



# Planning and development

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# 1 Introduction

This guide supports the Planning and development 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

The Planning and development pathway is a wide-ranging specialist area that is concerned with both the highly strategic policy issues as well as more operational aspects of land and real estate use and development. The work of planning and development surveyors impacts not only on the physical aspects of the built and natural environment, but crucially too the social, economic and environmental aspects as well. The profession is continually evolving and new areas of practice and associated competencies will emerge, so please make sure you refer to the latest guidance and updates.

Planning and development is of strategic importance as governments and industry are placing more emphasis on the design quality and sustainability of the built environment, urban and rural regeneration, conservation, the impact of IT and big data, climate and demographic change, health, well-being and (even) happiness, transport and sources of renewable energy and related efficiencies. Chartered planning and development surveyors play a vital role in identifying and promoting effective land management and administration as one of the primary drivers behind sustainable development.

Planning and development chartered surveyors work across the globe, adjusting their expertise to the specific planning and development cultures, laws and processes that each country or region operates. The client base ranges from local and national governments, planning authorities and other public agencies, to the private sector such as property companies, house builders, commercial developers,

industrial and corporate land owners, special interest groups and the general public.

It is their strategic perspective, combined with practicality that allows planning and development surveyors to work well with the rest of the profession, as well as other built environment professionals. This underpins their holistic approach to help identify and achieve the world's future sustainable development needs.

### RICS qualification

The Planning and development pathway is ideal for anyone pursuing a career in property who has a particular interest in shaping the built environment through a thorough assessment of future needs and the planning and development processes that follow it.

Although planning legislation and regulation is applied across most chartered surveying specialisms, this pathway is aimed at individuals whose main areas of practice are planning and development, whether in the public or private sector. The Planning and development pathway places emphasis on at least one of the two planning competencies and the development appraisal, which are required to Level 3 in this pathway. However, as with the other property pathways, a broad base of experience in general property and some aspects of construction practice is also required.

Candidates undertaking the Planning and development pathway may gain their experience either in the public or private sector – or in a mixture of these.

### Chartered alternative designations

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

### Associate membership

The Planning and development pathway is also offered at Associate level under the Associate Land pathway.

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>• Development appraisals</li> <li>• Planning and development management <b>or</b> Spatial planning policy and infrastructure</li> </ul> <p><b>Level 2</b></p> <ul style="list-style-type: none"> <li>• Legal/regulatory compliance</li> <li>• Valuation (or Level 3*)</li> </ul> <p><b>Level 1</b></p> <ul style="list-style-type: none"> <li>• Measurement</li> <li>• Surveying and mapping</li> </ul>	<p><b>Two to Level 3</b></p> <ul style="list-style-type: none"> <li>• Access and rights over land</li> <li>• BIM management</li> <li>• Cadastre and land administration</li> <li>• Compulsory purchase and compensation</li> <li>• Contaminated land</li> <li>• Design and specification</li> <li>• Development/project briefs</li> <li>• Economic development</li> <li>• Environmental assessment</li> <li>• Housing strategy and provision</li> <li>• Leasing/letting</li> <li>• Management and regeneration of the built environment</li> <li>• Masterplanning and urban design</li> <li>• Measurement</li> <li>• Planning and development management <b>or</b> Spatial planning policy and infrastructure (whichever is not selected as a core competency)</li> <li>• Project finance</li> <li>• Purchase and sale</li> <li>• Risk management</li> <li>• Strategic real estate consultancy</li> <li>• Surveying and mapping</li> <li>• Sustainability</li> </ul>	<p>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.</p> <p><b>*If Valuation is taken to Level 3 the requirements are as follows:</b></p> <p>From the optional list, you must select one to Level 3 and one to Level 2</p> <p>plus</p> <p><b>one to Level 3 or two to Level 2</b> from the full list of technical competencies.</p>

# 4 Technical competencies guidance

## Access and rights over land

This competency is about access and easements for power, water and communications infrastructure, including wayleaves, and the differing methods of acquisition and compensation negotiations, including fees. The competency also addresses temporary access arrangements for various uses.

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

#### 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.

Examples of knowledge comprised within this level are:

- the processes involved in the acquisition of land for the purposes of establishing access agreements, wayleaves and easements for the provision of power, water, pipelines or communications infrastructure
- compensation procedures associated with such acquisitions, including any temporary accommodation and other works required for the construction and maintenance of infrastructure on the land acquired.

#### 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.

Examples of activities and knowledge comprised within this level are:

- negotiating with occupiers and companies regarding the routes, accommodation works, temporary works, and reinstatement and compensation
- agreeing heads of terms and final documentation.

#### 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.

Examples of activities and knowledge comprised within this level are:

- providing strategic advice on complex elements of the subject including dispute resolution
- preparing and providing strategic advice on unusual or challenging cases.

