

Associate Assessment

Land

February 2017



# Land

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# Introduction

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

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

Refer to this guide while preparing your submission for assessment.

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

## Competencies

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

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

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

Assessment

Associate

# What is the Land pathway?

This pathway is for people who work in the following areas:

### Environmental

Environmental covers all aspects of the management, monitoring and assessment of the environment in the context of real estate, land and construction. For example:

- environmental management
- land use and contaminated land
- environment auditing and assessment
- environmental impact assessment
- environmental risk assessment.

## **Planning and development**

Planning and development impacts not only on the physical aspects of the built environment, but social and environmental aspects as well. The profession is continually evolving with a wide range of environmental, economic, political and social relevance to its day-to-day activities.

### **Minerals and waste management**

Minerals are the raw materials needed to supply the construction and manufacturing industry and provide fuel for the world's energy requirements. A consumer-led society needs careful waste disposal and management. Extracting minerals and managing waste requires sensitive planning from the initial prospecting stage to the ultimate restoration and after-use of each site. Examples of areas covered by minerals and waste management are:

- mining and quarrying
- minerals economics and valuation
- mining law
- minerals planning
- environmental assessment and auditing
- waste disposal and management.

## **Rural practice**

Rural practice draws on a wide range of professional and technical skills and knowledge. The following are examples of areas covered by rural practice:

- rural estate management
- agriculture
- planning
- valuation
- auctioneering
- asset management.

Geomatics specialist candidates should refer to the RICS Associate routes on Hydrographic Surveying and Land/Engineering Surveying.

# Land competencies

You must select any **six** from the following **eleven** technical competencies:

- access and rights over land
- development/project briefs
- inspection/reporting
- landlord and tenant (including rent reviews and lease renewals)
- legal/regulatory compliance
- mapping
- measurement of land and property
- planning
- property management
- property records/information systems
- valuation.

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

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

# **Technical competencies**

You must select **six** of the following **eleven** technical competencies

Access and rights over land	
Description	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.
Requirements	Demonstrate knowledge and understanding of the legislation and/or framework for acquiring sites or access for the provision of power, water, pipelines and other third party or communications infrastructure. This should include the methodology and techniques used in valuation for these purposes. Provide evidence of identifying and understanding the appropriate routing for lines, cables and other third party infrastructure. This should include associated environmental assessments, undertakings, inspections and evaluating and negotiating payments for their use or acquisition.
Examples of likely skills, knowledge and experience	<ul> <li>Knowledge</li> <li>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</li> <li>necessary issues to be taken into account when accessing neighbouring land</li> <li>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</li> <li>common law presumptions regarding property boundaries</li> <li>all relevant and extant RICS guidance and professional information and/or the local land law and cadastral procedures relevant to your region.</li> <li>Activities</li> <li>negotiating with occupiers and companies regarding the routes, accommodation works, temporary works, reinstatement and compensation</li> <li>compiling a case file of appropriate documentation</li> <li>preparing initial reports using a variety for sources from old deeds to modern downloadable title plans and land registry information</li> <li>agreeing heads of terms and final documentation.</li> <li>Within a cadastral system:</li> <li>researching and evaluating of initial cadastral issues</li> <li>basic reporting on potential issues of 'encroachment'</li> <li>reporting on land purchase and basic valuation</li> <li>preparing land transfer data for local/national cadastral authority.</li> </ul>

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Access and rights over land (cont.)	
Examples of tasks undertaken	<ul> <li>developing and supporting client relationships</li> <li>researching appropriate data sources</li> <li>applications of land law from easements to entering someone's land</li> <li>communication with relevant authorities for issues of legal title, easements, access rights and covenants (land registry), mapping (relevant national mapping agency) and/or client</li> <li>choosing which documentation to rely upon</li> <li>requesting documents from the legal profession.</li> </ul>

