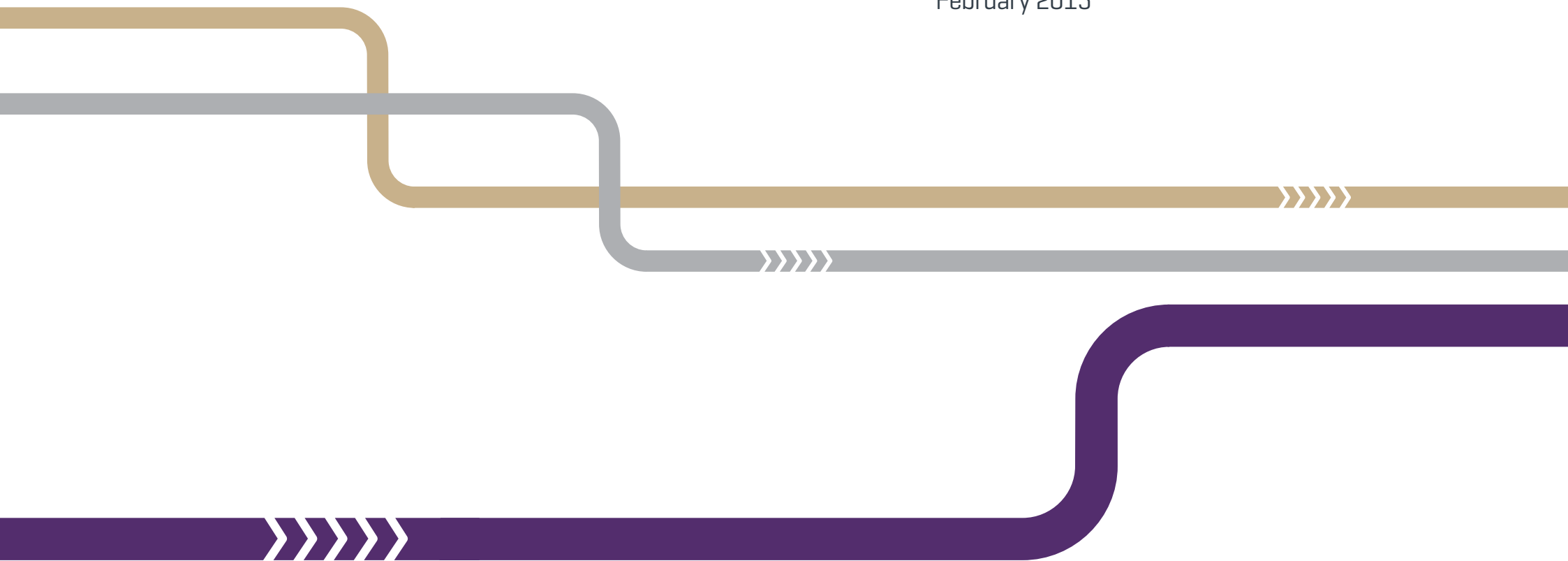




Assessment of Professional Competence

# Project management

February 2015



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## About the APC

The RICS Assessment of Professional Competence (APC) ensure that those applying for RICS membership are competent to practise and meet the high standards of professionalism required by RICS. There is a wide range of pathways available to qualify as an RICS member covering many different areas of practice.

The APC normally consists of:

- a period of structured training
- a final assessment

The structured training is based on candidates achieving a set of requirements or competencies. These are a mix of technical, professional, interpersonal, business and management skills.

## How to use this guide

This guide supports the project management APC pathway. It is designed to help you understand more about qualifying as an RICS member in project management. Project management is a global APC pathway but it is appreciated that markets may vary from country to country. If you have any queries please contact your local office. The material is set out in three sections.

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**Section one** – provides information on this area of practice with a general overview of the project management pathway.

**Section two** – lists the competency requirements of the project management APC pathway.

**Section three** – describes the main technical competencies associated with project management, providing expanded sector specific guidance on each of them. This forms the main part of the guide.

You **MUST** use this guide in conjunction with the core APC documentation which is available on the RICS website and comprises:

- APC Requirements and competencies guide
- The candidates guide
- The counsellors guide.