## 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.

Examples of knowledge comprised within this level are:

- BIM strategies and implementation
- the various technical options and solutions for using information modelling in operations
- the collaborative processes necessary for BIM adoption
- digital surveying techniques such as laser scanning
- standard classification systems and their use in operational phases of buildings
- standards such as PAS 1192-2 and PAS 1192-3 or local equivalence
- relevant information exchange processes 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:

- design and implementation of a BIM management process
- utilise BIM data to provide options for life cycle, maintenance and energy management strategies in use
- define the data required within the BIM model to ensure optimum FM data
- define and implement surveying programmers to ensure effective data capture
- maintenance and upkeep of an information model in operational use
- 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 in operations strategies at a corporate or project level
- designing and advising on collaborative strategies for the successful implementation of BIM on operational projects
- advising on the contractual and commercial implications of using BIM on operational projects
- advising on options for software and protocols on BIM
- advising on technical information systems requirements for BIM at corporate or project level.

## Cadastre and land administration

This competency deals with assessing documents relating to the demarcation, registration and transfer of land in order to define, on the ground, the extent of legal and/or registered title. It involves the preparation of expert lucid reports for the legal profession and provision of opinions to the legal profession and property owners.

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

#### 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.

Examples of knowledge comprised within this level are:

- the property registers in use
- all plans relating to the registration process
- limitations of national mapping
- definition of 'extent of registered title'
- paper-title (the deeds)
- the status of a deed plan when referred to in the text of a deed
- common law presumptions regarding property boundaries
- the law relating to 'moving boundaries' accretion, erosion, foreshore.

#### 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.

Examples of activities and knowledge comprised within this level are:

- adopting appropriate scales for measured surveys to be used in cadastre
- choosing which documentation to rely on
- practising with complete independence from the client
- requesting documents from the legal profession
- obtaining documents from the land registries or the relevant documentation based on location
- using and interpreting aerial photography and digital imagery
- reporting relevant matters back to the legal profession
- Understanding of the requirements for determining boundaries.

#### 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.

Examples of activities and knowledge comprised within this level are:

- advising on the duty of an expert to the court
- preparing expert reports for use in litigation
- advising on the requirements of an expert witness within the civil procedure rules
- advising on the requirements and role of an expert at a 'meeting of experts'
- advising on the role of an expert at a 'conference with counsel'
- preparing for trial
- advising on the role of an expert during and after the trial
- an appreciation of alternative dispute resolution options, particularly the differences and advantages/disadvantages when comparing mediation with arbitration.

## Compulsory purchase and compensation

The understanding and practical application, within the appropriate legal framework, of compulsory purchase powers, including the assessment of and claim for compensation. The candidate is expected to have an understanding from both the acquiring authority and claimant's position.

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

#### 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.

Examples of knowledge comprised within this level are:

- the historical background, requirement for, and justification of, the use of compulsory purchase powers
- an overview of the various Acts of Parliament or any relevant statutory requirements covering acquisition of land and rights, planning and compensation or local equivalent
- the basic principles of compensation (the before and after principle), accommodation works, betterment, equivalence and the legal right to claim.

Examples of activities and knowledge comprised within this level are:

- outlining the stages and timing involved in making, confirming and implementing a compulsory purchase order
- an understanding of statutory abilities to acquire rights other than outright purchase, such as those exercised by utilities companies
- setting out heads of claim under a compensation claim
- relevant statutory and case law in the assessment of a claim for compensation.

Examples of activities and knowledge comprised within this level are:

- supplying and justifying evidence for a statement of claim using both valuation and logical techniques to back up the quantum of the claim
- dealing with best practice in the implementation of a compulsory purchase order on, for example, a road scheme
- developing a rationale for the use of compulsory purchase powers in order to enable development, taking into account human rights legislation
- the fee basis for chartered surveyors and the role of the Lands Tribunal as well as mediation/arbitration
- assisting in the preparation for and attendance at a Public Inquiry into a Compulsory Purchase Order including understanding of procedure and process.

## Contaminated land

This competency is about an understanding of contaminated land in the context of urban and rural land and property asset management, transaction and development, law and planning.

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

#### 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.

Examples of knowledge comprised within this level are:

- the definition of contaminated land under the *Contaminated Land Regulations 2000*, and associated legislation
- areas of professional practice where contaminated land is relevant, e.g. valuations, development, asset management, transactions, environmental assessment
- the relevance under Part 11A of the *Environmental Protection Act*, planning policy guidance and RICS standards and guidance
- demonstrate an understanding of the limitations on chartered surveyors in this area, e.g. professional indemnity insurance, public liability insurance.

