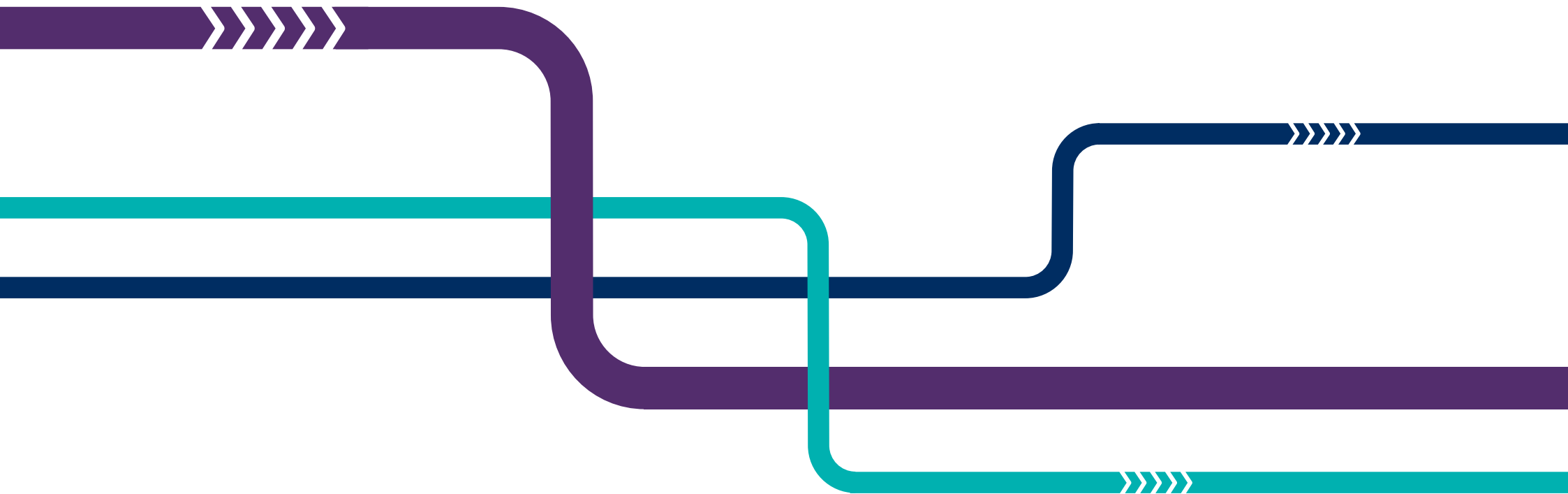




Associate Assessment

Candidate guide

August 2017



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Introduction

The RICS Associate qualification is about demonstrating competence for a specific role. To achieve the qualification you need to provide written material described in this guide, which we will assess. You will also complete the online RICS ethics module and test.

You must use the relevant **pathway guide** with this document. Pathway guides describe in detail the required competencies for your chosen pathway and give examples to help you prepare your assessment.

Four stages of your application

1. Registration

This is the stage where you register as a candidate. The registration system determines whether you are ready for assessment now, whether you need to obtain further qualifications or gain more experience before being assessed.

2. Submission

You prepare your submission using the materials provided by RICS. Submission consists of a summary of experience, case study and your continuing professional development [CPD].

3. Online ethics module

Anyone joining RICS must show commitment to professional ethics. You will take our ethics module and test.

4. Assessment

Our assessors review your submission and decide whether you have met all the requirements to become an RICS Associate.

The people

Counsellor

Must be an RICS member¹. Usually your counsellor will be your line manager or another person in your organisation, who will be able to help and guide you to understand the pathway competencies and interpret the assessment requirements. Please let us know who is your counsellor and ensure they read the relevant counsellor guide for a thorough understanding of the role.

Proposer

Must be an RICS member¹. The proposer endorses your application by signing a declaration to confirm you are a fit and proper person to practise.

Assessors

Two assessors review your submissions.

- **Assessor** – an RICS member trained to assess your submission and decide whether you have met the competency requirements.
- **Lead Assessor** – as above, but also writes the referral report if your first submission is unsuccessful.

RICS assessment team

Your main contact with us. The team is responsible for helping with any queries and administering your submission. For local contact details please refer to www.rics.org/contactus

Registration

Registration is the stage at which:

- you tell us about your qualifications and experience, and we advise whether you need to gain more experience before assessment
- you pay your assessment fee and join RICS as an Associate Candidate.

How to register

Go to the registration page at www.rics.org/associate

The step by step instructions will take you through the registration process.

Pathway guides

Your 'pathway' is your chosen area of specialism (for example, Commercial Property or Project Management). Each pathway consists of:

- the technical competencies you need for your role
- the business skills that all practitioners need (known as mandatory competencies).

