

RICS Assessment of Professional Competence – Planning and Development Final Assessment Submission

Candidate and Counsellor/Supervisor declaration

Candidate details:

Candidate Name:	XXXXXX	
	XXXXXX	
RICS Membership Number:	XXXXXX	
Date of Birth:	XXXXXX	
Pathway:	Planning and Development	
Employer / organisation:	Savills UK	
	33 Margaret Street	
	W1G 0JD	
Previously Referred?	No	0
Case Study Title:	Disposal of XXXXX	

Candidate Declaration:	I confirm that I have completed this document in line with the Assessment of Professional Competence candidate guide and understand the competencies and levels required in my pathway guide. I confirm that all documentation is based on my own experience.
Candidate Signature:	

Counsellor/Supervisor details:

Counsellor Declaration:	By countersigning this document you confirm that to the best of your knowledge that the candidate has understood the requirements and this document complies with RICS guidance. Also that the content of this submission is a true representation of the candidates own work and involvement in the projects details herein.
Counsellor Name:	XXXXXX
Counsellor Signature:	
RICS Membership number:	XXXXX
Supervisor name: (optional role)	XXXXX
Job title/role:	XXXXX
Supervisor signature:	

Submission content – please ensure you have completed or attached all relevant elements:

Qualifications and Employment Information:	
Summary of experience:	
Case study:	
CPD:	
Log book (if applicable):	
Referral report (if applicable):	
Declared disability to RICS (if applicable):	

Qualification and Employment Information

Please insert more rows or delete as applicable

Qualifications:				
Name of Educational establishment	City/Country	Please confirm full title of qualification	Date started	Date completed
University of Cambridge	Cambridge, England	BA Hons Land Economy	05/10/2010	25/06/2013

Any other relevant professional qualification(s):			
Name of organisation	Current grade	How membership was achieved (e.g. examination)	Year gained

Professional experience (Please list all relevant employment details, starting with the most recent)			
Employer	Position held (job title)	Date from:	Date to:
Savills UK	Graduate Surveyor	09/09/2013	Present
<p>Brief overview of scope and responsibilities:</p> <p>As a graduate surveyor at Savills I have had experience working in a range of residential development and planning teams, including Central London Planning, Development Land, and London Residential Consultancy. In these teams I have learnt about different aspects of the development process and the delivery of residential development.</p>			

Planning and Development Pathway

You must refer to your Planning and Development pathway guide and candidate guide to understand the requirements of this section. Please complete the required number of competencies for your chosen pathway to the specified level in the format outlined below.

Summary of Experience - Mandatory Competencies (1500 words in total)

Competency	Level	Summary of Experience	Date achieved (mm/yyyy)
Conduct rules, ethics and professional practice	1	<p>From undertaking the RICS Online Ethics Training and attending a lecture on RICS Professional Ethics, I am aware of the Five Core Principles of the RICS as outlined in the RICS Global and Professional Ethical Standards (2015), and the RICS Rules of Conduct (amended 2014), that the RICS requires all of its members to adhere to.</p> <p>I am also aware of the various guidance notes, best practice statements and information papers that the RICS publish to help guide members and promote best practice within the profession. I understand the importance of Continuing Professional Development in order to stay up to date with this guidance and industry best practice.</p>	02/12/2013
	2	<p>Featherstone Lodge, SE23 – Before pitching for this Viability instruction, I carried out a conflict of interest check using my company's internal database. After establishing there was no conflict of interest and following my company's client acceptance procedure, I agreed a fee with the client and sent them our Terms of Engagement and Terms of Business. I ensured I received signed Terms before commencing work.</p> <p>Parsons Green, SW6 – My team were instructed to undertake consultancy work to aid my client in the acquisition of this development site. When carrying out a conflict of interest check I identified that another team within my company was advising an alternative party. This was disclosed to both parties in writing, and written confirmation was received from both parties stating that they were satisfied for us to proceed. An information barrier was set up accordingly.</p>	12/08/2014
	3	<p>Walpole Court, W5 – During the course of marketing this development site, the total NSA of the proposed scheme was altered by the architect. I advised my client that the particulars would need to be amended and all prospective parties alerted of the change in accordance with the Consumer Protection Regulations (CPRs) under the Unfair</p>	25/03/2015

		<p>Trading Regulations (2008) and the Business Protection Regulations (BPRs) from the Misleading Market Regulations (2008). I subsequently contacted all known prospective bidders and amended the data room and brochure accordingly.</p> <p>Priests Bridge, SW14 – When appraising this MOT garage as a potential development site, my client asked me to comment on the likelihood of contamination on site and recommend suitable available remediation methods. Having regard to the RICS Rules of Conduct, I advised my client that this was outside my area of expertise, and that they should seek specialist advice in this regard.</p>	
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Competency	Level	Summary of Experience	Date achieved (mm/yyyy)
Client care	1	In my Graduate Induction I learnt about the importance of client care in order to build and maintain working relationships, as well as ensuring a high level of service to clients. I also understand that the same principles apply to colleagues and third parties. Before undertaking an instruction I ensure that I understand the client's objectives and expectations, and confirm these in my Terms of Engagement. I also ensure that they are aware of my company's complaints handling procedure, should they have any issues with my work.	12/08/2014
	2	<p>Dudley House, TW7 – Prior to submitting a fee proposal for the disposal of this site, I met with the client to ensure that I fully understood their requirements, objectives and expectations for the sale. Having established these, I included them in my Terms of Engagement and asked the client to confirm in writing that these were agreed.</p> <p>Pembridge Crescent, W2 – When submitting a planning application for external works at this property, there was a delay in the validation of the application. I ensured that the client was fully informed in order to manage their expectations on timescales. Once the application was validated I continued to update my client regularly on the application's progress.</p>	25/03/2015

Competency	Level	Summary of Experience	Date achieved (mm/yyyy)
Communication and negotiation	1	Throughout my training I have developed my oral, written and presentation skills, allowing me to communicate and negotiate more effectively with clients and other parties. From attending Soft Skills Training, I understand the importance of conveying information	12/08/2014

		clearly and effectively, whether in meetings, via email, on the phone or in written reports. I am able to choose the most appropriate method of communication depending on the situation and the party I am addressing.	
	2	<p>Aylmer Road, N2 – When disposing of this residential development site I prepared written marketing particulars and an online dataroom. I also discussed the opportunity with potential purchasers over the telephone and in person during on-site viewings. This required good written and verbal communication skills in order to generate interest and to negotiate a successful sale.</p> <p>Knightsbridge, SW7 – I undertook extensive market research to help inform my client's bid for this development site. This required communicating with colleagues and third parties to gather the necessary information. I then prepared a written report including graphs and charts demonstrating the key findings and market statistics. I then presented my findings to my client in a meeting, aided by a power point presentation.</p>	25/03/2015

Competency	Level	Summary of Experience	Date achieved (mm/yyyy)
Health and safety	1	I understand the importance of following health and safety practices in order to protect myself, my colleagues and other parties. From attending an internal Health & Safety seminar I am aware of my company's Health and Safety policy and from attending a lecture on Surveying Safely I understand the recommendations of the RICS Surveying Safely guidance note (2011). I ensure that I consider potential risks and how to minimise them when conducting work both inside and outside the office in compliance with the Health and Safety at Work Act (1974). I am also aware of the risks associated with asbestos and how these can be managed.	02/12/2013
	2	<p>Greenwich Square, SE10 – Prior to visiting this development site I contacted the site manager to ensure I understood its current condition and to confirm that the appropriate personal protection equipment would be provided on site. Upon arrival I signed the site entry book and was accompanied by the site manager at all times.</p> <p>Northdown Street, N1 – When completing a lone viewing at this site, I ensured I followed my company's Lone Working Practice by informing my colleagues where I was going and who I was meeting, putting the meeting in my Outlook calendar and taking a fully charged mobile phone. I was also aware of my company's agreed alert code.</p>	26/11/2014

Competency	Level	Summary of Experience	Date achieved (mm/yyyy)
Accounting principles and procedures	1	From attending a workshop on company accounts I understand the requirements and purposes of both management and audited accounts. I am aware of my company's financial performance through monitoring half year and year end financial reports. I have attended departmental meetings where we have discussed billings and annual profit targets, and analysed profit and loss statements. I have also assisted in preparing pitch documents and fee proposals through which I have furthered my understanding of the different types of fee structure.	25/03/2015