Development/project briefs	
Description	The purpose of development briefs are to stimulate interest in development sites whilst project briefs influence the form that a desired development might take. Both provide a framework for developers in the conception of major types of development schemes. It is expected that candidates taking this competency will primarily focus on compilation and development/project brief research skills and outcomes. It is recognised that the application of this competency across sectors could be in anything from minerals development to mixed use developments to rural business development schemes, to environmental impact and risk assessments mitigation design and management strategies for development schemes. Most, if not all, generally require a good technical level of background information to help inform any development/project brief.
Requirements	Demonstrate knowledge and understanding of the information required to prepare a development brief or project brief. Apply your knowledge to identify, select, assemble and analyse information relevant to the preparation of development briefs or outline project briefs.
Examples of likely skills, knowledge and experience	<ul> <li>Knowledge <ul> <li>the basic objectives of development/project briefs</li> <li>essential site details including history, location, accessibility, services and utilities</li> <li>basic environmental features and issues</li> <li>the development consultation and planning processes</li> <li>planning policy</li> <li>RICS guidance and information papers within this area.</li> </ul> </li> <li>Activities <ul> <li>compiling and producing a case file</li> <li>information resourcing and research</li> <li>gathering and analysing relevant planning documentation including information on land ownership and disposal arrangements, planning status, planning policy, development management, market conditions and development budgets</li> <li>producing a basic initial development/project brief</li> <li>gathering spatial information and data such as Ordnance Survey mapping (UK) or national agency, cadastral information, Google maps and source any other relevant locational information.</li> </ul> </li> </ul>
Examples of tasks undertaken	<ul> <li>analysing relevant data</li> <li>sourcing spatial and/or environmental information.</li> </ul>

Inspection/reporting	
Description	Property inspection is fundamental to providing accurate property advice. It is important that candidates are able to demonstrate knowledge and understanding of the core requirements of property inspection. Candidates must demonstrate awareness that inspection should be carried out in accordance with instructions at the appropriate level of detail for the task in hand whether for purchase, sale planning or design. Assessors will be seeking confirmation that candidates have knowledge of any of the following: basic building construction, location analysis, rural property issues, environmental issues, mineral/waste specifics, renewable energy installations and related defects.
Requirements	Demonstrate knowledge and understanding of the different requirements for inspection, together with the required information and factors affecting the approach to an inspection. 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 likely skills, knowledge and experience	<ul> <li>Knowledge</li> <li>the requirements and reasons for a property inspection</li> <li>safety issues when undertaking an inspection</li> <li>implications of location and situation</li> <li>access arrangements and relevant legal obligations</li> <li>basic building construction, location analysis, rural property issues, planning and environmental issues, mineral/waste specifics and related defects</li> <li>legal requirements that impact upon the occupation/ownership of buildings.</li> <li>Activities</li> <li>accurate recording of natural and artificial site characteristics</li> <li>preparing, or assisting in the preparation of, reports for clients</li> <li>understanding potential defects of buildings and implications</li> <li>assessing quality of location, design and specification.</li> </ul>
Examples of tasks undertaken	<ul> <li>use of local records, including maps and geological/soils data, databases of government designation etc. and other geographical-based information in order to augment preparations for inspection and to complement inspection records and notes</li> <li>collecting and compiling information on site condition</li> <li>collecting and compiling information on natural and artificial features</li> <li>collecting and compiling information on ownership extents, access and right of way issues, planning and development issues such as zoning extents and in some cases aspects of building defects.</li> </ul>

Description	This competency is about the management of the landlord and tenant relationship in the context of all of the areas within the Land Surveying pathway
Description	from minerals and waste management facilities to post development letting to rural tenancy issues and telecoms installations. This competency also covers lease negotiations and all lease-related matters arising between landlord and tenant, representing either party.
Requirements	Demonstrate knowledge and understanding of the law and practice relating to landlord and tenant. 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 likely skills, knowledge	Knowledge
and experience	<ul> <li>basic principles of property law (according to your jurisdiction)</li> </ul>
	legislation relevant to the subject area and applicable to your jurisdiction
	the content, form and structure of leases
	relevant market conditions and land/property values
	<ul> <li>relevant RICS guidance and best practice including the RICS Appraisal and Valuation Standards (Red Book)</li> </ul>
	<ul> <li>principles of property law and valuation including minerals ownership and ownership of landfill void</li> </ul>
	<ul> <li>land law including knowledge of the relevance of easements, covenants (restrictive and positive) and ownership</li> </ul>
	lease issues with regards to telecoms, renewable energy installations and related break clauses and compensation factors
	planning use classes.
	Activities
	<ul> <li>developing the content of initial reports about tenancies and lease agreements</li> </ul>
	investigating current arrangements for specific sites
	<ul> <li>compiling background information and building project specific case files</li> </ul>
	compiling information for land and tenant based rent reviews or lease renewal activities
	<ul> <li>carrying out basic market research, collating and analysing comparable evidence</li> </ul>
	supporting the preparation, serving and responding to legal notices.
Examples of tasks undertaken	<ul> <li>collecting and compiling information about the landlord and tenant relationship (e.g. rent review, lease renewal) including the collation of relevan comparable evidence</li> </ul>
	supporting negotiations with other parties
	<ul> <li>achieving a satisfactory solution, reporting recommendations and concluding matters.</li> </ul>