There is a guide for each pathway covered by the Associate qualification.

It is essential you download the pathway guide that relates to your chosen specialism. Your pathway guide explains the requirements of all competencies in your pathway. Referring to it will enable you to evaluate how your experience meets the competency requirements. Make sure you have it to hand when preparing your submission.

Pathway guides can be found at www.rics.org/associate

¹ Associate (AssocRICS) of four years; MRICS; or FRICS

Associate submission

Your submission consists of:

- a summary of experience
- case study
- CPD record.

These demonstrate your experience, competence and ability to perform in your role. It must be submitted electronically, using the RICS-formatted material which will be supplied to you when you enrol.

Summary of experience

Your summary of experience should demonstrate how your experience meets the requirements of the technical and mandatory competencies of your chosen pathway. You may not include appendixes or additional supporting materials for the summary of experience outside of the allowed word count.

Technical competencies

You have to demonstrate **six** technical competencies. You will write an individual summary for each one. All six, together, must come to no more than 2000 words. Summaries must clearly show how your work experience is relevant to each competency. Examples are available at www.rics.org/associate.

Please do not attach any additional documents.

Mandatory competencies

Mandatory competencies are non-technical general business skills. You must demonstrate **eight** of these. The other seven mandatory competencies will be assessed through your submission.

Write one brief example for each to demonstrate you have met the competency. There is a word limit of 1000 words in total – approximately 150 words per mandatory competency.

You are not required to write about the mandatory competency ‘Conduct rules, ethics and professional practice’, because you will demonstrate this by completing the online RICS ethics module and test.

Case study

The case study is an account of a project or piece of work you have been involved in, described in terms of the competencies. Focus mainly on the two technical competencies most relevant to your day-to-day work, but try to refer to other technical and mandatory competencies as well. Use a recent project so that we can be sure your skills are up-to-date.

Your case study must not exceed 2500 words.

You may attach illustrations, calculations or plans, provided they are scanned and sent electronically. They should be attached only if they are directly relevant to the two main competencies you are demonstrating in your case study.

The template provides a text box for you to describe briefly the context. Use it to set the scene with some details of the project. Include the date and location, the name of the employer and details of your job at the time.

Your case study should show the following:

- the objective of the project
- your knowledge, skills and experience
- the role you played and the contribution you made
- technical skills you employed
- the overall outcome of the project.

Ensure your case study:

- demonstrates understanding of the competencies
- focuses on two technical competencies
- displays some of the general business skills [mandatory competencies].

While writing the case study you should be aware of what you have already said in your summary of experience. Make sure the level and scope of activities you are describing is consistent.

The content of your case study is more important than the style, but it should meet the standard of writing expected in a report prepared for a client. Spell-check, proof-read and take care with presentation. Have a friend or colleague read it, to check it makes sense, is well written and clear.

The assessors will expect you to present a sensible and realistic topic for your case study that reflects the skills needed to fulfill the role of a professional in your area of practice and geographical location. You should expect to be assessed in the country where you work. This is because you are required to have a working knowledge of the legislation and are competent to practice in the country where you are working.

Continuing Professional Development (CPD)

CPD is the systematic updating and enhancement of skills, knowledge and competence that takes place throughout your working life. It should be closely linked to your current work.

CPD can be taken from various sources including attending conferences, meetings or seminars, completing an academic course or informal reading. It is for you, as a professional, to decide what is appropriate and this should complement both your mandatory and technical competencies.

Special attention must be given to the principles underpinning CPD:

- gained in a structured manner
- based on an explicit process of selecting, planning and evaluating the activities
- reflect learning from informal training sources e.g. structured reading, secondments

All candidates are required to complete 48 hours of CPD, this must have taken place in the 12 months prior to your associate assessment.

Your CPD must be split between formal development such as professional courses, seminars or online events and informal development such as private study or on the job training. At least 50% of your CPD must be dedicated to formal development. For more information on the types of formal and informal CPD please go to www.rics.org/cpd

You are required to record your CPD within the Associate assessment submission.

Once you have become an Associate member (AssocRICS) you must continue to undertake and record online a minimum of 20 hours of CPD activity each calendar year as part of your commitment to your professional development.

Points to note

▪ Confidentiality

Each submission is confidential and will not be disclosed by us to any third party without your consent or be used for any other purpose other than assessing your competencies.

However, you may need to ensure, for commercial reasons, that you do not include names of clients, locations of developments, etc. If that is the case and you choose, for example, to replace the name of your client with a pseudonym, you should include a statement such as 'the names in this document have been changed to preserve confidentiality'.

▪ Presentation

RICS' brand represents the highest standard of work. The appearance and presentation of your work is important. Make sure that your submission is of a professional level, that the language you use is appropriate and that all written material is checked carefully.