#### Level 2

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

Examples of activities and knowledge comprised within this level are:

- assembling specialist team members to advise on contaminated land assessment and remediation
- undertaking Review Stage 1 and desktop environmental reports and advise clients accordingly
- assisting in project management of and undertaking phased contaminated land assessments and remediation options appraisals
- negotiating and liaising with clients and regulators on contaminated land issues
- working with specialist project teams dealing with contaminated land and assessment and remediation.

#### Level 3

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

Examples of activities and knowledge comprised within this level are:

- advising clients on the application of contaminated land to their asset management, planning and development projects
- advising clients on the law and regulation and procedures and RICS standards and guidance appertaining to contaminated land.

## Design and specification

This competency involves the skills involved in the design and specification of development projects. Knowledge of the stages of design and specification, from inception to completion can be part of a chartered planning and development surveyor's knowledge and skill base.

### 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
- knowledge and understanding of preambles to contract documentation.

#### Level 2

Prepare and/or advise on designs and specifications, including at outline and detail levels.

Examples of activities and knowledge comprised within this level are:

- understand and 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 and/or approve 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
- provision of advice to clients regarding sustainability issues surrounding the proposals for their building
- manage the design process to incorporate design works by others in the specification.

## Development appraisals

This competency is about the commercial and/or public assessment of a property or infrastructure based development scheme and its appraisal from inception through to completion. Development appraisals also have a role in residual valuations of development sites but it should be remembered that the two may serve different purposes.

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

#### Level 1

Demonstrate knowledge and understanding of the principles and practices underlying a proposed and on-going appraisal of a property and/or infrastructure development scheme.

Examples of knowledge comprised within this level are:

- the role and nature of project business case and related development aims and objectives in terms of feasibility, viability and desirability.
- the character of and distinctions between cost, price, value and worth.
- the context and components of appraisals and residual valuations and how different project specific and contextual issues, e.g. planning requirements and site constraints and opportunities are reflected
- property market surveys and evaluations
- the sensitivities of appraisal inputs and variables and what factors affect outcomes
- development finance: sources and types.

#### Level 2

Identify, select, assemble and analyse data relevant to undertaking appraisals. Undertake appraisals using appropriate methodologies and relevant techniques. Identify and evaluate possible sources and methods of development funding.

Examples of activities and knowledge comprised within this level are:

- selecting and analysing appropriate quantitative and qualitative sources of information and data that affect cost, values and viability.
- preparing appraisals for the possible acquisition, disposal or valuation of sites and buildings for a range of possible uses and/or infrastructure development.
- using spreadsheets and associated software packages available for appraisals
- undertaking risk evaluation and sensitivity analysis
- assisting in the selection of appropriate sources, methods and packages of finance
- evaluating the impact of different procurement routes on project risk and appraisal.

#### Level 3

Interpret and provide reasoned advice on development appraisals and the implications for related decision making and implementation

Examples of advice, activities and knowledge comprised within this level are:

- detailed appraisals for the acquisition, disposal, financing, implementation, valuation of property or infrastructure development and its possible phasing
- viability appraisals in regards to planning applications and S106/CIL contributions
- the sustainability implications of appraisals including e.g. whole life cycle and/or carbon costing
- cost planning, value engineering and BIM in appraisals
- how non-market/qualitative factors affects appraisals (e.g. environmental/natural and social capital)
- the evaluation of risk, uncertainty, profit erosion and the interpretation of sensitivity analyses
- options appraisals, weightings and ranking
- examples of sources, methods and structuring of finance and/or grant funding and their impact on appraisal
- public sector and public sector led projects, viability studies, cost-benefit evaluation and treasury-based appraisal.

## Development/project briefs

The purpose of a development brief is to stimulate interest and help make a business case for the development of a site or a building's refurbishment. Project briefs are intended to influence and control the form and uses that a desired development will take. Both provide a framework for developers in the conception of major types of development schemes.

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

#### Level 1

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

Examples of knowledge comprised within this level are:

- the objectives of development/project briefs and associated business case
- essential site details including history, location, accessibility, services and utilities
- environmental features and issues
- the consultation process
- the planning policy background
- relevant planning documentation
- land ownership and disposal arrangements
- market conditions and trends
- development budgets and finance.

#### Level 2

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

Examples of activities and knowledge comprised within this level are:

- producing or responding to either a development or project brief
- analysing gathered information and data for a development/project brief
- programming or phasing of the stages of development
- producing a risk analysis.

#### Level 3

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

Examples of activities and knowledge comprised within this level are:

- using a development/project brief to plan design and develop a scheme
- negotiating agreements with stakeholder interests
- planning the implementation of a development scheme
- assist in formulating financial arrangements for a development scheme.

## Economic development

This competency is about understanding international, national, regional and local economic and social development policies and the provision of appropriate strategic property advice to clients that accord with or complement such policies.