You can download all the supporting guidance from [www.rics.org/apcguides](http://www.rics.org/apcguides)

# Introduction

## About the competencies

The APC aims to assess that you are competent to carry out the work of a qualified chartered surveyor. To be competent is to have the skill or ability to perform a task or function. The RICS competencies are not just a list of tasks or functions, they are also based upon attitudes and behaviours. The competencies have been drawn up in a generic way so that they can be applied to different areas of practice and geographical locations. This guide is designed to help you interpret these competencies within the context of project management.

The competencies are defined at three levels of attainment and each APC pathway has its own specific combination of competencies that you must achieve at the appropriate level. You must reach the required level in a logical progression and in successive stages:

**Level 1** – knowledge and understanding

**Level 2** – application of knowledge and understanding

**Level 3** – reasoned advice and depth of technical knowledge.

The competencies are in three distinct categories:

**Mandatory competencies** – the personal, interpersonal, professional practice and business competencies common to all pathways and compulsory for all candidates.

**Core competencies** – the primary competencies of your chosen APC pathway.

**Optional competencies** – a set of competencies selected by the candidate from a list defined for the particular pathway. In most cases there is an element of choice. These are mostly technical competencies, but certain mandatory competencies also appear on the optional competency list and candidates are permitted to select one of these at a higher level.

## Choosing your competencies

It is important that you give careful thought to your choice and combination of competencies. Your choice will inevitably reflect the work you do in your day-to-day environment [driven by the needs of your clients/employer]. Your choice and combination of competencies will be a reflection of your judgement. At the final assessment interview, the assessors will take these choices into account. They will expect you to present a sensible and realistic choice that reflects the skills needed to fulfil the role of a surveyor in your field of practice.

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

## How to find help

RICS has fully trained teams across the globe who will be able to help you with any general APC queries. For details of your local office – [www.rics.org/contactus](http://www.rics.org/contactus)

RICS HQ  
Parliament Square  
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www.rics.org

## About project management

Project managers occupy a central role in the development process driving successful completion of projects. Project management is a thriving professional discipline much in demand around the globe.

Consequently, these chartered professionals can choose from a variety of potential employers including clients and consultants from both the public and private sectors, with either commercial or not-for-profit aims.

Typically, project managers will be appointed at the beginning of a project and will assist the client in developing the project brief and then selecting, appointing and co-ordinating the project team. He or she will then usually represent the client throughout the full development process managing the inputs from the client, consultants, contractors and other stakeholders.

## RICS qualification

Chartered project management surveyors operate across the land, real estate and construction markets and their skill sets and knowledge are sought in both private and public sector organizations, for most sizes and types of projects.

The profession requires a combination of technical competence and business acumen. Leadership skills, motivational/soft skills and risk management expertise are tools commonly considered essential to be an effective project manager.

The diversity of clients and the variable workload make a career in project management both challenging and rewarding. The activities they are most commonly involved with typically include:

- Identifying and developing the client brief
- Leading and managing project teams
- Identifying and managing project risks
- Establishing communication and management protocols
- Managing the feasibility and strategy stages
- Establishing the project budget and project programme
- Coordinating legal and other regulatory consents
- Advising the selection/appointment of the project team
- Managing the integration and flow of design information
- Managing the preparation of design and construction programmes/schedules and CPM networks
- Advising on alternative procurement strategies
- Conducting tender evaluation and contractor selection
- Establishing time, cost, quality and function control benchmarks
- Controlling, monitoring and reporting on project progress
- Administering consultancy and construction contracts.

RICS also offers a Project management pathway in its Associate assessment.

For further details on Associate membership and this pathway please go to [rics.org/associate](https://www.rics.org/associate)

## Chartered alternative designations related to this pathway

All candidates qualifying under the Project management APC pathway will be entitled to use the designation Chartered Project Management Surveyor.

# Pathway requirements

## Project management APC

### Mandatory competencies

You must achieve the minimum levels as set out in the mandatory competencies.

### Core competencies

#### Level 3

- Contract practice
- Managing people
- Procurement and tendering
- Programming and planning

#### Level 2

- Construction technology and environmental services
- Leadership
- Project administration
- Project process and procedures
- Risk management

### Optional competencies

**Three** competencies to Level 2 from the list below

- Commercial management of construction
- Development appraisals
- Development/project briefs
- Project audit
- Project evaluation



## Competency guidance

The pages that follow are intended to provide guidance for users on the main competencies associated with project management.

