



# Building surveying

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# 1 Introduction

This guide supports the Building surveying pathway. It is designed to help you understand more about qualifying in this area.

You must use this guide in conjunction with the core assessment documentation which is available on the RICS website and comprises of:

- Requirements and competencies guide
- Candidate guide for your RICS assessment e.g. APC, Academic, Senior Professional, Specialist
- Counsellor guide.

You can download all the supporting guidance from the [Sector pathways](#) web page.

All RICS pathways are global, though it is appreciated that markets may vary from country to country. If you have any queries please contact your local office.

## About the competencies

The RICS competency framework ensures those applying for the RICS qualification are competent to practise and meet the highest standards of professionalism required by RICS. There is a wide range of pathways available to qualify as an RICS professional covering many different areas of practice.

The RICS assessment aims to assess that you are competent to carry out the work of a qualified chartered surveyor. To be competent is to have the skill or ability to perform a task or function. The RICS competencies are also based on attitudes and behaviours. 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.

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.

The mandatory competency requirements are set out in detail in the *Requirements and competencies guide*.

## Choosing your competencies

It is important that you give careful thought to your choice and combination of competencies. Your choice will inevitably reflect the work you do in your day-to-day environment (driven by the needs of your clients/employer). Your choice and combination of competencies will be a reflection of your judgement.

At the final assessment interview, the assessors will take these choices into account. They will expect you to present a sensible and realistic choice that reflects the skills needed to fulfil the role of a surveyor in your field of practice.

This guide should help candidates and employers with a degree of assistance in choosing the competencies that are most appropriate to their area of practice.

RICS pathways are designed to include rules about competency selection.

- For pathways with a **core** competency required to Level 1, candidates **can choose** the same competency to Level 2 or Level 3 as part of their **optional** selection where it is permitted in the pathway guide.

For example, in the Building surveying pathway, Fire safety is **core** to Level 1. It is also **optional** and can be selected to a higher level.

- For pathways with a **core** competency required to Level 2, candidates **cannot choose** the same competency to level 3 as part of their **optional** selection.

- Some pathways include **mandatory** competencies that can be selected to a higher level as part of the **core** or **optional** requirements.

Where this is the case, the competencies are grouped together as 'one' (see example below). Candidates can choose **only one\*** as part of their overall selection.

## Optional competencies

### Three to Level 3

- Accounting principles and procedures
- or Conflict avoidance, management and dispute resolution or Data management
- or Sustainability

(\* For the Building control pathway, candidates can select up to two of these competencies. This is because Client care and Data management are grouped as 'one' and Sustainability is listed separately.)

- Most pathways require candidates to choose at least one competency from the full list of technical competencies in the *Requirements and competencies guide* (see example below).

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.

Where this is the case, a **mandatory** competency can only be selected:

- if it is listed as technical (**core** or **optional**) in the pathway guide and
- if grouped with other competencies as 'one' (see third bullet point above), no other competency from the group has already been selected.

## Where to find help

RICS has fully trained teams across the globe who will be able to help you with any queries. For details of your local office, visit the [Contact us](#) web page.

## 2 About the pathway

Building surveying is one of the widest areas of surveying practice. Chartered building surveyors are involved in all aspects of property and construction from supervising large mixed-use developments to planning domestic extensions. This varied workload can include everything from the conservation and restoration of historic buildings to contemporary new developments.

Building surveyors work in most real estate markets including residential, commercial, retail, industrial, leisure, education and health. Consequently, there are a wide variety of opportunities for chartered building surveyors to work in both the commercial, private, and public sectors. Many chartered building surveyors work for property consultancies, public sector organisations, real estate owning clients and contractors as well as in a number of specialist niche areas such as insurance, rights to light, party wall matters, etc.

As well as strong technical skills, building surveyors need to have strong people skills and the highest levels of integrity. Clients, whether a large corporation or an individual member of the public, need to have the utmost confidence in the impartial advice given by chartered building surveyors.

Chartered building surveyors are clearly differentiated from the rest of their market by their enhanced technical knowledge and professional standards. Achieving the chartered status will enhance your professional status with employers and clients alike leading to more and varied employment opportunities.

### RICS qualification

Building surveyors provide professional technical advice on land, property and construction for commercial companies and consultants, central and local government, and private individuals.

Whichever sector they work in, building surveyors' knowledge and understanding of construction technology and building pathology means they are ideally equipped to provide a wide range of services including the following:

- managing design and construction
- undertaking building surveys and measured surveys
- analysing design and building defects
- preparing strategies for asset management and property maintenance
- preparing insurance valuations and claims
- preparing strategic property advice covering land ownership, lease conditions, boundaries, title matters (including easements, licences and covenants, etc.), and landlord and tenant legislation
- project management and development monitoring
- miscellaneous services including accessibility and energy audits, specialist surveys (asbestos, damp etc.), conservation advice and sustainability advice.

### Chartered alternative designations

All candidates qualifying through this pathway will be entitled to use the designation 'Chartered Building Surveyor'.

### Associate membership

RICS also offers a Building surveying pathway as part of the Associate assessment.

For further details please go to the [Associate member](#) web page.