Competency	Level	Summary of Experience	Date achieved (mm/yyyy)
Business planning	1	I understand the importance of business planning in securing new business, meeting client objectives and generating profit for the team and the wider company. I am aware of the importance of monitoring workloads and future instructions in order to ensure the team is on track to meet annual fee and profit targets. From attending an internal Development Services Conference, I also understand the importance of my company's 'Cross Selling' policy in transferring business across departments to deliver a higher level of service to clients and win new business.	25/03/2015

Competency	Level	Summary of Experience	Date achieved (mm/yyyy)
Conflict avoidance, management and dispute resolution procedures	1	From attending internal Compliance Training, I am familiar with my company's policy on conflict avoidance and complaints handling, and I am aware of the RICS Conflicts of Interest guidance note (2012). I understand the importance of always undertaking the necessary checks to establish if there is a conflict of interest prior to undertaking an instruction. I am also aware of my company's complaints handling procedure and the necessary process should I receive a complaint.	25/03/2015

Competency	Level	Summary of Experience	Date achieved (mm/yyyy)
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Data management	1	<p>Throughout my training I have used a variety of sources to collect data including the Land Registry, industry websites such as Molior and Lonres, and Local Authority online planning databases. I understand the importance of verifying this information where possible to ensure its accuracy.</p> <p>I have used various methods to store, analyse and display collected data such as Microsoft Excel and am able to select the most appropriate method depending on the purpose. I also understand the importance of adhering to the Data Protection Act (1998) and keeping data secure, particularly when storing client contact information.</p>	25/03/2015
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Competency	Level	Summary of Experience	Date achieved (mm/yyyy)
Sustainability	1	<p>From attending a lecture on sustainability legislation, I am aware of the importance of sustainability in the property industry and the requirements placed upon both existing and new build real estate. I understand the requirements of the Energy Act (2011) and ways of measuring sustainability including BREEAM, EPCs and Predicted Energy Assessments.</p> <p>I ensure I am environmentally conscious when conducting my work, following my company's sustainability policies which actively seek to reduce our carbon footprint through various measures including using electronic filing and recycling wherever possible.</p>	26/11/2014

Competency	Level	Summary of Experience	Date achieved (mm/yyyy)
Teamworking	1	<p>From working in several different teams I understand the principles and dynamics of effective team work, both within smaller teams and across the wider business. At my company's Development Services Conference, I learnt how different teams can work together to undertake instructions to deliver a higher level of service and make the company more profitable. I also understand the importance of working with other professionals from outside my company in order to effectively meet clients' needs.</p>	25/03/2015

Total word count for mandatory competencies: 1,497

Summary of Experience - Technical Competencies

You are required to write 3000 - 4000 words in total for your technical competencies, this includes the core and optional competencies.

Please complete the required number of competencies for your chosen pathway to the specified level in the format outlined below.

Core competencies

Please note if you wish to become an RICS Registered Valuer you must take Valuation to Level 3.

For Level 3 competencies follow this format below:

Competency	Level	Summary of Experience	Date achieved (mm/yyyy)
Development appraisals	1	During my training I have gained an understanding of the principles and practices of development appraisals. From attending ARGUS Developer software training, I understand that basic inputs into development appraisals include costs, sales revenue, project timescales and professional fees. I also understand the importance of accurate inputs in order to produce a reliable appraisal. I have learnt that external factors including planning, interest rates and construction costs can influence the viability of a development scheme. I therefore understand the need to undertake sensitivity analyses to assess the potential impact of these factors.	01/04/2014
	2	<p>Wandsworth Road, SW8 – I was asked to undertake a residual appraisal of this site in Lambeth in order to help my client decide whether to dispose of the site. I used the plans provided by the client's architect and gathered local comparable evidence to come to an opinion of Gross Development Value. I used average build costs for the Borough and development type from BCIS, and used standard market assumptions on finance rates and profitability. I reported the residual land value to the client.</p> <p>Stormont Road, SW11 – I undertook a residual appraisal prior to marketing this development site. Our local sales team advised on sales values from their extensive experience in the area, which I checked by researching recent comparable transactions. I concluded that there was limited new build evidence in the local area, so I ran a sensitivity analysis demonstrating what effect changes in</p>	01/04/2014

		the sales values would have on the residual land value, and used this to help inform the guide price.	
	3	<p>Bessant Drive, TW9 - I produced a residual appraisal as part of a Viability Assessment for this development site. In the appraisal I included the likely planning obligations payable which I calculated using the Borough's S106 calculator. I used the build costs provided by my client's QS, which I checked against the BCIS average build cost database. The resulting residual land value demonstrated that the client could afford a payment-in-lieu of affordable housing. I prepared a report advising my client of this, including a sensitivity analysis demonstrating the impact of changes in build costs and sales values on the potential payment that would be due.</p> <p>Master Brewer Site, UB10 – I was instructed to produce a residual appraisal to advise my client on their potential purchase of this development site. The site had an outline planning consent for 125 residential units. I took my construction costs from BCIS average prices for the development type and region. There was little new build comparable evidence in the local area, so I used second hand comparables and talked to local agents to arrive at a GDV for the scheme. I appraised the site using ARGUS Developer software. I advised the client of the residual land value, which informed their bid for the site.</p>	25/03/2015

Competency	Level	Summary of Experience	Date achieved (mm/yyyy)
Planning	1	In the Planning Team I had experience in preparing planning appraisals, applications and appeals for properties and development sites in Central London. I have a good understanding of the planning system, supported by the Town and Country Planning Act (1990) and the Planning and Compulsory Purchase Act (2004), and I understand the importance of the National Planning Policy Framework (2012). I understand that the system is plan-led with policy and guidance produced on a national, regional and local level. I am also aware of the specific policies in the NPPF and London Plan governing listed buildings, conservation areas and trees.	01/04/2014
	2	Hereford Road, W2 - I prepared and submitted a planning application for the partial change of use of this A2 retail unit in Westminster to C3 residential. I prepared a planning statement setting out the proposals, the site and its surroundings, and the planning considerations. I addressed Westminster's City Plan and concluded that the proposals were in line with the strategic objectives and adopted	26/11/2014

	<p>policies, as well as those contained in the London Plan and NPPF. I prepared the application forms and submitted the application using the planning portal. The application was subsequently granted under delegated powers by the Planning Officer.</p> <p>Melbury Road, W14 – I assisted in seeking pre application advice for a proposed scheme of four mews-style properties on a site in Holland Park. I prepared a pre application statement detailing the proposals and demonstrated how they complied with the relevant planning policies. I submitted the statement and plans to the Council with a formal request for a pre application meeting, and I attended a site visit with the Planning and Conservation officers. I informed the client of the officers' response and recommended amendments to the proposals.</p>	
3	<p>Victoria Street, SW1 - I prepared a Feasibility Study to inform my client's bid for this development site. I researched the site's planning history and adopted local and regional planning policy. I found that the site was within the Core CAZ and an Opportunity Area, and that policies for these areas encouraged mixed use development. I advised the client of this and assessed their subsequent proposals against the adopted planning policy. I confirmed that the proposed scheme appeared to be compliant, and advised the client of what planning obligations may be due, calculating the S106 and CIL payable based on the Borough's Planning Obligations SPD and proposed CIL charging schedule, in accordance with Regulation 40 of the Community Infrastructure Levy Regulations (2010) (as amended).</p> <p>Chesham Street, SW1 - Following the refusal of planning permission for a mansard roof extension at this property, I was instructed to appeal the decision. I advised the client that written representation was the most appropriate method, being the most cost and time effective. Given that the property was within a Conservation Area and that the application was refused on Heritage grounds, I advised the client that they should instruct a Heritage Consultant to produce a Heritage Statement assessing the impact of the proposals. I liaised with the appointed consultant, prepared a Statement of Case and submitted the appeal to the Planning Inspectorate (PINS).</p>	26/11/2014

For Level 2 competencies follow this format below:

