of Ethics.
- A Surveyor must hold Professional Indemnity Insurance, Public Liability insurance and where required in law, Employers liability insurance.

### Conflicts of Interest

- To prevent any possible suggestion of complicity a Surveyor must declare to the PCA any commercial links with contracting organisations and/or material suppliers. Declarations of commercial links will be available to view on the PCA website. (*Refer to Definitions Document for guidance*)
- A Surveyor is at liberty to offer and provide services to any individual or business who may wish to engage them and that remuneration for the provision of such service is agreed in writing in advance.
- A surveyor must not offer any form of inducement to a company, organisation or individual to obtain instructions. An independent surveyor must not receive any commission, profit share, bonus or other incentive or reward resulting from the supply of their services or the execution of any work that may transpire as a result of their inspection. A Freelance surveyor may benefit as outlined above, where commercial links have been declared and made known.
- A Surveyor must take all reasonable measures to avoid conflicts of interest. Where the potential for a conflict of interest exists, the Surveyor must either declare their conflict or withdraw from the instruction.

### Inspections & Submissions

- A Surveyor must at all times demonstrate a commitment to extending professional courtesy to fellow professionals, PCA members and officers of the PCA.
- A Surveyor must not use language in promotional material, reports, web sites, internet chat rooms/forums or on site which by inference or innuendo could be regarded as defamatory or derogatory. The use of such language is regarded by the Association as unacceptable, particularly if it brings the Association into disrepute.
- A Surveyor must be familiar with relevant British Standards, Codes of Practice and general guidance issued by BSI, BRE and PCA concerning inspection, remedial treatment, repair and improvement of buildings.
- Prior to conducting an inspection, the scope and extent of a survey should be agreed in writing with the client and the client should be given the opportunity to change, clarify or withdraw instructions if they are not satisfied.
- A Surveyor is expected to conduct all surveys and site investigations with the due care and diligence that would be expected of a competent building preservation surveyor.
- Surveyor must as far as practically possible carry out their survey or site investigation in accordance with the instructions agreed in advance with their client.
- Survey reports and submissions produced by a Surveyor should relate to the facts apparent and exposed during a survey, site investigation or subsequent off-site analysis and must, when relevant, correctly exercise a duty of care to the client.
- In the event of a client requiring an oral report only all notes, observations, sketches etc. recorded at the time of the inspection and any subsequent recommendations made must be recorded and retained.

### **Safety & Health and Safety Management**

- A Surveyor must comply with requirements of the Health and Safety at Work Act 1974 and regulations there under including in particular The Management of Health and Safety at Work Regulations 1999
- A Surveyor should not put them self or others at risk when conducting an inspection or site visit.
- Risks associated with specialist recommendations made by a surveyor should be identified and reported to their client.
- A surveyor must immediately verbally report to the client any hazardous situation, material or substance discovered or exposed during the course of an inspection. This initial reporting should be followed up in writing as soon as practicably possible.

### **Personnel, Training & Instruction**

- A Surveyor must be appropriately trained, experienced and qualified and must not take on any instruction that from the onset is known to be beyond their experience, qualification or practical ability.
- A Surveyor is expected to commit to a process of continual learning and knowledge development.

### **Site Management & Site Supervision**

- Should a Surveyor being engaged to provide a site management service, or to act in a supervisory role for specialist work, the surveyor must take all reasonable steps to ensure that as far as practicably possible all work is undertaken effectively, in accordance with industry best practice and the terms of engagement agreed and contained with the written work specification.
- A Surveyor must be honest, fair and equitable at all times when dealing with contractors or other third parties.

### **Dispute Resolution – Complaint Management**

- In the event of a dispute arising between a client and a Surveyor it must be handled in accordance with a written complaint's procedure. This procedure will have provision for recourse to an independent dispute resolution service. This is available through the Property Care Association and the Chartered Institute of Arbitrators.

## Code of Ethics

Members of the PCA together with employees, partners and associates of member organisations and individual members shall abide by and comply with the PCA Code of Ethics.

The PCA Directors and Officers will impose adherence to the Code of Ethics upon its members with rigor and fairness to maintain the expectation and performance of high standards by its members in the execution of their profession.

### PCA Members Must:

1. Fully comply with all requirements and matters appertaining to insurance as set out in the rules of the PCA.
2. Commit to the continual development of knowledge, skills and understanding in all matters relevant and applicable to their professional activities.
3. Perform all aspects of their work and professional activities in accordance with all relevant Codes of Practice and Codes of Conduct published by the PCA and other bodies relevant and applicable to their work and/or professional activities.
4. Be honest, truthful and clear in all communications with their clients, potential clients and guarantee/warranty beneficiaries.
5. Be fully compliant with all statutory requirements necessary in the execution of their professional activities.
6. In the event of a dispute situation arising with a client, property owner, guarantee/warranty beneficiary or another member of the PCA, fully co-operate with the PCA and its officers to seek a resolution without delay.

### PCA Members Must not:

1. Participate in, instigate, encourage or tolerate any unethical or unprofessional work practice that will bring or have the potential to bring the PCA into disrepute.
2. Instigate, participate in or encourage the deliberate, reckless, or negligent sale of products or services in circumstances where the contract is either misrepresented, or the product or service being suggested or offered is unsuitable or unnecessary for the customer's needs.
3. Mislead, make a false or untrue statement(s) to understate the extent of any defects, repairs or treatment concerning an enquiry or inspection requested by a potential client, property owner or guarantee/warranty beneficiary seeking a professional diagnostic investigation and guidance.
4. Overstate, exaggerate or create any work, treatment, installation or procedure concerning an enquiry or inspection requested by a potential client, property owner or guarantee/warranty beneficiary seeking a professional diagnostic investigation and guidance.
5. Make, publish or distribute any derogatory or demeaning remarks, statements, comments or comparisons in respect of personnel, materials, equipment or work practices of any other company or organisation.
6. Offer or provide, either directly or indirectly, any form of reward, gift or inducement to any person or organisation to perform unsatisfactory work or service of any type.
7. With the exception of normal business networking, marketing promotions and a moderate seasonal token of appreciation, offer or provide, either directly or indirectly, any form of reward or inducement of any kind to any person or organisation in order to unduly influence that person or organisation to introduce, recommend or accept services or products provided and offered by the PCA member.
8. Unnecessarily delay the completion of work, correspondence or provision of any service.
9. Following an enquiry from a client or property owner, unnecessarily delay, put off or ignore the investigation of alleged defective workmanship, a complaint, or a guarantee/warranty claim.
10. Unnecessarily delay, put off or ignore attending to the execution and completion of any work or the provision of any service deemed necessary in connection with a justified claim in respect of defective workmanship, a complaint, or a guarantee/warranty claim

11. Advertise, market, display or broadcast their services or products in a manner that is not clear, accurate, or correctly descriptive of the products or services being offered or provided.
12. Advertise, market, display or broadcast their business, products or services in a manner that is not accurate, legal, decent, truthful and honest.
13. Instigate, participate in or contribute to any forum, blog or other means of electronic or social media in a manner that brings the PCA and/or its members into disrepute.

### Professional Courtesy

1. PCA members, their staff and associates must, at all times, extend a professional courtesy towards fellow members, other professionals and officers of the PCA.
2. In the event of a PCA member being asked to inspect or comment upon any work or service carried out or performed by a fellow member or fellow professional, be it orally or in writing, they should act in strict accordance with PCA guidelines addressing such matters that are in place at that time.