



# RICS Requirements and Competencies guide

**August 2018**

Updated February 2022 to reflect new Rules of  
Conduct



Date published: February 2022, Version 1.5

Published by: RICS, Parliament Square, London SW1P 3AD.

All rights in this publication, including full copyright or publishing right, content and design, are owned by RICS, except where otherwise described. Any dispute arising out of this publication is subject to the law and jurisdiction of England and Wales

# RICS Requirements and Competencies guide

## Section one

<b>Introduction</b> .....	5
About the competencies .....	5
Chartered designations .....	5
Valuer Registration .....	5

## Section two

<b>Mandatory competencies</b> .....	6
-------------------------------------	---

## Section three

<b>Pathway competencies</b> .....	23
Building Control.....	23
Building Surveying.....	24
Commercial Real Estate.....	25
Corporate Real Estate.....	26
Environmental Surveying.....	27
Facilities Management.....	28
Geomatics.....	29
Infrastructure.....	30
Land and Resources.....	31
Management Consultancy.....	32
Minerals and Waste Management.....	33
Personal Property / Arts and Antiques.....	34
Planning and Development.....	35
Project Management.....	36

Property Finance and Investment.....	37
Quantity Surveying and Construction.....	38
Research.....	39
Residential.....	40
Rural.....	41
Taxation Allowances.....	42
Valuation.....	43
Valuation of Businesses and Intangible Assets.....	44

## Section four

Competency list and descriptors .....	45
---------------------------------------	----

## Introduction

RICS' pathways and competencies define the knowledge, skills, experience and competence required to become a chartered surveyor.

Candidates must achieve a set of requirements and competencies. These are a mix of technical and professional practice, business, interpersonal, and management skills.

The technical competencies undertaken will depend on your pathway.

### About the competencies

The competencies are presented in a generic way so they can be applied to different areas of practice and geographical locations. It is important that you interpret them within the context of your own area of practice or specialism and location.

The contextualisation of the competencies for your area of practice as well as examples of the likely skills, knowledge and experience required to demonstrate the competencies are set out in the individual **pathway guides**.

Each competency is defined at three levels of attainment. You must reach the required level in a logical progression and in successive stages:

**Level 1** – knowledge and understanding

**Level 2** – application of knowledge

**Level 3** – reasoned advice, depth and synthesis of technical knowledge and its implementation

The competencies are in three distinct categories:

**Mandatory** – The personal, interpersonal, professional practice and business skills common to all pathways and mandatory for all candidates.

**Technical core** – The primary skills of your chosen pathway.

**Technical optional** – Selected as additional skill requirements for your pathway from a list of competencies relevant to the area of practice.

## Chartered designations

Some pathways allow candidates to achieve an optional chartered alternative designation in addition to the Chartered Surveyor title. These designations are listed in each pathway guide where appropriate.

Where a pathway-specific designation is not listed, successful candidates are entitled to use the Chartered Surveyor title.

## Valuer Registration

Valuer Registration is an independent system of regulatory monitoring by RICS. If you wish to become an RICS Registered Valuer you must achieve either the Valuation or Valuation of businesses and intangible assets competency to Level 3.

# Mandatory competencies

All candidates must achieve the defined level of the mandatory competencies. These competencies are necessary for all RICS professionals.

## Level 3

- Ethics, Rules of Conduct and professionalism

## Level 2

- Client care
- Communication and negotiation
- Health and safety

## Level 1

- Accounting principles and procedures
- Business planning
- Conflict avoidance, management and dispute resolution procedures
- Data management
- Diversity, inclusion and teamworking
- Inclusive environments
- Sustainability

## Senior Professional Assessment

There are three additional professional competencies for the Senior Professional assessment which must also be achieved to Level 2.

- Leadership
- Managing people
- Managing resources (excluding human resources)

Mandatory competencies may also appear in some pathways as technical competencies. If so, this will be shown in the technical core and/or optional competency lists for the pathway and will need to be achieved to a higher level.

## Ethics, Rules of Conduct and professionalism

### Description of competency in context of this sector

This competency covers your professionalism. It requires you to understand the role of RICS and how it works. As your regulating body, you must have a thorough knowledge of RICS regulations and Rules of Conduct, which embed ethical principles. You should understand your role as a professional and society's expectations of professional practice. You should also understand the general principles of law and the legal system, as applicable in your country of practice.

### Examples of likely knowledge, skills and experience at each level

#### Level 1

Demonstrate knowledge and understanding of the role and significance of RICS and its functions. Your personal professional role and society's expectations of professional practice and RICS' Rules of Conduct and conduct regulations, including the general principles of law and the legal system, as applicable in your country of practice.

Examples of knowledge comprised within this level are:

- The structure of RICS
- RICS' Rules of Conduct
- Mandatory Professional Statements e.g. Conflicts of Interest
- Guidance notes and their status
- RICS' CPD policy
- The role of Professional Groups
- Bodies within the RICS e.g. Matrics, LionHeart
- Policy documents
- RICS Bye-laws
- Government, legislation and regulation
- Common law
- Relevant case law.

#### Level 2

Provide evidence of practical application in your area of practice, being able to justify actions at all times and demonstrate personal commitment to RICS' Rules of Conduct and any mandatory standards.

Examples of activities and knowledge comprised within this level are:

- Your involvement with RICS
- Identifying a conflict of interest
- Transparency in professional fees
- Checking terms of appointment for compliance with RICS rules
- Handling gifts and hospitality
- Complying with RICS' CPD policy for members
- Checking your employer's compliance with RICS' Rules of Conduct.

#### Level 3

Provide evidence of application of the above in your area of practice in the context of advising clients.

Examples of activities and knowledge comprised within this level are:

- Dealing with a complaint
- Handling client's money
- Setting up professional indemnity insurance
- Registration of a firm with RICS.

## Client care

### Description of competency in context of this sector

This competency covers how a surveyor meets a client’s brief in respect of a specific appointment and how they deal with a client from a business and professional perspective.

The term “client” as it is used in this competency means not only the contractual party who has appointed the surveyor, but also all of the stakeholders in a project with whom the surveyor has to engage.

This competency is closely linked to Ethics, Rules of Conduct and professionalism, which defines professional behaviour and sets out some mechanisms for protecting clients.

### Examples of likely knowledge, skills and experience at each level

#### Level 1

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 behaviour that is 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.

Examples of knowledge comprised within this level are:

- The information contained within a client’s brief
- Defining your scope of services within the limits of your competence and PI insurance
- How fees are established
- The use of standard forms of appointment
- Mechanisms contained within an appointment document
- Insurance requirements (legal and RICS)
- How stakeholders are identified and how their status within the project is established
- Formal communication systems with clients and stakeholders
- Complaints handling procedures
- Key Performance Indicators (KPIs)

#### Level 2

Provide evidence of practical application of the principles and practice of client care in your area of practice.

Examples of activities and knowledge comprised within this level are:

- Establishing a client’s objectives
- Confirming a client’s brief
- Establishing a scope of services
- Calculating fees for professional services
- Compiling an appointment document
- Establishing project stakeholders and their status
- Setting up communication systems with a client and stakeholders
- Issuing reports to a client e.g. cost reports
- Dealing with a complaint
- Measurement of KPIs
- Analysing the data gathered through the client briefing process and formulating a detailed client brief

#### Level 3

Provide evidence of reasoned advice given to clients and others.

Examples of activities and knowledge comprised within this level are:

- Developing tailored proposals linked to business strategies
- Presenting a prioritised and informed brief to enable decision-making
- Value management with stakeholders to ensure delivery against client expectations
- Advising on the need for statutory and other consents and approvals
- Presenting alternative proposals including option appraisals
- Presenting outline schedules of work
- Agreeing the level of fees with a client
- Issuing an appointment document
- Ensuring insurances are in place
- Setting performance levels and KPIs

continued on next page



## Client care (continued)

### Level 1

- The methods of data gathering during the inception stage of a project including client briefings and site-based information
- The law applicable to your area of practice, in particular those relating to employment law, statutory compliance, consents and approvals
- The principles of the preparation of alternative outline proposals, including the methodology of preparing option appraisals
- The principles of preparing outline schedules of work.

### Level 2

- Measurement of KPIs
- Analysing the data gathered through the client briefing process and formulating a detailed client brief
- Consulting with the statutory authorities on the consents and other approvals required
- Preparing alternative outline design proposals, including option appraisals
- Preparing outline schedules of work
- Assessing client relationships, team performance and stakeholder interfaces on international projects.

### Level 3

- Monitoring compliance with the scope of services
- Monitoring performance internally and externally against client/stakeholder performance levels
- Reporting to clients and stakeholders
- Using KPIs to improve performance.

## Communication and negotiation

### Description of competency in context of this sector

This competency covers the way in which a surveyor communicates, in writing, graphically and orally. It also looks at the process and strategy of a negotiation. Effective communication is a fundamental aspect of professionalism and candidates must be able to communicate complex technical matters to both technical and non-technical people in a clear fashion. Negotiation is a regular part of a surveyor's work and this competency deals with taking a systematic approach to achieving a satisfactory conclusion.

### Examples of likely knowledge, skills and experience at each level

#### Level 1

Demonstrate knowledge and understanding of effective oral, written, graphic and presentation skills including the methods and techniques that are appropriate to specific situations.

Examples of knowledge comprised within this level are:

- Good grammar and spelling
- The etiquette of written communication in emails, letters and reports
- Common formats for reports
- Presentation of figures and data using spreadsheets, graphs and charts
- How to deliver a report at a meeting
- How to structure and deliver a presentation
- Establishing your objectives and strategy for a negotiation
- The process of negotiation.

#### Level 2

Provide evidence of practical application of oral, written, graphic and presentation skills that are appropriate in a variety of situations, specifically including where negotiation is involved.

Examples of activities and knowledge comprised within this level are:

- Writing letters or other formal documents
- Compiling a report
- Compiling minutes of meetings
- Producing pricing documents
- Delivering reports at meetings
- Taking part in interviews e.g. for contractor selection
- Giving presentations to staff or project teams
- Negotiating a loss and expense claim, extension of time, acceleration programme, contract sum or final account
- Agreeing the value of an instruction.

#### Level 3

Provide evidence of evaluation of your communication in a variety of situations.

Examples of activities and knowledge comprised within this level are:

- Issuing reports to clients
- Producing in-house management communications
- Chairing meetings
- Conducting interviews
- Presenting at seminars
- Public speaking on behalf of your business
- Agreement of fees with a client
- Advising on complex negotiations or disputes e.g. claims for loss and expense.

## Health and safety

### Description of competency in context of this sector

This competency covers the relationship between the work of the surveyor and health and safety issues. Candidates should understand the legal, practical and regulatory requirements. They should have a detailed understanding of the health and safety processes and guidelines used to achieve this.

### Examples of likely knowledge, skills and experience at each level

#### Level 1

Demonstrate knowledge and understanding of the principles and responsibilities imposed by law, codes of practice and other regulations appropriate to your area of practice.

Examples of knowledge comprised within this level are:

- Personal safety on site and in the office
- Procedures imposed by law
- Specific regulations relevant to your area of work e.g. Fire safety standards
- The impact on health and safety of: design, construction processes, building maintenance
- Health and safety training requirements as it relates to the employment of staff.

#### Level 2

Apply evidence of practical application of health and safety issues and the requirements for compliance, in your area of practice.

Examples of activities and knowledge comprised within this level are:

- Obtaining formal health and safety qualifications including first aid, industry specific or nationally recognised qualifications
- Being involved with specific roles and responsibilities within the various regulations
- Being involved in specific health and safety audits/reviews
- Reviewing health and safety proposals as part of a contractor's tender.

#### Level 3

Provide evidence of reasoned advice given to clients and others on all aspects on health and safety.

Examples of activities and knowledge comprised within this level are:

- Giving reasoned advice on and/or taking responsibility for health and safety issues relating to:
  - Impact of design on construction
  - Alternative construction processes
  - Impact of design on occupation and maintenance
  - Undertaking risk assessments
  - Advising on current legislation
  - Advising on adequacy of health and safety allowances within tenders.

## Accounting principles and procedures

### Description of competency in context of this sector

This competency covers the basic principles of accounting and the interpretation of company accounts in order that reasoned advice can be given to clients.

### Examples of likely knowledge, skills and experience at each level

#### Level 1

Demonstrate knowledge and understanding of accounting concepts and the format and preparation of management and company accounts, including profit and loss statements, cash flow statements and balance sheets.

Examples of knowledge comprised within this level are:

- The Generally Accepted Accounting Principles (GAAP) relevant to the candidate's geographical area of experience and how property is treated in an entity's accounts
- International Accounting Standards (IAS), broadly how IAS vary from National GAAP and how a property/asset is treated in an entity's accounts prepared under IAS
- An entity's financial results and basic accounting principles including balance sheets, profit and loss, and cash flow statements
- The role of the auditor.

#### Level 2

Provide evidence of interpretation of company accounts and balance sheets in your area of practice and application of appropriate accounting and regulatory standards.

Examples of activities and knowledge comprised within this level are:

- Considering financial statements to establish, for example, the financial strength of an entity
- Reviewing and understanding analysts' reports on financial statements
- Considering and understanding common financial measures such as return on capital employed, NAV, net assets per share, gearing ratio, EBIT, EBITDA and PE ratio.

#### Level 3

Provide evidence of reasoned advice given to clients with regards to profit and loss statements and balance sheets.

Examples of activities and knowledge comprised within this level are:

- Providing clients, in an appropriately supervised manner, with reasoned advice relating to the financial standing of a company e.g. for agency activities such as leasing, buying and selling or to assess suitability for a commercial relationship
- Preparing, or assisting in the preparation of, service charge accounts
- Preparing, or assisting in the preparation of, management accounts for a property
- Preparing, or assisting in the preparation of, an entity's accounts i.e. balance sheet, profit and loss, and cash flow statements
- Providing other professional advice related to the interpretation and/or preparation of accounts.

## Business planning

### Description of competency in context of this sector

This competency is about the principles and tools of business planning.

### Examples of likely knowledge, skills and experience at each level

#### Level 1

Demonstrate knowledge and understanding of how business planning activities contribute to the achievement of corporate objectives.

Examples of knowledge comprised within this level are:

- Types of business plan (e.g. strategic, departmental, operational, corporate)
- The essential elements of a business plan
- Organisational structures
- Methods for financial benchmarking (e.g. key financial ratios)
- Meaning of working capital, stock, debtors and creditors
- Accounting techniques
- Forecasting techniques
- Planning to meet corporate objectives.

#### Level 2

Provide evidence of application of the principles and demonstrate your ability to use the tools of business planning appropriate to your area of practice.

Examples of activities and knowledge comprised within this level are:

- Setting objectives and targets
- Undertaking risk analysis
- Preparing a business plan
- Creating an organisational chart
- Using financial ratios
- Using company accounts.