▪ Review

Ensure you review your submission and all supporting materials together before finalising and submitting them to us. In particular you should check that:

- all information is truthful and accurate
- you are happy with the content and any supporting documentation
- there are no gaps or contradictions
- you have used your best examples
- you have upheld confidentiality, where necessary.

Associate declaration

Before providing us with your submission, you and your counsellor/proposer must sign a declaration verifying your work and your suitability for RICS membership. This will be part of the submission process.

Your counsellor must be an RICS member (Associate of four years, MRICS or FRICS). They must declare your submission is reflective of your own work and job role.

Your proposer must be an RICS member (Associate of four years, MRICS or FRICS) but does not necessarily have to work in the same organisation as you. They must declare that you are a fit and proper person to become an RICS Associate.

A single person can act as both counsellor and proposer, if they are an RICS member.

Once the declaration is signed and dated, it remains valid for 28 days. After that time it will no longer be accepted.

The declaration can be found at www.rics.org/associate

Checklist

Have you completed?

- Candidate details
- Summary of experience – technical competencies
- Summary of experience – mandatory competencies
- Case study
- Continuing Professional Development (CPD)
- All documents have been spell-checked and proof-read
- Declaration is signed
- Ethics test complete
- All documents are ready to submit

Ethics module

As a professional body RICS has a responsibility to protect the public by ensuring our members operate to the highest ethical standards. This is why you must complete our ethics module, which consists of learning materials and case studies followed by a multiple choice test.

Your assessment cannot be considered until you have completed the module successfully.

How and when you take the module

Your local RICS office will send you instructions for the online RICS ethics module and test.

Results of the module

If you do not pass the ethics test first time you will be able to retake it.

If more than 12 months passes between the date you pass the ethics test and the date on which you pass your assessment, you will have to re-take the ethics module and test before you can become an RICS Associate.

The assessment

Once you have submitted your submission and declaration, your application is ready for assessment.

Two assessors will carry out your assessment. They will evaluate your submission and decide whether you have met the requirements for your chosen pathway.

Result

RICS will notify you of your results after your assessment. It is your responsibility to check RICS has your up-to-date contact details. For security and data protection reasons, RICS will not give results over the telephone or to a third party. Your result will be either 'Pass' or 'Refer'.

- **Pass**

If you pass the overall assessment and the ethics module, you will qualify as an RICS Associate. The notification we send to you will explain the next steps.

- **Refer**

If you do not satisfy the overall assessment requirements you will be referred. We will give you feedback on what you need to do before re-submitting, for example additional training or experience.

Your referral report will be sent with your result. It will give:

- feedback on each competency that has not been met
- feedback on your case study and continuing professional development [CPD]
- a clear explanation of what you will need to do in order to be ready for reassessment.

You will only be asked to re-submit the items that the assessors did not consider satisfactory.

You must update your summary of experience, demonstrating your progress in any competencies you did not achieve. Updated mandatory competency statements should be approximately 150 words in total. Updated technical competency statements should be approximately 300 words in total. Please do not exceed word limits stated in the submission document.

You will also be required to submit additional continuing professional development (CPD) records of 4 hours per month since your referral.

Please ensure you submit your referral report to your new submission document and indicate the mandatory and technical competencies that have been developed for reassessment in the referral section.

You should discuss the feedback with your counsellor and plan to re-submit within 12 months. If you go over that period, you will be starting again – that is, you will have lost the right to rely on any of your original materials. An entirely new submission, using new examples, must be prepared.

You can submit for reassessment as soon as you have completed the areas of improvement mentioned in your referral report.

There is a reassessment fee for each assessment after your first one.

Appeal

You have the right to appeal against a referral. You cannot appeal simply because you disagree with the decision of the assessors. For an appeal to be successful you must be able to show fault in the way the assessment was conducted, which led to an unfair decision. Examples would be administrative error or procedural unfairness. Details of how to appeal will be given in the referral report. There is an appeal fee.

Audit and quality assurance

We are committed to ensuring rigorous processes for the Associate qualification so that employers, clients and the public can have confidence that anyone achieving it, is competent to practise as an RICS Associate.

Desktop audit

We will select a number of submissions for audit as part of the quality assurance process. If your submission is audited, you and your mentor may be asked for further confirmatory evidence of your role, responsibilities and work history.

Verification interview

As part of the audit process we may require you to participate in a verification interview after your assessment.

The purpose of the interview is not to re-assess your competence, but to verify the extent of your involvement in the work described in your submission, and the validity of the assessment. Any element of the assessment may be subject to audit.

Assessors will nominate a candidate for a verification interview if they have doubts about whether the written work is genuinely original – for example, if they suspect plagiarism.

If the auditor is not satisfied, the individual and employer concerned may be referred to our regulatory arm for formal investigation.



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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