### 3 Pathway requirements

Mandatory	Core	Optional	
<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 pathology</li> <li>• Construction technology and environmental services</li> <li>• Contract administration</li> <li>• Design and specification</li> <li>• Inspection</li> <li>• Legal/regulatory compliance</li> </ul> <p><b>Level 1</b></p> <ul style="list-style-type: none"> <li>• Fire safety</li> </ul>	<p><b>Two to Level 2</b></p> <ul style="list-style-type: none"> <li>• BIM management</li> <li>• Commercial management</li> <li>• 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</li> <li>• Conservation and restoration</li> <li>• Contract practice</li> <li>• Design economics and cost planning</li> <li>• Development/project briefs</li> <li>• Fire safety</li> <li>• Housing maintenance, repair and improvements or Maintenance management</li> <li>• Insurance</li> <li>• Landlord and tenant</li> <li>• Measurement</li> <li>• Procurement and tendering</li> <li>• Project finance</li> <li>• Quantification and costing</li> <li>• Risk management</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>

# 4 Technical competencies guidance

## Building information modelling (BIM) management

This competency encompasses the establishment and management of the information modelling systems on projects. It covers collaborative process and technological principles involved in implementing building information modelling (BIM).

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

#### Level 1

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

Examples of knowledge comprised within this level are:

- BIM strategies and implementation
- the various technical options and solutions for information modelling
- the collaborative processes necessary for BIM adoption
- standard classification systems and their use in infrastructure
- relevant internationally recognised management standards such as Construction Operations Building Information Exchange (COBie).

#### Level 2

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

Examples of activities and knowledge comprised within this level are:

- preparation of a BIM execution plan
- design and implementation of a BIM management process
- analysis of comparative BIM solutions
- maintenance of an information model
- agree and implement contractual aspects of BIM such as separate protocol
- facilitate and manage project team members for BIM implementation.

#### 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.

Examples of activities and knowledge comprised within this level are:

- analysing, assessing, evaluating and reporting on options for BIM strategies at a corporate or project level
- designing and advising on collaborative strategies for the successful implementation of BIM on projects
- advising on the contractual and commercial implications of using BIM on projects
- advising on options for software and protocols on BIM projects
- advising on technical information systems requirements for BIM at corporate or project level.

## Building pathology

Building pathology is core to many areas of surveying. It is essential that all candidates have an understanding of defects analysis, and the likely resultant defects from failures in building fabric. This will range from the effects of a defective waterproof covering at simple building pathology, to much more complex defects such as interstitial condensation, and the possible effects on building fabric. Candidates will be expected to have an in-depth knowledge of the range of defects found in typical buildings in their locality, as well as an understanding of defects that they may come across more infrequently. In order to be competent in building pathology and defects analysis, candidates will need to have detailed construction technology knowledge.

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

#### Level 1

Demonstrate your knowledge and understanding of building defects.

Examples of knowledge comprised within this level are:

- on typical building defects explain cause and effect of these for example, dampness, timber defect, building movements
- building defects likely to be encountered in typical building surveying activities
- differing types of testing, and the limitations of the tests, for example the use of damp meters, and borescopes
- construction detailing of different building types and through ages of construction.

#### Level 2

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

Examples of activities and knowledge comprised within this level are:

- identify in detail cause and mechanics of varying types of failure
- using detailed examples, explain the relationship between observations taken on site and the diagnosis of failure in building fabric
- information gathered from several sources, including if necessary specialist inspections, to diagnose and explain building fabric failure
- demonstrate an understanding of the appropriate level of detail required in typical reports, including examples of layout, and the use of sketches/drawings and photographs.

#### Level 3

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

Examples of activities and knowledge comprised within this level are:

- explaining the causes of failure, and the likely results of failure, together with recommendations of appropriate remedial measures
- analysing information gathered from inspections to formulate the necessary remedial/preventative works including specific detail, in the form of a schedule of works, if required with sketches/drawings and photographs
- discussing in detail examples of unusual defects you have identified and the remedial works recommended.

## Client care

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)
- the methods of data gathering during the inception stage of a project including client briefings and site based information

#### Level 2

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

#### Level 3

Provide evidence of reasoned advice given to clients and others.

Examples of activities and knowledge comprised within this level are:

- 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
- consulting with the statutory authorities on the consents and other approvals required
- preparing alternative outline design proposals, including option appraisals
- preparing option appraisals

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
- monitoring compliance with the scope of services

## Client care (continued)

### Level 1

- 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

- preparing outline schedules of work
- assessing client relationships, team performance and stakeholder interfaces on international projects.

### Level 3

- monitoring performance internally and externally against client/stakeholder performance levels
- reporting to clients and stakeholders
- using KPIs to improve performance.

## Commercial management

This competency covers the commercial management of construction works. Candidates should have an awareness of how commercial competitiveness balances against profitability. They must have a thorough understanding of the financial processes used to achieve profitability and how these integrate with the overall delivery of the project.

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

#### Level 1

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

Examples of knowledge comprised within this level are:

- identifying and understanding the components that make up the cost of the project to the contractor or client
- the effect that the design and construction processes have on the cost
- the techniques used to reconcile the cost against income
- the techniques to financially manage subcontractors and suppliers
- the use of cash flows.

#### Level 2

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

Examples of activities and knowledge comprised within this level are:

- collecting of data for reports
- carrying out cost to completion exercises
- preparing cash flows
- preparing reports such as liability statements, cost to complete and cost value reconciliations
- applying value engineering processes
- preparing and submitting cost data for in-house and/or external use in relation to areas such as cost of preliminaries, comparative cost of different construction techniques and taxation allowances.

#### Level 3

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

Examples of activities and knowledge comprised within this level are:

- monitoring, analysing, reporting and advising at a senior level on project cash flows and profitability
- evaluating and advising on financial implications and appropriate management actions.

## Conflict avoidance, management and dispute resolution procedures

This covers the recognition, avoidance, management and resolution of disputes, involving an awareness of different dispute resolution processes 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:  
A basic knowledge and understanding of some of the following, as most appropriate to your market sector/areas of specialism:

- common causes of disputes
- the contribution of some of the following to dispute avoidance:
  - risk management (its basic principles and techniques)
  - 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 (e.g. how forms of contract deal with dispute resolution, and the scope of such clauses):

#### 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 (e.g. performance failure, unavailability, contract variations, contract interpretations and payment) prior to third-party referral
- assisting in the collation or preparation of claims/counterclaims and submissions
- 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 stakeholders 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
- involvement in, or assistance with, a referral to a third-party resolution process and associated management of that process on behalf of client.