#### Level 3

Provide evidence of reasoned advice given to clients and others of the principles and tools of business planning and be able to evaluate your performance and outcomes.

Examples of activities and knowledge comprised within this level are:

- Undertaking presentations and reports
- Undertaking option appraisals
- Setting performance indicators
- Reviewing performance against targets and indicators.

## Conflict avoidance, management and dispute resolution procedures

### Description of competency in context of this sector

This covers the recognition, avoidance, management and resolution of disputes, involving an awareness of different dispute resolution procedures and an understanding of the application of dispute resolution procedures appropriate to the area and jurisdiction of professional practice.

### Examples of likely knowledge, skills and experience at each level

#### Level 1

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.

Examples of knowledge comprised within this level are:

- Common causes of disputes
- The contribution of some of the following to dispute avoidance:
  - Risk management
  - Early warning systems
  - Partnering techniques
  - Clear and robust client briefings
- Theories of negotiation and the role of effective communication and negotiation
- The primary features, advantages and disadvantages of a range of dispute resolution procedures and their surrounding statutory and/or non-statutory legal/ judicial context, for example:
  - Mediation and conciliation
  - Dispute Resolution Boards (DRBs)
  - Dispute Resolution Advisers (DRAs)
  - Adjudication
  - Independent Expert determination
  - Arbitration

#### Level 2

Provide evidence of practical application in your area of practice having regard to the relevant law.

Examples of activities and knowledge comprised within this level are:

- Adopting – or encouraging the adoption of (as appropriate) – suitable dispute avoidance techniques
- Negotiating actively on behalf of clients prior to third-party referral
- Assisting in the collation or preparation of claims/counter-claims and representations
- Assisting in the identification, gathering and collation of facts and expert evidence for use in expert reports
- Sufficient understanding of the main points of the statutory or non-statutory law relevant to/underpinning any particular dispute resolution process and its application.

#### Level 3

Provide evidence of the application of the above in the context of advising clients in the various circumstances referred to above.

Examples of activities and knowledge comprised within this level are:

- Advising clients of the most suitable means of dispute avoidance on their projects, and of dispute resolution procedures appropriate to their individual circumstances, demonstrating appreciation of when to seek further specialist advice and when to advise clients within the scope of the insurance cover of the candidate's organisation
- Providing advice to clients over protection on the issue of costs of dispute resolution proceedings (e.g. Calderbank offers or liaising with solicitors over the content of Part 36 Offers)
- Involvement in, or assistance with, a referral to a third-party resolution process and associated management of that process on behalf of client

NB: Please note that the roles of acting as a third-party dispute resolver – or expert witness, are – for the vast majority of candidates – not likely to be an activity that is undertaken. It is only a small minority of candidates with substantive work experience for whom this is likely to be relevant.

continued on next page

## Conflict avoidance, management and dispute resolution procedures (continued)

### Level 1

- Professional Arbitration on Court Terms (PACT)
- Court proceedings/litigation
- The possible roles of a surveyor as an expert witness and/or an advocate, to include an awareness of the existence and scope of applicability of RICS guidance for expert witnesses and advocates
- The range of nominating bodies and services available to resolve disputes, and particularly the role of the RICS Dispute Resolution Service and any specialised dispute resolution schemes it offers relevant to your market sector
- The RICS Global Professional Statement on Conflict of Interest and any appropriate national RICS guidance.

### Level 2

### Level 3

## Data management

### Description of competency in context of this sector

This competency covers how data relating to individual projects and a surveyor's work generally is collected, stored and retrieved. In addition to understanding the different storage systems and data sources available and knowing how they work, a candidate should also understand the principles behind the systems and what makes them effective. Candidates should also understand how general information and data is managed on a project and the increasing use of computerised central project databases.

### Examples of likely knowledge, skills and experience at each level

#### Level 1

Demonstrate knowledge and understanding of the sources of information and data, and the systems applicable to your area of practice, including the methodologies and techniques most appropriate to collect, collate and store data.

Examples of knowledge comprised within this level are:

- The use of published sources of data
- How data is collected, analysed and stored within your employer's organisation
- How project information is stored within your employer's organisation
- How electronic database systems work
- The use of computerised central project databases or Building Information Modelling, the benefits, challenges and dangers
- How technical libraries are set up and used
- Legislation applicable to data management and data access.

#### Level 2

Provide evidence of practical application in your area of practice and understand the relevance of information gathered and the uses to which it can be applied. Analyse the information and data collected.

Examples of activities and knowledge comprised within this level are:

- Obtaining data from published sources for use on a project
- Obtaining data from in-house sources
- Extracting data for inclusion in a database
- Setting up and using paper-based or electronic project filing systems
- Using a computerised central project database
- Retrieving information from a technical library
- Setting up a technical library
- Interpreting plan/map data
- Ensuring security of data
- Retrieving data from existing records, manual or electronic.

#### Level 3

Provide evidence of reasoned advice given to clients and others on the use and practical application of the information collected and systems used, and/or specify the most appropriate way for your own and/or client organisation to collect, analyse and apply relevant information and data.

Examples of activities and knowledge comprised within this level are:

- Advising on data storage system
- Advising on business filing systems
- Benchmarking from analysed historic data
- Advising on the use of a computerised central project database
- Advising on security of data.



## Diversity, inclusion and teamworking

### Description of competency in context of this sector

This competency covers the role of the surveyor within the team and their involvement with the establishment of the team. It deals with how team members interact, their behaviour and communication. It also looks at how to build a diverse and inclusive team and the resulting benefits for both the individual and the team.

### Examples of likely knowledge, skills and experience at each level

#### Level 1

Demonstrate knowledge and understanding of the principles, behaviour and dynamics of successfully working in a team.

Examples of knowledge comprised within this level are:

- How team members are selected and appointed
- The role played by the various team members
- The importance and business value of diversity in a team
- Formal communication processes within the team
- Inclusive communications
- How partnering and collaborative working affects the team
- Internal diversity and inclusion policies, including any applicable to non-discrimination or anti-harassment in the workplace
- Unconscious bias
- Supply chain management
- Relevant legislation within your area of practice.

#### Level 2

Provide evidence of practical application of working as a team member in your area of practice.

Examples of activities and knowledge comprised within this level are:

- Involvement with the selection and appointment of team members (consultants, contractors, sub-contractors, suppliers)
- Commitment to diversity and inclusion throughout the attraction and recruitment process
- Implementing processes to identify and address any barriers faced by different groups within the team
- Participating in project meetings
- Using project communication systems
- Ensure internal and external communications reach minimum standards for accessibility.

#### Level 3

Provide evidence of evaluation of your teamworking skills in a variety of situations.

Examples of activities and knowledge comprised within this level are:

- Chairing project meetings
- Promote flexible working policies and work-life balance within the team
- Provide visible support to underrepresented groups
- Facilitating risk or value workshops
- Setting up project communication systems
- Setting up partnering agreements
- Establishing frameworks
- Post-completion project analysis of the team's performance
- Participation in diverse recruitment panels
- Taking action to identify and address unconscious bias.

## Inclusive environments

### Description of competency in context of this sector

This competency is about the principles and processes that deliver accessible and inclusive environments, recognising the diversity of user needs and the requirement to put people (of all ages and abilities) at the heart of the process.

An inclusive environment recognises and accommodates differences in the way people use the built and natural environment. It facilitates dignified, equal and intuitive use by everyone. It does not physically or socially separate, discriminate or isolate. It readily accommodates and welcomes diverse user needs.

These principles and processes apply to all buildings, places, and spaces, and to equipment, in and around new property or in the adaptation of existing property, as well as to services provided to the public. Particular regard should be given to buildings, places and spaces that are open to the public; sports and entertainment venues; schools, colleges and educational establishments; hospitals and health facilities; and residential care facilities; as well as commercial and employment buildings.

### Examples of likely knowledge, skills and experience at each level

#### Level 1

Demonstrate an understanding of the principles and processes that deliver accessible and inclusive environments, recognising the diversity of user needs and the requirement to put people (of all ages and abilities) at the heart of the process. In doing so, have regard to the legal, economic, sustainable and social case for making inclusion the norm not the exception.

Examples of knowledge comprised within this level are:

- Recognition of the diversity of user needs
- Local planning policy, building regulation and health and safety requirements as applied to inclusive environments
- Appreciate and distinguish between ethical issues as opposed to legal requirements
- Knowledge of best practice technical standards relevant to country of practice.

#### Level 2

Provide evidence of practical application of the principles and processes that deliver accessible and inclusive environments.

Examples of activities and knowledge comprised within this level are:

- Practical applications as applied to different types of building and their associated uses
- Practical applications as applied to different types of outside areas and their associated uses
- A recognition of real and perceived sensitive situations in the design or use of inclusive environments
- Ability to recognise the need for and use appropriate language in the discussion and resolution of inclusivity challenges.

#### Level 3

Provide evidence of reasoned advice given to clients and others of the principles and processes that deliver accessible and inclusive environments.

Examples of activities and knowledge comprised within this level are:

- The scoping and briefing of new design work or in relation to remodelled buildings and external spaces
- The design and specification of a building, landscape/public realm project from outline proposals to completion of the design and specification process
- The drafting of clauses in leases or user agreements as to how places and spaces might be accessed or used

## Sustainability

### Description of competency in context of this sector

This competency covers the role of the surveyor in dealing with the impact of sustainability issues. Achievement of this competency demonstrates a broad-based understanding of the theory of sustainability as set in its political and legal framework, together with an appreciation of its economic, social and environmental context and the tools and techniques used to measure cost and return, and evaluate options for action.

### Examples of likely knowledge, skills and experience at each level

#### Level 1

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.

Examples of knowledge comprised within this level are:

- The principles of sustainability within the development process
- The relationship between property and the environment
- How national and international legislation, regulations and taxation relating to sustainability affect a project
- Criteria by which sustainability is measured in relation to finished buildings
- The principles of how design, technology and construction processes can contribute to sustainable building
- Design considerations – site, location, building form, materials, lighting, ventilation, heating, water and drainage
- Sources of renewable energy and energy recovery
- The principles of material resource efficiency within the supply chain.

#### Level 2

Provide evidence of the practical application of sustainability appropriate to your area of practice, and the circumstances in which specialist advice is necessary.

Examples of activities and knowledge comprised within this level are:

- Planning guidance, sustainability checklists
- Focus on energy – EU Directive on Energy Performance of Buildings or National equivalent
- Renewable energy options – photovoltaics, wind turbines, biomass, central heating and power (CHP), ground source heating, thermal mass
- National Infrastructure projects and energy conservation
- Carrying out capital cost and value engineering exercises to determine the impact of sustainability issues
- Carrying out life cycle cost exercises which take account of sustainability issues
- Understanding the measures undertaken by governments and international bodies to encourage the reduction of the environmental impact of development.

#### Level 3

Provide evidence of reasoned advice given to clients and others on the policy, law and best practice of sustainability in your area of practice.

Examples of activities and knowledge comprised within this level are:

- Giving reasoned advice to your client and members of the project team on the financial impact of sustainability on a project
- Giving reasoned advice on the application of environmental law and policy
- Interpreting environmental reports and giving reasoned advice on the financial impact and programme implications on a project
- Giving advice on sustainable material selection and how performance baselines can be estimated
- Sustainable valuation, triple bottom line, economic, social and environmental considerations, short- medium- long term impacts
- Hard and soft valuation issues, health, well-being and productivity.

## Leadership (mandatory for Senior Professional applicants only)

### Description of competency in context of this sector

This competency covers the characteristics and behaviour of leaders. Candidates should be aware of the alternative styles of leadership and motivation. Candidates should have an understanding of how these techniques can be applied in their area of practice.

### Examples of likely knowledge, skills and experience at each level

#### Level 1

Demonstrate knowledge and understanding of the characteristics and behaviour of a leader.

Examples of knowledge comprised within this level are:

- The different styles of leadership
- The different motivation theories
- Effective organisational design and communication strategies
- The climate necessary for the creation of high performing teams.

#### Level 2

Provide evidence of application of your role as a leader appropriate to your area of practice.

Examples of activities and knowledge comprised within this level are:

- How leadership and motivation theories can be applied in practice
- How organisational design and communication strategies can affect leadership
- The ingredients necessary to create high performing teams.

#### Level 3

Provide evidence of evaluation of your leadership role.

Examples of activities and knowledge comprised within this level are:

- Adapting your natural leadership style to meet challenges in your area of practice
- Adapting your leadership style to improve personal and team performance
- Demonstrating successful outcomes from your leadership and decision making
- Receiving acceptable peer group reviews of your performance as a leader.

## Managing people (mandatory for Senior Professional applicants only)

### Description of competency in context of this sector

This competency covers the principles and practice of managing people. Candidates should be aware of the skills required to manage people. Candidates should have an understanding of the appropriate application of these skills.

### Examples of likely knowledge, skills and experience at each level

#### Level 1

Demonstrate knowledge and understanding of the principles and practice of managing people.

Examples of knowledge comprised within this level are:

- Human resource management legislation and techniques
- Effective organisational design and communication strategies
- The climate and culture necessary for the creation of high performing teams.

#### Level 2

Provide evidence of the application of the skills required to manage people.

Examples of activities and knowledge comprised within this level are:

- The principles of human resource legislation
- Applying human resource techniques
- Effecting improved human resource performance
- How use of effective organisational design and communication strategies improves human resource performance
- How climate and culture affect human resource performance.

#### Level 3

Provide evidence of the evaluation of your people management skills.

Examples of activities and knowledge comprised within this level are:

- Managing people and teams and achieving performance targets
- Carrying out performance appraisals and receiving acceptable individual and team peer reviews
- Carrying out training needs analyses
- Recruiting people.

## Managing resources (excluding human resources) (mandatory for Senior Professional applicants only)

### Description of competency in context of this sector

This competency is about managing the effective use, allocation and costing of resources (not including human resources).

### Examples of likely knowledge, skills and experience at each level

#### Level 1

Demonstrate knowledge and understanding of the resources required and their cost for the effective operation of a business.

Examples of knowledge comprised within this level are:

- Types of resources required
- How to manage financial resources
- Accounting techniques
- Budgeting techniques
- Forecasting techniques
- Methods for obtaining resources and monitoring their use
- Personal resource management
- Costing of resources
- Relationship between cost and value of resources.

#### Level 2

Provide evidence of the application in your area of practice, giving reasoned advice on the most effective use, allocation and cost of resources.

Examples of activities and knowledge comprised within this level are:

- Setting financial objectives
- Constructing a budget
- Monitoring and managing financial resources
- Setting personal objectives
- Preparing reports and recommendations for the use and allocation of resources.

#### Level 3

Provide evidence of the evaluation of managing resources in specific business cases.