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

#### 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 and political issues. This should include inward investment strategies and urban and rural regeneration and related infrastructure strategies.

Examples of knowledge comprised within this level are:

- international, national, regional and local socio-economic development policies, agencies and programmes
- funding sources
- inward investment strategies and marketing
- regional, urban and rural regeneration and new growth strategies including new settlements and physical, social and economic infrastructure projects.

#### 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.

Examples of activities and knowledge comprised within this level are:

- undertaking desktop and field study surveys and evaluation
- making appropriate use of relevant statistical sources
- selecting funding and grant sources, qualifications and restrictions
- understanding a range of international, national, regional and local organisational missions and responsibilities
- explaining place marketing, new infrastructure and inward investment.

#### Level 3

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

Examples of activities and knowledge comprised within this level are:

- examining and analysing employment and census data
- evaluating floor-space availability and needs
- undertaking and analysing business surveys
- policy analysis and development
- preparing and /or evaluating grant bids
- cost-benefit analysis and value for money evaluation
- partnership schemes and area-wide regeneration
- legacy planning and development of buildings and related infrastructure
- developing making and defending a business case for new initiatives
- monitoring and review of projects or programmes.

## Environmental assessments

This competency is about an understanding and application of the principles of environmental assessment, such as an Environmental Impact Assessment, within the planning and regulatory framework.

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

#### 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.

Examples of knowledge comprised within this level are:

- the aims, objectives and principles of an Environmental Impact Assessment (EIA) (or equivalent)
- the data gathering processes for environmental assessment such as BREEAM, EIA or similar
- the types of development that may require an environmental assessment.

#### Level 2

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

Examples of activities and knowledge comprised within this level are:

- managing the preparation of an environmental assessment
- conducting an environmental assessment, including EIA, BREEAM or similar for development and/or infrastructure projects
- experience of when a formal or informal environmental assessment is applicable
- the processes, procedures and requirements of a formal EIA and Social Impact Assessment (SIA), including screening and scoping.

#### Level 3

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

Examples of activities and knowledge comprised within this level are:

- advising on the need and application of an environmental assessment
- providing specialist advice on environmental assessments, including negotiations with clients and regulators
- advising on requirements and scope of an environmental assessment and the regulators' roles
- preparing and compiling environmental statements and non-technical summaries for submission to clients, regulators, and other stakeholders.

## Housing strategy and provision

This competency is about the provision of private and public sector housing and the strategies for the implementation of residential led mixed use and community development.

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

#### Level 1

Demonstrate knowledge and understanding of the various methods used to assess and identify overall housing and associated mixed use community development need as well as the options available for housing providers to meet these housing needs.

Examples of knowledge comprised within this level are:

- economic and demographic indicators for residential development and subsequent ownership/management
- national policies in terms of meeting housing supply targets
- sources of information and research outcomes that define housing need and demand across different tenures, residential types, locations and levels of affordability
- how developers, local authorities and other housing providers identify, source and procure development opportunities
- place-making and wider planning and development aims.

#### 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.

Examples of activities and knowledge comprised within this level are:

- producing reports on land assembly outlining the position in terms of planning, residential mix, tenure types, infrastructure, values and funding
- housing needs assessment and related planning policies
- examining different types of housing demand
- investigating ways of satisfying the different types of housing need and demand
- assist in undertaking a place making review and evaluation.

#### Level 3

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

Examples of activities and knowledge comprised within this level are:

- giving advice on the acquisition or disposal of residential or mixed-use development sites
- evaluating market research and analysis on housing demand and values
- acquiring or disposing of sites for residential or mixed use or community development
- leading a place-making based development proposal.

## Leasing/letting

This competency is specifically in relation to the market for leasehold property and includes assignments. Candidates should be able to demonstrate an understanding and experience (if appropriate) of working for both landlord and tenant. The candidate should have a knowledge of the whole transactional market for property.

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

#### 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.

Examples of knowledge comprised within this level are:

- the market for leasing/letting, and how values and lease terms may be affected by market trends and pressures
- the legislative framework associated with lease terms and show how this is reflected in the marketplace
- the factors that affect value for property in the letting market.

#### 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/letting route.

Examples of activities and knowledge comprised within this level are:

- experience of leasing/letting for both landlord and tenant
- experience of transaction from initial inspections through to completion of documentation
- negotiation with both prospective parties and the property owner
- decision making and recommendation of courses of action including valuation advice.

#### Level 3

Provide evidence of reasoned advice and report to clients on all types of leasing/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.

Examples of activities and knowledge comprised within this level are:

- experience of complex leasing/letting cases and explaining the factors that made the case deviate from the market norm
- commenting clearly on why decisions were made in relation to the chosen route of leasing/letting
- reporting to clients with recommendations including valuation advice
- reporting to clients with recommendations on strategy in relation to all options for the property
- dealing with externalities to the market that may affect leasing/letting
- utilising negotiation and business skills in relation to challenging leasing situations.