Competency	Level	Summary of Experience	Date achieved (mm/yyyy)
Legal/regulatory compliance	1	During my training I have gained a greater understanding of the legislation and regulations that govern various aspects of the profession. When collecting and storing data I ensure that I comply with the Data Protection Act (1998), and when undertaking agency instructions I have regard to the Estates Agents Act (1979) and Money Laundering Regulations (2007). When undertaking planning instructions I ensure I comply with planning law, and from attending a CPD lecture on Compulsory Purchase Orders I am aware of land compensation principles.	01/04/2014
	2	<p>Carnwath Road, SW6 – Prior to undertaking this planning instruction for the change of use from B1(a) office to C3 residential, I had regard to the Town & Country Planning (General Permitted Development) (England) Order 1995 (as amended May 2013) and concluded that the building complied with the requirements of Class J. I subsequently submitted an application for prior approval for the change of use of the property, accompanied by a flood risk assessment, transport impact assessment and prior notification form.</p> <p>Pembridge Place, W2 – When preparing the Statement of Case for an appeal against the refusal of planning permission at this property, I had regard to recent appeal decisions where the Planning Inspector had overturned the Local Authority's refusal of planning permission for roof alterations in a Conservation Area. I concluded that the same principles could be applied to the subject site, and subsequently referenced these in my Statement.</p>	25/03/2015

Competency	Level	Summary of Experience	Date achieved (mm/yyyy)
Valuation	1	From attending my company's Valuation Roadshow and a Residential Valuation workshop I have learnt about the different purposes of valuations, and the methods of valuation, and when it is appropriate to use each method. During my training I have gained knowledge of the use of the comparable and residual methods in valuing residential property and development land. I am also familiar with the requirements of the RICS Valuation – Professional Standards January 2014 (Red Book). I understand the importance of promoting best practice within the profession, and I am aware of the Valuation	02/12/2013

		Information Papers produced by the RICS.	
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For Level 1 competencies follow this format below:

Competency	Level	Summary of Experience	Date achieved (mm/yyyy)
Mapping	1	Throughout my training I have had to use and produce a range of mapping data. The main mapping tool I have used is Promap, which I have used to create precise location maps for submission with planning applications and use in marketing particulars. I am also able to interpret a range of mapping data, including using planning policy maps, Environment Agency flood risk maps, and title plans. I understand that it is important to use scales that are appropriate for the purpose, such as a scale of 1:1250 or 1:2500 for location plans for use in planning applications.	25/03/2015

Competency	Level	Summary of Experience	Date achieved (mm/yyyy)
Measurement of land and property	1	<p>During my training I have gained knowledge and experience in the different methods and principles of property measurement. From attending a CPD lecture on the measurement of land and buildings, I am familiar with the RICS Code of Measuring Practice (2007), which I have referred to when measuring properties and interpreting scaled plans, drawings and area schedules. I am aware of the different types of measurement, and which are appropriate for each purpose and property type.</p> <p>I have taken scale measurements from scaled drawings, and used Promap mapping software to measure development sites. I have also used a laser distometer to check the stated existing floor areas of buildings.</p>	25/03/2015

Optional competencies

For the Planning and Development pathway you must select two competencies to Level 3 from the list below. You must also choose one competency to Level 3 or two competencies to Level 2 from the full list of technical competencies, including any not already chosen.

Please note if Valuation is taken to Level 3 the requirements are as follows:

From the optional competency list you must select one at Level 3 and one at Level 2 plus from the full list of technical competencies you must select one to Level 3 or two at Level 2.

Competency	Level	Summary of Experience	Date achieved (mm/yyyy)
Housing strategy and provision	1	<p>Through my training I have gained knowledge and experience of the economic and demographic factors that affect the housing market and residential development. These factors include housing demand, which can be monitored through the House Price Index and Sales Volume Data produced by the Land Registry. Another major factor is planning policy and local authority monitoring reports, particularly through the results of Strategic Housing Market Assessments and Strategic Housing Land Availability Assessments. From attending various research presentations I am aware that there is currently an undersupply of homes, and the availability of land and labour are key to ensuring that housing need is met.</p> <p>I understand that developers and housing providers can use a variety of methods to source development opportunities. These include talking to agents and monitoring Local Authority Strategic Site Allocations, recent planning applications and industry press.</p>	12/08/2014
	2	<p>Bessant Drive, TW9 – As part of producing a Viability Assessment for this site, I examined local, regional and national planning policy guidance and extensively researched the local market. I talked to local agents and used online property databases to establish both the current supply and pipeline of new build residential units in the local area in order to assess the local housing demand. I used this evidence to inform a unit by unit pricing exercise of the proposed scheme, reflecting oversupply in certain unit types.</p> <p>Battersea Park Road, SW8 – I was asked to undertake an appraisal of this site in Wandsworth to assess its</p>	12/08/2014

		development potential. The site did not have a planning consent for redevelopment, however it was allocated as a strategic mixed use development site by the Borough in the adopted Site Allocations document. I had reference to this site allocation and the Borough's adopted policies, including those on affordable housing, to determine what type of use and scale would be achievable on site.	
	3	<p>Bankside Quarter, SE1 - I provided market commentary to advise my client on their potential acquisition of this development site. I collected comparable new build sales evidence and had reference to recent research on housing supply and demand. I found that the consented unit mix was skewed to large units, of which there was an over supply in the local market. I produced a market report and advised my client that they should procure planning advice to investigate the possibility of amending the planning consent to a more marketable mix. I provided the client with a suggested unit mix which would prove the most profitable based on the market data.</p> <p>Portal Way, W3 – I was instructed to produce a Market Report to advise my client on the acquisition of this development site in a key regeneration area. I had reference to recent housing market research, noting that the new Crossrail station within close proximity to the site was forecasted to increase local housing demand, and that the area currently had an under supply of new build flats for private sale. I collected comparable sales evidence from the local and wider London market, and advised the client on the likely purchaser profile for the area, and therefore what type of product they should deliver. I also advised on what average values they could expect to achieve.</p>	05/08/2015

Competency	Level	Summary of Experience	Date achieved (mm/yyyy)
Purchase and sale	1	<p>Whilst in the Development Land team I gained knowledge and experience of the different methods of disposal and acquisition, and when each is appropriate. I am aware of the different types of interests that can be sold or purchased, and I am aware that factors affecting the value can include planning status, housing market sentiment, and current and future supply of development land.</p> <p>I understand the requirements of the Estate Agents Act (1979) and the Consumer Protection from Unfair Trading Regulations & Business Protection from Misleading Marketing Regulations (2008). I am also aware of the</p>	25/03/2015

		principles of the Residential Property Standards ('Blue Book') (2014) and the RICS Global Practice Statement in Real Estate Agency & Brokerage and Real Estate Management (2014).	
	2	<p>Aylmer Road, N2 – When assisting in the disposal of this residential development site, I prepared the marketing collateral setting out the details of the opportunity to prospective buyers including a bespoke brochure and an online data room. During marketing I liaised with potential purchasers by email and on the telephone, and conducted viewings. I reported regularly to the client, keeping them updated on the sales progress. Upon receipt of the bids, I produced a bid analysis in order to allow the client to make an informed decision in selecting the preferred bidder.</p> <p>Union Road, SW4 – I was invited to pitch for the disposal of this residential development site in Lambeth. The site had prior approval for change of use from offices to residential, so I undertook a residual land valuation of this scheme in order to provide the client with my opinion of the site's value and a suitable guide price. I set out my recommendations for marketing in a proposal letter to the client.</p>	25/03/2015
	3	<p>Bamborough Gardens, W12 – I was instructed to acquire a residential property within the W12 area for a client for long term investment purposes. I used property portals and local agents to source a suitable opportunity, and viewed the property with my client. I analysed comparable transactions to help the client make an informed decision on a suitable offer level, and then subsequently submitted the offer along with their proof of funds. I advised the client that the purchase should be subject to vacant possession, and that a delayed completion would therefore be most suitable in order to allow the vendor to give notice to the current tenants. I then negotiated with the vendor's agents and solicitors in order to progress to exchange of contracts.</p> <p>Walpole Court, W5 – Following an invitation to pitch for the disposal of this residential development site, I inspected the site and prepared a marketing proposal to submit to the client. Due to the client's objective to maximise value, I advised selling the site by way of informal tender as this would allow the client to have more flexibility in accepting an offer, and would allow them to revert to an alternative method of sale if an acceptable offer was not received. Following receipt of our signed Terms of Business, I prepared the marketing collateral, contacted prospective purchasers, and conducted viewings. Following receipt of bids, the client selected their preferred bidder and we were able to progress to exchange of contracts within the client's desired time frame.</p>	25/03/2015