Examples of activities and knowledge comprised within this level are:

- Undertaking cost benefit analysis
- Monitoring performance against budgets
- Taking action to improve poor performance against budgets/ plans
- Reviewing personal performance
- Reviewing project performance.

## Building Control

Mandatory competencies	Core competencies	Optional competencies	
<p><b>Level 3</b></p> <ul style="list-style-type: none"> <li>Ethics, Rules of Conduct and professionalism</li> </ul> <p><b>Level 2</b></p> <ul style="list-style-type: none"> <li>Client care</li> <li>Communication and negotiation</li> <li>Health and safety</li> </ul> <p><b>Level 1</b></p> <ul style="list-style-type: none"> <li>Accounting principles and procedures</li> <li>Business planning</li> <li>Conflict avoidance, management and dispute resolution procedures</li> <li>Data management</li> <li>Diversity, inclusion and teamworking</li> <li>Inclusive environments</li> <li>Sustainability</li> </ul>	<p><b>Level 3</b></p> <ul style="list-style-type: none"> <li>Building control inspections</li> <li>Fire safety</li> <li>Inspection</li> <li>Legal/regulatory compliance</li> </ul>	<p><b>Two to Level 3 and one to Level 2</b></p> <ul style="list-style-type: none"> <li>BIM management</li> <li>Building pathology</li> <li>Client care (to Level 3) <b>or</b> Data management</li> <li>Conservation and restoration</li> <li>Construction technology and environmental services</li> <li>Contaminated land</li> <li>Measurement</li> <li>Planning and development management</li> <li>Risk management</li> <li>Sustainability</li> <li>Works progress and quality management.</li> </ul>	<p>Plus, <b>one to Level 2</b> from the full list of technical competencies, including any not already chosen from the optional list.</p>

## Building Surveying

### Mandatory competencies

#### Level 3

- Ethics, Rules of Conduct and professionalism

#### Level 2

- Client care
- Communication and negotiation
- Health and safety

#### Level 1

- Accounting principles and procedures
- Business planning
- Conflict avoidance, management and dispute resolution procedures
- Data management
- Diversity, inclusion and teamworking
- Inclusive environments
- Sustainability

### Core competencies

#### Level 3

- Building pathology
- Construction technology and environmental services
- Contract administration
- Design and specification
- Inspection
- Legal/regulatory compliance

#### Level 1

- Fire safety

### Optional competencies

#### Two to Level 2

- BIM management
- Client care (to Level 3) **or** Conflict avoidance, management and dispute resolution procedures **or** Health and safety (to Level 3) **or** Inclusive environments **or** Sustainability
- Commercial management
- Conservation and restoration
- Contract practice
- Design economics and cost planning
- Development/project briefs
- Fire safety
- Housing maintenance, repair and improvements **or** Maintenance management
- Insurance
- Landlord and tenant
- Measurement
- Procurement and tendering
- Project finance
- Quantification and costing
- Risk management
- Works progress and quality management

Plus, **one to Level 2** from the full list of technical competencies, including any not already chosen from the optional list.



## Commercial Real Estate

### Mandatory competencies

#### Level 3

- Ethics, Rules of Conduct and professionalism

#### Level 2

- Client care
- Communication and negotiation
- Health and safety

#### Level 1

- Accounting principles and procedures
- Business planning
- Conflict avoidance, management and dispute resolution procedures
- Data management
- Diversity, inclusion and teamworking
- Inclusive environments
- Sustainability

### Core competencies

#### Level 3

- Inspection

#### Level 2

- Measurement
- Valuation (or Level 3\*)

### Optional competencies

#### Three to Level 3

- Accounting principles and procedures **or** Conflict avoidance, management and dispute resolution **or** Data management **or** Sustainability
- Auctioneering
- BIM management
- Building pathology
- Capital taxation
- Compulsory purchase and compensation
- Contaminated land
- Corporate recovery and insolvency
- Development appraisals
- Insurance
- Indirect investment vehicles
- Investment management
- Landlord and tenant
- Leasing and letting
- Legal / regulatory compliance
- Loan security valuation
- Local taxation / assessment
- Planning and development management
- Property finance and funding
- Property management
- Purchase and sale
- Strategic real estate consultancy

Plus, **one to Level 3** or **two to Level 2** from the full list of technical competencies, including any not already chosen from the optional list.

\* If Valuation is taken to Level 3 the requirements are as follows;  
From the optional competency list you must select **two at Level 3** and **one at Level 2**  
**plus**  
From the full list of technical competencies you must select **one to Level 3** or **two at Level 2**

Although commercial real estate is the focus for the pathway, up to 30% of your experience can come from other property sectors, e.g. residential.

## Corporate Real Estate

### Mandatory competencies

#### Level 3

- Ethics, Rules of Conduct and professionalism

#### Level 2

- Client care
- Communication and negotiation
- Health and safety

#### Level 1

- Accounting principles and procedures
- Business planning
- Conflict avoidance, management and dispute resolution procedures
- Data management
- Diversity, inclusion and teamworking
- Inclusive environments
- Sustainability

### Core competencies

#### Level 3

- Business alignment **or** Strategic real estate consultancy

#### Level 2

- Business case
- Landlord and tenant **or** Property management

#### Level 1

- Valuation

### Optional competencies

**Three to Level 3** and **one to Level 2**, including any not already chosen from the core list

- Change management
- Inspection
- Leasing and letting
- Local taxation / assessment
- Measurement
- Performance management
- Procurement and tendering
- Programming and planning
- Purchase and sale
- Strategic real estate consultancy
- Supplier management
- Sustainability
- Valuation
- Workspace strategy

Plus, **one to Level 2** from the full list of technical competencies, including any not already chosen from the core and optional lists.

## Environmental Surveying

### Mandatory competencies

#### Level 3

- Ethics, Rules of Conduct and professionalism

#### Level 2

- Client care
- Communication and negotiation
- Health and safety

#### Level 1

- Accounting principles and procedures
- Business planning
- Conflict avoidance, management and dispute resolution procedures
- Data management
- Diversity, inclusion and teamworking
- Inclusive environments
- Sustainability

### Core competencies

#### Level 3

- Environmental management

#### Level 2

- Legal/regulatory compliance

#### Plus, three to Level 3

- Consultancy services
- Contaminated land
- Environmental assessment
- Environmental audit (and monitoring)
- Environmental science and processes
- Inspection
- Management of the natural environment and landscape
- Planning and development management

### Optional competencies

**Two to Level 2**, including any not already chosen from the core list

- Development appraisals
- Development/project briefs
- Energy and renewable resources
- Environmental analysis
- Forestry and woodland management
- GIS
- Ground engineering and subsidence
- Land use and diversification
- Management and regeneration of the built environment
- Measurement
- Surveying and mapping
- Sustainability
- Waste management

Plus, **one to Level 2** from the full list of technical competencies, including any not already chosen from the core and optional lists.

## Facilities Management

### Mandatory competencies

#### Level 3

- Ethics, Rules of Conduct and professionalism

#### Level 2

- Client care
- Communication and negotiation
- Health and safety

#### Level 1

- Accounting principles and procedures
- Business planning
- Conflict avoidance, management and dispute resolution procedures
- Data management
- Diversity, inclusion and teamworking
- Inclusive environments
- Sustainability

### Core competencies

#### Two to Level 3 and two to Level 2

- Asset management
- Business alignment
- Client care (must be taken to Level 3)
- Legal/regulatory compliance
- Maintenance management
- Performance management
- Procurement and tendering
- Project finance
- Supplier management
- Workspace strategy

### Optional competencies

#### Two to Level 3 and one to Level 2, including any not already chosen from the core list

- Big data
- BIM management
- Business case
- Change management
- Commercial management
- Conflict avoidance, management and dispute resolution procedures **or** Data management **or** Health and safety (must be taken to Level 3) **or** Inclusive environments **or** Sustainability
- Construction technology and environmental services
- Consultancy services
- Contract administration
- Contract practice
- Design and specification
- Environmental management
- Landlord and tenant
- Managing projects
- Measurement
- Risk management
- Smart cities and intelligent buildings
- Stakeholder management
- Strategic real estate consultancy
- Waste management
- Works progress and quality management

Plus, **one to Level 2** from the full list of technical competencies, including any not already chosen from the core and optional lists.

## Geomatics

### Mandatory competencies

#### Level 3

- Ethics, Rules of Conduct and professionalism

#### Level 2

- Client care
- Communication and negotiation
- Health and safety

#### Level 1

- Accounting principles and procedures
- Business planning
- Conflict avoidance, management and dispute resolution procedures
- Data management
- Diversity, inclusion and teamworking
- Inclusive environments
- Sustainability

### Core competencies

#### Three to Level 3

- Cadastre and land administration
- Conflict avoidance, management and dispute resolution procedures
- Engineering surveying
- Geodesy
- GIS
- Hydrographic surveying
- Legal/regulatory compliance
- Measurement
- Remote sensing and photogrammetry
- Surveying and mapping
- Surveying land and sea
- Use of the marine environment

Plus, Level 1

- Measurement

### Optional competencies

**One to Level 3** and **two to Level 2**, including any not already chosen from the core list

- Big data
- BIM management
- Construction technology and environmental services
- Consultancy services
- Data management
- Development/project briefs
- Environmental assessment
- Ground engineering and subsidence
- Management of the natural environment and landscape
- Planning and development management

Plus, **one to Level 2** from the full list of technical competencies, including any not already chosen from the core and optional lists.

To achieve the **Chartered Engineering Surveyor** designation candidates must select **Engineering surveying** to Level 3

To achieve the **Chartered Hydrographic Surveyor** designation candidates must select **Hydrographic surveying** to Level 3

To achieve the **Chartered Land Surveyor** designation candidates must select **Surveying and mapping** to Level 3

## Infrastructure

Mandatory competencies	Core competencies	Optional competencies
<p><b>Level 3</b></p> <ul style="list-style-type: none"> <li>Ethics, Rules of Conduct and professionalism</li> </ul> <p><b>Level 2</b></p> <ul style="list-style-type: none"> <li>Client care</li> <li>Communication and negotiation</li> <li>Health and safety</li> </ul> <p><b>Level 1</b></p> <ul style="list-style-type: none"> <li>Accounting principles and procedures</li> <li>Business planning</li> <li>Conflict avoidance, management and dispute resolution procedures</li> <li>Data management</li> <li>Diversity, inclusion and teamworking</li> <li>Inclusive environments</li> <li>Sustainability</li> </ul>	<p><b>Level 3</b></p> <ul style="list-style-type: none"> <li>Engineering science and technology</li> </ul> <p>Plus, four to Level 3</p> <ul style="list-style-type: none"> <li>Client care</li> <li>Contract practice</li> <li>Cost prediction and analysis</li> <li>Procurement and tendering</li> <li>Programming and planning</li> <li>Project controls</li> <li>Quantification, costing and price analysis</li> <li>Risk management</li> </ul>	<p><b>Two to Level 2</b>, including any not already chosen from the core list</p> <ul style="list-style-type: none"> <li>Asset management</li> <li>Building information modelling (BIM) management</li> <li>Compulsory purchase and compensation</li> <li>Conflict avoidance, management and dispute resolution procedures <b>or</b> Sustainability</li> <li>Contract administration</li> <li>Cross cultural awareness in a global business</li> <li>Leading projects, people and teams</li> <li>Managing projects</li> <li>Project finance</li> <li>Stakeholder management</li> <li>Supplier management</li> </ul> <p>Plus, <b>one to Level 2</b> from the full list of technical competencies, including any not already chosen from the core and optional lists.</p>

## Land and Resources

### Mandatory competencies

#### Level 3

- Ethics, Rules of Conduct and professionalism

#### Level 2

- Client care
- Communication and negotiation
- Health and safety

#### Level 1

- Accounting principles and procedures
- Business planning
- Conflict avoidance, management and dispute resolution procedures
- Data management
- Diversity, inclusion and teamworking
- Inclusive environments
- Sustainability

### Optional competencies

#### Five to Level 3 and one to Level 2

- Access and rights over land
- Agriculture
- Big data
- Cadastre and land administration
- Client care (must be taken to Level 3)
- Compulsory purchase and compensation
- Consultancy services
- Contaminated land
- Development appraisals
- Economic development
- Energy and renewable resources
- Engineering surveying
- Environmental management
- Geodesy
- GIS
- Hydrographic surveying
- Inspection
- Land use and diversification
- Landlord and tenant
- Legal/regulatory compliance
- Management of the natural environment and landscape
- Masterplanning and urban design
- Measurement
- Minerals management
- Planning and development management
- Property management
- Risk management
- Smart cities and intelligent buildings
- Spatial planning policy and infrastructure
- Strategic real estate consultancy
- Surveying and mapping
- Sustainability
- Valuation
- Waste management

Plus, **two to Level 2** from the full list of technical competencies, including any not already chosen from the optional list.

## Management Consultancy

Mandatory competencies	Core competencies	Optional competencies
<p><b>Level 3</b></p> <ul style="list-style-type: none"> <li>Ethics, Rules of Conduct and professionalism</li> </ul> <p><b>Level 2</b></p> <ul style="list-style-type: none"> <li>Client care</li> <li>Communication and negotiation</li> <li>Health and safety</li> </ul> <p><b>Level 1</b></p> <ul style="list-style-type: none"> <li>Accounting principles and procedures</li> <li>Business planning</li> <li>Conflict avoidance, management and dispute resolution procedures</li> <li>Data management</li> <li>Diversity, inclusion and teamworking</li> <li>Inclusive environments</li> <li>Sustainability</li> </ul>	<p><b>Level 3</b></p> <ul style="list-style-type: none"> <li>Business case</li> <li>Business planning</li> <li>Consultancy services</li> <li>Research methodologies and techniques</li> </ul>	<p><b>One to Level 3 and one to Level 2</b></p> <ul style="list-style-type: none"> <li>Business alignment</li> <li>Change management</li> <li>Corporate finance</li> <li>Corporate recovery and insolvency</li> <li>Data Management</li> <li>Development appraisals</li> <li>Development projects/briefs</li> <li>Economic development</li> <li>Managing resources</li> <li>Performance management</li> <li>Programming and planning</li> <li>Property finance and funding</li> <li>Smart cities and intelligent buildings</li> <li>Strategic real estate consultancy</li> <li>Workspace strategy</li> </ul> <p>Plus, <b>one competency to Level 2</b> from the full list of technical competencies, including any not already chosen from the optional list.</p>



## Minerals and Waste Management

### Mandatory competencies

#### Level 3

- Ethics, Rules of Conduct and professionalism

#### Level 2

- Client care
- Communication and negotiation
- Health and safety

#### Level 1

- Accounting principles and procedures
- Business planning
- Conflict avoidance, management and dispute resolution procedures
- Data management
- Diversity, inclusion and teamworking
- Inclusive environments
- Sustainability

### Core competencies

#### Level 3

- Minerals management **or** Waste management

#### Level 2

- Legal/regulatory compliance

#### Plus, three to Level 3

- Environmental assessment
- Environmental audit (and monitoring)
- Ground engineering and subsidence
- Inspection
- Landlord and tenant
- Local taxation/assessment
- Planning and development management
- Surveying and mapping
- Valuation

### Optional competencies

**Two to Level 2** from the list below, including any not already chosen from the core list

- Consultancy services
- Contaminated land
- Contract administration
- Development appraisals
- Development project briefs
- Energy and renewable resources
- Risk management
- Sustainability
- Works progress and quality management

Plus, **one to Level 2** from the full list of technical competencies, including any not already chosen from the core and optional lists.