Legal/regulatory compliance	Legal/regulatory compliance	
Description	Legal issues are at the heart of many areas of traditional land practice. All candidates should have a good working knowledge of any legislation that may impact on their work whether it is health and safety legislation in environmental surveying, minerals survey, rural, land law and/or cadastral survey. This also includes marine regulations or the law of the sea. An awareness of the planning legislative and policy framework is an important requirement. Although candidates are not generally asked to be expert in legal matters, some may eventually wish to add expert witness training to their core surveying skill sets. Depending on your location, this competency may be especially applicable in a cadastral context.	
Requirements	Demonstrate knowledge and understanding of any legal/regulatory compliance requirements in relation to your area of practice.	
Examples of likely skills, knowledge and experience	<ul> <li>Knowledge</li> <li>the legislative needs of land and marine survey work</li> <li>the basics of land law in your country</li> <li>legislative strictures such as health and safety legislation and/or traffic management</li> <li>regulatory systems relating to planning, building and environmental protection</li> <li>basic contract law and its principles</li> <li>national land registration issues/legislation and cadastral laws</li> <li>all relevant RICS and survey industry guidance, specifications and related professional information.</li> </ul> Activities <ul> <li>compiling and researching information about the necessary legal/regulatory requirements according to project needs</li> <li>communicating regulatory issues within the context of a project briefing note</li> <li>integrating legal/regulatory requirements into project briefing or pre-inspection reports.</li> </ul>	
Examples of tasks undertaken	<ul> <li>regulations, licensing and laws applicable to your country</li> <li>risk assessment in the office/field</li> <li>maritime law in an international/national and/or regional scenario</li> <li>law such as a boundary dispute, wayleaves, environmental protection, and liabilities, waste regulation, planning application, extraction licensing or renewable energy facility</li> <li>the cadastral context</li> <li>health and safety legislation in the office/field.</li> </ul>	

Mapping	
Description	<ul> <li>Mapping, in this context, is an exceptionally broad potential area of practice.</li> <li>Encompassing: <ul> <li>aerial photography and other primary data capture techniques such as satellite imagery [Google maps]</li> <li>ground control using GPS and/or traditional techniques</li> <li>production of digital elevation models (DEMs)</li> <li>any form of geographical output including GIS data capture and output.</li> </ul> </li> <li>Candidates in the Land Surveying pathway are not expected to be experts at field survey data capture but are expected to understand basic survey data capture techniques, use survey instruments and understand core surveying principles.</li> </ul>
Requirements	Demonstrate knowledge and understanding of the principles of mapping and geographic information sciences appropriate to your area of practice. Understand accuracy, scale, currency and fitness for purpose of hardcopy and/or digital maps, drawings, imagery and plans. Apply your knowledge of mapping and geographical sciences in relation to your area of practice.
Examples of likely skills, knowledge and experience	<ul> <li>Knowledge</li> <li>data capture techniques and the issues regarding accuracy and precision</li> <li>cartographic standards</li> <li>basic principles of Geodesy and mapping</li> <li>use of basic survey and mapping software</li> <li>survey instruments and basic topographic survey data capture techniques</li> <li>survey equipment calibration, limitations and fitness for purpose according to your area of practice</li> <li>map generalisation issues and potential effect on data representation</li> <li>copyright rules and usage/licensing rights</li> <li>all RICS and survey industry standard guidance and information</li> <li>scale and fitness for purpose issues</li> <li>online mapping resources and data integration (mash ups)</li> <li>uses of geographic information systems and relevant data.</li> </ul> Activities <ul> <li>compiling project specific geographic information in appropriate medium (hardcopy, digital, aerial photography etc)</li> <li>undertaking basic topographic survey</li> <li>undertaking basic building measurement survey</li> <li>integrating mapping and geographic information into project specific case file and briefing notes.</li></ul>
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Mapping (cont.)	
Examples of tasks undertaken	<ul> <li>sourcing and checking mapping and geographical information data provenance and quality control</li> <li>understanding and use of survey instrumentation (e.g. levels, theodolites, basic distance measurement (disto), GPS equipment)</li> <li>carrying out survey data capture techniques and using correct methodology</li> <li>assessment and use of most appropriate output for a project taking into account product type, scale, content and resolution of mapping to be used. This could include anything from Google maps/internet derived output to site specific Ordnance Survey (or relevant National Mapping Organisation) mapping information</li> <li>utilisation of industry standard CAD, imagery and GIS software for presentation of final data</li> <li>quality assurance flowline to ensure that final mapping data is produced according to the specification</li> <li>choice of mapping product appropriate for project considering accuracy, reliability and area of practice</li> <li>basic survey data capture and presentation of topographic survey results in digital/hard copy format</li> <li>principles of data integration and compatibility, integrating different data sets to achieve client needs.</li> </ul>