Competency	Level	Summary of Experience	Date achieved (mm/yyyy)
Property records/information systems	1	I have had experience using a variety of property databases and information systems, ranging from Planning Authority websites to online residential databases such as Rightmove, Molior and Lonres, and commercial databases such as Costar Focus. I have also used the Land Registry for house price indices and finding land title documents. I am able to find, collate, store and present data in a range of forms depending on its purpose, in line with the Data Protection Act (1998) and the RICS Electronic Document Management Guidance Note (2009).	02/12/2013
	2	<p>Whilst in the Development Land team I was required to keep a database of prospective buyers. This involved collecting information on visitors to our marketing websites, and recording the details of people enquiring about properties for sale. I stored this information in an excel document to allow for easy use in both Outlook and Microsoft Word. I ensured that the information was secure, saving it in a file that could only be accessed by my team, and in compliance with data protection guidelines.</p> <p>Grosvenor Road, SW1 - I used the comparable method of valuation to come to an opinion of GDV when appraising this residential development scheme. I used online databases including Lonres, Rightmove and Molior to gather comparable evidence. I presented the data in an Excel spreadsheet to allow for easy analysis, including using filtering, pivot tables and graphs, in order to come to an opinion of value for the proposed scheme.</p>	12/08/2014
	3	<p>Stockley House, SW1 – I prepared a Market Report for this residential development site in Westminster in order to advise the client of the scheme's GDV and help inform their strategy going forward. As well as collecting local comparable evidence using Molior and Lonres, I used the Land Registry and my company's internal market research to compile average price data to produce graphs and average price maps. I used this data to price the residential scheme proposed for the site, producing a pricing schedule and accompanying report which I sent to the client.</p> <p>Merton Site Search – I was instructed by a client to identify development opportunities to acquire within the London Borough of Merton. I used the borough's planning applications database, Molior and EGi to</p>	25/03/2015

	<p>identify sites which had recently applied for or been granted planning permission. I stored the data in an Excel schedule and advised my client that this would enable them to analyse the opportunities more easily using the filter and search functions. For those that were of interest, I then used the Land Registry to identify the landowner, and contacted them by letter to enquire whether they would be interested in selling their property.</p>	
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Total word count for technical competencies: 3,020

EXAMPLE ONLY

Case study

Submit one case study of **3000** words. The focus of the case study must be on a single project or piece(s) of work undertaken in the last 24 months. The project you choose **MUST** allow you to demonstrate technical competencies from your chosen pathway, and how you used the competency skills.

Name of case study: Disposal of XXXXX

Date the project or piece(s) of work were carried out: June – July 2015

Confidentiality statement

The following case study contains confidential information included for the purpose of the Assessment of Professional Competence. XXXXX, hereinafter termed “the client” and Savills UK have given their consent to disclose details for the case study on the basis that the information is not to be used for any other purpose or by any person other than those authorised by the Royal Institution of Chartered Surveyors (e.g. staff and assessors).

Contents:

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2. My Approach
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4. Conclusion
5. Appendix A – Competencies Achieved
6. Appendix B – Project Photographs and Plans
7. Appendix C – Marketing Particulars
8. Appendix D – Schedule of Comparable Evidence
9. Appendix E –Development Appraisal Summary

Total Word Count: 2,970 words (Not including content list or Appendices)

1. Introduction

This case study reflects on my involvement in the disposal of the site known as XXXXX (“the Property”) on behalf of XXXXX (“the Client”).

The Property comprises a 0.422 hectare (1.042 acre) site, used as a surface car park. Photographs of the site, a site plan and a location plan can be found at **Appendix B**. At the time of marketing the car park was let to XXXXX on a five year lease from January 2015, with a mutual break option in 2017. The site did not benefit from planning permission for development and was designated as Metropolitan Open Land (MOL).

Savills were invited to pitch for the instruction to dispose of the Property on behalf of the Client in June 2015. Prior to the submission of our fee proposal, I completed a conflict of interest check using my company’s internal database in line with RICS guidelines¹. There were no conflicts and I was able to submit our fee proposal and Terms of Engagement² to the Client.

I inspected the Property on 2nd June 2015 with my supervisor to confirm its extent and to gain an understanding of its immediate surroundings. I confirmed the site boundaries with reference to the title plan before measuring the site area once I had returned to the office using Promap mapping software.

I then undertook a planning appraisal and considered the site value for marketing purposes, using Argus Developer software and comparable evidence. I set out our opinion of value and recommended marketing strategy to the Client in our fee proposal on the basis of sole agency. Following receipt of signed Terms of Business, I prepared the marketing material, including an advert in the Estates Gazette and a brochure, attached at **Appendix C**. I ensured that I received written approval of the marketing material from the Client before sending to print. During the marketing process, I assisted my supervisor in contacting prospective purchasers, and reported interest to the Client on a regular basis.

2. My Approach

Key Issue 1 – Method of Valuation

I was required to consider the value of the Property in order to set a suitable guide price for marketing. Following my inspection of the site and an analysis of planning policy, I concluded that the Property had development potential and its value as a development site would exceed its existing use value. I reviewed the five methods of valuation and considered there to be two suitable options for valuing the Property³.

Option 1 - Comparable Method

The comparable method is used to value land or properties through comparison with transactions of similar properties.

Option 2 - Residual Method

The residual method is used to assess the market value of development land by calculating the Gross Development Value (GDV) of the completed development and subtracting the costs of the development and the developer’s profit to arrive at a land value.

¹ RICS Guidance Notes – Conflicts of Interest (2011).

² RICS Global Practice Statement in Real Estate Agency & Brokerage and Real Estate Management (2014).

³ RICS Valuation Information Paper 12 – Valuation of Development Land (2008).

The Property did not benefit from planning permission, and the Client had not undertaken a feasibility study or held pre-application discussions with the Local Authority. My preferred method of valuation was initially the comparable method as this would provide a more objective assessment of value based on similar land transactions, whereas the residual method would require a subjective assessment of the Property's development potential and assumptions on the type and mass of development it could accommodate.

Having spoken to local agents and completed a search of online sources⁴, I found that there were limited recent comparable land sales within the local area to enable me to value the site accurately using the comparable method alone. I therefore decided that the most appropriate method of valuation would be to use the residual method to derive a land value, which I would then sense check against the available comparable land sales. A schedule of comparable evidence is included at **Appendix D**.

Key Issue 2 – Planning

As the Property did not have a planning consent and no indicative scheme had been drawn up, I was required to assess the type and mass of development deliverable in order to establish a conceptual scheme which was acceptable in planning terms. In order to do this I assessed planning policy and considered how the immediate surroundings would dictate the design of an acceptable scheme.

The adopted development plan for the London Borough of Hounslow comprises the London Plan (2011), the Unitary Development Plan (2007), the Employment Development Plan (2008), and the Brentford Area Action Plan (2009). At the time of this instruction the Borough were consulting on the Proposed Modifications to their Local Plan following an Examination in Public.

A review of these adopted and emerging policy documents, including the Development Plan Proposals Map, indicated that the Property is allocated as MOL. However, the site was not subject to any other allocations or designations⁵.

Local and regional planning policy seeks to protect MOL, and states that development proposals will be expected to be appropriate and compatible with the principle purposes of MOL (as outlined in the London Plan) or demonstrate very special circumstances^{6,7}. It also affirms that the National Planning Policy Framework (NPPF) policy on Green Belts applies equally to MOL, and therefore should also be considered. The NPPF framework states that development in the green belt is inappropriate, with limited exceptions including redevelopment of previously developed sites, where development would not have an impact on the openness of the green belt⁸.

While these policies do largely preclude development on land designated as MOL, as the Property is currently hardstanding and in use as a car park it could be considered as previously developed land and as such fall under the exceptions stated in the NPPF, as long as it could be demonstrated that any development would not impact on the openness of the MOL as a whole. This would be supported by the extensive tree screening around the site which separates the Property from the MOL to the north, and existing residential areas to the south, reducing the visual impact of any development.

⁴ Online sources including www.rightmove.co.uk; www.eji.co.uk; www.molior.com.

⁵ London Borough of Hounslow Development Plan Proposals Map (2011).

⁶ London Borough of Hounslow Emerging Local Plan Policy GB1.

⁷ Further Alterations to the London Plan (FALP) (March 2015) Policy 7.17.

⁸ NPPF (2012) Paragraph 89.

I therefore considered that the Property did have potential for development. Having reviewed the Borough wide policies, I was able to discount industrial and office uses because policy directed these uses elsewhere. Given the adjoining residential area and the low PTAL rating, I considered that residential development was the most suitable land use, and that houses would be the most appropriate form of development.

