

Artificial Intelligence (AI) Acceptable Use Policy

1. Purpose

AI is recognised as innovative technology that will help push the construction industry forward by improving productivity, research capability, and operational efficiency. b&m recognise that opportunity but also the risks if not implemented professionally and responsibly. b&m are committed in providing excellent service and diligent client care. Therefore, this policy sets out how Artificial Intelligence (AI) tools may be used within b&m and be controlled to ensure compliance with:

- Professional obligations under the Royal Institution of Chartered Surveyors (RICS) Rules of Conduct
- The RICS Professional Standard 'Responsible use of artificial intelligence in surveying practice'
- Client confidentiality requirements
- Data protection legislation (UK GDPR and Data Protection Act 2018)
- Professional indemnity insurance obligations
- Information security standards

AI must support and never replace professional judgement.

2. Scope

This policy applies to:

All employees, consultants and contractors, surveyors and RICS-regulated professionals and temporary staff and agency workers.

It covers all AI systems including (but not limited to):

- Generative AI (e.g. text, image, coding or analytical tools)
- AI research assistants
- Automated valuation or modelling tools
- Document drafting and summarisation tools
- Predictive analytics platforms

This policy applies whether AI is accessed via:

- Company devices
- Personal devices
- Third-party platforms
- Browser-based services

3. Key Principles

The Company adopts the following principles consistent with RICS professional standards:

3.1 Human Professional Judgement

AI output must never be relied upon as a final professional opinion. All work prepared using AI must be reviewed, validated, professionally interpreted. A qualified professional remains fully responsible for all advice issued to a client.

3.2 Accountability

Employees remain personally accountable for work produced using AI. Using AI does not transfer professional responsibility to:

- the software provider
- the model
- the company

All employees must be able to justify decisions independently of the AI system.

3.3 Transparency

Where AI materially contributes to professional work (e.g. reports, advice, analysis), this must be disclosed internally to a line manager and recorded in the Project Information File (QAF-GN10).

Where required by professional judgement or client instruction, appropriate disclosure to the client may also be required.

3.4 Confidentiality

Under no circumstances may confidential client information be entered into **public** AI tools, this includes:

- property addresses
- valuations
- client identities
- lease terms
- financial data
- drawings
- survey reports
- building defects
- photographs
- legal documentation

Public AI platforms store and train on user input. Entering confidential information may constitute a data breach and a breach of professional confidentiality. Private AI platforms are preferred – refer to Section 9 for further information of approved AI tools.

3.5 Data Protection

Personal data must never be uploaded into an AI system unless:

- the system is approved by IT
- a data processing agreement is in place
- the system is secure and private

Uploading personal data into unapproved AI tools is considered a serious disciplinary matter.

4. Permitted Uses

Employees may use approved AI tools for:

- Research and general information gathering
- Drafting non-client internal documents
- Structuring notes
- Proofreading and grammar checking
- Generating ideas or outlines
- Coding assistance (non-security systems)
- Recording meetings and minute taking

All outputs must be checked for accuracy.

5. Prohibited Uses

The following uses are strictly prohibited:

- Producing valuation reports using AI
- Producing building surveys without professional inspection
- Providing client advice based solely on AI output
- Uploading client documents to public AI systems
- Uploading personal data
- Using AI to bypass professional review processes
- Generating legal or contractual advice without review
- Allowing AI to communicate directly with clients on behalf of the company

6. Accuracy and Risk

AI systems may fabricate information (“hallucinate”), use outdated sources or produce biased or incorrect outputs. Employees must verify all outputs before use. AI must be treated as a research assistant, not an expert. No AI output should be copied into a report without verification.

7. Intellectual Property

AI-generated material may not be:

- copyrighted by the company

- original
- legally reliable

Employees must ensure:

- no copyrighted third-party material is used
- no proprietary client data is reproduced

8. Record Keeping

Where AI is used in a project, the following must be recorded and retained on the Project Information Form:

- a note that AI was used
- purpose of use
- confirmation that professional review occurred

This is required for audit and professional indemnity purposes.

9. Approved Tools

Only AI tools approved by the Company IT or Compliance function may be used for work purposes - please refer to Approved AI Tools List document.

The Company reserves the right to:

- monitor usage
- restrict access
- block unapproved tools
- test new AI tools for appropriateness ahead of adding to the approved list

10. Breaches

Failure to comply with this policy may result in:

- disciplinary action
- removal of system access
- reporting to professional bodies (including RICS)
- potential dismissal for gross misconduct

Serious breaches include:

- disclosure of confidential client information
- reliance on AI for professional advice
- uploading personal data

11. Training

The Company will provide employees with guidance and training on the safe, ethical and responsible use of Artificial Intelligence (AI) tools. Training is recorded within QAR-002.

All employees are expected to familiarise themselves with this policy before using any AI tools for work purposes.

Employees must not use AI in connection with client work until they have completed the Company's AI awareness guidance.

Managers are responsible for ensuring their teams understand this policy and for supervising the appropriate use of AI in day-to-day work. Additional guidance or refresher training may be issued where required.

The Company may update training and guidance periodically in response to regulatory, legal, technological or professional developments, and employees are expected to comply with any updated requirements.

12. Review

This policy will be reviewed annually or sooner if regulatory or professional guidance changes.

Signed:



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Date: 17th February 2026