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.

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

### Level 1

- mediation (could include contracted and project mediation) and conciliation
- Dispute Resolution Boards (DRBs)
- Dispute Resolution Advisers (DRAs)
- adjudication
- independent expert determination
- arbitration
- 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 current edition of RICS' *Conflict of interest* and any related RICS standards and guidance.

### Level 2

### Level 3

## Conservation and restoration

This competency is about understanding historic buildings/structures and the factors that influence performance and future ongoing use. This requires a sound understanding of principles, philosophy, materials, architectural history and the law to enable practical sustainable heritage solutions to be devised to ensure ongoing benefit for the built heritage. Conservation and restoration can be compatible, but can more frequently bring about conflict and this competency seeks to ensure the candidate is equipped to understand the issues and negotiate solutions.

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

#### Level 1

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

Examples of knowledge comprised within this level are:

- the definitions used in conservation (such as listed building, scheduled ancient monument, conservation area)
- the principles of building/structure conservation
- identification of age, styles and materials
- the diversity of materials and techniques used in the construction of historic structures
- differentiating between conservation and restoration (as well as preservation and refurbishment)
- the lime cycle
- breathable building technology
- understanding factors that lead to redundancy of a building
- the law relevant to conservation of the built environment.

#### Level 2

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

Examples of activities and knowledge comprised within this level are:

- undertaking architectural assessments
- preparing statements of significance
- preparing reports identifying materials, periods of construction (including historic alterations), typical defects/problems
- preparing and submitting applications, e.g. listed building consent
- preparing schedules of work for standard repairs using traditional materials
- assessing the impact of modern technology and repair methods on traditional buildings, structures, elements and materials
- assessing and reporting on factors that are resulting or could result in redundancy.

#### Level 3

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

Examples of activities and knowledge comprised within this level are:

- preparing and presenting a conservation management plan
- preparing and implementing a sustainable/justifiable philosophical approach to guide both present and future works (repairs and alterations)
- preparing schedules of work in detail for a variety of situations for client approval (non-standard)
- undertaking a programme of works
- providing advice on appropriate repair methods
- providing advice on appropriate works to ensure continued use of a building, or to bring back into use a redundant building
- advising on alternative repair methods
- advising on non-standard approaches to repair and re-use
- advising on situations where incompatibility of materials is found to be detrimental to the future of the structure or element
- negotiating, e.g. where conservation is perceived to be a barrier to the future use of a building and/or restoration such as with statutory bodies.

## Construction technology and environmental services

This competency covers the understanding of design and construction of buildings and other structures. Candidates should have a clear understanding of the design and construction processes and components commonly used in the industry. They should have detailed knowledge of construction solutions relevant to their projects.

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

#### Level 1

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

Examples of knowledge comprised within this level are:

- the stages of design and construction from inception to completion
- the impact of current legislation regulations and standards both national and international
- how the various elements of the building work and inter-relate including: sub structures, super structures, mechanical and electrical, elevation and fenestration
- the process of construction and alteration
- operational and maintenance processes
- alternative construction details in relation to functional elements of the design such as different types of piling or structural frame solutions
- how construction design solutions vary for different types of buildings such as clear span or acoustic requirements.

#### Level 2

Apply your knowledge to the design and construction processes.

Examples of activities and knowledge comprised within this level are:

- utilise knowledge of current regulations and design standards to ensure compliance with legislation
- prepare annotated sketches and specification detailing how elements interact
- identification of mechanical and electrical services relevant to the area of work.

#### 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.

Examples of activities and knowledge comprised within this level are:

- making recommendations on the choice of construction solutions for your project
- reporting on the impact of different design solutions and construction processes on cost and programme.

## Contract administration

This competency covers the role of a surveyor administering a construction contract, including the roles and responsibilities of the administrator under the main forms of contract. They should have a detailed understanding of the contractual provisions relating to the forms of contract that they have administered

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

#### Level 1

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

Examples of knowledge comprised within this level are:

- the various standard forms of contract and sub-contract used in the industry
- basic contractual mechanisms and procedures applied at various stages of the contract
- the roles and responsibilities of the contract administrator
- the duties of the parties
- what is required to create a building contract
- what is included in preliminaries and preambles.

#### Level 2

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

Examples of activities and knowledge comprised within this level are:

- issuing instructions
- dealing with payment provisions
- managing variation procedures
- involvement with dispute avoidance
- dealing with completion and possession issues
- issuing certificates.

#### 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.

Examples of activities and knowledge comprised within this level are:

- resolving disputes
- assessing and recommending entitlement for extension of time
- assessing and recommending entitlement for loss and expense
- advising all parties of their contractual rights and obligations
- completion of certification and agreement of final account
- outlining and recommending to a client the proposed contract preliminaries
- assessing the quantum of a contractor's claim.

## Contract practice

This competency covers the various forms of contract used in the construction industry. Candidates should have an awareness of all of the main standard forms of contract and a thorough understanding of contract law, legislation and the specific forms that they have used.

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

#### Level 1

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

Examples of knowledge comprised within this level are:

- basic contract law and legislation
- contract documentation
- the various standard forms of contract, warranty and subcontract
- when the different contract forms would be used
- basic contractual mechanisms and procedures at various stages of the contract
- the contents of a written consultant appointment, warranty and novation agreement
- general contractual provisions such as letters of intent, insurances, retention, bonds, liquidated and ascertained damages, early possession, practical completion and other common contractual mechanisms.