The guidance has been drawn up by experienced practitioners and aims to give you a clear and practical understanding of how to apply the listed core and optional competencies in the context of project management.

The official competency definitions [at levels one, two and three] are provided, followed by a description of the key knowledge and activities that are likely to fall within the scope of each competency.

The information provided is designed to be helpful but informal guidance. The knowledge and activities described under each competency are not exhaustive, and should not be relied upon as any form of revision list. Candidates must satisfy themselves and their employers that they have reached the required level of attainment before applying for final assessment.

The competencies are arranged in alphabetical order.

## Mandatory competencies

These competencies are a mix of the professional practice, interpersonal, business and management skills that are considered common to, and necessary for, all professional members.

Title	Definition	Level required
Conduct rules, ethics and professional practice	<p><b>Level 1</b> Demonstrate knowledge and understanding of the role and significance of RICS and its functions. Also an appreciation of your personal professional role and society's expectations of professional practice and RICS Rules of Conduct and conduct regulations, including the general principles of law and the legal system, as applicable in your country of practice.</p> <p><b>Level 2</b> Provide evidence of practical application in your area of practice, being able to justify actions at all times and demonstrate personal commitment to the RICS Rules of Conduct, ethics and RICS 5 professional and ethical standards.</p> <p><b>Level 3</b> Provide evidence of application of the above.</p>	3
Client care	<p><b>Level 1</b> Demonstrate knowledge and understanding of the principles and practice of client care including:</p> <ul style="list-style-type: none"> <li>• the concept of identifying all clients/colleagues/third parties who are your clients and the behaviours that are appropriate to establish good client relationships</li> <li>• the systems and procedures that are appropriate for managing the process of client care, including complaints</li> <li>• the requirement to collect data, analyse and define the needs of clients</li> </ul> <p><b>Level 2</b> Provide evidence of practical application of the principles and practice of client care in your area of practice.</p>	2
Communication and negotiation	<p><b>Level 1</b> Demonstrate knowledge and understanding of effective oral, written, graphic and presentation skills including the methods and techniques that are appropriate to specific situations.</p> <p><b>Level 2</b> Provide evidence of practical application of oral, written, graphic and presentation skills that are appropriate in a variety of situations, specifically including where negotiation is involved.</p>	2

Title	Definition	Level required
Health and safety	<p><b>Level 1</b> Demonstrate knowledge and understanding of the principles and responsibilities imposed by law, codes of practice and other regulations appropriate to your area of practice.</p> <p><b>Level 2</b> Provide evidence of practical application of health and safety issues and the requirements for compliance, in your area of practice.</p>	2
Accounting principles and procedures	Demonstrate knowledge and understanding of accounting concepts and the format and preparation of management and company accounts, including profit and loss statements, cash flow statements and balance sheets.	1
Business planning	Demonstrate knowledge and understanding of how business planning activities contribute to the achievement of corporate objectives.	1
Conflict avoidance, management and dispute resolution procedures	Demonstrate knowledge and understanding of the techniques for conflict avoidance, conflict management and dispute resolution procedures including for example adjudication and arbitration, appropriate to your APC pathway.	1
Data management	Demonstrate knowledge and understanding of the sources of information and data, and of the systems applicable to your area of practice, including the methodologies and techniques most appropriate to collect, collate, disseminate, manage and store data. Demonstrate an awareness of Building Information Modelling including the relevant standards applicable to your geographic region.	1
Sustainability	Demonstrate knowledge and understanding of why and how sustainability seeks to balance economic, environmental and social objectives at global, national and local levels, in the context of land, property and the built environment.	1
Team working	Demonstrate knowledge and understanding of the principles, behaviour and dynamics of working in a team.	1