## Personal Property / Arts and Antiques

### Mandatory competencies

#### Level 3

- Ethics, Rules of Conduct and professionalism

#### Level 2

- Client care
- Communication and negotiation
- Health and safety

#### Level 1

- Accounting principles and procedures
- Business planning
- Conflict avoidance, management and dispute resolution procedures
- Data management
- Diversity, inclusion and teamworking
- Inclusive environments
- Sustainability

### Core competencies

#### Level 3

- Object identification
- Research methodologies and techniques

#### Level 2

- Valuation (or Level 3\*)

#### Level 1

- Auctioneering

### Optional competencies

#### Three to Level 3 and one to Level 2

- Accounting principles and procedures **or** Business planning **or** Communication and negotiation (Communication and negotiation must be taken to Level 3)
- Auctioneering
- Capital taxation
- Conservation and restoration
- Insurance
- Purchase and sale

Plus, **one to Level 2** from the full list of technical competencies, including any not already chosen from the optional list.

\* If Valuation is taken to Level 3 the optional requirements are;

**Two to Level 3 and one to Level 2 plus two to Level 2** from the full list of technical competencies

## Planning and Development

### Mandatory competencies

#### Level 3

- Ethics, Rules of Conduct and professionalism

#### Level 2

- Client care
- Communication and negotiation
- Health and safety

#### Level 1

- Accounting principles and procedures
- Business planning
- Conflict avoidance, management and dispute resolution procedures
- Data management
- Diversity, inclusion and teamworking
- Inclusive environments
- Sustainability

### Core competencies

#### Level 3

- Development appraisals
- Planning and development management **or** Spatial planning policy and infrastructure

#### Level 2

- Legal/regulatory compliance
- Valuation (or Level 3\*)

#### Level 1

- Measurement
- Surveying and mapping

### Optional competencies

#### Two to Level 3

- Access and rights over land
- BIM management
- Cadastre and land administration
- Compulsory purchase and compensation
- Contaminated land
- Design and specification
- Development/project briefs
- Economic development
- Environmental assessment
- Housing strategy and provision
- Leasing and letting
- Management and regeneration of the built environment
- Masterplanning and urban design
- Measurement
- Planning and development management **or** Spatial planning policy and infrastructure (whichever is not selected as a core competency)
- Project finance
- Purchase and sale
- Risk management
- Strategic real estate consultancy
- Surveying and mapping
- Sustainability

Plus, **one to Level 3** or **two to Level 2** from the full list of technical competencies, including any not already chosen from the optional list.

\* If Valuation is taken to Level 3 the requirements are as follows;

From the optional list, you must select **one to Level 3** and **one to Level 2**

**plus**

**one to Level 3** or **two to Level 2** from the full list of technical competencies

## Project Management

### Mandatory competencies

#### Level 3

- Ethics, Rules of Conduct and professionalism

#### Level 2

- Client care
- Communication and negotiation
- Health and safety

#### Level 1

- Accounting principles and procedures
- Business planning
- Conflict avoidance, management and dispute resolution procedures
- Data management
- Diversity, inclusion and teamworking
- Inclusive environments
- Sustainability

### Core competencies

#### Level 3

- Contract practice
- Development/project briefs
- Leading projects, people and teams
- Managing projects
- Programming and planning

#### Level 2

- Construction technology and environmental services
- Procurement and tendering
- Project finance

### Optional competencies

#### One to Level 2

- Accounting principles and procedures **or** Communication and negotiation (must be taken to Level 3) **or** Conflict avoidance, management and dispute resolution procedures **or** Sustainability
- BIM management
- Commercial management
- Consultancy Services
- Contract administration
- Development appraisals
- Legal/regulatory compliance
- Maintenance management
- Performance management
- Purchase and sale
- Stakeholder management
- Supplier management
- Works progress and quality management

Plus, **one to Level 2** from the full list of technical competencies, including any not already chosen from the optional list.

## Property finance and investment

### Mandatory competencies

#### Level 3

- Ethics, Rules of Conduct and professionalism

#### Level 2

- Client care
- Communication and negotiation
- Health and safety

#### Level 1

- Accounting principles and procedures
- Business planning
- Conflict avoidance, management and dispute resolution procedures
- Data management
- Diversity, inclusion and teamworking
- Inclusive environments
- Sustainability

### Core competencies

#### Three to Level 3 and one to Level 2

- Financial modelling
- Inspection
- Investment management (including fund and portfolio management)
- Property finance and funding

#### Level 1

- Valuation

### Optional competencies

#### One to Level 3 and one to Level 2

- Accounting principles and procedures
- Capital taxation
- Corporate finance
- Development appraisals
- Indirect investment vehicles
- Landlord and tenant
- Leasing and letting
- Local taxation/assessment
- Property management
- Purchase and sale
- Research methodologies and techniques
- Strategic real estate consultancy
- Valuation

Plus, **one to Level 2** from the full list of technical competencies, including any not already chosen from the optional list.

## Quantity Surveying and Construction

### Mandatory competencies

#### Level 3

- Ethics, Rules of Conduct and professionalism

#### Level 2

- Client care
- Communication and negotiation
- Health and safety

#### Level 1

- Accounting principles and procedures
- Business planning
- Conflict avoidance, management and dispute resolution procedures
- Data management
- Diversity, inclusion and teamworking
- Inclusive environments
- Sustainability

### Core competencies

#### Level 3

- Commercial management (of construction works) **or** Design economics and cost planning\*
- Construction technology and environmental services
- Contract practice
- Procurement and tendering
- Project finance (control and reporting)
- Quantification and costing (of construction works)

### Optional competencies

#### Two to Level 2

- Capital allowances
- Commercial management (of construction works) **or** Design economics and cost planning (whichever is not selected as core competency)
- Conflict avoidance, management and dispute resolution procedures **or** Sustainability
- Contract administration
- Corporate recovery and insolvency
- Due diligence
- Insurance
- Programming and planning
- Project feasibility analysis
- Risk management

\* Candidates working in a **commercial or contracting environment** will likely choose **Commercial management to Level 3**.

Candidates working in a **consulting environment** within either the public or private sector will likely choose **Design economics and cost planning to Level 3**.

## Research

### Mandatory competencies

#### Level 3

- Ethics, Rules of Conduct and professionalism

#### Level 2

- Client care
- Communication and negotiation
- Health and safety

#### Level 1

- Accounting principles and procedures
- Business planning
- Conflict avoidance, management and dispute resolution procedures
- Data management
- Diversity, inclusion and teamworking
- Inclusive environments
- Sustainability

### Core competencies

#### Level 3

- Client care
- Data management
- Research methodologies and techniques

### Optional competencies

Five to Level 1 from the core and/or optional competency lists for your chosen pathway.

Plus, **one to Level 2** and **two to Level 1** from the full list of technical competencies.

Candidates must demonstrate competence in research that is applied to the delivery of solutions to a wide range of projects, employing a range of approaches and relating to a number of locations. The research must be relevant to the chosen pathway.

## Residential

Mandatory competencies	Core competencies	Optional competencies
<p><b>Level 3</b></p> <ul style="list-style-type: none"> <li>Ethics, Rules of Conduct and professionalism</li> </ul> <p><b>Level 2</b></p> <ul style="list-style-type: none"> <li>Client care</li> <li>Communication and negotiation</li> <li>Health and safety</li> </ul> <p><b>Level 1</b></p> <ul style="list-style-type: none"> <li>Accounting principles and procedures</li> <li>Business planning</li> <li>Conflict avoidance, management and dispute resolution procedures</li> <li>Data management</li> <li>Diversity, inclusion and teamworking</li> <li>Inclusive environments</li> <li>Sustainability</li> </ul>	<p><b>Two to Level 3</b> and <b>two to Level 2</b> of which candidates must select <b>Inspection, Measurement</b> and <b>Valuation</b> to at least <b>Level 2</b></p> <ul style="list-style-type: none"> <li>Building pathology</li> <li>Housing maintenance, repairs and improvements</li> <li>Housing management and policy</li> <li>Housing strategy and provision</li> <li>Inspection</li> <li>Leasing and letting</li> <li>Legal/regulatory compliance</li> <li>Market appraisal</li> <li>Measurement</li> <li>Property management</li> <li>Purchase and sale</li> <li>Valuation</li> </ul>	<p><b>Two to Level 3</b> and <b>one to Level 2</b>, including any not already chosen from the core list.</p> <ul style="list-style-type: none"> <li>Auctioneering</li> <li>Capital taxation</li> <li>Compulsory purchase and compensation</li> <li>Conflict avoidance, management and dispute resolution procedures <b>or</b> Sustainability</li> <li>Data management</li> <li>Development appraisals</li> <li>Environmental assessment</li> <li>Indirect investment vehicles</li> <li>Investment management (including fund and portfolio management)</li> <li>Land use and diversification</li> <li>Landlord and tenant</li> <li>Loan security valuation</li> <li>Local taxation/assessments</li> <li>Maintenance management</li> <li>Planning and development management</li> <li>Procurement and tendering</li> <li>Property finance and funding</li> <li>Risk management</li> <li>Spatial planning policy and infrastructure</li> <li>Strategic real estate consultancy</li> <li>Supplier management</li> </ul> <p>Plus, <b>one to Level 2</b> from the full list of technical competencies, including any not already chosen from the core and optional lists.</p>



## Rural

Mandatory competencies	Core competencies	Optional competencies
<p><b>Level 3</b></p> <ul style="list-style-type: none"> <li>Ethics, Rules of Conduct and professionalism</li> </ul> <p><b>Level 2</b></p> <ul style="list-style-type: none"> <li>Client care</li> <li>Communication and negotiation</li> <li>Health and safety</li> </ul> <p><b>Level 1</b></p> <ul style="list-style-type: none"> <li>Accounting principles and procedures</li> <li>Business planning</li> <li>Conflict avoidance, management and dispute resolution procedures</li> <li>Data management</li> <li>Diversity, inclusion and teamworking</li> <li>Inclusive environments</li> <li>Sustainability</li> </ul>	<p><b>One to Level 3</b></p> <ul style="list-style-type: none"> <li>Agriculture</li> <li>Management of the natural environment and landscape</li> <li>Property management</li> <li>Valuation</li> </ul>	<p><b>Three to Level 3 and two to Level 2</b>, including any not already chosen from the core list</p> <ul style="list-style-type: none"> <li>Access and rights over land</li> <li>Agriculture*</li> <li>Auctioneering</li> <li>Compulsory purchase and compensation</li> <li>Forestry and woodland management</li> <li>Land use and diversification</li> <li>Landlord and tenant</li> <li>Management of the natural environment and landscape</li> <li>Planning and development management</li> <li>Property management</li> <li>Purchase and sale</li> <li>Valuation</li> </ul> <p>Plus, <b>one to Level 3</b> or <b>two to Level 2</b> from the full list of technical competencies, including any not already chosen from core and optional lists</p> <div data-bbox="1653 539 2101 699" style="background-color: #e0f2f1; padding: 5px;"> <p>* If Agriculture has not been selected as the one core competency it must be taken as one of the optional competencies to either Level 2 or 3.</p> </div>

## Taxation Allowances

### Mandatory competencies

#### Level 3

- Ethics, Rules of Conduct and professionalism

#### Level 2

- Client care
- Communication and negotiation
- Health and safety

#### Level 1

- Accounting principles and procedures
- Business planning
- Conflict avoidance, management and dispute resolution procedures
- Data management
- Diversity, inclusion and teamworking
- Inclusive environments
- Sustainability

### Core competencies

#### Level 3

- Accounting principles and procedures
- Capital allowances
- Construction technology and environmental services
- Quantification and costing (of construction works)
- Valuation

#### Level 2

- Contract practice

### Optional competencies

#### Two to Level 2

- Capital taxation
- Contaminated land
- Design economics and cost planning
- Development appraisals
- Due diligence
- Insurance
- Property finance and funding
- Property management
- Risk management
- Sustainability

## Valuation

### Mandatory competencies

#### Level 3

- Ethics, Rules of Conduct and professionalism

#### Level 2

- Client care
- Communication and negotiation
- Health and safety

#### Level 1

- Accounting principles and procedures
- Business planning
- Conflict avoidance, management and dispute resolution procedures
- Data management
- Diversity, inclusion and teamworking
- Inclusive environments
- Sustainability

### Core competencies

#### Level 3

- Inspection
- Valuation

#### Level 2

- Measurement

### Optional competencies

#### Three to Level 3 or two to Level 3 and two to Level 2\*

- Accounting principles and procedures **or** Conflict avoidance, management and dispute resolution procedures **or** Data management **or** Sustainability
- Auctioneering
- Building pathology
- Capital taxation
- Compulsory purchase and compensation
- Construction technology and environmental services
- Contaminated land
- Corporate recovery and insolvency
- Development appraisals
- Indirect investment vehicles
- Insurance
- Investment management (including fund and portfolio management)
- Landlord and tenant
- Leasing and letting
- Legal/regulatory compliance
- Loan security valuation
- Local taxation/assessment
- Planning and development management
- Property finance and funding
- Property management
- Purchase and sale
- Strategic real estate consultancy
- Valuation of businesses and intangible assets

Plus, **one to Level 2** from the full list of technical competencies, including any not already chosen from the optional list.

\* Candidates planning to specialise in **Residential survey and valuation** must choose Building pathology to Level 3 as part of their optional competency requirements.