#### 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.

Examples of activities and knowledge comprised within this level are:

- producing contract documentation for construction and consultant agreements
- understand the status of documents relating to a contract, minutes of meetings, instructions, contractor quotations
- third-party rights including relevant legislation and the use of collateral warranties
- applying general contractual provisions such as letters of intent, insurances, retention, bonds, liquidated and ascertained damages, sectional completion, practical completion and other common contractual mechanisms.

#### 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.

Examples of activities and knowledge comprised within this level are:

- assessing and recommending the appropriate form of contract and/or subcontract for your chosen procurement route
- advising on the most appropriate contractual procedure at the various stages of a contract
- evaluating and advising on the appropriateness and implications of proposed contractual amendments.

## Design and specification

This competency involves the skills involved in the design and specification of construction projects. Building surveyors are usually involved in refurbishment of property, and in some cases new build projects. Knowledge of the stages of design and specification, from inception to completion is an essential building surveying skill.

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

#### Level 1

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

Examples of knowledge comprised within this level are:

- the various stages of the design process
- the functional requirements and performance of building materials and components
- the health and safety regulations including the implications on design
- the effect of technical standards and statutory regulations, such as planning, on the design process
- the structural implications of design to the load bearing components of building fabric
- the ability to interpret the requirements of a client's brief, in order to satisfy their requirements
- the general issues surrounding sustainability in design such as materials, sources, transportation and energy efficiency
- the concepts of modern methods of construction
- preambles to contract documentation.

#### Level 2

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

Examples of activities and knowledge comprised within this level are:

- how to apply spatial parameters and requirements
- preparation of sketch designs to demonstrate compliance with a client's brief, while satisfying statutory requirements
- detailing of how components are installed, connect and perform
- development of initial proposals to a detailed stage (including sections and details) and obtaining statutory consents
- preparing design risk assessments (DRA) of the proposed design, to satisfy the requirements of the health and safety regulations
- express recognised performance standards and guidance
- investigate suitable sustainable features and incorporate them within a design.

#### Level 3

Prepare the full design and specification for the project.

Examples of activities and knowledge comprised within this level are:

- carry out the preparation of the design and specification of a building project from outline proposals to completion of the design and specification process
- apply knowledge and application of the specification process, including detailed knowledge of the main methods of specification
- apply knowledge and application of the design and specification process, and its relevance and importance to the procurement and execution of the contract selected for the building works
- advising clients regarding sustainability issues surrounding the proposals for their building
- managing the design process to incorporate design works by others in the specification.

## Design economics and cost planning

This competency covers the impact of design and other factors on cost throughout the life of the building and the control of cost during the pre-contract stage. Candidates should have an awareness of how design decisions and construction processes impact on construction and operational costs. They must have a thorough understanding of techniques used to manage and control costs pre-contract.

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

#### 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.

Examples of knowledge comprised within this level are:

- the main factors that affect design economics over the whole life of the building including capital and life cycle costs
- how cost planning assists in the financial control of projects during the design development stage
- the various stages of cost planning
- sources of cost data adjustments that may be required for factors including location, specification, time and market forces.

#### 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.

Examples of activities and knowledge comprised within this level are:

- producing estimates and cost plans
- carrying out life cycle costing exercises
- applying value engineering processes
- preparing cost reports
- preparing and submitting 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.

Examples of activities and knowledge comprised within this level are:

- preparing and presenting reports with reference to cost, time, quality and buildability, including qualifications and exclusions
- evaluating and reporting on building design efficiency
- evaluating and comparing market factors and trends in construction costs
- analysing the accuracy of predicted cost using benchmarking techniques
- interrogating historical cost data
- using value and risk management techniques.

## Development/project briefs

This competency is about understanding the key documents used in determining the main requirements of a client before initiating a development. It also covers how well information provided by the client has been understood by the project team to establish their terms of reference, objectives, functional and operational requirements to manage the development. It also covers sufficient detail through the Project Execution Plan to enable the project team to manage the detailed design and specification of the work and understanding the law applicable to developments and building projects.

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

#### Level 1

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

Examples of knowledge comprised within this level are:

- a clear understanding of the scope/environment and background of the project
- the project definition, explaining what it needs to achieve or address in relation to the client's objectives
- identify ownership and the involvement of stakeholders in the project
- clear terms of reference between the client and the project team before initiating the project.

#### Level 2

Apply your knowledge of cost, quality and time-related examinations in your area of practice.

Examples of activities and knowledge comprised within this level are:

- preparing and understanding the outline business case stating the client's required cost, time and performance/ quality expectations
- establishing success measurement criteria and benefits of the project to the client
- establishing any known project risks, constraints and interfaces
- developing an outline project plan
- implementing clear procedures for managing changes to the client's brief.

#### Level 3

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

Examples of activities and knowledge comprised within this level are:

- advising whether the information collated by the project team accurately reflects the project brief
- integrating a project within an over-arching programme of delivery, including understanding strategic parameters and dependencies
- developing and implementing a Project Execution Plan that needs to be adhered to by the project team for managing the detailed design and specification of the construction works.

## Fire safety

This competency is about having the skills to assess the level of fire safety in buildings, and in proposed building projects, and being able to advise how to achieve required levels of safety when they are not present.

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

#### 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.

Examples of knowledge comprised within this level are:

- how a fire might start in buildings, how it will spread and can be contained by the structure or layout
- how the structure might be protected
- understand the methods for safe escape
- the responsibility of duty holders, such as occupiers or management undertaking risk assessments
- systems to protect buildings and occupiers e.g. detection and suppression.