## Legal/regulatory compliance

Legal and regulatory compliance is an essential element in the work of a Chartered Planning and Development Surveyor. All development schemes must be conceived within the provisions of relevant legislation and associated regulations.

### 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 area of practice.

Examples of knowledge comprised within this level are:

- the law relating to planning and land compensation principles
- the extent and impact of regulation compliance on development projects with particular reference to health and safety, disability, and construction, design and management regulations.

#### Level 2

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

Examples of activities and knowledge comprised within this level are:

- using current case law, planning policy issues, appeals and representations
- using the law relating to conservation areas, listed buildings, planning policy, planning agreements (e.g. S106 in England, or S75 in Scotland)
- applying health and safety at work practices, disability, and construction, design and management regulations.

#### Level 3

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

Examples of activities and knowledge comprised within this level are:

- giving written, reasoned advice on legal and regulatory compliance for a development project, for example:
  - planning appeals and representations on consultation matters, in written reports, in liaison with solicitors
  - construction, land and financial contracts based disputes
  - tortious liabilities.

## Management and regeneration of the built environment

Planning and development surveyors contribute to the planning, management and future resilience of area-wide urban and/or rural based regeneration policies, projects and programmes. These are undertaken to meet highly focused and/or more policy orientated economic, social and environmental aims and objectives. It is acknowledged that work in this area will be very geographically and culturally determinant and thus often exploratory and uncertain in character.

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

#### Level 1

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

Examples of knowledge comprised within this level are:

- recognising the key factors and principles for the sustainable and resilient management of the built environment
- identifying planning and associated economic, social and environmental policies, and guidance notes applicable to the sustainable management of regeneration projects and/or programmes.
- understanding the nature of smart city and related PropTech strategies and benefits in relation to urban and rural regeneration
- project management principles applied to the planning and implementation of regeneration projects and programmes.

#### Level 2

Apply a knowledge of sustainable planning and management of regeneration projects and programmes. Demonstrate an understanding of the roles played by public, private and not-for-profit sectors.

Examples of activities and knowledge comprised within this level are:

- interpreting and evaluating the key factors and principles for the sustainable management and future resilience of the built environment
- responding to planning policies and guidance notes applicable to the sustainable management of the built environment for a development or conservation project
- working with and coordinating development partners, key stakeholders and the wider community
- recognising and evaluating key equity, cultural and ethical issues in large scale or otherwise complex projects or programmes.

#### Level 3

Provide evidence of reasoned advice, write reports and negotiate on all matters relating to the planning and sustainable management of regeneration aims, objectives, processes and outcomes. This should include the roles played by public, private and not-for-profit sectors.

Examples of activities and knowledge comprised within this level are:

- preparing detailed client and stakeholder reports on all matters in relation to the policy development, planning, management and efficacy of the regeneration programmes and/or projects.
- giving written and oral advice on the envisioning, viability and resilience of urban or rural based regeneration, development or conservation projects or programmes and their associated policy basis.
- engaging in and/or giving advice on smart strategies and technologies
- regeneration project planning, managing and/or evaluation
- identifying and resolving complex, contradictory and competing regeneration aims, processes, issues and outcomes.

## Masterplanning and urban design

Masterplanning and urban design is a multi-disciplinary activity. Its purpose is to set out a vision and framework for the planning and development of large or otherwise complex area of land. This might be both for green field development and for regeneration areas. Masterplanning typically involves the planning of land uses, grey and green infrastructure, scale and density terms, along with its phasing over time. Masterplanning should be linked to political and social processes as well funding and financial planning.

Urban design is concerned with the three- and four-dimensional designed characteristics of spaces and places and groups of buildings, rather than individual buildings or sites. Urban design is said to be primarily an art but the science of placemaking is also important in terms of human behaviour and psychology and aspects related to green and grey infrastructure.

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

#### Level 1

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

Examples of knowledge comprised within this level are:

- the objectives of masterplans and urban design
- essential area wide and component site/building details including location, history, design character, legibility, vitality, distinctiveness, permeability, serviceability, transportation, accessibility, services and utilities
- environmental features and issues
- stakeholder identification and the consultation process
- the property market and planning policy context and related documentation
- land ownership, acquisition and disposal arrangements
- funding and budgetary considerations.

#### Level 2

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

Examples of activities and knowledge comprised within this level are:

- contributing to a masterplan, urban design strategy or scheme
- collecting and evaluating information and data in support of a masterplan and/or urban design exercise.
- contributing to the programming or phasing of the stages of development
- presenting and explaining a masterplan and urban design strategy/scheme to clients/stakeholders/the public
- undertaking a detailed critique of an urban design strategy or proposal.