After an assessment of the surrounding buildings and reference to local planning policy, I determined that the Property could accommodate approximately 25 houses of 2 and a half storeys, and an average unit size of 1,250 sq ft (Gross Internal Area). This represented a density of 64 units per hectare, which was in line with the London Plan density matrix for a site of this character⁹. I allowed for 40% of the proposed residential units to be delivered as affordable housing, in line with Borough policy¹⁰.

Following discussions with my supervisor and Savills Planning Team, the proposed use and areas were considered to be suitable assumptions for the conceptual development. Increasing the density or scale of development beyond this level would possibly be considered overdevelopment, especially in the context of the surrounding MOL, and would risk overvaluing the Property.

Conclusion of Key Issue 1 and Key Issue 2

I therefore calculated the GDV based on this conceptual residential scheme of 25 houses. I analysed comparable evidence of recent house sales in the local area, which I obtained from online sources and through discussions with local agents, in order to come to an opinion of residential values. A schedule of comparable evidence is included at **Appendix D**.

The value of the residential element amounted to a GDV of approximately £11,600,000.

I used Argus Developer software to calculate the residual land value, arriving at a land value of approximately £2,875,000. I also ran a sensitivity analysis to understand how changes to key variables affected this land value. A development appraisal summary is attached at **Appendix E**.

After comparing this residual land value to the comparable land transactions I had obtained and running the sensitivity analysis, I reported my opinion of value to the Client, recommending a guide price of £2,750,000.

Key Issue 3 – Method of Sale

I was required to advise the client on the most suitable method of sale for the Property. XXXXX require all Real Estate Assets to be openly marketed for sale, and their objective is to obtain the best achievable financial return¹¹. However, they also indicated that they wanted the sale concluded in as short a timeframe as possible, with a target completion date of 24th July.

I evaluated each method of sale against these aims in order to establish the most suitable method.

Option 1 – Auction

A sale by auction would allow the Property to be sold ahead of the target exchange date. However, it would not necessarily achieve the best financial return as an auction restricts the market to those that are present at the time.

⁹ Further Alterations to the London Plan (FALP) (March 2015) Table 3.2.

¹⁰ London Borough of Hounslow Emerging Local Plan Policy SC2.

¹¹ XXXXX

Option 2 – Formal Tender

A sale by formal tender would allow a date to be set by which parties must submit their best and final offers, allowing the sale to complete within the specified timeframe with contracts exchanged at selection of the best bid. However, this method again may not achieve the best financial return as it commits the Client to accepting an offer once they have been received, removing the ability to seek higher offers or revert to an alternative method of sale.

Option 3 – Informal Tender

A sale by informal tender also allows a date to be set by which parties must submit their offers, but it provides flexibility to the Client to request further bids if all of the offers are unacceptable, or if a number of similar offers are received. It also would allow me to contact the bidding parties and discuss their offers, enabling a more thorough analysis of the conditions of their offer and their ability to complete, therefore increasing the likelihood of a successful sale for my Client.

Option 4 – Private Treaty

A sale by private treaty involves an initially open-ended marketing period, however best bids may be requested in order to finalise the sale. In this method of sale, bids are usually received at different times, hampering comparison, and the unspecified timescale can result in a lack of competition amongst bidders. This would make it hard to demonstrate best value.

Given the Client's preference for a short timescale, I immediately discounted the private treaty method. I also discounted the auction method as there was a greater risk that this would not maximise value for the Client. Whilst both the formal tender and the informal tender methods would meet the Client's objectives for a quick sale, I decided that the informal tender method was the most suitable as it would allow my Client flexibility in accepting an offer, retaining the ability to request further bids if necessary and therefore maximising the financial return.

As the Property did not have planning permission, I advised the Client that some parties may wish to bid on a 'subject to planning' basis. Whilst this may attract higher offers as the purchaser would foresee less risk, it would increase the timescale to completion and would introduce more risk for my Client as the sale would be dependant upon obtaining an acceptable planning permission. I therefore advised my Client that they should seek offers on an unconditional basis only in order to meet their requirement for a quick sale and completion.

3. My Achievements

Planning

Due to the time constraints of this disposal, the Client was unable to seek pre-application advice in order to give potential purchasers greater confidence that planning consent for development of the site could be secured. In order to address this, I undertook a comprehensive analysis of local, regional and national planning policy, producing a planning note to issue to prospective bidders in order to set out the planning policy framework which would dictate the development of the site, and the key considerations against which any application for redevelopment would be judged. The policy analysis also allowed me to form a conceptual scheme from which to come to an opinion of site value. I ensured that this conceptual scheme met the various policy requirements, and did not represent overdevelopment of the site.

Development Appraisals

Given the various risks associated with the Property, I used a sensitivity analysis to advise the Client of the potential impact on the residual land value if any of the key assumptions were to be altered, particularly the number of units in my conceptual scheme. In coming to my opinion of value, I used a conceptual scheme of 25 houses, based on my analysis of planning policy and the character of the surrounding area. However, after running the sensitivity analysis, my supervisor and I came to the conclusion that a developer may take a different view of the site's development potential. I took this into account when setting the Guide Price.

Purchase and Sale

I successfully selected a method of sale which aligned with the client strategy, as the informal tender method allowed me to balance the Client's objectives of a short timescale and maximising financial return. For example, when it became clear that prospective purchasers were struggling to undertake sufficient due diligence within the tight timescales, I advised the Client to extend the marketing period by a week in order to increase the likelihood of obtaining robust offers at an acceptable level. This resulted in an acceptable offer being received, whilst allowing enough time to exchange and complete before the agreed deadline.

Through the preparation of the marketing collateral and communicating with prospective purchasers I adhered to and furthered my understanding of statute¹² and RICS guidance¹³. Upon receipt of the offers, I acknowledged receipt to the bidder before sending to the Client for consideration. To assist their analysis of the bids received, I summarised the key considerations of each offer within a schedule in order to enable them to fully understand the nuances of each offer and make an informed decision when selecting the preferred purchaser.

4. Conclusion

Having exchanged contracts for the sale of the Property for £XXXXXX to a residential developer, I am now able to reflect on my role in this instruction. I consider the instruction to have been a success, however there were also certain elements which I could have improved upon.

Communication and Client Care

There was a good level of communication with the Client and their legal advisors throughout the instruction. Prior to the commencement of marketing I ensured that I had received all of the information necessary to undertake due diligence, and I sought client approval of all marketing material to ensure that it was accurate. During marketing, I responded to prospective purchasers' queries and expressions of interest promptly, and I ensured that the Client was regularly updated with the sales progress.

Timescale

The tender date for the submission of offers was initially set for the 26th June, however this was revised to the 3rd July to enable prospective bidders to carry out sufficient due diligence given the complexities of the site. I advised the Client that the legal pack should be prepared during this time in order to avoid delaying the overall marketing process and allow sufficient time for exchange and completion before the 24th July. However, I had underestimated the time it would take for the Client to select a preferred bidder and the sale did not complete within the requested timescale. It will be important in future instructions to set realistic timescales and ensure that I understand my Client's decision making process to allow sufficient time for decisions to be made.

¹² Estate Agents Act (1979); The Consumer Protection from Unfair Trading Regulations & Business Protection from Misleading Market Regulations (2008).

¹³ RICS UK Residential Property Standards (the 'Blue Book') (2014); RICS UK Commercial Real Estate Property Standards (the 'Purple Book') (2014).

Guide Price

Whilst the Property successfully sold in excess of the guide price, there were numerous offers received well below the guide price. On reflection, I could have amended the development appraisal by allowing for more planning risk foreseen by potential purchasers, by extending the pre-planning timescale, including a greater profit margin and increasing the professional fees. I could have placed more weight on comparable land sales and attempted to find more transactions of a similar nature to the Property by widening the search area. This would have provided me with a better indication of market sentiment and appetite for development sites with significant risk involved, which may have suggested a lower guide price more in line with the majority of offers received.

Conduct Rules, Ethics and Professional Practice

Throughout this instruction I provided a standard of service in line with the requirements and expectations of both my employer and the RICS. I ensured that I maintained a good level of communication with the Client, and undertook all aspects of the instruction with their objectives and requirements in mind. I acted with the professionalism and integrity expected of a RICS member¹⁴, and when dealing with matters outside my area of competence and expertise, I always sought the guidance of more experienced and specialist colleagues, promoting best practice and trust within the profession.

Overall, the experience I have gained through the course of this instruction has aided my professional development and I am confident that I could successfully complete future instructions to the high standards expected of my clients, my employer and the RICS.

Total word count: 2,970

¹⁴ RICS Rules of Conduct for Members (2007) (as amended 2014); RICS Global and Professional Ethical Standards (2015).