Candidates planning to specialise in **Machinery and business assets** must choose **two to Level 3** from the following list as part of their optional competency requirements:

- Accounting principles and procedures **or** Conflict avoidance, management and dispute resolution procedures **or** Sustainability
- Auctioneering
- Capital taxation
- Compulsory purchase and compensation
- Corporate recovery and insolvency
- Insurance
- Investment management (including fund and portfolio management)
- Leasing and letting
- Legal/regulatory compliance
- Local taxation/assessment
- Purchase and sale

## Valuation of Businesses and Intangible Assets

Mandatory competencies	Core competencies	Optional competencies	
<p><b>Level 3</b></p> <ul style="list-style-type: none"> <li>Ethics, Rules of Conduct and professionalism</li> </ul> <p><b>Level 2</b></p> <ul style="list-style-type: none"> <li>Client care</li> <li>Communication and negotiation</li> <li>Health and safety</li> </ul> <p><b>Level 1</b></p> <ul style="list-style-type: none"> <li>Accounting principles and procedures</li> <li>Business planning</li> <li>Conflict avoidance, management and dispute resolution procedures</li> <li>Data management</li> <li>Diversity, inclusion and teamworking</li> <li>Inclusive environments</li> <li>Sustainability</li> </ul>	<p><b>Level 3</b></p> <ul style="list-style-type: none"> <li>Accounting principles and procedures</li> <li>Asset identification and assessment</li> <li>Valuation of businesses and intangible assets</li> <li>Valuation reporting and research</li> </ul>	<p><b>One to Level 3 or two to Level 2</b></p> <ul style="list-style-type: none"> <li>Capital allowances</li> <li>Compulsory purchase and compensation</li> <li>Corporate finance</li> <li>Corporate recovery and insolvency</li> <li>Purchase and sale</li> <li>Taxation</li> </ul>	<p>Plus, <b>one to Level 2</b> from the full list of technical competencies, including any not already chosen from the optional list.</p>

# Competency list and descriptors

- 1
- 2
- 3
- 4

✓ – Core      ✓ – Optional		Environmental Surveying	Geomatics	Minerals and Waste Management	Planning and Development	Rural	Land and Resources	Personal Property / Arts and Antiques	Commercial Real Estate	Corporate real estate	Facilities Management	Management Consultancy	Property Finance and Investment	Residential	Valuation	Valuation of Businesses and Intangible Assets	Building Control	Building Surveying	Infrastructure	Project Management	Quantity Surveying and Construction	Taxation Allowances
----------------------------	--	-------------------------	-----------	-------------------------------	--------------------------	-------	--------------------	---------------------------------------	------------------------	-----------------------	-----------------------	------------------------	---------------------------------	-------------	-----------	---	------------------	--------------------	----------------	--------------------	-------------------------------------	---------------------

Mandatory			
Ethics, Rules of Conduct and professionalism		Applicable to all pathways	
Communication and negotiation			
Client care			
Health and safety			
Accounting principles and procedures			
Business planning			
Conflict avoidance, management and dispute resolution procedures			
Data management			
Diversity, inclusion and teamworking			
Inclusive environments			
Sustainability			

# Competency list and descriptors



	Environmental Surveying	Geomatics	Minerals and Waste Management	Planning and Development	Rural	Land and Resources	Personal Property / Arts and Antiques	Commercial Real Estate	Corporate real estate	Facilities Management	Management Consultancy	Property Finance and Investment	Residential	Valuation	Valuation of Businesses and Intangible Assets	Building Control	Building Surveying	Infrastructure	Project Management	Quantity Surveying and Construction	Taxation Allowances
✓ – Core    ✓ – Optional																					
<b>Technical</b>																					
Access and rights over land				✓	✓	✓															
Agriculture					✓	✓															
Asset identification and assessment															✓						
Asset management										✓								✓			
Auctioneering					✓		✓	✓					✓	✓							
Big data		✓				✓				✓											
BIM management		✓		✓				✓		✓						✓	✓	✓	✓		
Building control inspections																✓					
Building pathology								✓					✓	✓		✓	✓				
Business alignment									✓	✓	✓										
Business case									✓	✓	✓										
Cadastre and land administration		✓		✓		✓															
Capital allowances															✓					✓	✓
Capital taxation							✓	✓				✓	✓	✓							✓

# Competency list and descriptors



	Environmental Surveying	Geomatics	Minerals and Waste Management	Planning and Development	Rural	Land and Resources	Personal Property / Arts and Antiques	Commercial Real Estate	Corporate real estate	Facilities Management	Management Consultancy	Property Finance and Investment	Residential	Valuation	Valuation of Businesses and Intangible Assets	Building Control	Building Surveying	Infrastructure	Project Management	Quantity Surveying and Construction	Taxation Allowances
✓ – Core    ✓ – Optional																					
Change management									✓	✓	✓										
Client care						✓				✓						✓	✓	✓			
Commercial management										✓							✓		✓	✓	
Compulsory purchase and compensation				✓	✓	✓		✓					✓	✓	✓			✓			
Conservation and restoration							✓									✓	✓				
Construction technology and environmental services		✓								✓				✓		✓	✓		✓	✓	✓
Consultancy services	✓	✓	✓			✓				✓	✓								✓		
Contaminated land	✓		✓	✓		✓		✓						✓		✓					✓
Contract administration			✓							✓							✓	✓	✓	✓	
Contract practice										✓							✓	✓	✓	✓	✓
Corporate finance											✓	✓			✓						
Corporate recovery and insolvency								✓			✓			✓	✓					✓	
Cost prediction and analysis																		✓			
Cross cultural awareness in a global business																		✓			
Design and specification				✓						✓							✓				

# Competency list and descriptors



	Environmental Surveying	Geomatics	Minerals and Waste Management	Planning and Development	Rural	Land and Resources	Personal Property / Arts and Antiques	Commercial Real Estate	Corporate real estate	Facilities Management	Management Consultancy	Property Finance and Investment	Residential	Valuation	Valuation of Businesses and Intangible Assets	Building Control	Building Surveying	Infrastructure	Project Management	Quantity Surveying and Construction	Taxation Allowances
✓ – Core    ✓ – Optional																					
Design economics and cost planning																	✓			✓	✓
Development appraisals	✓		✓	✓		✓		✓			✓	✓	✓	✓					✓		✓
Development/project briefs	✓	✓	✓	✓							✓						✓		✓		
Due diligence																				✓	✓
Economic development				✓		✓					✓										
Energy and renewable resources	✓		✓			✓															
Engineering surveying		✓				✓															
Engineering science and technology																		✓			
Environmental analysis	✓																				
Environmental assessment	✓	✓	✓	✓									✓								
Environmental audit (and monitoring)	✓		✓																		
Environmental management	✓					✓				✓											
Environmental science and processes	✓																				
Financial modelling												✓									
Fire safety																✓	✓				



# Competency list and descriptors



	Environmental Surveying	Geomatics	Minerals and Waste Management	Planning and Development	Rural	Land and Resources	Personal Property / Arts and Antiques	Commercial Real Estate	Corporate real estate	Facilities Management	Management Consultancy	Property Finance and Investment	Residential	Valuation	Valuation of Businesses and Intangible Assets	Building Control	Building Surveying	Infrastructure	Project Management	Quantity Surveying and Construction	Taxation Allowances
✓ – Core    ✓ – Optional																					
Forestry and woodland management	✓				✓																
Geodesy		✓				✓															
GIS	✓	✓				✓															
Ground engineering and subsidence	✓	✓	✓																		
Housing maintenance, repairs and improvements													✓				✓				
Housing management and policy													✓								
Housing strategy and provision				✓									✓								
Hydrographic surveying		✓				✓															
Indirect investment vehicles								✓				✓	✓	✓							
Inspection	✓		✓			✓		✓	✓			✓	✓	✓		✓	✓				
Investment management								✓				✓	✓	✓							
Insurance							✓	✓						✓			✓			✓	✓
Land use and diversification	✓				✓	✓							✓								
Landlord and tenant			✓		✓	✓		✓	✓	✓		✓	✓	✓			✓				
Leading projects, people and teams																		✓	✓		

# Competency list and descriptors



	Environmental Surveying	Geomatics	Minerals and Waste Management	Planning and Development	Rural	Land and Resources	Personal Property / Arts and Antiques	Commercial Real Estate	Corporate real estate	Facilities Management	Management Consultancy	Property Finance and Investment	Residential	Valuation	Valuation of Businesses and Intangible Assets	Building Control	Building Surveying	Infrastructure	Project Management	Quantity Surveying and Construction	Taxation Allowances
✓ – Core    ✓ – Optional																					
Leasing/letting				✓				✓	✓			✓	✓	✓							
Legal/regulatory compliance	✓	✓	✓	✓		✓		✓		✓			✓	✓		✓	✓		✓		
Loan security valuation								✓					✓	✓							
Local taxation/assessment			✓					✓	✓			✓	✓	✓							
Maintenance management										✓			✓				✓		✓		
Management and regeneration of the built environment	✓			✓																	
Management of the natural environment and landscape	✓	✓			✓	✓															
Managing projects										✓								✓	✓		
Managing resources											✓										
Market appraisal													✓								
Masterplanning and urban design				✓		✓															
Measurement	✓	✓		✓		✓		✓	✓	✓			✓	✓		✓	✓				
Minerals management			✓			✓															
Object identification							✓														
Open data																					

# Competency list and descriptors



	Environmental Surveying	Geomatics	Minerals and Waste Management	Planning and Development	Rural	Land and Resources	Personal Property / Arts and Antiques	Commercial Real Estate	Corporate real estate	Facilities Management	Management Consultancy	Property Finance and Investment	Residential	Valuation	Valuation of Businesses and Intangible Assets	Building Control	Building Surveying	Infrastructure	Project Management	Quantity Surveying and Construction	Taxation Allowances
✓ – Core    ✓ – Optional																					
Performance management									✓	✓	✓								✓		
Planning and development management	✓	✓	✓	✓	✓	✓		✓					✓	✓		✓					
Procurement and tendering									✓	✓			✓				✓	✓	✓	✓	
Programming and planning									✓		✓							✓	✓	✓	
Project controls																		✓			
Project feasibility analysis																				✓	
Project finance				✓						✓							✓	✓	✓	✓	
Property finance and funding								✓			✓	✓	✓	✓							✓
Property management					✓	✓		✓	✓			✓	✓	✓							✓
Purchase and sale				✓	✓		✓	✓	✓			✓	✓	✓	✓				✓		
Quantification and costing																	✓			✓	✓
Quantification, costing and price analysis																		✓			
Remote sensing and Photogrammetry		✓																			
Research methodologies and techniques							✓				✓	✓									
Risk management			✓	✓		✓				✓			✓			✓	✓	✓		✓	✓

# Competency list and descriptors



	Environmental Surveying	Geomatics	Minerals and Waste Management	Planning and Development	Rural	Land and Resources	Personal Property / Arts and Antiques	Commercial Real Estate	Corporate real estate	Facilities Management	Management Consultancy	Property Finance and Investment	Residential	Valuation	Valuation of Businesses and Intangible Assets	Building Control	Building Surveying	Infrastructure	Project Management	Quantity Surveying and Construction	Taxation Allowances
✓ – Core    ✓ – Optional																					
Smart cities and intelligent buildings						✓				✓	✓										
Spatial planning policy and infrastructure				✓		✓							✓								
Stakeholder management										✓								✓	✓		
Strategic real estate consultancy				✓		✓		✓	✓	✓	✓	✓	✓	✓							
Supplier management									✓	✓			✓					✓	✓		
Surveying and mapping	✓	✓	✓	✓		✓															
Surveying land and sea		✓																			
Taxation															✓						
Use of marine environment		✓																			
Valuation			✓	✓	✓	✓	✓	✓	✓			✓	✓	✓							✓
Valuation of business and intangible assets														✓	✓						
Valuation reporting and research															✓						
Waste management	✓		✓			✓				✓											
Works progress and quality management			✓							✓						✓	✓		✓		
Workspace strategy									✓	✓	✓										

For each descriptor, candidates will be required, as outlined in the pathway requirements, to demonstrate competency in terms of knowledge, understanding, its application and an ability to give reasoned advice or undertake action.

For each mandatory competency descriptor, please refer to section two of this document.

Technical competency descriptors for the area of practice, including examples of the likely skills, knowledge and experience required to demonstrate a competency at Levels 1, 2 and 3 are included in each individual pathway guide.

## Access and rights over land

### Level 1

Demonstrate knowledge and understanding of the legislation and/or framework for acquiring sites or access for the provision of power, water, pipelines, other third-party or communications infrastructure and other temporary uses. This should include the methodology and techniques used in valuation for these purposes.

### Level 2

Provide evidence of identifying and understanding the appropriate routing for lines, cables and other third-party infrastructure. This should include associated environmental assessment, undertaking inspections, and evaluating and negotiating payments for their use or acquisition.

### Level 3

Provide evidence of reasoned advice, undertake valuations on, and write reports in relation to, all matters relating to provision of power, water, pipelines, other third-party or communications infrastructure.

## Agriculture

### Level 1

Demonstrate knowledge and understanding of the principles, characteristics and organisation of agriculture according to different geographical, soil and climatic conditions.

### Level 2

Demonstrate application of the principles and systems of practical farming methods. This includes the requirements and characteristics of yields; current market prices of agricultural produce and livestock; costs of production; farm business management and the utilisation and cost of farm buildings.

### Level 3

Provide evidence of reasoned advice given to stakeholders on the management and practical application of appropriate methods and requirements of farming.

## Asset identification and assessment

### Level 1

Demonstrate knowledge and understanding of the identification and assessment of assets within your area of practice.

### Level 2

Apply your knowledge and understanding of what constitutes assets, the nature and character of the asset and different forms of ownership.

### Level 3

Provide evidence of reasoned advice on complex asset identification issues, the nature of assets, liability or asset to be valued.

## Asset management

### Level 1

Demonstrate knowledge and understanding of the aims, objectives, strategies and processes of managing assets.

### Level 2

Apply your knowledge to the processes and activities necessary including systematic record keeping, developing strategies of planned maintenance, repair and replacement and managing information systems.

### Level 3

Provide evidence of reasoned advice, based upon the knowledge and experience gained, in order to improve decision-making in asset management.

## Auctioneering

### Level 1

Demonstrate knowledge and understanding of the basic principles and legal obligations of auction. This should include preparation for, and procedures prior to or during, an auction.

### Level 2

Provide evidence of the practical application of your knowledge to the preparation for the sale of property at auction and procedures prior to or during an auction.

### Level 3

Provide evidence of reasoned advice based on a thorough working knowledge and experience of the auction process, including experience of selling at auction.

## Big data

### Level 1

Demonstrate knowledge and awareness of the principles of big data processing, the range of available sources of big data, data dynamics and a critical appreciation of the latest big data research issues.

### Level 2

Demonstrate an understanding of the techniques and the tools required for the maintenance of data quality, data hygiene and the statistical modelling, analysis and visual data interrogation of big data sets.

### Level 3

Provide evidence of design and implementation of big data analysis using algorithms to handle data sets in a scientific computing environment for the analysis of big data.

## Building information modelling (BIM) management

### Level 1

Demonstrate knowledge and understanding of the technical, process and collaborative aspects of the use of BIM.

### Level 2

Develop and apply management systems to facilitate the use of BIM on projects, including unified control and reporting procedures.

### Level 3

Show how the knowledge and experience gained in this competency has been applied to advising clients and/or senior management on BIM strategy.

## Building control inspections

### Level 1

How to undertake building inspections at stages of work in progress in order to assess compliance with building legislation.

### Level 2

Demonstrate the ability to observe, assess and take authoritative action in respect of contraventions of building legislation on site.