# Technical competencies

## Commercial management of construction

### Description of competency in context of this sector

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

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

Level 1	Level 2	Level 3
Demonstrate knowledge and understanding of the principles of the management of construction projects.	Apply your knowledge to the financial management of construction projects, including regular monitoring and reporting on cashflow and profitability.	Monitor, report and advise on project cashflows and profitability. Evaluate and advise on the financial implications and appropriate management actions.
<p>Examples of knowledge comprised within this level are:</p> <ul style="list-style-type: none"> <li>Identifying and understanding the components that make up the cost of the project to the contractor</li> <li>Understanding the effect that the design and construction processes have on the cost</li> <li>Awareness of the techniques used to reconcile the cost against income</li> <li>Awareness of the techniques to financially manage sub-contractors and suppliers</li> <li>Understanding the use of cashflows.</li> </ul>	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> <li>Collecting of data for reports</li> <li>Carrying out cost to completion exercises</li> <li>Preparing cashflows</li> <li>Preparing reports such as liability statements, cost to complete and cost value reconciliations</li> <li>Applying value engineering processes</li> <li>Preparing and submitting cost data for in-house and/or external use in relation to areas such as cost of preliminaries, comparative cost of different construction techniques and taxation allowances.</li> </ul>	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> <li>Monitoring, analysing, reporting and advising at a senior level on project cashflows and profitability for internal use</li> <li>Evaluating and advising on financial implications and appropriate management actions.</li> </ul>

## Construction technology and environmental services

### Description of competency in context of this sector

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

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

Level 1	Level 2	Level 3
Demonstrate knowledge and understanding of the principles of design and construction relating to your chosen field of practice.	Apply your knowledge to the design and construction processes.	Advise on the selection and application of particular processes within your area of experience. This should include liaison with specialists and consultants to develop project specific design and construction solutions.
<p>Examples of knowledge comprised within this level are:</p> <ul style="list-style-type: none"> <li>• The stages of design from inception to completion</li> <li>• Impact of current legislation and regulations (both national and international)</li> <li>• How the various elements of the building work and inter-relate</li> <li>• The process of constructing the works</li> <li>• Operational and maintenance processes post contract.</li> </ul>	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> <li>• Appreciating how design solutions vary for different types of building such as clear span requirements for warehousing or acoustic requirements for accommodation</li> <li>• Understanding alternative construction details in relation to functional elements of the design such as different types of piling or structural frame solutions.</li> </ul>	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> <li>• Advising on the choice of construction solutions for your project</li> <li>• Reporting on the impact of different design solutions and construction processes on cost and programme.</li> </ul>

## Contract practice

### Description of competency in context of this sector

This competency concerns the ability to recognise, understand and interpret the different procurement routes and contracts. Candidates should be aware of the different options available within their area of practice. Candidates should have a detailed understanding of appropriate use of alternative procurement routes and contracts.

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

Level 1	Level 2	Level 3
Demonstrate knowledge and understanding of the various forms of contract used in the construction industry and/or your area of business.	Apply your knowledge of the use of the various standard forms of contract at project level, including the implications and obligations that apply to the parties to the contract.	Provide evidence of reasoned advice, prepare and present reports on the selection of the appropriate form of contract and warranties for your chosen procurement route. This should include advising on the most appropriate contractual procedure at the various stages of a construction or other contract.
<p>Examples of knowledge comprised within this level are:</p> <ul style="list-style-type: none"> <li>• The purpose of contracts and their relevance in the construction industry</li> <li>• The typical elements of a 'project' that need to be considered when selecting a form of contract</li> <li>• Alternative forms of contract available and the principle reasons for these.</li> </ul>	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> <li>• Providing options for alternative forms of contract with respect to specific procurement routes</li> <li>• Reviewing particular key contract provisions and how these differ between alternative forms of contract</li> <li>• Highlighting the impact of alternative contractual arrangements on that party to the contract.</li> </ul>	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> <li>• Providing reports on the ability of different forms of contract to achieve specific requirements and objectives of the contractual parties</li> <li>• Advising on the purpose of warranties and bonds, and the different forms available</li> <li>• Providing guidance on the provisions of contract if either party fails to comply with the terms set out therein</li> <li>• Identifying the correct procedure for the application of a contract provision and the potential impact if this is not followed.</li> </ul>

## Development appraisals

### Description of competency in context of this sector

This competency is about the role of development appraisals. Candidates should be aware of development appraisal techniques including Net Present Value and Residual Land Valuations. Candidates should have a detailed understanding of how these techniques are applied in the acquisition, disposal and evaluation of development opportunities.