Appendix A - Competencies demonstrated in this case study

Core Technical	Optional Technical	Mandatory
Development Appraisals	Purchase and Sale	Client Care
Planning	Property Records and Information Systems	Communication and negotiation
Legal/regulatory compliance	Housing Strategy and Provision	Conduct rules, ethics and professional practice

EXAMPLE ONLY

Appendix B – Site & Location Plans and Site Photographs

EXAMPLE ONLY

EXAMPLE ONLY

Appendix D – Schedule of Comparable Evidence

EXAMPLE ONLY

EXAMPLE ONLY

Continuing professional development (CPD) record

If you are undertaking structured training you must complete a minimum of 48 hours per 12 months of structured training. If you are not required to complete structured training, you need to demonstrate a minimum of 20 hours in the 12 months prior to your final assessment. At least 50% of your CPD must be dedicated to formal development.

Date		
23/09/2013	<p>Health and Safety Course Activity type: Online training platform Purpose: To gain a better understanding of the Health & Safety risks associated with my job and the industry, and how to minimise these risks. Description: I learnt about common health and safety risks in the workplace and ways to mitigate these risks through online learning modules followed by quizzes. Learning Outcomes: The course gave me a greater understanding of how to mitigate the risks associated with my job. Formal or Informal: Formal</p>	3
30/09/2013	<p>Graduate Induction Activity type: Presentation by Savills HR Team and Directors Purpose: To gain a better understanding of my Company's ethos, structure, objectives, internal procedures, ethical values and Health & Safety regulation. Description: I listened to various presentations given by my company's HR team and other senior members of the company. Learning Outcomes: The presentation allowed me to gain a greater understanding of the Company values, systems and processes, structure and team integration. This made me aware of what is expected of me as an employee of my company and helped me understand internal procedures. Formal or Informal: Formal</p>	8
09/10/2013	<p>RICS Professional Ethics Online Training Activity type: Online course run by the RICS Purpose: To learn the ethical standards that the RICS expects of its members. Description: I learnt about the RICS Core Values through online modules before undertaking a test. Learning Outcomes: Having passed the test, I have a greater understanding of the RICS professional and ethical standards and how to ensure I act in line with them. Formal or Informal: Formal</p>	3
25/10/2013	<p>Argus Circle Developer Basic Training Course Activity type: Workshop with an external trainer Purpose: To learn how to use Argus Developer and be able to carry out residual appraisals. Description: I participated in a practical workshop using Argus Developer software. Learning Outcomes: I increased my knowledge of Argus Developer and how to produce a residual land value, use the sensitivity analysis and amend the cash flow to suit an individual project. Formal or Informal: Formal</p>	4

05/11/2013	<p>Soft Skills Training Course Activity type: Workshop with an external trainer Purpose: To improve my time management and communication skills. Description: I participated in a structured workshop to better understand my working style and learn techniques to increase my efficiency. Learning Outcomes: I learnt some techniques to better manage my time and to better communicate with clients and team members to enable me to complete my work within acceptable time periods and to a high standard. Formal or Informal: Formal</p>	6
12/11/2013	<p>Global Investor Appetite for UK real estate Activity type: Seminar run by Nabarro Purpose: To understand foreign involvement in the UK Real Estate market Description: I attended a seminar run by property law firm Nabarro where they presented the results of their recent research. Learning Outcomes: I learnt that foreign ownership plays a large part in the UK real estate market, and that foreign investment is increasing due to favourable yields in comparison to other countries. Other drivers include our legal framework, English language, economic stability, and availability of market data. Formal or Informal: Formal</p>	1
14/11/2013	<p>APC Process Talk Activity type: Seminar with recently qualified Savills surveyors Purpose: To understand the APC process and the role of a graduate within Savills. Description: I attended a seminar held by recently qualified surveyors where we heard about their experiences of the APC and could ask questions about the APC process. Learning Outcomes: I gained a good understanding of the requirements of the APC and met many of my peers on the graduate intake. Formal or Informal: Formal</p>	2
04/12/2013	<p>Microsoft Excel Training Activity type: Workshop with an external trainer Purpose: To become more proficient on excel and learn new functions of the software. Description: I participated in a practical workshop using Microsoft Excel software. Learning Outcomes: I learnt a range of new formulas and functions that I can apply to the various tasks I undertake for my company, such as pricing for valuations and comparables schedules. Formal or Informal: Formal</p>	4
14/01/2014	<p>Compulsory Purchase Lecture Activity type: Seminar given by Savills CPO team Purpose: To understand what CPO is, who has CPO powers and how it works Description: I attended a seminar held by my company's CPO team Learning Outcomes: I learnt that CPO can provide vacant possession and clean title, and is important to minimise potential ransom by land owners that can affect the viability of a scheme. I also learnt that primary CPO powers lie with LAs, Highways, Network Rail, Utilities, Environment Agency and Crossrail. Formal or Informal: Formal</p>	1

23/01/2014	<p>P&D Graduates Seminar Day Activity type: Seminar with members from the Cambridge Development team Purpose: To understand key stages in the development process which we may be involved in as graduates and qualified surveyors Description: I attended a seminar day where colleagues from the Cambridge Development team spoke about what they did at different stages of the development process. Learning Outcomes: I improved my understanding of the planning system, including the requirement for LAs to have a housing strategy and a five year land supply. I also learnt about the purchase and sale of development land, and how land owners can promote their land for inclusion in SHLAAs and site allocation documents. Formal or Informal: Formal</p>	4
28/01/2014	<p>Building Measurement Lecture Activity type: Lecture given by a Savills surveyor Purpose: To understand the RICS Code of Measuring guidance note Description: I attended a lecture to learn about ways of measuring buildings Learning Outcomes: I learnt that there are three ways of measuring, and the one used depends on the building and the objective. I also learnt that the RICS guidance note allows for a +/- 1-10% margin of error, especially for complicated buildings. Formal or Informal: Formal</p>	1
29/01/2014	<p>2018 EPC Legislation Seminar Activity type: Lecture given by SVM Associates Purpose: To understand how real estate contributes to carbon emissions and the changes to legislation requirements Description: I attended a lecture held by external consultants. Learning Outcomes: I learnt that EPCs are required for all buildings that are built, sold or let under the Energy Performance of Buildings Directive. I also learnt that by April 2018 it will be unlawful to build, sell or let buildings below Band E. As property professionals we should encourage our clients to improve the energy performance of their buildings in line with the published guidelines. Formal or Informal: Formal</p>	1
10/02/2014	<p>Development Appraisals 2: Cash Flows and Sensitivity Analysis Activity type: Lecture at the CPD Foundation Reasoning: Cash flows are a fundamental aspect of development and a sensitivity analysis provides a way to assess how a change in certain factors will affect the Learning Outcomes of the project. These are both important to consider when undertaking development appraisals. Description: I attended a lecture held by the CPD Foundation. Learning Outcomes: I learnt about the effects of time and interest rates on development viability. I am aware of the benefits of undertaking a sensitivity analysis on the fundamental or risky aspects of the development, which will have the largest effect on the residual value or profit. Formal or Informal: Formal</p>	1

19/02/2014	<p>Health and Safety Training Seminar Activity type: Seminar with Savills Health & Safety Officer Reasoning: It is important to understand healthy & safety legislation to ensure that I comply, and also to understand the company's procedures to minimise health & safety risks so that I can follow them and ensure my personal safety and also that of my colleagues and clients Description: I attended a seminar held by my company's Health & Safety Director Learning Outcomes: I learnt about my company's health & safety procedures including those on lone working. I also learnt about the Control of Asbestos Regulations 2012 and how to spot potential asbestos in buildings. Formal or Informal: Formal</p>	1.5
24/02/2014	<p>Development Appraisals 3: Site Assembly and Possession Strategy Activity type: Lecture at the CPD Foundation Purpose: To understand the processes that are involved in the initiation of development projects Description: I attended a lecture held by the CPD Foundation. Learning Outcomes: I gained a greater understanding of what is needed to put together a site for development, including obtaining vacant possession. Formal or Informal: Formal</p>	1
18/03/2014	<p>EGi Training and Update Activity type: Seminar with EGi Purpose: To understand what data is collected and published by EGi and how I can utilise it Description: I attended a seminar where a trainer from EGi demonstrated how to use the website and answered any questions Learning Outcomes: I learnt how to utilise the EGI database to search for comparable evidence and get updates on industry news Formal or Informal: Formal</p>	1
31/03/2014	<p>Valuation Roadshow Activity type: Seminar with Savills Valuation team Purpose: To understand what is currently accepted industry-wide and within Savills as Valuation best practice Description: I attended a seminar held by colleagues in the Valuation department Learning Outcomes: I improved my understanding of the importance of conflict checks, peer reviews, and auditing files in the Valuation process to minimise conflicts of interest and ensure robustness of valuations Formal or Informal: Formal</p>	2
16/04/2014	<p>Anti-Corruption Online Training Activity type: Online training platform Purpose: To learn how to manage the risks of client entertainment and business dealings Description: I learnt about Anti-Corruption Regulations and Measures through an online training platform, followed by a quiz Learning Outcomes: I understood the boundaries of what is acceptable as client entertainment, both for me to accept from clients and to offer clients. I also learnt that if I am unsure if behaviour is acceptable I should speak to my line manager or Savills Compliance Team Formal or Informal: Formal</p>	1