### Level 3

Demonstrate the application of specialist knowledge to the resolution of complex problems and contraventions of building legislation; demonstrate understanding of collapse of structures and measures necessary to ensure public safety.

## Building pathology

### Level 1

Demonstrate your knowledge and understanding of building defects.

### Level 2

Apply your knowledge to undertake surveys, use survey and other information to diagnose cause and mechanisms of failure.

### Level 3

Give reasoned advice and appropriate recommendations, including the preparation and presentation of reports.

## Business alignment

### Level 1

Demonstrate knowledge and understanding of how the business's core drivers impact on property provision and vice versa.

### Level 2

Provide evidence of the practical application that allows a closer working relationship between business functions and corporate real estate solutions.

### Level 3

Provide evidence of reasoned advice of developing appropriate strategies to develop and align real estate portfolio and workplace strategies with those of the business.

## Business case

### Level 1

Demonstrate knowledge and understanding of business cases and their application in corporate real estate.

### Level 2

Provide evidence of the practical application of the business case.

### Level 3

Provide evidence of advising on the preparation and presentation of business cases for a variety of purposes.

## Cadastre and land administration

### Level 1

Demonstrate knowledge and understanding of field and office procedures for boundary and/or cadastral surveys appropriate to your national and/or international location. Understand legal and physical boundaries and provide examples of these. Understand the principles of land management.

### Level 2

Apply your knowledge of the principles of land registration, land management, administration and legislation related to rights in real estate internationally and nationally. Understand the relationship between the surveyor, client and legal profession and preparation of evidence for the legal process.

### Level 3

Provide evidence of reasoned advice, and fully understand the role and responsibility of an expert witness, on the resolution of disputes by litigation and alternative procedures.

## Capital allowances

### Level 1

Demonstrate knowledge and understanding of capital allowances and grants.

### Level 2

Apply knowledge of capital allowances and grants, including the ability to use source documents necessary to prepare taxation allowances analyses.

### Level 3

Provide evidence of giving reasoned advice; preparing claims; making applications for grants; preparing and presenting reports to clients; and corresponding and negotiating with the relevant government and other authorities.

## Capital taxation

### Level 1

Demonstrate knowledge and understanding of the relevant provisions for capital taxation of real estate, equipment and/or other property/assets in your area of taxation.

### Level 2

Undertake valuations and negotiations for a variety of different property/asset types using different valuation methods for the purposes of capital taxation in your area of taxation.

### Level 3

Provide evidence of reasoned advice to stakeholders (to include senior management within your organisation, clients and courts/tribunal members) in respect of specific cases and/or other capital taxation issues in your area of taxation.

## Change management

### Level 1

Demonstrate knowledge and understanding of change management and its application in real estate.

### Level 2

Provide evidence of practical involvement with change management projects.

### Level 3

Provide evidence of advising on the development and implementation of strategies for change.



## Commercial management

### Level 1

Demonstrate knowledge and understanding of the principles of the management of projects.

### Level 2

Apply your knowledge to the financial management of projects, including regular monitoring and reporting on cashflow and profitability.

### Level 3

Monitor, report and advise on project cashflows and profitability. Evaluate and advise on the financial implications and appropriate management actions.

## Compulsory purchase and compensation

### Level 1

Demonstrate knowledge and understanding of the powers and procedures of government and other bodies in relation to the compulsory purchase and compensation. This covers legal interests in real estate and of the rights of owners, occupiers and the impacts on third-party affected by works or developments associated with compulsory purchase.

### Level 2

Assist in the preparation of the various stages involved in the process and negotiations in relation to compulsory purchase including the estimation and settlement of compensation claims.

### Level 3

Provide evidence of reasoned advice in relation to the validity and level of a claim for compensation, using a variety of valuation methodologies appropriate for the circumstances of the claim. Take an active role in the negotiation and settlement of claims, using a variety of bases of statutory and other valuation methodologies. Provide reasoned advice on the role of compulsory purchase in facilitating planning and regeneration initiatives.

## Conservation and restoration

### Level 1

Demonstrate knowledge and understanding of the principles, techniques and methods applied to conservation and restoration.

### Level 2

Undertake inspections or object identification to identify all the relevant factors that may affect the conservation or restoration of the subject matter.

### Level 3

Provide evidence of reasoned advice on the conservation, restoration of or managing conservation or restoration process of the subject property.

## Construction technology and environmental services

### Level 1

Demonstrate knowledge and understanding of the principles of design and construction relating to your chosen field of practice.

### Level 2

Apply your knowledge to the design and construction processes.

### Level 3

Advise on the selection and application of particular processes within your area of experience. This should include liaison with specialists and consultants to develop project-specific design and construction solutions.

## Consultancy services

### Level 1

Demonstrate knowledge and understanding of the procurement and execution of advisory and strategic consultancy services.

### Level 2

Apply your knowledge of the provision of consultancy services.

### Level 3

Give reasoned advice, prepare and present consultancy reports, together with relevant analysis to clients.

## Contaminated land

### Level 1

Demonstrate knowledge and understanding of how land becomes contaminated through human activities and natural occurrences. Clearly illustrate the implications of contamination for real estate valuation, development and management.

### Level 2

Prepare a brief and/or specification for the appointment of a specialist(s) to undertake a site investigation.

### Level 3

Supervise a site investigation, interpret the results of laboratory analyses and make recommendations as to remedial treatments.

## Contract administration

### Level 1

Demonstrate knowledge and understanding of the contractual, legislative and statutory terminology/requirements of a construction contract.

### Level 2

Implement administrative procedures necessary for the smooth running of a construction contract.

### Level 3

Advise on the administrative procedures necessary for the smooth running of a construction contract including document control techniques and systems, meetings and reporting procedures.

## Contract practice

### Level 1

Demonstrate knowledge and understanding of the various forms of contract used in the construction industry and/or your area of business.

### Level 2

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.

### Level 3

Provide evidence of reasoned advice, prepare and present reports on the selection of the appropriate form of contract and warranties for your chosen procurement route. This should include advising on the most appropriate contractual procedure at the various stages of a construction or other contract.

## Corporate finance

### Level 1

Demonstrate knowledge and understanding of the principles and practices underlying the structuring and financing of corporate transactions, with particular reference to the role of real estate within these transactions.

### Level 2

Apply your knowledge and understanding to assist in advising corporate organisations on the capital structure options relating to both occupational and surplus real estate. This should include the calculation and modelling of the cost of capital, plus a working knowledge of the regulatory framework within which the corporate finance marketplace operates.

### Level 3

Give reasoned advice on the effects of different corporate financing techniques and structures on real estate (or plant and machinery) holdings in a corporate context. This should include impacts on accounts and contributions to both merger and acquisition activity, as well as general corporate financing/restructuring transactions.

## Corporate recovery and insolvency

### Level 1

Demonstrate knowledge and understanding of the role of the Chartered Surveyor in corporate recovery and insolvency situations.

### Level 2

Demonstrate an understanding of the various types of appointment that can be made to administer/manage the affairs of insolvent and potentially insolvent companies and individuals.

### Level 3

Provide evidence of reasoned advice, prepare and present reports on the property assets of insolvent companies and individuals and/or in the administration of Fixed Charge Receivership appointments.

## Cost prediction and analysis

### Level 1

Demonstrate knowledge and understanding of the main factors that affect design economics over the life of the asset. Demonstrate knowledge and understanding of how cost benchmarking and cost planning assists in the financial control of projects from inception to the commitment to proceed.

### Level 2

Apply the knowledge to the cost management of design development and the whole life cycle. Prepare and submit cost data to in-house and/or external data collection agencies.

### Level 3

Give strategic and reasoned advice, including the preparation and presentation of reports with reference to cost, time, quality, logistics and methodology. Advise on various market factors and trends in costs. Comment on accuracy and risk.

## Cross cultural awareness in a global business

### Level 1

Demonstrate knowledge and understanding of the way business is undertaken in different cultures, including the differing drivers, ethos, etiquette and assumptions prevalent in global business.

### Level 2

Apply your knowledge to different business skills, including client liaison, team-working, leadership, negotiation and communication.

### Level 3

Provide evidence of reasoned advice to clients and senior management on strategies and tactics for dealing with cultural issues in global business in order to ensure effective corporate and project performance.

## Design and specification

### Level 1

Demonstrate knowledge and understanding of the design process and the scope and content of related documentation.

### Level 2

Prepare designs and specifications, including at outline and detail levels.

### Level 3

Prepare the full design and specification for the project.

## Design economics and cost planning

### Level 1

Demonstrate knowledge and understanding of the main factors that affect design economics over the whole life of a building. Demonstrate knowledge and understanding of how cost planning assists in the financial control of projects during the design development stage.

### Level 2

Apply your knowledge to the cost management of design development on a project from feasibility to design completion. Prepare and submit cost data to in-house and/or external data collection agencies.

### Level 3

Give strategic and reasoned advice, including the preparation and presentation of reports with reference to cost, time, quality and buildability. Advise on various market factors and trends in construction costs. Comment on accuracy and risk.

## Development appraisals

### Level 1

Demonstrate knowledge and understanding of the principles and practices underlying a valid development appraisal.

### Level 2

Identify, select, assemble and analyse data relevant to carrying out development appraisals. Undertake appraisals using relevant techniques and methodology and identify possible sources of development funding.

### Level 3

Interpret and provide evidence of reasoned advice on development appraisals and further opportunities.

## Development/project briefs

### Level 1

Demonstrate knowledge and understanding of the information required to prepare a development brief or project brief.

### Level 2

Apply your knowledge to identify, select, assemble and analyse information relevant to the preparation of development briefs or outline project briefs.

### Level 3

Apply information in the preparation and presentation of development briefs or detailed design briefs, or parts thereof.

## Due diligence

### Level 1

Demonstrate knowledge of the techniques used for cost, quality and time related forensic examination in your area of practice.

### Level 2

Apply your knowledge of cost, quality and time related forensic examination in your area of practice.

### Level 3

Provide evidence of reasoned advice and report to clients on cost, quality and time related forensic examination in your area of practice.

## Economic development

### Level 1

Demonstrate knowledge and understanding of the principles and practices underlying sound economic development policies in the context of international, national, regional and local economic issues. This should include inward investment strategies and urban regeneration strategies.

### Level 2

Identify and fully understand the organisational processes and mechanisms involved in implementing economic development policies, and their impact on urban regeneration, property development and infrastructure provision.

### Level 3

Undertake initial feasibility studies and analysis as a preliminary to advising clients on appropriate economic development strategies.

## Energy and renewable resources

### Level 1

Demonstrate a broad appreciation of energy and renewable resources of energy. Undertake inspections of energy and renewable energy facilities.

### Level 2

Demonstrate experience of the economic and technical viability and monitoring of energy and renewable energy facilities.

### Level 3

Demonstrate practical competence in providing reasoned advice to clients in a wide range of services relating to the energy and renewable resources sector. Be responsible for the preparation of formal reports and advice under proper supervision. Demonstrate a thorough knowledge of the sector.

## Engineering science and technology

### Level 1

Demonstrate knowledge and understanding of the principles of the design, methodology, logistics and construction in the chosen field of practice.

### Level 2

Apply the knowledge to an understanding of the systems, components, timing, methodologies and logistics of the construction of infrastructure projects in the chosen field of practice.

### Level 3

Advise on the selection and application of particular processes within the area of experience. This should include liaison with specialists and consultants to develop project-specific design and construction solutions.

## Engineering surveying

### Level 1

Demonstrate knowledge and understanding of the principles of the design, methodology, logistics and construction in the chosen field of practice.

### Level 2

Apply the knowledge to an understanding of the systems, components, timing, methodologies and logistics of the construction of infrastructure projects in the chosen field of practice.

### Level 3

Advise on the selection and application of particular processes within the area of experience. This should include liaison with specialists and consultants to develop project-specific design and construction solutions.

## Environmental analysis

### Level 1

Demonstrate knowledge and understanding of best practice in environmental laboratories, including accreditation requirements and criteria.

### Level 2

Determine an appropriate analytical scope, taking account of present and historic site activities, environmental setting and proposed uses.

### Level 3

Interpret laboratory results and make recommendations as to further analytical requirements and/or other actions that may be needed.

## Environmental assessments

### Level 1

Demonstrate knowledge and understanding of appropriate environmental assessment concepts, processes and systems. This should include responsibilities imposed by law, codes of practice and other regulations relating to environmental assessment.

### Level 2

Apply in practice your understanding of environmental assessment and the requirements for compliance, including undertaking an environmental assessment.

### Level 3

Provide evidence of reasoned advice including the preparation and production of reports based on appropriate environmental assessments.

## Environmental audit (and monitoring)

### Level 1

Demonstrate knowledge and understanding of appropriate environmental auditing concepts, processes, systems and the role of the environmental audit in environmental monitoring.

### Level 2

Apply in practice your understanding of environmental auditing and monitoring, as appropriate.

### Level 3

Provide evidence of reasoned advice including the preparation and production of reports of appropriate environmental audits.

## Environmental management

### Level 1

Demonstrate knowledge and understanding of appropriate environmental management concepts, processes and systems.

### Level 2

Apply your understanding of appropriate environmental management and environmental land management concepts, processes and systems.

### Level 3

Give reasoned advice on appropriate environmental management and environmental land management concepts, processes and systems.

## Environmental science and processes

### Level 1

Demonstrate knowledge and understanding of the environmental sciences, with particular references to the impact of human activities on the natural & built environment and human health, including ecology soil, water and air.

### Level 2

Interpret specialist reports and/or specifications in order to advise on possible present and future environmental implications.

### Level 3

Where appropriate, apply your own understanding of environmental science and processes, or specify works and materials, including design detailing, to ensure achievement of environmental objectives.

## Financial modelling

### Level 1

Demonstrate a basic understanding of the main financial modelling software packages and how these may be used to create a financial model which illustrates the risk and returns available in a development and investment scenario.

### Level 2

Apply your knowledge to produce bespoke financial models including full property analysis and cash flows from base information reflecting the individual investment or development characteristics.

### Level 3

Use financial models to provide detailed reasoned advice on the performance of investment and development scenarios. Carry out a full sensitivity analysis taking into account a range of inputs and assumptions. Be able to segregate performance between senior debt and equity returns using the model to illustrate this.

## Fire safety

### Level 1

Demonstrate knowledge and understanding of the consequences of fire in a building, how it is modified by the enclosure and how the impact may be controlled. Apply fire safety principles to practical situations so as to minimise the risk from fire to personal injury or death, physical loss and adverse environmental impact.

### Level 2

Demonstrate knowledge and understanding of the combustion process; the physics and chemistry of fire; the physiological and psychological effects of fire; and the ability to assess means of escape systems according to circumstance, including fire safety management systems.