#### Level 3

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

Examples of activities and knowledge comprised within this level are:

- taking a major role in preparing a masterplan and/or its implementation and/or related funding and financial arrangements. this could include neighbourhood planning
- producing an opportunities/risk evaluation and associated options report
- preparing and/or responding to an urban design brief and associated matters of detail, e.g. density, scale, materials, green and grey landscaping, highways, etc.
- negotiating agreements with stakeholder interests in relation to masterplanning and urban design
- linking a masterplan and urban design strategy to individual site opportunities and constraints.

## 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.

### 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
- 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 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:

- please note, 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.

## Planning development and management

Planning appraisal is one of the crucial starting points in the development or refurbishment process. Such appraisals draw together all of the relevant policies, site history and local context pertaining to a site and the potential to secure planning consent.

Development management (described as 'development control' until recently) covers the process of managing or obtaining the grant of planning consents working for either the local authority or client-side perspective. The competency also covers the appeals process and the criteria by which cases will be considered by inspectors.

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

#### 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.

- Examples of knowledge comprised within this level are:
- the purpose of the development management system and process
  - the stages of the development application and appeals process
  - the consultation process and stakeholder management
  - the decision making process and role of key stakeholders
  - the need for supporting information and basis for determining what is required
  - familiarity with appropriate planning policy and procedures relevant to the locality/region of working
  - site/building surveys and details, e.g. site planning history, flood risk, biodiversity, archaeology, architectural character, conservation, accessibility, highways, services and utilities
  - analysis of environmental features and issues
  - urban design principles and characteristics and their implications for development appraisals
  - the role of supplementary planning documents, design guides and codes in guiding planning applications and their consideration.

#### Level 2

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

- Examples of activities and knowledge comprised within this level are:
- support the making of planning applications and/or appeal documentation
  - selecting, researching and analysing information and data and writing reports in support of or in response to planning applications
  - identify and implement appropriate consultation procedures and respond to issues identified
  - identify and help ensure compliance with planning policies and guidance
  - support the preparation of a design and access statement in conjunction with a planning application.

#### Level 3

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

- Examples of activities and knowledge comprised within this level are:
- liaising with and negotiating with planning officers, clients, fellow professionals and third-party stakeholders in relation to a development project
  - preparing planning appraisals of land, buildings and concepts and area wide planning parameter studies
  - making a planning application and/or submitting an appeal and appearing at an informal or public inquiry
  - lead the preparation or write a detailed design and access statement
  - formulating and negotiating a planning or highways agreements
  - creativity, problem solving and dispute mediation in scheme development.

## Project finance

This competency covers the effective cost control of property/construction projects and/or facilities management contracts while in progress, including the principles of controlling and reporting costs on any project. They should have a detailed understanding of the control and reporting processes used on their projects.

### 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 while a property/construction project is in progress
- the legal and contractual constraints on the cost of a project such as changes in property or building legislation and design risk allocation
- the reporting and forecasting of costs
- the principles of contingencies/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
- reporting and forecasting costs for different procurement routes and client types
- using cashflows in financial management
- managing client budget/contingencies/risk allowances.

#### Level 3

Provide evidence of reasoned advice 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
- advising on capital and operational expenditure.

## Purchase and sale

This competency relates to the purchase and/or sale of land/property on a freehold and leasehold basis. Note: candidates are not necessarily required to evidence competence to Level 2 or 3 with regards to sale and purchase. Sales and purchases of property in both its pre-development or completed state are included. Candidates should have clear regard and command to the property markets in which they operate. Purchase and sale of land and property for development purposes will be restricted to the sector of the property market in which the candidate works.

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

#### Level 1

Demonstrate knowledge and understanding of how various types of property interests are purchased and sold and placed on the market. Demonstrate an understanding of the economics of the market for such interests and the appropriate legal considerations of purchase and sale.

#### Level 2

Apply your knowledge and skills to the purchase or sale of a range of 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 the reasons supporting the decision to proceed along the chosen purchase or sale route.

#### Level 3

Provide evidence of reasoned advice and reporting to clients on purchase or sale. Demonstrate the ability to see cases through from start to finish and for complex cases with appropriate assistance.

Be able to provide clients or line managers with a holistic view of the entire transactional market, and advise, not only on the sale or disposal market but also on all other contingent matters.

Examples of knowledge comprised within this level are:

- the different types of freehold and leasehold interests that can be sold or purchased, and the factors that affect value, price and worth
- key legal factors that affect the process of property purchase and sales
- private treaty, tender and auction
- options, conditional contracts and pre-emptions
- factors governing the methods of disposal/acquisition and the advantages/disadvantages of each
- negotiating skills in sale and purchase.

