Associate Assessment

Project Management

February 2017

Project Management

Introduction

In order to become an RICS Associate you must demonstrate that you have knowledge, understanding and practical ability relevant to a surveying role – in this case, Project Management.

This guide explains the competencies for your pathway, with examples of how you can show you meet the requirements.

Refer to this guide while preparing your submission for assessment.

The **Associate Assessment Candidate Guide** gives further essential information on how to prepare for the assessment.

Competencies

A competency is the knowledge, skills, abilities and behaviours needed for a particular role or task. RICS competencies equip you to work in your chosen pathway.

The six technical competencies are the pathway-specific 'hard' skills needed for your role.

The eight mandatory competencies are the 'soft' business skills demonstrating your ability to work with colleagues, manage workloads and act with integrity. All candidates, regardless of their pathway, need these skills.

What is Project Management?

Project managers occupy a central role in the development process, driving successful completion of projects.

Project Management is a thriving professional discipline much in demand around the globe.

Typically, project managers will be appointed at the beginning of a project and will assist the client in developing the project brief and then selecting, appointing and co-ordinating the project team.

A project manager will then usually represent the client throughout the full development process managing the inputs from the client, consultants, contractors, supply chain and other stakeholders.

Those working in project management can choose from a variety of potential employers including clients and consultants from both the public and private sectors, with either commercial or not-for-profit aims.

Project Management competencies

You must select any **six** of the following **eight** technical competencies:

- commercial management of construction
- construction technology and environmental services
- contract practice
- procurement and tendering
- programming and planning
- project administration
- project evaluation
- risk management.

You must complete all **eight** mandatory competencies:

- client care
- communication and negotiation
- conduct rules, ethics and professional practice
- conflict avoidance, management and dispute resolution procedures
- data management
- health and safety
- sustainability
- teamworking.

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Technical competencies

Commercial management of construction	
Description	This competency covers the commercial management of construction works. Candidates should have an awareness of how their work relates to commercial competitiveness balanced against profitability. An awareness of the financial process used to achieve profitability is required as well as how these integrate with the overall delivery of the project.
Requirements	Demonstrate knowledge and understanding of the principles of management of construction projects. Apply your knowledge to the financial management of construction projects, including regular monitoring and reporting on cash flow and profitability.
Examples of likely skills, knowledge and experience	**Knowledge** • financial management of construction projects, including regular monitoring • reporting on cash flow procedures and profitability. **Activities** • collecting of data for reports • carrying out cost to completion exercises • preparing cash flows • preparing reports such as liability statements, cost to complete and cost value reconciliations • applying value engineering processes • preparing and submitting cost data for in-house and/or external use in relation to areas such as cost of preliminaries, comparative cost of different construction techniques and taxation allowances.
Examples of tasks undertaken	• cash flow statements • development or construction budgets • reports or activities associated with the value engineering process • collecting/preparing/evaluating cost data.

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Construction technology and environmental services	
Description	This competency covers the design and construction of buildings and other structures. Candidates should have an awareness of the design and construction processes commonly used in the industry. They should have a detailed knowledge of construction solutions relevant to their projects.
Requirements	Demonstrate knowledge and understanding of the principles of design and construction relating to your chosen field of practice. Apply your knowledge to the design and construction process.
Examples of likely skills, knowledge and experience	**Knowledge** • the process of design information production, revision and delivery to the project team and those involved outside the project team • alternative construction details in relation to functional elements of the design such as different types of piling or structural frame solutions. **Activities** • implementing the principles of designing and constructing for sustainability and environmental awareness • participating in the process of site investigation, archaeological studies and environmental assessments • appreciating how design solutions vary for different types of building, such as clear span requirements for warehousing, or acoustic requirements for accommodation.
Examples of tasks undertaken	• site investigation, archaeological studies or environment assessments • site drawings or design schedules • setting out foundation, drainage, building or structures • selection or procurement or materials for construction purposes.