#### 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.

Examples of activities and knowledge comprised within this level are:

- assessing project plans for fire safety compliance
- inspecting projects to assess satisfactory implementation of fire safety features
- inspect premises, record attributes and develop a fire safety audit
- apply fire safety and engineering in a building project design specification process or to comply with recommendations from a risk assessment
- inspect and complete fire safety audits of simple buildings.

#### 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.

Examples of activities and knowledge comprised within this level are:

- preparing a fire safety strategy for a building
- carrying out fire risk assessments
- present and recommend actions from a fire safety audit
- develop and recommend a fire safety strategy
- negotiate with fire officer or other statutory body on fire safety matters for clients.

## Health and safety

This competency covers the relationship between the work of the building surveyor and health and safety issues within the construction industry, including 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
- context of the health and safety law
- your employer's and your own responsibility for health and safety
- the health and safety legislation process, including asbestos management, fire safety, workplace regulations etc.
- the findings from asbestos or fire safety surveys
- the latest Construction Design and Management (CDM) Regulations.

#### 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:

- prepare risk assessments, such as designer versions for health and safety regulations compliance
- work closely with the health and safety co-ordinator and assist in the health and safety process
- undertake occupancy risk assessments
- advise clients of the need for health and safety regulations compliance.

#### 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:

- advise clients on the need for alternative design to comply with health and safety including the requirements for future maintenance
- design and specify where health and safety affects the construction method
- provide advice to clients on health and safety matters, e.g. design and specification.

## Housing maintenance, repair and improvements

This competency is about organising and running maintenance and improvement operations for stock managed by social registered landlords and other housing providers. This requires an understanding of the nature of the tenancy agreements regarding property repairs, improvements, alterations, and use; a knowledge of how to determine maintenance needs from both technical and functional perspectives, a knowledge of health and safety and other statutory requirements relevant to managed occupied residential property, and an understanding of how maintenance planning, procurement, and monitoring functions are formulated and operated. A knowledge of how to apply principles of sustainability in relation to residential building use and maintenance is also required.

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

#### Level 1

Demonstrate knowledge and understanding of the nature of building maintenance, and the principles and practice of building maintenance management.

Examples of knowledge comprised within this level are:

- housing policy and law relating to maintenance repair and improvements including decent homes, pathfinder projects, and neighbourhood improvements
- the nature and extent of maintenance and improvement operations in housing
- the statutory and contractual rights and responsibilities of landlords and tenants regarding maintenance, repairs and improvements
- planned, service level, and reactive maintenance
- maintenance inspections and monitoring
- maintenance planning, prioritising and programming
- fiscal planning in housing maintenance management
- maintenance procurement and contractor partnership agreements
- effective communication with tenants and occupiers
- energy and environmental management of housing.

#### Level 2

Apply your knowledge to gather housing maintenance information, formulate policies, and implement housing maintenance management operations.

Examples of activities and knowledge comprised within this level are:

- carrying out condition surveys of residential property
- receiving, prioritising and actioning repair notifications from tenants
- formulating maintenance management policies
- producing planned maintenance programmes
- planning and monitoring maintenance expenditure and budgets
- setting up and running partnership agreements, procurement contracts, and orders for maintenance and servicing works
- inspecting completed maintenance works
- consulting with tenants, contractors, and housing managers about the quality of the maintenance service and maintenance works
- integrating maintenance policies with environmental requirements and policies
- keeping appropriate records of buildings and works carried out.

#### Level 3

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

Examples of activities and knowledge comprised within this level are:

- providing assessments of condition and wants of repair for individual buildings or portfolios of residential properties
- formulating and presenting a Maintenance Policy for a housing provider
- presenting a Planned Maintenance Programme
- recommending proposals for maintenance and improvement programmes to tenants
- recommending budget and expenditure reports and predictions for building maintenance needs
- preparing and negotiating partnership agreements with contractors and providers of maintenance and servicing works
- preparing and implementing maintenance and servicing contracts and measured term agreements.

## Inclusive environments

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:

- knowledge of best practice technical standards relevant to country of practice.
- 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.

#### 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 both 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 design work or new buildings, 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

## Inspection

The inspection of property is a core skill of all chartered building surveying activities. It is essential that candidates exhibit a knowledge and understanding of the core requirements of property inspection, for example the degree of detail required in connection with differing types of inspection. Assessors will be seeking confirmation that all candidates have a detailed knowledge of building construction and pathology, in order that they can competently carry out inspections of property for clients in order to fulfil the requirements of the client's brief.

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

#### 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.

Examples of knowledge comprised within this level are:

- the requirements of the differing types of inspection, e.g. reacquisition, and Reinstatement Cost Assessments
- the methodology for completing a successful property inspection, including review of relevant documentation
- building construction and pathology knowledge to enable competent inspection techniques
- inspection techniques including, for example, concrete inspection and diagnosis techniques, the uses and limitations of borescopes, the use of thermography in leak detection, etc.
- RICS good practice of inspections.

#### 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.

Examples of activities and knowledge comprised within this level are:

- undertaking inspections for a variety of reasons and taking accurate records
- assisting in the preparation of professional reports
- assisting in the preparation of Schedules of Condition and Dilapidations
- commission of advanced inspection techniques for example infrared thermography, fibre optics, concrete testing.

#### Level 3

Give reasoned advice and recommendations arising from inspections.

Examples of activities and knowledge comprised within this level are:

- preparing detailed building survey reports for clients, containing detailed information, conclusions and recommendations
- assisting in providing detailed reasoned advice to clients relating to claims for dilapidations, including analysis of lease documentation
- assisting or preparing detailed building survey reports, for example on a preacquisition basis, on a complex building structure for developers/investors
- interpret and provide advice in relation to results of advanced inspections undertaken by others.