### Level 3

Provide research advice to clients or other bodies on the requirements for fire safety engineering, including strategy. Represent clients to statutory bodies in preparing, agreeing and defending a fire safety strategy.

## Forestry and woodland management

### Level 1

Demonstrate the ability to describe the silvicultural requirements, and the tree identification and silvicultural characteristics, of the main commercial and amenity species. Demonstrate knowledge and understanding of current grant regimes, product sale options, value added opportunities, prices and markets.

### Level 2

Demonstrate the ability to apply your understanding of silviculture to the establishment and management of different forest and woodland systems. Demonstrate an understanding of the practice of silviculture from seed through establishment of crops, through to thinning and harvesting. Demonstrate an understanding of current forestry policy and its impact on grant regimes.

### Level 3

Demonstrate experience of the economics and financial implications of various types of forest and woodland systems; preparation and submission of forest and woodland grant scheme applications; calculation of timber yields, forecasting, and use of plans and recording systems; carrying out valuation of trees and stands of timber; and drawing up of thinning and harvest programmes.

## Geodesy

### Level 1

Demonstrate knowledge and understanding of the principles of geodesy, Global Navigation Satellite Systems, global/regional/national geodetic reference systems, geoids, datums and projections.

### Level 2

Apply your knowledge in practice, specify and plan surveys and instrumentation needs, including error sources and 'fitness for purpose' of data. Use industry standard software and apply network adjustments and/or transformations.

### Level 3

Provide evidence of reasoned advice on advanced practice and planning. Use advanced software and carry out adjustments and analysis. Advise on client specifications and final product needs.



## GIS (Geographical Information Systems)

### Level 1

Demonstrate knowledge and understanding of the principles of geographic information science and systems, including industry standard GIS, data structures, types and their applications, and of appropriate capture and output systems.

### Level 2

Apply your knowledge and assess data quality; define and use appropriate input and data transfer methods; analyse data and prepare databases; identify digital data sources and assess 'fitness for use'. Apply your knowledge of national and international data standards.

### Level 3

Assess clients' needs and advise them accordingly. Define specifications including data and process modelling, customise systems, carry out advanced spatial analyses, and manage data and observe data standards.

## Ground engineering and subsidence

### Level 1

Undertake appropriate investigations including site inspection to research site history and geology.

### Level 2

Collate, analyse and interpret information gathered after initial research.

### Level 3

Provide evidence of reasoned advice, prepare and present reports.

## Housing maintenance, repairs and improvements

### Level 1

Demonstrate knowledge and understanding of the roles of owners, occupiers, providers and local authorities in the maintenance, repair and improvement of housing. Demonstrate knowledge of funding methods available, legislative requirements, and property-related health and safety issues.

### Level 2

Apply your knowledge to assess the condition of housing, prepare reports and cost estimates.

### Level 3

Advise on obtaining funding and prepare contracts in relation to the work programmes. Assess and advise on residents' needs. Manage work in progress and payments. Demonstrate and apply your understanding of defect liability and dispute resolution procedures.

## Housing management and policy

### Level 1

Demonstrate knowledge and understanding of the legislation and statutory regulations that are relevant to the management of housing.

### Level 2

Apply your knowledge to day-to-day housing management functions, including the implementation of tenancy conditions, leases or licences, relevant legislation and statutory guidance.

### Level 3

Provide evidence of reasoned advice including the preparation and presentation of reports relating to the formulation and implementation of housing management policy and good practice.

## Housing strategy and provision

### Level 1

Demonstrate knowledge and understanding of the various methods used to assess and identify overall housing needs, including the options available for housing providers to meet these housing needs.

### Level 2

Apply your knowledge to identify and respond to housing needs. This should include house types, tenures, funding, planning, and other statutory or non-statutory considerations.

### Level 3

Provide evidence of reasoned advice and contribute to the formulation and implementation of a housing strategy to meet identified housing needs.

## Hydrographic surveying

### Level 1

Demonstrate a working knowledge and understanding of the principles and limitations of hydrographic survey. Conduct measurements in the marine environment.

### Level 2

Plan the conduct of marine surveys, including taking into account safety issues. Specify appropriate instrumentation and ensure correct calibration. Understand the principles of geodesy on a local and international basis, and its application in a marine environment. Fully understand the principles, application and limitations of navigation, geophysical and marine survey instrumentation and software.

### Level 3

Assess the client's needs and define specifications, tenders and/or contracts. Manage marine surveys. Analyse the data collected and use it to prepare reports and briefings. Be conversant with the International Law of the Sea and/or maritime boundaries.

## Indirect investment vehicles

### Level 1

Demonstrate knowledge and understanding of the principles of indirect investment including the different structures and instruments relating to the ownership and funding of real estate.

### Level 2

Apply your knowledge to identify which structures might suit an investor or lender in any given scenario. Understand the management and risk issues that may differ from a more direct form of investment. Gain an appreciation of how investing indirectly can assist portfolio risk and return management.

### Level 3

Assist in the analysis and preparation of reasoned advice covering the benefits or otherwise of indirect investment. Participate in the establishment and management of such vehicles and demonstrate an understanding of how these vehicles impact the larger direct market.

## Inspection

### Level 1

Demonstrate knowledge and understanding of the different requirements for inspection, together with the required information and factors affecting the approach to an inspection.

### Level 2

Undertake inspections and apply the information gained to prepare reports, schedules and/or registers of equipment, presenting appropriate information gained from the inspection.

### Level 3

Provide evidence of reasoned advice and recommendations arising from inspections.

## Insurance

### Level 1

Demonstrate knowledge and understanding of the principles and practices of insurance in relation to your area of practice.

### Level 2

Apply your knowledge and/or be involved with the insurance of matters in relation to your area of practice.

### Level 3

Demonstrate a thorough understanding of the regulations and practice governing insurance matters.

## Investment management

### Level 1

Demonstrate knowledge and understanding of the principles of financial investment in property.

### Level 2

Apply the principles of managing property as a financial investment.

### Level 3

Provide evidence of reasoned and strategic advice on property as a financial investment, including the preparation and presentation of reports.

## Land use and diversification

### Level 1

Demonstrate knowledge and understanding of how a variety of land uses, policies and options for diversification have an impact on real estate and business.

### Level 2

Apply your knowledge to recognise and evaluate the economic, social and environmental needs of different land uses and options for diversification in relation to location and markets.

### Level 3

Provide evidence of reasoned advice, write reports and undertake the management of land use and, where appropriate, diversification and related projects.

## Landlord and tenant

### Level 1

Demonstrate knowledge and understanding of the law and practice relating to landlord and tenant.

### Level 2

Apply the principles of the law and practice relating to landlord and tenant. Carry out relevant negotiations to provide solutions to issues affecting both owners and occupiers of real estate.

### Level 3

Provide evidence of reasoned advice, prepare and present reports on the law and practice relating to landlord and tenant. Apply your knowledge to assist in undertaking relevant dispute resolution procedures.

## Leading projects, people and teams

### Level 1

Demonstrate knowledge and understanding of the characteristics and behaviour required to lead and manage teams.

### Level 2

Provide evidence of application of your role as a team and project leader and manager.

### Level 3

Provide evidence of how you have intervened to improve the performance of people and teams.

## Leasing and letting

### Level 1

Demonstrate knowledge and understanding of how various types of property are let (or a similar interest is acquired for a client) and the different types of interests that may be placed on the market. Demonstrate an understanding of the economics of the market for such interests and the appropriate legal frameworks.

### Level 2

Apply your knowledge and skills to the leasing/letting of all types of property and demonstrate practical experience of the associated decision-making process, marketing, reporting and completion of the transaction. Demonstrate knowledge and understanding of other forms of property transaction, and of the reasons supporting the decision to proceed along the chosen leasing or letting route.

### Level 3

Provide evidence of reasoned advice and report to clients on all types of leasing or letting transactions. Demonstrate the ability to see complex cases through from start to finish with appropriate assistance. Be able to provide clients with a holistic view of the entire transactional market, and advise them clearly and appropriately, not only on the letting or leasing market, but also on other areas.

## Legal/regulatory compliance

### Level 1

Demonstrate knowledge and understanding of any legal/regulatory compliance requirements in relation to your area of practice.

### Level 2

Apply your knowledge to comply with legal/regulatory requirements in specific situations within your area of practice.

### Level 3

Provide evidence of reasoned advice, prepare and present reports on legal/regulatory compliance requirements in relation to your area of practice.

## Loan security valuation

### Level 1

Demonstrate knowledge and understanding of the financial market and how this is supported by valuation advice, including trading assets and loan security, the relevant valuation standards (Red Book) and relevant negligence case law, due diligence relevant to loan security valuation, particularly conflict of interest, and risk management in property lending decisions.

### Level 2

Demonstrate practical competence in undertaking valuation for the purpose of loan security using appropriate techniques, including the application of the relevant valuation standards (Red Book) to valuation, incorporating lenders' specific requirements into a valuation, and appropriate research into factors affecting risk in loan security valuation.

### Level 3

Provide evidence of complex reasoned quantitative valuation advice to client in the form of compliant valuation reports. For example: SWOT analysis, commenting on loan terms, commenting on future performance of the investment and commenting on the influences of the wider market.

## Local taxation/assessment

### Level 1

Demonstrate knowledge and understanding of the provisions for taxation of real estate, plant and machinery and/or other property types at a local/municipal level.

### Level 2

Undertake valuations and negotiations for a variety of different property types using different valuation methods for the purposes of local/municipal taxation.

### Level 3

Provide evidence of reasoned advice to stakeholders (including senior management within your organisation, clients and courts/tribunal members) in respect of specific cases and/or other local taxation issues.

## Maintenance management

### Level 1

Demonstrate knowledge and understanding of the maintenance requirements of buildings, structures and other real estate.

### Level 2

Manage and keep up-to-date maintenance information to determine and implement operational maintenance policies.

### Level 3

Provide evidence of reasoned advice, write and present reports on maintenance management.

## Management and regeneration of the built environment

### Level 1

Demonstrate knowledge and understanding of the importance of sustainable management of the built environment as part of the planning and regeneration process.

### Level 2

Apply your knowledge of sustainable management of the built environment as part of the planning and regeneration process. Demonstrate an understanding of the roles played by public, private and not-for-profit sectors.

### Level 3

Provide evidence of reasoned advice, write reports and negotiate on all matters relating to sustainable management of the built environment as part of the urban planning and regeneration process. This should include the roles played by public, private and not-for-profit sectors.

## Management of the natural environment and landscape

### Level 1

Demonstrate knowledge and understanding of the importance and role of nature conservation and the landscape in real estate, business management and development.

### Level 2

Apply your knowledge of nature conservation and landscape in the management of real estate and development.

### Level 3

Provide evidence of reasoned advice, write reports and negotiate on all matters relating to nature conservation and landscape.

## Managing projects

### Level 1

Demonstrate knowledge and understanding of all the stages of a project life-cycle including the feasibility study process, the tools and techniques associated with project controls, and the essential requirements of a project audit/closeout report.

### Level 2

Apply the principles of the project life-cycle process including the implementation of management procedures necessary for the smooth running of a project life-cycle/whole life costing and risk assessment.

### Level 3

Provide evidence of reasoned advice to the client on the detailed procedures associated with the project life-cycle, including strategies and procedures to analyse, predict and control time and cost on projects.

## Market appraisal

### Level 1

Demonstrate knowledge and understanding of the purposes for which market appraisals are undertaken; the relevant appraisal methods and techniques; the appropriate standards and guidance and, in particular, the limitations of such market appraisal advice.

### Level 2

Demonstrate practical competence in undertaking both sale and rental market appraisals and detailed involvement with the preparation and presentation of client reports. Demonstrate your ability to use appraisal methods and techniques. Show how the relevant appraisal standards and guidance have been applied.

### Level 3

Preparation of client reports based on interpretation of locational market trends, knowledge of investment proposals in the site location, and advice on the likely availability and conditionality of finance for the local market for both the construction period and for prospective future customers.

## Masterplanning and urban design

### Level 1

Demonstrate knowledge and understanding of the information required to prepare masterplans and urban design strategies and schemes.

### Level 2

Apply your knowledge to identify, select, assemble and analyse information relevant to the preparation of masterplans and urban design strategies and schemes.

### Level 3

Apply information and skills in the preparation and presentation of masterplans and urban design strategies and schemes and/or detailed parts thereof.

## Measurement

### Level 1

Demonstrate knowledge and understanding of the principles and limitations of measurement relevant to your area of practice.

### Level 2

Apply your knowledge to undertake measurement. Use basic and/or advanced instrumentation to collect data. Present appropriate information gained from measurement.

### Level 3

Evaluate, present, manage, analyse data and/or apply spatial data and information. Show an advanced understanding of accuracy, precision and error sources.

## Minerals management

### Level 1

Demonstrate a broad appreciation of geology, exploration techniques (including site investigation), and surface and/or underground mining methods.

### Level 2

Analyse site investigations and interpret results. Demonstrate an appreciation of the economic and technical viability and/or management of minerals extraction and restoration.

### Level 3

Design, give advice on, and/or manage minerals exploitation schemes, their implementation and/or property interests therein.

## Object identification

### Level 1

Demonstrate knowledge and understanding of the object identification checklist, including the characteristics to be observed, to be able to complete an object identification.

### Level 2

Apply your knowledge of object identification.

### Level 3

Demonstrate the ability to give reasoned advice based on your assessments of objects.

## Open data

### Level 1

Demonstrate knowledge and awareness of open data sources and formats, the benefits and risks and opportunities of open data and the current open data technology landscape and policy debates.

### Level 2

Apply your knowledge to the collection, storage and management of open data, demonstrating the achievement of data quality, data hygiene and data security.

### Level 3

Provide evidence of the application and implementation of open data in a project that combines complex data sets to deliver a unified set for analysis.

## Performance management

### Level 1

Demonstrate knowledge and understanding of performance management approaches and methodologies.

### Level 2

Apply your knowledge and understanding of performance management within a business context.

### Level 3

Provide evidence of reasoned advice on the organisational requirements of performance management and show evidence of performance metric tracking across CRE services and capabilities.

## Planning and development management

### Level 1

Demonstrate knowledge and understanding of the key principles and processes used to determine both the need for planning consent and the procedures involved in obtaining appropriate planning permission.

### Level 2

Apply your knowledge to identify, select, assemble and analyse information relevant to the preparation or determination of appropriate planning applications.

### Level 3

Apply information and reasoned advice in the preparation, presentation and/or negotiation of planning application and/or appeals documentation.

## Procurement and tendering

### Level 1

Demonstrate knowledge and understanding of the main types of procurement. Demonstrate knowledge and understanding of the tendering and negotiation processes involved in procurement.

### Level 2

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.

### Level 3

Give reasoned advice on the appropriateness of various procurement routes. Manage the tendering and negotiation process and present reports on the outcome.