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Contract practice	
Description	This competency concerns the ability to recognise, understand and interpret the different procurement routes and contracts. Candidates should be aware of the different options available within their area of practice. Candidates should have an understanding of appropriate use of alternative procurement routes and contracts.
Requirements	Demonstrate knowledge and understanding of the various forms of contract used in the construction industry and/or your area of business. Apply your knowledge of the use of the various standard forms of contract at project level, including the implications and obligations that apply to the parties to the contract.
Examples of likely skills, knowledge and experience	**Knowledge** • variables for consideration when selecting procurement system • the impact of alteration of contractual arrangements on parties to the contract • legal and contractual constraints e.g. terms and conditions of engagement, construction legislation • collateral warranties and latent defects • contract documentation • basic contractual mechanisms and procedures at various stages of the contract • third party rights etc. **Activities** • reviewing contractual relationships with the main parties associated with traditional, design and build, or management types of procurement routes • preparing documents associated with warranties and bonds • providing options for alternative forms of contract with respect to specific procurement routes • reviewing particular key contract provisions and how these differ between alternative forms of contract.
Examples of tasks undertaken	• contract documentation associated with bonds, warranties or insurances • contract documentation associated with statuary authorities, suppliers or contractors • meetings or communications associated with contract practices • contract processes involved with procurement selection or forms of contract.

Procurement and tendering	
Description	This competency covers the way a project is structured and delivered in terms of risk allocation and contractual relationships and how tendering processes are used to establish a contract price. Candidates should have a clear understanding of the different types of procurement and tendering commonly used and the advantages and disadvantages of each to the parties involved. Candidates should have a detailed working knowledge of the procurement routes and tendering procedures used on their projects.
Requirements	Demonstrate knowledge and understanding of the main types of procurement. Demonstrate knowledge and understanding of the tendering and negotiation processes involved in procurement. Apply your knowledge to the implementation of the procurement routes selected for your projects and to carrying out tendering and negotiation processes relevant to them
Examples of likely skills, knowledge and experience	**Knowledge** • the main types of procurement used in both the public and private sectors, both nationally and internationally • tendering and negotiation processes involved in procurement • ancillary process such as partnering and framework agreements • codes of practice and procedures commonly used. **Activities** • evaluating the characteristics to be considered for determining the chosen procurement route • participating in the tendering and negotiating process, including interviews • implementing procurement routes such as traditional, design and build, management forms, term and serial contracting, and other types • producing and/or compiling tender documentation such as letters of invitation, health and safety documentation, design documentation and contractual details • carrying out of tendering and negotiation processes such as single and two stage tendering, the use of codes of practice and electronic tendering.
Examples of tasks undertaken	• participating in tendering or negotiation processes • investigating or compiling factors relevant for the selection of the procurement route • participating in the negotiation or interview stages of the procurement process • on site implementation of the chosen procurement route.

Programming and planning	
Description	This competency is about the management of time and the duration of activities from project inception to completion. It covers an understanding of programming techniques and critical path features including use of computer software to produce programmes.
Requirements	Describe the principles of financial and programme monitoring of projects, including planning techniques such as Gantt charts etc. Demonstrate knowledge and understanding of various types of programmes and schedules commonly used on projects. Assess, interpret and report on the programme control of projects.
Examples of likely skills, knowledge and experience	**Knowledge** • project milestones and acceleration techniques • network analysis, critical path, Programme Evaluation and Review Technique (PERT) • resource analysis, line of balance. **Activities** • evaluating alternative programme techniques • reviewing and interpreting Gantt charts and other programmes • evaluating the significance of float • explaining the critical path determined by a programme • analysing and evaluating actual performance against planned performance.
Examples of tasks undertaken	• gathering data for the development of project plans or programmes • creating Gantt charts, milestones and other programmes such as network analysis • identifying key activities and floats whilst developing the critical path • recording, analysing or managing resources, progress and programmes.