## Insurance

Aspects of insurance affect all activities of a chartered building surveyor, from insurance required in building contracts, to reinstatement cost assessments, to the requirements for professional indemnity insurance.

Chartered building surveyors cannot practice effectively without a knowledge and understanding of the impact of insurance on the various projects in which they are involved. The understanding of insurance is so important that it impacts on a number of other competencies, and it is considered that a working knowledge of insurance is a core skill of chartered building surveyors. (This competency is best used by candidates involved in a slightly specialist role, for example, working for loss adjusters, and is unlikely to be suitable for candidates who do not have regular and continuing involvement in insurance).

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

#### Level 1

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

Examples of knowledge comprised within this level are:

- the different types of insurance, PI, employer's liability, all risks
- the procedures, mechanism and risk limitations of insurance
- how a building surveyor's reinstatement valuation feeds into property insurance
- the different insurance provision in a building contract, such as a part refurbishment to a new build
- insurance requirements in different property leases
- the role of loss assessors and loss adjusters
- the restrictions imposed by RICS and Financial Services Authority on advice provided by surveyors.

#### Level 2

Apply your knowledge and/or be involved with the insurance of construction and/or property related matters.

Examples of activities and knowledge comprised within this level are:

- undertake checks to ensure third parties (such as contractors) have suitable insurance
- determine the required insurance of professional teams, employers and contractors
- prepare a building surveyor's reinstatement valuation
- undertake the role of building surveyor in a project occasioned by an insurance claim.

#### Level 3

Demonstrate a thorough understanding of the regulations and practice governing the insurance of construction and/or property related matters.

Examples of activities and the application of knowledge comprised within this level are:

- provide advice and recommendations for the requirements of insurance of property and construction
- explaining restrictions imposed by RICS or Financial Services Authority regulation on providing advice regarding insurance matters, in relation to your field of practice
- advising brokers/clients on requirements of insurance clauses of building contracts/development agreements
- carrying out a reinstatement cost valuation of a complex multi-storey, multi-occupied building, and provide a comprehensive report to a client
- acting in an insurance capacity in relation to a claim under a building contract insured risk
- acting as a loss adjuster in a moderately complex claim under an insurance contract
- providing detailed advice to a client as to the insurance requirements under a building contract, noting especially, among other matters, the effects of partial possession of the building.

## Landlord and tenant

This competency is about managing the landlord and tenant relationship, covering all matters arising between the landlord and tenant, representing either party. Experience may be gained in relation to short or long leasehold tenancies.

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

#### Level 1

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

Examples of knowledge comprised within this level are:

- the principles of property law and policy
- the statutory framework applying to the landlord and tenant relationship
- the content, form and structure of leases in the context of residential lettings and/or leasehold transactions
- the landlord and tenant issues arising within leasehold enfranchisement negotiations and similar statutory processes.

#### 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.

Examples of activities and knowledge comprised within this level are:

- reading and interpreting leases
- preparing, serving and responding to notices
- entering in to negotiations
- reaching an agreed solution and report recommendation to client
- instructing legal advisers.

#### 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.

Examples of activities and knowledge comprised within this level are:

- providing strategic advice on landlord and tenant matters, relating to individual properties or blocks of properties (such as service charges)
- dealing with disputes
- providing advice as to alternative dispute resolution options in the event of breakdown of negotiations and take any necessary action to protect the clients' position.
- preparing reports containing recommendations prior to the commencement of negotiations
- reaching an agreed solution and reporting recommendations to client.

## Legal/regulatory compliance

This competency covers all aspects of day-to-day functions associated with property management. It includes issues relating to works, health and safety, landlord and tenant relationships, and service charges. In general, any matter associated with the smooth running of a property.

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

#### Level 1

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

Examples of knowledge comprised within this level are:

- statutory control of building works, including building and planning Acts within the country of practice
- enforcement controls on unauthorised building works
- statutory control of asbestos
- the implications of the Disability Discrimination Act or similar local legislation
- health and safety as it affects the construction industry or local regulations
- environmental legislation
- the law and practice of dilapidations
- the law and practice of building contracts, as used by building surveyors
- building reinstatement cost assessments
- responsibilities and liabilities of providing professional advice and how this can be governed by written appointment agreements
- leases and licences to alter premises.
- the law covering leasehold obligations and rules governing civil law procedure.

#### Level 2

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

Examples of activities and knowledge comprised within this level are:

- carrying out of planning and building control applications, together with licence applications, for property alterations and other consents
- carrying out inspections and preparing reports for schedules of condition and dilapidations, and negotiations with party representatives, in non-complex matters
- preparation of building reinstatement cost assessments
- carrying out health and safety obligations during works for clients, including design works
- applications for listed building consent, conservation area consents etc.
- reviewing and reporting on lease obligations
- party wall inspections and negotiations
- rights to light inspections and negotiations.

#### Level 3

Provide reasoned advice and recommendations to organise so that they can comply with legal regulatory requirement in specific situations within your chosen field of practice. Represent clients to statutory bodies or other parties relating to legal and regulatory compliance.

Examples of activities and knowledge comprised within this level are:

- advise on the requirements for end of tenancy liability.
- negotiate settlement and make recommendations to clients for settlement
- negotiating end of tenancy liability, knowledge of case law, etc.
- negotiating with other professional representatives, after issuing of Schedules of Condition and Dilapidations
- advise clients on the requirements for, submit and produce detailed supporting reports for asbestos audits and management, access, energy performance certificates, site regulation procedures, planning applications, and/or planning appeals or environmental matters
- provide advice to clients in respect of their statutory obligations, including access and asbestos
- advise and recommend on the application of relevant lease clauses.