Examples of activities and knowledge comprised within this level are:

- selling or purchasing land/property
- decision making and recommending courses of action including associated valuation advice
- undertaking transactions from initial inspections through to completion of documentation
- negotiating with both prospective parties and where appropriate interested third parties
- understanding of the legal frameworks governing sale/purchase and the implications and penalties.

Examples of activities and knowledge comprised within this level are:

- participating in complex or difficult purchases/sales, and explaining the factors that made it so
- due diligence and advising on why decisions were made in relation to chosen routes of sale or purchase and any subsequent implications
- experience of market, legal or public policy externalities that may affect sale or purchase
- reporting to clients with recommendations
- applying negotiation and business skills to handle difficult situations effectively.

## Risk management

This competency is about the effective use of risk management relating to projects. It includes a knowledge, understanding and use of the tools and techniques available, how insurance is used to deal with risk in developments, and the contractual requirements and implications of risk under various standard forms of contract or under associated 'rights of light' legislation.

### 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 concepts of risk
- the tools and techniques commonly used to evaluate and manage risk
- the use of risk registers and the models used to quantify risk.

#### 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:

- applying the various methods and techniques to measure risk
- participating in risk workshops
- preparing reports resulting from risk workshops.

#### Level 3

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

Examples of activities and knowledge comprised within this level are:

- facilitating risk workshops including preparation prior to the workshop
- evaluating the qualitative and quantitative output from risk workshops
- ongoing monitoring of risk issues through the project life cycle.

## Spatial planning policy and infrastructure

National, regional and local spatial planning policies seek to influence the strategic direction, scale and location of development and associated infrastructure delivery. Planning and development surveyors need to understand the key drivers that shape decisions and, where appropriate, influence spatial policy and infrastructure planning taking account of commercial market trends.

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

#### 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.

Examples of knowledge comprised within this level are:

- the aims and objectives of national planning laws and policies and its underlying political basis
- the preparation and adoption process for local plans, core strategies and supporting planning documents; neighbourhood plans and community infrastructure needs
- conservation and listed buildings policies, ecology, habitat management and planning policies to support and enhance biodiversity
- environmental assessment policies and processes
- understanding the geographic and demographic characteristics of areas (at, e.g. regional and local scale) and the impacts of spatial planning proposals and infrastructure development
- consultation processes and stakeholder perspectives
- infrastructure provision and delivery at the local and national level
- Community Infrastructure Levy (CIL) and other local taxation initiatives and their rationale and efficacy.

#### 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 as well as infrastructure planning and provision including transportation, energy, waste, IT and local community infrastructure related provision.

Examples of activities and knowledge comprised within this level are:

- contributing to a consultation process on a local plan, supplementary planning documents and their review
- identify appropriate planning strategy to help promote and/or manage proposed development allocations and/or strategic and community infrastructure requirements
- identifying and evaluating both desktop and field study planning information and data in relation to a purchase, sale, investment and/or development decision
- critiquing, reporting and explaining to clients, stakeholders and the public: land use allocations, housing need assessments, regeneration strategies, infrastructure or economic development plans
- contributing to the settlement or review of local CIL policies and implementation or review in the context of wider spatial planning policy.

#### 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.

Examples of activities and knowledge comprised within this level are:

- taking a key role in contributing to a spatial planning policy and/or and its related implementation or monitoring. This could include, e.g. local plans, strategic development plans, neighbourhood plans, regeneration masterplans, conservation areas
- producing an opportunities/risk evaluation and associated options report based on plans and policy-based documentation
- take a key role in the preparation, implementation or monitoring of related infrastructure planning policy instruments
- acting on behalf of stakeholder interests in relation to spatial planning or infrastructure matters
- evaluating spatial planning and infrastructure policies, programmes and delivery in relation to individual sites, buildings and wider development or restraint areas.

## Strategic real estate consultancy

This competency is about the provision of strategic consultancy advice to clients on real estate issues influencing the business.

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

#### 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.

Examples of knowledge comprised within this level are:

- organisational structures, values and objectives
- business performance
- the role and importance of real estate in organisational/business performance
- the role of real estate in business strategies
- strategic uses of real estate
- methods for appraising options for real estate strategies
- the role of the real estate professional as a strategic business adviser
- styles of consultancy intervention.

#### Level 2

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

Examples of activities and knowledge comprised within this level are:

- researching organisational background
- preparing relevant data
- analysing data
- undertaking option appraisals for real estate strategies
- using different styles of consultancy intervention for different client needs
- using your knowledge of real estate to find strategic solutions to meet client requirements.

#### Level 3

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

Examples of activities and knowledge comprised within this level are:

- strategic advice and recommendations to clients
- presentations to clients
- presenting data to support recommendations.