Project administration	
Description	This competency concerns the contractual, legislative/statutory and other processes required to administer a project. It also covers the reporting and information management systems for projects
Requirements	Demonstrate knowledge and understanding of contractual, legislative and statutory terminology/requirements in the management of a project. Implement management procedures necessary for the smooth running of a project.
Examples of likely skills, knowledge and experience	**Knowledge** • contractual, legislative and statutory requirements • document control systems and techniques • reporting mechanisms and structures **Activities** • co-ordinating the statutory authorities and service providers • recording and monitoring records of progress associated with the design and construction processes • identifying and implementing the contractual, legislative and statutory requirements needed for a development project including any collateral documents e.g. insurances, warranties etc • managing document control and information management systems • managing management reporting systems.
Examples of tasks undertaken	• reporting systems associated with the project supply chain • managing off or on site reporting systems • managing off or on site document control systems • preparing or implementing project organisations structures.

Project evaluation	
Description	This competency concerns the evaluation process – assessing the technical and financial feasibility of a project including the resultant economic return. The assessment should consider both initial capital costs as well as whole life costs.
Requirements	Describe the feasibility study process, including the financial and town planning aspects associated with a development appraisal. Apply the techniques used in value management/value engineering, life cycle/whole life costing and risk assessment, together with a balance sheet analysis.
Examples of likely skills, knowledge and experience	**Knowledge** • development appraisals • feasibility studies • value engineering workshops • risk analysis • life cycle costing **Activities** • preparing a development appraisal and feasibility study • reviewing the business case drivers for the development • using value management/value engineering techniques to advise on and improve the viability of the development • carrying out a life cycle/whole life costing exercise • preparing a risk register to advise on and improve the management of a development.
Examples of tasks undertaken	• data collection for developing appraisal or feasibility study • value management/engineering exercise to investigate the value and financial viability of the project • business case/whole life costing assessments • risk identification and assessment via the risk register to evaluate the risks' potential impact upon the development.

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Risk management	
Description	This competency is about the effective use of risk management relating to projects. It includes a knowledge, understanding and use of the tools and techniques available.
Requirements	Demonstrate your knowledge and understanding of the nature of risk and, in particular, of the risks associated with your area of business/practice. Apply your knowledge to carry out risk assessment taking into account all relevant factors. Understand the application of the various methods and techniques used to measure risk.
Examples of likely skills, knowledge and experience	**Knowledge** • risk management • risk register techniques • risk ownership allocation • quantitative methods for measuring risk and contingency. **Activities** • undertaking qualitative risk identification and the formation of a risk register • assisting with the allocation of risk ownership and the subsequent monitoring of project risks throughout the project • applying the various quantitative methods and techniques to measure risk • participating in risk workshops • preparing reports resulting from risk workshops.
Examples of tasks undertaken	• gathering data for the tabulation and measurement of the numerous project risks • assembling the project risk register • arranging or taking part in risk workshops • recording, monitoring and managing the risk register.

Mandatory competencies

Title	Requirement
Client care	Demonstrate knowledge and understanding of the principles and practice of client care including: • the concept of identifying all clients/colleagues/third parties who are your clients and the behaviours that are appropriate to establish good client relationships • the systems and procedures that are appropriate for managing the process of client care, including complaints • the requirement to collect data, analyse and define the needs of clients. Demonstrate practical application of the principles and practice of client care in your area of practice.
Communication and negotiation	Demonstrate knowledge and understanding of effective oral, written, graphic and presentation skills including the methods and techniques that are appropriate to specific situations. Demonstrate practical application of these skills in a variety of situations, specifically including where negotiation is involved.
Conduct rules, ethics and professional practice	Although this is demonstrated through the RICS ethics module (see Candidate Guide) you should still refer to it (where applicable). Demonstrate knowledge and understanding of the role and significance of RICS and its functions. Also an appreciation of your personal professional role and society's expectations of professional practice and RICS Rules of Conduct and regulations, including the general principles of law and the legal system, as applicable in your country of practice. Demonstrate practical application in your area of practice, being able to justify actions at all times and demonstrate personal commitment to the RICS Rules of Conduct and RICS ethical standards. Demonstrate that you have applied these in the context of advising clients.
Conflict avoidance, management and dispute resolution procedures	Demonstrate knowledge and understanding of the techniques for conflict avoidance, conflict management and dispute resolution procedures including for example adjudication and arbitration, appropriate to your pathway.
Data management	Demonstrate knowledge and understanding of the sources of information and data, and of the systems applicable to your area of practice, including the methodologies and techniques most appropriate to collect, collate and store data.
Health and safety	Demonstrate knowledge and understanding of the principles and responsibilities imposed by law, codes of practice and other regulations appropriate to your area of practice. Demonstrate practical application of health and safety issues and the requirements for compliance, in your area of practice.
Sustainability	Demonstrate knowledge and understanding of why and how sustainability seeks to balance economic, environmental and social objectives at global, national and local levels, in the context of land, property and the built environment.
Teamworking	Demonstrate knowledge and understanding of the principles, behaviour and dynamics of working in a team.