## Maintenance management

This competency is about organising and running maintenance and improvement operations for a portfolio of commercial, residential, or mixed-use property. This requires an understanding of the legal framework for determining the owner's and occupiers' rights and responsibilities in authorising, executing, and paying for repairs and maintenance, a knowledge of how to determine maintenance needs from both technical and functional perspectives, a knowledge of health and safety and other statutory requirements relevant to managed occupied buildings, and an understanding of how maintenance planning, procurement, and monitoring functions are formulated and operated. A knowledge of how to apply principles of sustainability in relation to building use and maintenance; and, where appropriate, how building maintenance interfaces with conservation, is also required.

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

#### Level 1

Demonstrate knowledge and understanding of the nature of building maintenance, and the principles and practice of building maintenance management.

Examples of knowledge comprised within this level are:

- the nature and extent of maintenance operations
- the legal rights and responsibilities of owners and occupiers regarding maintenance repairs and improvements
- the statutory framework concerning building maintenance and occupation
- planned, service level, and reactive maintenance
- maintenance inspections and monitoring
- maintenance planning, prioritising and programming
- fiscal planning in maintenance management
- maintenance procurement
- effective communication with building occupiers
- energy and environmental management of occupied buildings
- the relationship between maintenance and conservation.

#### Level 2

Apply your knowledge to gather building maintenance information, formulate policies, and implement maintenance management operations.

Examples of activities and knowledge comprised within this level are:

- carrying out condition surveys of buildings
- receiving, prioritising and actioning repair notifications from occupiers
- formulating maintenance management policies
- producing planned maintenance programmes
- planning and monitoring maintenance expenditure and budgets
- setting up and running procurement contracts and orders for maintenance and servicing works
- inspecting completed maintenance works
- consulting with owners and occupiers about the quality of the maintenance service and maintenance works
- integrating maintenance policies with environmental and conservation requirements and policies
- keeping appropriate records of buildings and works carried out.

#### Level 3

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

Examples of activities and knowledge comprised within this level are:

- providing assessments of condition and wants of repair for individual buildings or portfolios of properties
- formulating and presenting a maintenance policy for an organisation
- drafting and presenting a planned maintenance programme
- preparing and presenting proposals for maintenance and improvement programmes to clients, tenants and occupiers
- preparing budget and expenditure reports and predictions for building maintenance
- preparing and negotiating partnership agreements with contractors and providers of maintenance and servicing works
- preparing and implementing maintenance and servicing contracts and measured term agreements.

## Measurement

This competency is relevant to all data capture and measurement of land or property. In the context of the property pathways, it refers particularly to measurement of saleable/lettable areas for agency or valuation purposes. In the context of the Built Environment, it refers particularly to measurement of sites and buildings for construction and maintenance purposes.

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

#### Level 1

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

Examples of knowledge comprised within this level are:

- relevant data capture techniques including the use of lasers and tapes
- the limitations of different methods of measurement checking procedures for the instruments used and the calculations undertaken
- potential sources of error from use of the instruments
- understanding the basis on which measurements should be undertaken i.e. the core definitions of measurement and their application
- the appropriate standards and guidance relating to measurement with particular reference to the current edition of RICS' *Property measurement*
- the degree of accuracy that is required for different types of property and the use to which the measurements will be put
- the use and limitations of plans and drawings.

#### Level 2

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

Examples of activities and knowledge comprised within this level are:

- using the appropriate instrumentation (including lasers and tapes) to capture sufficiently accurate data, based on an understanding of limitations of different instruments
- dealing with and advising on sources of error from use of instruments
- applying the appropriate guidance correctly in practice to undertake measurement of a variety of properties, understanding the basis on which measurements should be undertaken
- undertaking necessary calculations
- preparing and presenting measurements in a manner appropriate for the purpose they are to be used, understanding the level of accuracy that is required for different types of property.

#### Level 3

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

Examples of activities and knowledge comprised within this level are:

- Level 3 is only recommended for candidates with specialist knowledge and experience of sophisticated measurement and data capture practice. Most property candidates will only attain Level 2. For guidance on level 3 please refer to the RICS Geospatial surveying pathway guide.

## Procurement and tendering

This competency covers how a project is structured and delivered in terms of risk allocation and contractual relationships and how tendering processes are used to establish a contract price. Candidates should have a clear understanding of the different types of procurement and tendering commonly used and the advantages and disadvantages of each to the parties involved. They should have a detailed working knowledge of the procurement routes and tendering procedures used on their projects.

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

#### 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.

Examples of knowledge comprised within this level are:

- the main types of procurement used in both the public and private sectors, both nationally and internationally
- tendering and negotiation processes involved in procurement
- ancillary processes such as partnering and framework agreements
- codes of practice and procedures commonly used.

#### 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.

Examples of activities and knowledge comprised within this level are:

- implementing procurement routes such as traditional, design and build and management forms
- producing and/or compiling tender documentation such as letter of invitation, form of tender, health and safety documentation, design documentation and contractual details (Please note: pricing documents are covered under the Quantification and costing of construction works)
- carrying out of tendering and negotiation processes such as single and two stage tendering, the use of codes of practice and electronic tendering.

#### Level 3

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

Examples of activities and knowledge comprised within this level are:

- evaluating the appropriateness of various procurement routes
- managing the tendering and negotiation process
- preparing procurement and tendering reports.

## Project finance

This competency covers the effective cost control of construction projects during the construction phase, including the principles of controlling and reporting costs on any construction project. They should have a detailed understanding of the control and reporting processes used on their projects (please note: for surveyors working in contracting this competency covers externally issued cost advice and reports).

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

#### 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.

Examples of knowledge comprised within this level are:

- the effective control of costs during the construction phase of a project
- the legal and contractual constraints on the cost of a project such as changes in building legislation and design risk allocation
- the reporting and forecasting of costs during the construction phase
- the principles of risk allowances.