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

Level 1	Level 2	Level 3
Demonstrate knowledge and understanding of the principles and practices underlying a valid development appraisal.	Identify, select, assemble and analyse data relevant to carrying out development appraisals. Undertake appraisals using relevant techniques and methodology and identify possible sources of development funding.	Interpret and provide evidence of reasoned advice on development appraisals and further opportunities.
<p>Examples of knowledge comprised within this level are:</p> <ul style="list-style-type: none"> <li>• The role of development appraisals in the marketplace and the situations where their use is appropriate</li> <li>• The content of appraisals and how different issues such as planning requirements can be reflected</li> <li>• The sensitivities of appraisals, what factors affect the appraisal</li> <li>• Awareness of external factors which have an influence upon the appraisal process.</li> </ul>	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> <li>• Analysing appropriate sources of information and data</li> <li>• Preparing appraisals for possible acquisition, disposal or valuation of development sites including residential, commercial and/or mixed use</li> <li>• Using different techniques and software available for appraisals (whilst having an understanding of the basic principles of development appraisal)</li> <li>• Undertaking a sensitivity analysis</li> <li>• Assisting in the selection of appropriate sources of development finance.</li> </ul>	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> <li>• Using development appraisals to advise on the acquisition, disposal or valuation of development sites</li> <li>• Producing reasoned analysis of risk using appropriate sensitivity analysis</li> <li>• Advising on the appropriate sources of development finance.</li> </ul>

## Development/project briefs

### Description of competency in context of this sector

This competency is about understanding the preparation and development of a brief that reflects the client's requirements. It includes how the information provided by the client is understood and used by the project team to manage the design and construction of the client's aesthetic, functional and operational requirements for the development/project. It also covers the clarification and coordination of the roles of individual project stakeholders.

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

Level 1	Level 2	Level 3
Demonstrate knowledge and understanding of the information required to prepare a development brief or project brief.	Apply your knowledge to identify, select, assemble and analyse information relevant to the preparation of development briefs or outline project briefs.	Apply information in the preparation and presentation of development briefs or detailed design briefs, or parts thereof.
<p>Examples of knowledge comprised within this level are:</p> <ul style="list-style-type: none"> <li>• A clear understanding of the client's requirements, including the project definition, and any key constraints</li> <li>• A clear understanding of the roles of individual stakeholders</li> <li>• A clear understanding of the terms of reference between the client and the project team.</li> </ul>	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> <li>• Preparing and understanding the outline business case</li> <li>• Stating the client's required cost, time and performance/quality expectations</li> <li>• Establishing success measurement criteria and benefits of the project to the client</li> <li>• Establishing any known project risks, constraints and interfaces</li> <li>• Developing an outline project plan.</li> </ul>	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> <li>• Developing a project execution plan for managing the detailed design and specification of the development/project</li> <li>• Clearly identifying whether the information prepared by the project team accurately reflects the development/project brief</li> <li>• Establishing clear procedures for managing changes to the development/project brief.</li> </ul>



## Leadership

### Description of competency in context of this sector

This competency covers the characteristics and behaviour of leaders. Candidates should be aware of the alternative styles of leadership and motivation. Candidates should have an understanding of how these techniques can be applied in their area of practice.

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

Level 1	Level 2	Level 3
Demonstrate knowledge and understanding of the characteristics and behaviour of a leader.	Provide evidence of application of your role as a leader appropriate to your area of practice.	Provide evidence of evaluation of your leadership role.
<p>Examples of knowledge comprised within this level are:</p> <ul style="list-style-type: none"> <li>• Awareness of different styles of leadership</li> <li>• Awareness of different motivation theories</li> <li>• Awareness of effective organisational design and communication strategies</li> <li>• Awareness of the climate necessary for the creation of high performing teams.</li> </ul>	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> <li>• Understanding how leadership and motivation theories can be applied in practice</li> <li>• Understanding how organisational design and communication strategies can affect leadership</li> <li>• Understanding of the ingredients necessary to create high performing teams.</li> </ul>	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> <li>• Adapting your natural leadership style to meet challenges in your area of practice</li> <li>• Adapting your leadership style to improve personal and team performance</li> <li>• Demonstrating successful outcomes from your leadership and decision making</li> <li>• Receiving acceptable peer group reviews of your performance as a leader.</li> </ul>

## Managing people

### Description of competency in context of this sector

This competency covers the principles and practice of managing people. Candidates should be aware of the skills required to manage people. Candidates should have an understanding of the appropriate application of these skills.