## Surveying and mapping

Mapping, in this context, is an exceptionally broad potential area of practice. This competency encompasses from LIDAR, IFSAR, aerial photography and other primary data capture techniques to ground control using GPS and/or traditional techniques and the production of digital elevation models, DTMs or any form of geographical output including Geographic Information System (GIS) data capture and output.

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

#### Level 1

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

Examples of knowledge comprised within this level are:

- data capture techniques and effects regarding accuracy and precision
- instrument checking techniques
- the basic principles of geodesy and its application to mapping according to your area of practice
- knowledge and use of basic survey software.

#### Level 2

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

Examples of activities and knowledge comprised within this level are:

- using post processing survey/mapping software competently
- using digital terrain modelling/digital elevation models
- understanding the principles of data integration and compatibility, integrating different datasets to achieve client needs
- understanding scalability in the context of both mapping and user requirements
- using imagery software and GIS data capture tools
- using modern survey instrumentation and understanding checking/calibration techniques.

#### 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.

Examples of activities and knowledge comprised within this level are:

- using all forms of survey/mapping/imagery contracts competently and describing the nuances of each (i.e. accuracy/fitness for purpose issues)
- being fully conversant with all RICS Geospatial surveying specifications and guidance in relation to mapping
- explaining complex mapping issues to clients and discerning their 'actual' needs.

## Sustainability

This competency covers the role of the surveyor in dealing with the impact of sustainability issues on design and development, including the various ways in which sustainability can impact on these activities. They must have a thorough understanding of the impact made by sustainability on their projects including financial 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 the planning and development process
- the relationship between property and the environment
- how national and international legislation, regulations and taxation relating to sustainability affect planning and development
- criteria by which sustainability is measured in relation to finished developments
- the principles of how the technology and construction processes can contribute to sustainable design.

#### 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:

- carrying out sustainability appraisal or strategic environmental assessment exercises to determine the impact of sustainability issues on design and construction processes
- understanding the principles of life cycle cost exercises that 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 design solutions for projects
- advising clients on planning policy relating to sustainable development.

## Valuation

This competency is about the preparation and provision of properly researched valuation advice, made in accordance with the appropriate valuation standards, to enable clients to make informed decisions.

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

#### 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.

Examples of knowledge comprised within this level are:

- the main drivers that have an impact on value
- the principles and application of the latest relevant valuation standards
- the relevant RICS standards and guidance
- the principles of professional practice, liability and indemnity insurance
- the underlying principles of property law, planning and other relevant regulations or controls and their impact on property/asset values
- the different purposes for which valuations may be required (including, bank lending, taxation, performance management, etc.)

#### 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.

Examples of activities and knowledge comprised within this level are:

- understanding client requirements and the preparation of Terms of Engagement
- inspection and information gathering relevant to the valuation work being undertaken
- analysis and interpretation of comparable evidence
- application of a range of valuation methods or techniques
- valuing either a range of property types or for a range of purposes
- preparing valuation reports and advice to meet stakeholder needs and comply with the latest relevant valuation standards
- demonstrate competence to conduct a valuation task from beginning to end with appropriate supervision

#### 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.

Examples of activities and knowledge comprised within this level are:

- the properties/assets considered may relate to a particular area of practice but the candidate's experience should cover a range of purposes (in a properly supervised manner), such as loan security, financial statements, internal management, purchase or sale reports, tax, stock exchange and litigation, but not necessarily all of these
- the types of property/assets should ideally be varied both in terms of physical attributes, usage and also interest (i.e. freehold and leasehold). In respect of machinery and business assets they should also be varied according to industry sector
- valuation advice should demonstrate knowledge of standards in other areas of business, e.g. accounting standards
- the candidate's advice to the client should include knowledge of the main drivers that impact on property/asset values and include an understanding of the wider influences such as government policy, the economic climate, technological change and other investment medium

## Valuation (continued)

### Level 1

- the principles of the various methodologies needed to provide both capital and rental valuation advice
- the importance of independence and objectivity
- the underlying principles of machinery and business assets law, planning and other relevant regulations or controls and their impact on property/asset values in relation to residential valuation the following skills will also be necessary for Level 1
- the role and function of automated valuation models (AVMs).

### Level 2

To achieve Level 2 candidates will not necessarily be carrying out valuations as part of their full-time, day-to-day activities. In relation to residential valuation the following skills will also be necessary for Level 2:

- undertaking residential valuations (primarily for loan security purposes)
- experience of using or commenting on the results of an AVM.

### Level 3

- the candidate should demonstrate knowledge as to how their valuation advice inter-relates with their client's other professional advisers
- advising on the different levels of service that may be required, e.g. desktop advice versus a full inspection-led valuation and the benefits/limitations of each level.

## 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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