Description	This competency is relevant to all data capture and measurement areas of practice. In the context of the Land Surveying pathway it can be applied to the concept of 'measurement' in its broadest sense from actual spatial survey to energy and sustainability measurement and to economic measurement issues.
	measurement issues. The competency covers topographic land survey, engineering surveying, measured building survey and all general measured survey work. It is also relevant to boundary surveys, surveys for rental, ratings and valuations and inspection purposes, initial field visit surveys and high accuracy as-built surveys or large-scale utilities surveys.
Requirements	Demonstrate knowledge and understanding of the principles and limitations of measurement relevant to your area of practice. Apply knowledge to undertake measurement. Be able to use basic and/or advanced survey instrumentation to collect data and present appropriate information gained from measurement.
Examples of likely skills, knowledge and experience	<ul> <li>Knowledge</li> <li>checking procedures and the suitability of different instrumentation and measurement techniques</li> <li>principles of error sources</li> <li>data capture techniques and limitations of use</li> <li>different basic survey instrumentation</li> <li>principles of data representation and the use of appropriate data capture techniques to achieve agreed survey output</li> <li>principles of measured building surveying and its outputs</li> <li>principles of energy efficiency measurement [EPC in the UK] and its measurement</li> <li>basic mapping techniques and available data and its limitations [Google maps, for example]</li> <li>RICS and survey industry standard guidance and information.</li> <li>Activities</li> <li>basic surveying activity and data capture</li> <li>producing site layout plans, access points, rights of way and measured building surveys</li> <li>according to the project needs, the inclusion of relevant measured survey information and output in briefing files, case notes and final layout briefs</li> <li>undertaking as-built, post development surveys</li> <li>development of environmental data gathering.</li> </ul>

Measurement of land and property (cont.)	
Examples of tasks undertaken	<ul> <li>employing data capture techniques and methodology</li> <li>sourcing appropriate data (topographic, environmental and/or legal for example)</li> <li>initial site survey</li> <li>the initial planning of a measurement strategy</li> <li>issues of scale and survey specification</li> <li>equipment checking</li> <li>application of quality assurance procedures</li> <li>data capture (surveying) instrumentation</li> <li>measured building survey techniques</li> <li>topographical survey data capture techniques and appropriate output criteria</li> <li>basic rural topographic information for subsidy payment information purposes.</li> </ul>

Planning	
Description	The planning system plays a vital role for all areas of practice within the Land Surveying pathway particularly in relation to the opportunities available for any development scheme. It is important to have good working knowledge and experience of the processes involved to ensure successful development outcomes. Planning is an important skill set for all candidates in the Land Surveying pathway and wide ranging in its application. The planning needs of a rural practice will differ significantly from a minerals extraction operation but the core skills of data compilation and adherence to relevant legislation, planning policy and regulation will remain. In this context, planning includes environmental assessment processes associated with planning applications or the implementation of planning consents e.g. discharge of conditions or dealing with reserved matters.
Requirements	Demonstrate knowledge and understanding of the principles of planning. Apply your knowledge to matters relevant to the planning process within your area of practice.
Examples of likely skills, knowledge and experience	<ul> <li>Knowledge <ul> <li>the purpose of the planning system</li> <li>the different levels of the planning system from national strategic to local level</li> <li>the planning process and its requirements</li> <li>the decision-making process for planning applications (development management)</li> <li>the distinction between the technical and political aspects of planning</li> <li>special planning powers where specific planning restrictions apply, e.g. to conserve the historic environment</li> <li>the differences between rural, urban, minerals and environmental aspects of planning</li> <li>the requirements for community involvement in the planning system.</li> </ul> </li> <li>Activities <ul> <li>assisting in preparation of submissions as part of the planning process</li> <li>supporting the preparation of planning applications and related case files</li> <li>supporting the negotiation processes of the planning application procedure</li> <li>researching and compiling planning information for project and briefing use (including supplementary and supporting information such as site photographs, site history, geographic information and environmental data]</li> <li>supporting work so that a site complies with relevant planning requirements.</li> </ul> </li> </ul>
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Planning (cont.)	
Examples of tasks undertaken	<ul> <li>interpretation of strategic planning policies</li> <li>planning compliance</li> <li>environmental compliance</li> <li>planning restrictions</li> <li>local planning policy</li> <li>time limits and local procedures.</li> </ul>