## Programming and planning

### Level 1

Describe the principles of financial and programme monitoring of projects, including planning techniques such as Gantt charts etc. Demonstrate knowledge and understanding of the various types of programmes and schedules commonly used on projects.

### Level 2

Assess, interpret and report on the programme control of projects.

### Level 3

Provide evidence of reasoned advice on, or implement the principles of, executive programme control of projects. Your advice should demonstrate a good understanding of planning techniques (pert diagrams, network analysis/ critical path method).

## Project controls

### Level 1

Demonstrate knowledge and understanding of the tools and techniques associated with project controls, including work breakdown structures, Earned Value Management, productivity and resource analysis and programming.

### Level 2

Apply your knowledge of how to interpret, analyse and report upon data produced by project control techniques to facilitate both forensic and predictive decision-making.

### Level 3

Provide proof of how you advise on strategies and procedures to analyse, predict and control time and cost on infrastructure projects.



## Project feasibility analysis

### Level 1

Describe the feasibility study process, including the financial and town planning aspects associated with a development appraisal.

### Level 2

Apply the techniques used in value management/value engineering, life cycle/ whole life costing and risk assessment, together with a balance sheet analysis.

### Level 3

Initiate and monitor a feasibility study. Advise on the economics of design, on the use of value management and value engineering techniques and on how to undertake a full risk and balance sheet analysis.

## Project finance

### Level 1

Demonstrate knowledge and understanding of the effective control of costs during a project. Demonstrate understanding of the legal and contractual constraints and the effect of time and quality on the cost of a project.

Within the context of the Infrastructure pathway, this competency is about the funding sources and the principal forms of investment finance in infrastructure projects. .

### Level 2

Apply your knowledge to the management of project costs. This should include the preparation and presentation of financial reports on the performance of a project at appropriate intervals, to provide effective forecasting of costs, risks and their financial implications.

Within the Infrastructure pathway, candidates must apply their knowledge to identify the factors that affect the ability to obtain finance to fund an infrastructure project and the use of project finance evaluation techniques on infrastructure projects.

### Level 3

Advise on strategies and procedures to control predicted expenditure in line with a budget.

Candidates for the Infrastructure pathway should provide evidence of reasoned advice to clients and senior management on strategies and tactics for dealing with funding and finance issues on infrastructure projects.

## Property finance and funding

### Level 1

This competency focuses on the candidate's understanding of the range of finance available, their understanding of how this is sourced and how this may be used to assist with property investment and development scenarios. Candidates will be expected to apply this knowledge in order to provide advice to clients on their financing options and the impact of this on their returns.

### Level 2

Demonstrate knowledge and understanding of the role and importance of finance in property, including the principal forms of investment finance and their sources. Identify the factors that affect the ability to obtain finance to fund any investment project. Identify appropriate sources of finance and understand the principles that apply to securing finance for different purposes.

### Level 3

Provide evidence of reasoned advice on maximising the viability of any funding situation. Demonstrate your appreciation of the impact of property matters on valuation and funding. Demonstrate your understanding of the impact of funding matters on the property market.

## Property management

### Level 1

Demonstrate knowledge and understanding of property management and the relationship between owner and occupier.

### Level 2

Apply the principles of property management to provide solutions to issues affecting both owners and occupiers of real estate.

### Level 3

Provide evidence of reasoned advice including the preparation and presentation of reports in relation to property management.

## Purchase and sale

### Level 1

Demonstrate knowledge and understanding of how various types of property are sold (or a similar interest is acquired for a client) and the different types of interests that may be placed on the market. Demonstrate an understanding of the economics of the market for such interests and the appropriate legal frameworks.

### Level 2

Apply your knowledge and skills to the purchase or sale of all types of property and demonstrate practical experience of the associated decision-making process, marketing, reporting and completion of the transaction. Demonstrate knowledge and understanding of other forms of property transaction the reasons supporting the decision to proceed along the chosen purchase or sale route.

### Level 3

Provide evidence of reasoned advice and report to clients on all types of purchase or sale transactions. Demonstrate the ability to see complex cases through from start to finish with appropriate assistance. Be able to provide the client with a holistic view of the entire transactional market and advise him/her clearly and appropriately, not only on the sale or disposal market but also on other areas.

## Quantification and costing

### Level 1

Demonstrate knowledge and understanding of the principles of quantification and costing of construction works as a basis for the financial management of contracts.

### Level 2

Apply your knowledge to the quantification and costing of construction works, including the use of appropriate standard methods of measurement and forms of cost analysis. Carrying out measurement and costing of works at all stages of the process.

### Level 3

Advise on appropriate methods of quantification and costing for specific projects. Take responsibility for the preparing and issuing pricing documents. Price or analyse such documents. Give advice on and/or supervise the valuation of works throughout a project.

## Quantification, costing and price analysis

### Level 1

Demonstrate knowledge and understanding of the principles of quantification, costing and rate price analysis of works as a basis for the financial management of projects.

### Level 2

Apply the knowledge to the quantification and costing of works, including the use of appropriate standard methods of measurement and forms of benchmarking and cost analysis. Apply price rate analysis in both forensic and predictive techniques.

### Level 3

Advise on strategies and procedures to analyse, predict and control time and cost on projects. Take responsibility for preparing and issuing pricing documents. Price or analyse such documents.

## Remote sensing and photogrammetry

### Level 1

Demonstrate knowledge and understanding of the principles of remote sensing and photogrammetry (both aerial and terrestrial).

### Level 2

Apply your knowledge of scales, camera and satellite principles and different data capture techniques. Understand and undertake procedures for routine data capture, and analyse and/or adjust/transform data. Use standard industry software.

### Level 3

Provide evidence of fit-for-purpose advice on client requirements. Identify and assess client specifications. Use advanced industry software and advise on data transfer and/or format.

## Research methodologies and techniques

### Level 1

Demonstrate your ability to collect and collate appropriate data and other relevant material. Demonstrate familiarity with data and other sources, and with data handling and manipulation techniques.

### Level 2

Demonstrate the effective and appropriate analysis and interpretation of data and other material. Demonstrate your ability to make effective use of appropriate research methodologies and techniques, and to match your choice of methodologies to client requirements.

### Level 3

Demonstrate effective application of analysis and interpretation of research. Demonstrate your ability to apply the analysis to client requirements.

## Risk management

### Level 1

Demonstrate your knowledge and understanding of the nature of risk and, in particular, of the risks associated with your area of business/practice.

### Level 2

Apply your knowledge to carry out risk assessments taking into account all relevant factors. Understand the application of the various methods and techniques used to measure risk.

### Level 3

Provide evidence of reasoned advice and implement systems to manage risk by competent management in relation to specific projects.

## Smart cities and intelligent buildings

### Level 1

Demonstrate knowledge of the types of data that can be collected through building, personal and infrastructure sensors and how sensor data can be processed to support the management and visualisation in the built environment.

### Level 2

Apply your knowledge to the collection, storage and management of spatial sensor data, demonstrating the achievement of data quality, data hygiene and data security.

### Level 3

Provide evidence of the ability to use and generate application scenarios that capture and store sensor data in structures, that allows the analysis of the data by conventional and visual representation.

## Spatial planning policy and infrastructure

### Level 1

Demonstrate knowledge of national (as appropriate to a candidate's location) spatial planning and infrastructure systems, their legislative basis and key national policies and programmes.

### Level 2

Apply your knowledge to identify, select, assemble and analyse information relevant to the preparation and review of land use planning policies and plans. This infrastructure planning and provision includes transportation, energy, waste, IT and local community infrastructure related provision.

### Level 3

Use information and skills in the preparation and presentation of reports that interpret land use and/or infrastructure planning, in order to give reasoned advice, as regards investment, valuation and/or development decision making and implementation.

## Stakeholder management

### Level 1

Demonstrate knowledge and understanding of the principles and techniques associated with engaging and communicating with all relevant project stakeholders, including an understanding of decision-making in pluralistic clients.

### Level 2

Apply the knowledge to ensure that all parties are aligned with the project objectives using identification, analysis, matrix and engagement techniques.

### Level 3

Provide evidence of reasoned advice and implement systems to manage risk by competent management in relation to specific projects.

## Strategic real estate consultancy

### Level 1

Demonstrate knowledge and understanding of the business context of real estate, and an appreciation of the role of the real estate professional as a strategic adviser.

### Level 2

Apply your knowledge and understanding of the business context of real estate in a corporate or other context.

### Level 3

Provide evidence of reasoned oral and written advice on the principles and application of real estate knowledge.

## Supplier management

### Level 1

Demonstrate knowledge and understanding of how to manage suppliers using a logical process to ensure that scope and value of the service received meets organisational requirements.

### Level 2

Apply your knowledge and understanding by using an existing process to manage suppliers to ensure that the scope and value of the service received meets organisational requirements.

### Level 3

Provide evidence of appropriate approach to the management of an individual supplier or group of suppliers based on the scale of the service and the risk of service failure.

## Surveying and mapping

### Level 1

Demonstrate knowledge and understanding of the principles of mapping and geographic information sciences appropriate to your area of practice, including the accuracy, scale, currency and fitness for purpose of hardcopy and/or digital maps, drawings, imagery and plans.

### Level 2

Apply your knowledge of mapping and geographical sciences in relation to your area of practice.

### Level 3

Provide evidence of reasoned advice on the design and specification of mapping and/or geo-information projects in a national and/or international context.

## Surveying land and sea

### Level 1

Demonstrate knowledge and understanding of the principles of geomatics and the various applications of its techniques within the natural, maritime and built environments.

### Level 2

Apply your knowledge by identifying, planning and accessing survey requirements, specifications and appropriate instrumentation. Use industry standard survey and/or offshore software, and demonstrate an understanding of the principles, uses and limitations of Global Navigation Satellite Systems and other navigation systems.

### Level 3

Define and assess client needs. Define specifications and prepare tenders and/or contracts. Demonstrate that you are fully conversant with the principles of geodesy on a national, international and/or maritime basis.

## Taxation

### Level 1

Demonstrate knowledge and understanding of the relevant provisions, general criteria and statutory framework for taxation of different classes of assets.

### Level 2

Apply your knowledge and understanding of the principal main valuation directing provisions in relation to capital taxation, capital allowances, corporate intangibles regime and transfer pricing.

### Level 3

Provide evidence in relation to asset taxation matters and the conduct of negotiations with national taxation authorities.

## Use of the marine environment

### Level 1

Demonstrate an understanding of the principles of inshore and offshore resource development, exploitation and/or conservation as well as the relevant legal guidance and environmental issues.

### Level 2

Apply these principles to planning for the exploitation and/or use of marine resources. Use appropriate marine data capture and analysis software and/or instrumentation.

### Level 3

Oversee the conduct of operations to use and/or exploit marine resources. Analyse the data collected and prepare reports and briefings on the data collected. Advise on national and international policy on ocean and inshore resource management.

## Valuation

### Level 1

Demonstrate knowledge and understanding of the purposes for which valuations are undertaken, the relevant valuation methods and techniques, the appropriate standards and guidance, and any relevant statutory or mandatory requirements for valuation work in your area of practice.

### Level 2

Demonstrate practical competence in undertaking both capital and rental valuations and detailed involvement with the preparation and presentation of client reports.

Demonstrate your ability to use valuation methods and techniques appropriate to your area of practice. Show how the relevant valuation standards and guidance have been applied to your valuation experience.

### Level 3

Be responsible for the preparation of formal valuation reports under proper supervision and provide reasoned advice.

Produce reasoned valuation advice in a range of forms on a range of property types, valuation purposes and valuation methods.

Demonstrate a thorough knowledge of the appropriate valuation standards and guidance and how they are applied providing advice to clients.

## Valuation of businesses and intangible assets

### Level 1

Demonstrate knowledge and understanding of the purposes for which valuations of businesses and/or intangible assets are undertaken, the relevant valuation methods and techniques, the appropriate standards and guidance, and any relevant statutory or mandatory requirements for this type of valuation work.

### Level 2

Apply your knowledge and understanding of business valuations showing detailed involvement with the preparation and presentation of client reports. Demonstrate your ability to use the valuation methods and techniques appropriate to your area of practice. Show how any relevant standards and guidance have been applied to your experience.

**Note:** to achieve Level 2, candidates will not necessarily be carrying out valuations as part of their full time day-to-day activities.

### Level 3

Demonstrate practical competence in undertaking business valuations and their component parts for a range of purposes.

Demonstrate the application of the relevant valuation methods and techniques and a thorough knowledge of the appropriate valuation standards and guidance and how they are applied in practice.

**Note:** the businesses considered may relate to a particular sector but the candidate's experience should cover providing clients with valuation advice on a range of types of businesses and their component parts for a range of purposes, such as for financial statements, internal management, purchase or sale reports, tax and litigation, but not necessarily all of these. The types of businesses and their component parts should ideally be varied both in terms of usage, interest and size.

## Valuation reporting and research

### Level 1

Demonstrate knowledge and understanding of the nature and context of valuation reports, research analysis, interpretation and validation of information.

### Level 2

Apply your knowledge of valuation reporting and research to analyse and interpret key inputs for appraisal purposes, benchmarking techniques, valuation context and settings.

### Level 3

Provide evidence of reasoned advice in relation to valuation reports, valuation standards, methodologies, validation and interpretation of inputs and data.

## Waste management

### Level 1

Demonstrate a broad appreciation of practical aspects of waste management and regulatory regime. Undertake inspections of waste management facilities.

### Level 2

Demonstrate an appreciation of the economic and technical viability and/or management application of the practical requirements and monitoring of waste facilities.

### Level 3

Design, advise on, and/or manage waste management schemes, their implementation and/or property interests therein.

## Works progress and quality management

### Level 1

Inspect and record progress and quality of building works.

### Level 2

Report and advise upon the adequacy of progress and quality of building works.

### Level 3

Manage and co-ordinate progress and quality of building works as a contract administrator/supervising officer or equivalent.

## Workspace strategy

### Level 1

Demonstrate knowledge and understanding of how workspace strategy is integral to business.

### Level 2

Provide evidence of the practical application utilising workspace strategy to improve business performance.

### Level 3

Provide evidence of reasoned advice relating to workspace strategies to enable the improvement of business performance.

## Delivering confidence

We are RICS. Everything we do is designed to effect positive change in the built and natural environments. Through our respected global standards, leading professional progression and our trusted data and insight, we promote and enforce the highest professional standards in the development and management of land, real estate, construction and infrastructure. Our work with others provides a foundation for confident markets, pioneers better places to live and work and is a force for positive social impact.

### **Americas, Europe, Middle East & Africa**

[aemea@rics.org](mailto:aemea@rics.org)

### **Asia Pacific**

[apac@rics.org](mailto:apac@rics.org)

### **UK & Ireland**

[contactrics@rics.org](mailto:contactrics@rics.org)



[rics.org](https://www.rics.org)