27/05/2014	<p>Client Acceptance and Anti-Money Laundering Training Activity type: Online training platform Purpose: To understand how to manage risks associated with acceptance of new clients and my professional obligations under the Money Laundering Regulations Description: I learnt about Money Laundering Regulations and Measures through an online training platform, followed by a quiz Learning Outcomes: I learnt what checks need to be made when accepting an instruction from a new client and what red flags to look out for to avoid being complicit in money laundering activities Formal or Informal: Formal</p>	1
06/06/2014	<p>Financing Property Presentation Activity type: Presentation given by Savills Research Purpose: To understand where finance for property is coming from and if the recovery in the UK property market is stable Description: I attended a research presentation analysing finance in the London property market Learning Outcomes: I learnt that there is strong appetite for lending for property due to good returns. However since the crash stronger regulations have been put in place, which is limiting the loan to value ratio and helping reduce high risk loans. Formal or Informal: Formal</p>	1
08/07/2014	<p>Chinese Team Briefing Activity type: Presentation given by Savills China Purpose: To learn about current demand for London developments from Asian buyers Description: I attended a meeting with colleagues from the China office where they presented on current trends in Chinese demand for overseas property. Learning Outcomes: I learnt that there are two tiers of the Asian market, with largest demand for London property coming from Chinese middle class. Recent changes to Chinese foreign policy means that Chinese buyers can transfer money internationally but it has to be through Chinese banks. Formal or Informal: Informal</p>	1
23/06/2014	<p>London Development Market Update Activity type: Presentation given by Savills Research Purpose: To learn about the current trends in the London Development Market Description: I attended a presentation given by the Research team. Learning Outcomes: I learnt about current supply and demand gaps across London, with the greatest gap being in lower mainstream markets. I also learn that the biggest potential for value uplifts can be found in East London, where transport links have greatly improved yet housing stock hasn't Formal or Informal: Formal</p>	1
08/07/2014	<p>ISO Compliance Training Activity type: Seminar given by Savills Compliance Officer Purpose: To learn about ISO accreditation and compliance with ISO standards Description: I attended a seminar held by the Compliance team. Learning Outcomes: I learnt about Savills UK ISO Compliance policy including reducing waste and resource usage, and ensuring best practice through training of staff Formal or Informal: Formal</p>	1

08/09/2014	<p>Planning and Regeneration Seminar Activity type: Seminar given by Savills Planning team Purpose: To understand what services the planning & regeneration teams within Savills offer and the hot topics in planning at the moment Description: I attended a seminar held by the Planning team to provide an update on important changes within the Planning System. Learning Outcomes: I gained a greater understand of how planning policy changes introduced in the last few years are still making an impact, including the NPPF which is encouraging housing delivery through ensuring councils have an up to date Local Plan and a 5 year land supply for housing delivery. Formal or Informal: Formal</p>	1
10/09/2014	<p>The Private Rented Sector in London Activity type: Lecture at the CPD Foundation Purpose: To understand current trends in the PRS and the challenges that policy makers face Description: I attended a seminar by Rhona Brown, a Senior Housing Officer at the GLA. Learning Outcomes: I learnt that the PRS is rapidly growing, fuelled by lifestyle choices as well as financial barriers to home ownership. The government acknowledge that there needs to be more regulation in the sector to protect tenants. They have introduced the London Rental Standard which is a list of minimum standards landlords must adhere to, for example deposit protection schemes and gas safety certificates. Formal or Informal: Formal</p>	1.5
22/09/2014	<p>Changes to Permitted Development Rights Webcast Activity type: Webcast from the CPD Foundation Purpose: To further my knowledge of the permitted development rights allowing change of use from office to residential. Description: I watched a webcast of a seminar given by a Planning and Development Consultant at LSH Learning Outcomes: I gained a greater understanding of the amended permitted development legislation and the objectives behind introducing the new change of use from office to residential powers. I also learnt that there are some areas that are exempt from these rights. Formal or Informal: Formal</p>	1
13/10/2014	<p>GVA Lecture Series – Evolving London Activity type: Debate hosted by GVA Purpose: To further my understanding of the housing challenges in London Description: I attended a debate hosted by GVA, between the Deputy Mayor for Housing and a Professor of Housing Economics at LSE. Learning Outcomes: I gained further insight into the political and academic view points on the key housing challenges facing London, including the role of the green belt in restricting the availability of housing land and the potential of garden cities in alleviating this pressure. Formal or Informal: Formal</p>	2
17/10/2014	<p>APC 12 Month Review Session Activity type: Workshop with APC Success Limited Purpose: To check my APC training progress and understand what type of experience I need in order to meet my required competencies. Description: I attended a workshop with APC Success where we discussed experience to date and my training progress Learning Outcomes: I understood what stage I should be at in my APC training and what key action points I needed to achieve over the next few months. Formal or Informal: Formal</p>	7

21/10/2014	<p>Sustainability Seminar Activity type: Seminar given by Savills Sustainability Manager Purpose: To learn about current Sustainability legislation affecting the property industry Description: I attended a seminar where we learnt about Sustainability in property and discussed how it affected us and our clients. Learning Outcomes: I learnt about current legislation and the key changes being introduced, such as the Minimum Energy Performance Standards coming into force in 2018. I also learnt about my Company's commitment to sustainability and the Group Environmental Policy. Formal or Informal: Formal</p>	1
21/10/2014	<p>RICS Professional Ethics Lecture Activity type: Lecture at the CPD Foundation Purpose: To learn about what the RICS expects of its members. Description: I attended a lecture given by the Chair of the RICS Regulatory Board Learning Outcomes: I learnt about the Five Ethical Standards of the RICS and what is required of RICS members, both in and out of the work place. I also learnt about why the RICS have these measures in place. Formal or Informal: Formal</p>	1
20/11/2014	<p>Asia-Pacific Presentation Activity type: Presentation by Savills Singapore Purpose: To gain a greater understanding of the Asia-Pacific market and how it impacts the UK property market. Description: I attended a presentation given by a colleague from the Asia-Pacific office Learning Outcomes: I learnt that the Asia-Pacific region has been experiencing rapid growth, with capital values reaching record levels and a growing percentage of the world's HNWI's. I also learnt that this growth is aiding growth in other economies, such as Australia through demand for resources, and the UK through demand for development land. Formal or Informal: Formal</p>	1
09/12/2014	<p>Public Sector Property: Improved Utilisation Seminar Activity type: Seminar hosted by NHS Property Services Purpose: To learn about what strategies are in place in the public sector to rationalise public property holdings. Description: I attended a seminar given by the Head of Planning for the NHS and a director of the government Property Unit. Learning Outcomes: I learnt that the Government Property Unit was set up in 2010 to improve the efficiency of the government estate and dispose of surplus property in order to maximise financial returns. National Property Controls put in place don't allow lease renewals or acquisitions of new properties without Ministerial approval. This has dramatically reduced the running costs of the government estate. Formal or Informal: Formal</p>	2
13/01/2015	<p>Royal Borough of Kensington & Chelsea Planning Committee Meeting Activity type: Planning committee at RBKC Purpose: To improve my understanding of the planning application decision making process. Description: I attended a planning committee meeting where the Council were deciding on two major applications. Learning Outcomes: I furthered my understanding of the decision making process for major planning applications, including the role of the Case Officer in presenting the application, the ability for public parties to make representations, and how the Council decides whether to approve or refuse the application. Formal or Informal: Informal</p>	2