Property management	
Description	This competency covers all aspects of day-to-day functions associated with property management in the context of both the natural and built environment. 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. It may include environmental management in the context of proposed or consented development affecting a property.
Requirements	Demonstrate knowledge and understanding of property management and the relationship between owner and occupier. Apply the principles of property management to provide solutions to issues affecting both owners and occupiers.
Examples of likely skills, knowledge and experience	<ul> <li>Knowledge</li> <li>key factors determining the landlord and tenant relationship in relation to the running of property</li> <li>key lease terms and their implications to property management</li> <li>key development consent obligations and planning conditions and their implications for property and environmental management</li> <li>how disputes and problematical issues can be resolved, and how to prioritise key tasks</li> <li>operational objectives and management issues</li> <li>maintenance and statutory inspections and resultant corrective actions</li> <li>compliance requirements</li> <li>legal requirements associated with multi let property and/or managed property</li> <li>the purchase and sale process.</li> </ul> Activities <ul> <li>supporting the management of property and property portfolios</li> <li>liaising with tenants and supporting the management of lease agreements</li> <li>manitaning record systems</li> <li>identifying maintenance requirements</li> <li>visiting properties and inspection of lease issues</li> <li>supporting client and tenant lease management</li> <li>visiting properties and inspection of lease issues</li> <li>supporting client and tenant liaison and lease management</li> </ul>
Examples of tasks undertaken	<ul> <li>property management accounting principles from the landlord and tenant perspective, legal and RICS requirements</li> <li>possible courses of action in response to breaches of lease by landlord and tenant</li> <li>appropriate file management and administration systems</li> <li>appropriate reporting of property management and environmental issues to stakeholders.</li> </ul>

Description	This competency relates to the records that a nation keeps and maintains to support its own system of the registration of rights, responsibilities and restrictions pertaining to land within the state. It requires knowledge and understanding of the systems in use in one country, usually the country in which the candidate works.
	Some candidates may work within a cadastre. This competency reflects this diversity in the 'examples of activities'.
Requirements	Demonstrate knowledge and understanding of the factors required for property records/information systems, including the sourcing and collation of dat
	Apply knowledge to analyse data and assemble it for use in a database.
Examples of likely skills, knowledge and experience	<ul> <li>Knowledge</li> <li>the difference between deeds/registered titles</li> <li>supporting maps/plans</li> <li>legal documentation, index maps, electronic records</li> <li>RICS and survey industry guidance, specifications and related professional information</li> <li>sources of information pertaining to property held in the public domain and by private organisations.</li> </ul> Activities <ul> <li>conducting survey/field investigation. Interpreting plan/map whilst on site. Writing report from survey containing results</li> <li>computing survey/field investigation. Interpreting plan/map whilst on site. Writing report from survey containing results</li> <li>computing with relevant authorities</li> <li>compiling a case file of appropriate documentation</li> <li>supporting the maintenance of an appropriate project filing and administration system</li> <li>interpreting legal language in relation to property records</li> <li>accessing basic legal advice</li> <li>analysing deed plans. Interpreting map and legal wording in relation to legal estates</li> <li>in the context of access rights over land - supporting consent applications and compiling necessary case related documentation</li> <li>supporting and investigating background property data provenance (history), checking and processes</li> <li>compile land and property records and other information for planning applications (built environment, minerals and/or waste facilities)</li> <li>compile land and property records and other information for Environmental Impact Assessments (EIA)</li> <li>compileiton/processing of a boundary application.</li> </ul> Within the context of a 'cadastre' <ul> <li>developing a record for integration into an accepted national and/or local cadastral system</li> <li>gathering data, historic or recent, on the cadastral parcel/record</li> <li>initiating research into legal and boundary issues which may result from property record transfer.</li> </ul>