Continuing professional development (CPD)

In your submission document you must record 48 hours of CPD, this must be 12 months prior to your associate assessment. The following are examples of the type of development relevant to this pathway.

Contract Practice			
Activity type	**Purpose**	**Description**	**Learning outcomes**
Work-based	To develop my knowledge of the use of the various standard forms of contract	Attended in-house training workshop on Contractual Awareness	It is important for project managers to understand the various forms of contracts and the potential scenarios, including the implications and obligations that apply to the respective parties mentioned in each contract
Construction technology and environmental services			
Activity type	**Purpose**	**Description**	**Learning outcomes**
Private	Learn more about the main elements of a construction project and how they interrelate	Refresher online course on Construction Technology and environment services	To have a good understanding of the various kinds of construction designs, methods, materials and manufacturing processes – such as how steel and concrete frames are made and erected

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Procurement and tendering

Activity type	Purpose	Description	Learning outcomes
Organised	Strengthen my knowledge of procurement and tendering; how much it was being applied in practice and to further my understanding on the procurement options	CPD lecture – outlining the main forms of procurement as well as knowledge and understanding of the tendering and negotiation processes involved in procurement	To appreciate the variables or factors that need to be considered when selecting a procurement system such as 'design and build' to 'traditional', or one of the two main management procurement options. Also, to be familiar with the tendering process, especially when choosing a contractor or supplier

Health and Safety

Activity type	Purpose	Description	Learning outcomes
Work-based	The course aimed at making delegates familiar with relevant health and safety legislation and industry standards associated with preparing risk assessments, work package plans, and task briefings	Course delivered at my workplace over 9 hours through a combination of online materials, demonstration and hands-on tutoring	To understand the importance of health and safety to all parties involved with the development, both off site and on site and be aware of the key statutory requirements and systems and how they should be implemented during the various stages of the development

Confidence through professional standards

RICS promotes and enforces the highest professional qualifications and standards in the development and management of land, real estate, construction and infrastructure. Our name promises the consistent delivery of standards – bringing confidence to the markets we serve.

We accredit 125,000 professionals and any individual or firm registered with RICS is subject to our quality assurance. Their expertise covers property, asset valuation and real estate management; the costing and leadership of construction projects; the development of infrastructure; and the management of natural resources, such as mining, farms and woodland. From environmental assessments and building controls to negotiating land rights in an emerging economy; if our professionals are involved the same standards and ethics apply.

We believe that standards underpin effective markets. With up to seventy per cent of the world's wealth bound up in land and real estate, our sector is vital to economic development, helping to support stable, sustainable investment and growth around the globe.

With offices covering the major political and financial centres of the world, our market presence means we are ideally placed to influence policy and embed professional standards. We work at a cross-governmental level, delivering international standards that will support a safe and vibrant marketplace in land, real estate, construction and infrastructure, for the benefit of all.

We are proud of our reputation and we guard it fiercely, so clients who work with an RICS professional can have confidence in the quality and ethics of the services they receive.

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