23/02/2015	<p>CIL Briefing Activity type: Seminar given by Savills CIL Team Purpose: To further my understanding of what CIL is and when it is payable. Description: I attended a seminar given by my company's CIL Team. Learning Outcomes: I furthered my understanding of the 'lawful occupation' test which means CIL can be off-set against any floorspace that has been in continuous lawful occupation for a minimum of 6 months out of the last 36 months. I also learnt that after 6th April 2015 S106 obligations are restricted whether a CIL charging schedule is implemented or not. Formal or Informal: Formal</p>	1.5
23/02/2015	<p>Outlook For UK Real Estate Lecture Activity type: Lecture given by Nabarro Purpose: To gain a greater understanding of current trends in UK Real Estate. Description: I attended a lecture given by members of Nabarro, presenting the results of their recent research into UK Real Estate. Learning Outcomes: I learnt that as the economy improves, the real estate market is growing with increasing opportunities outside of London as investors increasingly view London as over valued. Investors are also moving into alternative asset classes, in particular PRS and student accommodation. Formal or Informal: Formal</p>	1
26/03/2015	<p>Development Services Conference Activity type: Conference with Savills Development teams Purpose: To improve my understanding of the different stages of development, and how the Savills Development Services Teams work together to advise clients on all aspects. Description: I attended a conference with the 600 other members of my company's national Development Services division. Learning Outcomes: I gained a better understanding of how my colleagues work together to guide different parties through all stages of the development process, from acquiring land to obtaining planning permission to forward funding of the development. Formal or Informal: Informal</p>	4
22/04/2015	<p>APC Preparation Session Activity type: Workshop given by APC Success Limited Purpose: To understand what is expected of me in my APC submission and how recent changes made by the RICS will affect me. Description: I attended a workshop given by APC Success Limited. Learning Outcomes: I learnt about the recent changes to the APC submission template, including the reduced word count and the change in the Case Study requirements. I gained a greater understanding of the timescales involved in submission. Formal or Informal: Formal</p>	7
29/04/2015	<p>London Development towards 50,000 homes Activity type: Presentation given by Savills Research Purpose: To understand how housing delivery can be increased by concentrating development in certain key locations. Description: I attended a presentation given by the Savills Residential Research team. Learning Outcomes: I learnt that the Research team have identified 21 hot spots across London where development activity could be intensified in order to increase housing delivery and help London meet its housing targets. Hot spot indicators include infrastructure improvements, positive planning frameworks such as Housing Zone designation, and availability of land. Formal or Informal: Formal</p>	1

11/05/2015	<p>Reapit Training Activity type: Workshop given by Reapit Purpose: To understand how the Reapit system can be used to help keep track of applicants and properties. Description: I attended a workshop with a trainer from Reapit. Learning Outcomes: I learnt how to use Reapit to register applicants, and monitor the sale of a property. I also learnt how the database can be used to produce comparables reports. Formal or Informal: Formal</p>	3
12/05/2015	<p>Is West the new East? Activity type: Conference and walking tour hosted by NLA Purpose: To learn about current and future large scale development opportunities in West London. Description: I attended a conference with speakers from developers, land owners and planners active in West London, and a walking tour of White City. Learning Outcomes: I learnt about the plans for the regeneration of White City, Old Oak Common and Earls Court, including the role of infrastructure improvements, such as Crossrail and HS2 in Old Oak Common. I saw how the development of White City is progressing, with Imperial College's new campus, the expansion of Westfield, and the redevelopment of the BBC Television Centre all already underway. Formal or Informal: Formal</p>	6
13/05/2015	<p>Surveying Safely Activity type: Lecture at the CPD Foundation Purpose: To understand the information included in the RICS Surveying Safely Guidance Note and current requirements for individuals and employers. Description: I attended a lecture at the CPD Foundation. Learning Outcomes: I learnt that I have a responsibility to take reasonable care of the health and safety of myself and others, and that my employer has a responsibility to have safe systems of work in place. I understood that risks differ between roles, but the most common risks relate to visiting sites and lone working. I understood RICS guidance on how best to mitigate these risks. Formal or Informal: Formal</p>	1
26/05/2015	<p>Introduction to Valuation Activity type: Presentation by Savills Valuation team Purpose: To improve my understanding of the bases, purposes and methods of Red Book Valuations. Description: I attended a presentation given by members of the Savills Valuation team. Learning Outcomes: I learnt about the different purposes and methods of Valuation, and when each method is appropriate. I also learnt about the key requirements of the Red Book Formal or Informal: Formal</p>	1
29/05/2015	<p>RICS Professional Ethics Update Activity type: Presentation by a Savills APC Assessor Purpose: To understand what is expected of me by the RICS and the format of Ethics questioning in my APC interview. Description: I attended a presentation given by a Savills colleague who is an APC Assessor. Learning Outcomes: I improved my understanding of the RICS Ethical Standards and Rules of Conduct, and how the RICS ethics and compliance decision trees can be used to help me comply with these standards when I encounter issues in my work. I also learnt about the format of the Ethics questioning in APC assessments. Formal or Informal: Formal</p>	1

16/07/2015	<p>Selling Internationally Masterclass Activity Type: Presentation and Q&A by Savills International Sales Team Purpose: To understand the key selling points of London residential developments to international buyers and the role that these buyers play in the development process. Description: I attended a presentation given by a Savills colleague who specialises in selling London residential developments overseas. Learning Outcomes: I improved my understanding of the importance of international buyers in funding new residential developments due to their willingness to buy off-plan. I also learnt how factors such as higher education and political stability play a key role in attracting foreign investment. Formal or Informal: Formal</p>	1
20/07/2015	<p>Who will build the homes we need? Activity Type: Presentation by Savills Residential Research team Purpose: To learn about current barriers to increasing the supply of new homes, and to understand the outlook for house builders and alternative developers. Description: I attended a presentation given by colleagues in residential research. Learning Outcomes: I learnt that there were 140,500 residential starts in England in 2014, however we need to be building 240,000 homes a year to meet housing need. The greatest barrier to increasing supply is land scarcity, with the government looking at various initiatives to address this including releasing public land and potentially reviewing greenbelt policies. It is projected that private sector developers and house builders will be able to deliver 150,000 homes per year by 2020, however the remaining shortfall is expected to be met by alternative developers, such as Local Authorities and Housing Associations. Formal or Informal: Formal</p>	1
20/07/2015	<p>Health and Safety APC Workshop Activity Type: Workshop run by Savills Health and Safety team Purpose: To review Health and Safety legislation and the key health and safety risks associated with my job and how to address them. Description: I attended a workshop given by a member of my company's health and safety team. Learning Outcomes: I furthered my understanding of Health and Safety legislation, including who the Health and Safety at Work Act 1974 gives duties to. I also furthered my understanding of what asbestos is and how it is managed, and how I can minimise the risks to my health and safety and that of others when visiting development sites. Formal or Informal: Formal</p>	1
19/08/2015	<p>Accounting Principles and Procedures – Company Accounts APC Workshop Activity Type: Workshop run by Savills Development Services Divisional Business Director. Purpose: To improve my understanding of our company accounts, and the requirements and purposes of management and audited accounts. Description: I attended a workshop given by my Divisional Business Director. Learning Outcomes: I furthered my understanding of my company's financial performance and what is included in both our published and internal accounts. I also learnt about the three essential measurement reports which are used to determine the performance and health of the company. Formal or Informal: Formal</p>	1

Additional documentation

Please attach the following supporting documentation to your submission making sure it is clear when each section of your submission starts.

- Log book (if applicable)
- Referral report (if applicable)

EXAMPLE ONLY

Referred candidates ONLY

Case study

Use the template above to write a new case study or re-submit the same case study as long as the project is no more than 24 months old.

Continuing professional development

You are required to maintain your CPD resubmit any undertaken since your last assessment.

Summary of experience

Update the summary of experience below to demonstrate how you have met the deficiencies identified in your referral report and provide details of the relevant experience gained since your last assessment. (200-300 words per competency).

Copy and paste the table below for each competency as required.

Updated summary of experience

Competency	Level	Summary of Experience	Date achieved (mm/yyyy)
Insert competency name	1	<i>Provide an updated statement any of learning you have achieved since your last assessment, linking wherever relevant to your CPD record.</i>	
	2	<i>Provide an updated statement of the range of experience you have achieved since your last assessment and include real-life project/process examples relevant to this competency.</i>	
	3	<i>Provide an updated detailed statement of advice given since assessment and include real-life project / process examples where YOU have given advice.</i>	