Property records/information systems (cont.)		
Examples of tasks undertaken	<ul> <li>analysis of deed plans. Interpretation of map and legal wording in relation to legal estates</li> <li>investigation of deeds and plans in relation to easements, rights of way and burdens affecting the land</li> <li>choice of mapping product appropriate for project considering accuracy and reliability</li> <li>applying quality control procedures</li> <li>plotting from information contained in deeds</li> <li>recording metadata for project.</li> </ul>	

Valuation	
Description	This competency is about the preparation and provision of properly researched valuation and appraisal advice, made in accordance with the appropriate valuation standards, to enable clients to make informed decisions about all kinds of property.
Requirements	Demonstrate knowledge and understanding of the purposes for which valuations and appraisals are undertaken; the relevant valuation methods and techniques; the appropriate standards and guidance; and any relevant statutory or mandatory requirements for valuation work. 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 likely skills, knowledge and experience	<ul> <li>Knowledge</li> <li>valuation techniques for rural, minerals, wasting assets, land development and environmental assets</li> <li>main drivers that have an impact on value</li> <li>principles and application of the RICS Appraisal and Valuation Standards [Red Book] or other relevant valuation standards</li> <li>principles of professional indemnity insurance</li> <li>'due diligence' issues in relation to inspection and valuation (for example environmental contamination reporting and its potential effect on value]</li> <li>underlying principles of land/property law, planning and other relevant regulations or controls and their impact on property/land values as related to your area of practice and location</li> <li>different purposes for which valuations may be required</li> <li>principles of the various methodologies needed to provide both capital and rental valuation advice</li> <li>importance of independence and objectivity</li> <li>client requirements and support the preparation of 'terms and conditions of engagement'.</li> </ul> Activities <ul> <li>analysing and information gathering relevant to the valuation work being undertaken</li> <li>analysing and interpreting of comparable evidence</li> <li>applying a range of valuation methods and techniques</li> <li>preparing valuation reports and advice to meet client needs and comply with the RICS Appraisal and Valuation Standards [Red Book], or other relevant standards </li> </ul>
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Valuation (cont.)	
Examples of tasks undertaken	<ul> <li>valuations for sale and purchase, taxation, finance, security, compensation</li> <li>negotiation of agreed values</li> <li>building and land inspections for valuation purposes</li> <li>annual stock taking valuation</li> <li>minerals and waste facility valuation</li> <li>valuation related site inspections</li> <li>client reporting and liaison</li> <li>inspecting and information gathering relevant to the valuation work being undertaken.</li> </ul>

# Mandatory competencies

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

# **Continuing professional development (CPD)**

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

Valuation				
Activity type	Purpose	Description	Learning outcomes	
Organised	To get up-to-date on the latest issues within the current revision of the Red Book according to my area of practice	A webinar by RICS online learning academy – interactive presentation (2 hrs)	To be conversant with changes to the Red Book which affect my working environment and enable me to support my colleagues, clients and supervisors better	
Legal/regulatory compliance	Legal/regulatory compliance			
Activity type	Purpose	Description	Learning outcomes	
Organised	The course aimed to make delegates familiar with relevant aspects of health and safety legislation, standards and procedures	Attended CPD relevant ½ day workshop on health and safety issues	The course provided a broad overview of current health and safety legislation, standards and procedures. It also focused on a number of specific case studies. I left feeling more knowledgeable about health and safety liability issues and my own personal health and safety procedures	

Measurement of land and property				
Activity type	Purpose	Description	Learning outcomes	
Work-based	To develop my knowledge and practical experience of basic surveying measurement techniques and instrumentation	Attended an in-house course with experienced staff on basic measured survey techniques, focusing on the appropriate use of sketch maps, tapes, electronic devices such as Leica Disto's and total stations	The hands-on sessions were very useful for developing my measurement skills and highlighting the importance of clear and concise note taking and measurement procedures	
Inspection/reporting	Inspection/reporting			
Activity type	Purpose	Description	Learning outcomes	



# **Confidence through professional standards**

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

We accredit 125,000 professionals and any individual or firm registered with RICS is subject to our quality assurance. Their expertise covers property, asset valuation and real estate management; the costing and leadership of construction projects; the development of infrastructure; and the management of natural resources, such as mining, farms and woodland. From environmental assessments and building controls to negotiating land rights in an emerging economy; if our professionals are involved the same standards and ethics apply. We believe that standards underpin effective markets. With up to seventy per cent of the world's wealth bound up in land and real estate, our sector is vital to economic development, helping to support stable, sustainable investment and growth around the globe.

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

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

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