#### 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.

Examples of activities and knowledge comprised within this level are:

- managing project costs during the construction phase
- reporting and forecasting costs for different procurement routes and client types
- using cashflows in financial management
- managing provisional sums and risk allowances.

#### Level 3

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

Examples of activities and knowledge comprised within this level are:

- implementing change control procedures within the contract
- establishing reporting regimes/protocols
- using risk management and analysis techniques.

## Quantification and costing

This competency covers the measurement and definition of construction works in order to value and control costs. Candidates should have an awareness of the various methods of quantifying and pricing construction works used throughout a project. They must have a thorough understanding of the specific methods used on their projects.

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

#### 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.

Examples of knowledge comprised within this level are:

- the quantification of construction works (including both measurement and definition)
- the various standard methods of measurement
- the costing of construction works
- the measurement of buildings and structures to agreed standards.

#### 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 construction process.

Examples of activities and knowledge comprised within this level are:

- quantifying construction works at the various stages of a project
- producing pricing documents such as bills of quantities, schedules of activities/works, schedules of rates or contract sum analyses
- carrying out the costing of construction works by methods such as tendered rates, quotations or dayworks.

#### Level 3

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

Examples of activities and knowledge comprised within this level are:

- advising on appropriate methods of measurement and costing
- analysing proposed construction costs submitted by others and recommending to clients how to progress these
- negotiating and agreeing the valuation of construction works at various stages of the project such as the contract sum, construction and final account
- advising on the construction and final account.

## Risk management

This competency covers the management of risk on construction projects including the benefits to be gained and the techniques and processes to manage risk. Candidates should have a detailed understanding of how risk is dealt with on their projects.

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

#### 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.

Examples of knowledge comprised within this level are:

- the principles of risk management
- how the various procurement routes and building contracts deal with risk
- mitigation strategies
- the techniques used to quantify risk
- the effect of risk on programme and cost.

#### 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.

Examples of activities and knowledge comprised within this level are:

- contributing towards the identification of risk
- identifying who owns the risk in relation to the chosen procurement route on your project
- contributing towards strategies to mitigate risk
- contributing data towards the quantification of risk
- considering the effect of risk on programme and management cost specific to a project.

#### Level 3

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.

Examples of activities and knowledge comprised within this level are:

- advising on the appropriate procurement route in relation to the type of project and the client's attitude to risk
- recognising and advising on the appropriate methodologies and approach to risk management on a project
- taking ownership of the risk register and advising on appropriate risk mitigation strategies
- applying techniques to quantify risk and advising clients on the appropriate level of contingency of time and money.

## Sustainability

This competency covers the role of the building surveyor in dealing with the impact of sustainability issues on development and construction. Candidates should have an awareness of the various ways in which sustainability can impact on development and construction. They must have a thorough understanding of the impact made by sustainability on their projects and have been involved with the financial management of that impact.

### 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 development and the construction process
- the relationship between property and the environment
- how national and international legislation, regulations and taxation relating to sustainability affect construction
- criteria by which sustainability is measured in relation to finished buildings or construction works
- the principles and reasoning of how the design, and construction processes, together with technologies, can contribute to sustainable building
- the principles of material resource efficiency within the supply chain including embodied energy
- the differences between the various sustainability 'labels' and methods such as BREEAM, LEED, SKA Rating, MEES and any other energy efficiency legislation.

#### Level 2

Provide evidence of 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:

- carrying out capital cost and value engineering exercises to determine the impact of sustainability actions on design and construction processes
- 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:

- recommendations 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 advising on the financial impact and programme implications on a project
- making recommendations on sustainable material selection and how performance baselines can be estimated
- giving reasoned advice on sustainable solutions, not only from a financial perspective but also from a technical angle.

## Works progress and quality management

Chartered building surveyors are frequently involved in the supervision of works on site. It is essential that candidates selecting this competency demonstrate a detailed knowledge of construction technology techniques, and the relevance of the techniques on site. Quality of work is vital to ensure the long-term functional ability of the element of the building design, and candidates will be expected to demonstrate detailed knowledge of site quality requirements.

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

#### Level 1

Inspect and record progress and quality of building works.

Examples of knowledge comprised within this level are:

- what is required to carry out a site inspection, and the importance of recording progress of works
- the requirements of recording progress and comparing to project phase
- the requirements for quality descriptors as set out in the contract documentation
- the differences between the duties of a contract administrator and those of a person appointed solely to report on progress and quality issues.

#### Level 2

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

Examples of activities and knowledge comprised within this level are:

- carry out inspections of works being completed on site, and prepare the necessary reports showing progress and quality issues that have arisen
- prepare reports for clients detailing the effects of additional instructions, amendments to specifications and the likely effect on progress
- record for in-house and external purposes reports on quality of works on site, including any works rejected and the reasons for doing so
- compare progress of construction works at any stage of the works against the contract programme, or status of current gross financial valuation to original projections/cash flow.

#### Level 3

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

Examples of activities and knowledge comprised within this level are:

- prepare reports for clients, on works progress quality or cost, showing any deviation from expected progress using multiple assessment methods
- implement systems for recording progress and quality issues as part of contract administrator duties, and prepare reports for external circulation
- act as a contract administrator and incorporate into your duties the requirements for progress, financial and quality reporting.

## Delivering confidence

We are RICS. As a member-led chartered professional body working in the public interest, we uphold the highest technical and ethical standards.

We inspire professionalism, advance knowledge and support our members across global markets to make an effective contribution for the benefit of society. We independently regulate our members in the management of land, real estate, construction and infrastructure. Our work with others supports their professional practice and pioneers a natural and built environment that is sustainable, resilient and inclusive for all.

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