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

Level 1	Level 2	Level 3
Demonstrate knowledge and understanding of the principles and practice of managing people.	Provide evidence of the application of the skills required to manage people.	Provide evidence of the evaluation of your people management skills.
<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> <li>• Awareness of human resource management legislation and techniques</li> <li>• Awareness of different motivation theories</li> <li>• Awareness of effective organisational design and communication strategies</li> <li>• Awareness of the climate and culture necessary for the creation of high performing teams.</li> </ul>	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> <li>• Appreciating the principles of human resource legislation</li> <li>• Applying human resource techniques</li> <li>• Effecting improved human resource performance</li> <li>• Understanding how use of effective organisational design and communication strategies improves human resource performance</li> <li>• Understanding how climate and culture affect human resource performance.</li> </ul>	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> <li>• Managing people and teams and achieving performance targets</li> <li>• Carrying out performance appraisals and receiving acceptable individual and team peer reviews</li> <li>• Carrying out training needs analyses</li> <li>• Recruiting people.</li> </ul>

## Procurement and tendering

### Description of competency in context of this sector

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

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

Level 1	Level 2	Level 3
Demonstrate knowledge and understanding of the main types of procurement. Demonstrate knowledge and understanding of the tendering and negotiation processes involved in procurement.	Apply your knowledge to the implementation of the procurement routes selected for your projects and to carrying out tendering and negotiation processes relevant to them.	Give reasoned advice on the appropriateness of various procurement routes. Manage the tendering and negotiation process and present reports on the outcome.
<p>Examples of knowledge comprised within this level are:</p> <ul style="list-style-type: none"> <li>The main types of procurement used in both the public and private sectors, both nationally and internationally</li> <li>Tendering and negotiation processes involved in procurement</li> <li>Ancillary processes such as partnering and framework agreements.</li> </ul>	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> <li>Implementing procurement routes such as traditional, design and build, management forms, term and serial contracting and other types</li> <li>Producing and/or compiling tender documentation such as letter of invitation, form of tender, health and safety documentation, design documentation and contractual details [please note, pricing documents are covered under the Quantification and Costing of Construction Works]</li> <li>Carrying out of tendering and negotiation processes such as single and two stage tendering, the use of codes of practice and electronic tendering.</li> </ul>	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> <li>Evaluating the appropriateness of various procurement routes</li> <li>Managing the tendering and negotiation process</li> <li>Preparing procurement and tendering reports.</li> </ul>

## Programming and planning

### Description of competency in context of this sector

This competency is about the management of time and the duration of activities from project inception to completion. It covers an understanding of programming techniques and critical path features including use of computer software to produce programmes.

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

Level 1	Level 2	Level 3
Describe the principles of financial and programme monitoring of projects, including planning techniques such as Gantt charts etc. Demonstrate knowledge and understanding of the various types of programmes and schedules commonly used on projects.	Assess, interpret and report on the programme control of projects.	Provide evidence of reasoned advice on, or implement the principles of, executive programme control of projects. Your advice should demonstrate a good understanding of planning techniques [pert diagrams, network analysis/ critical path method].
<p>Examples of knowledge comprised within this level are:</p> <ul style="list-style-type: none"> <li>• An understanding of the principles of programme and financial monitoring of projects</li> <li>• Knowledge of planning techniques including Gantt chart programmes, critical path analysis and the significance of float</li> <li>• Knowledge of the types of programmes and schedules, including computer software, commonly used on projects.</li> </ul>	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> <li>• Evaluating alternative programme techniques</li> <li>• Reviewing and interpreting Gantt charts and other programmes</li> <li>• Evaluating the significance of float</li> <li>• Explaining the critical path determined by a programme</li> <li>• Understanding project milestones and acceleration techniques</li> <li>• Analysing and evaluating actual performance against planned performance.</li> </ul>	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> <li>• Producing an executive/master programme for a project including showing the critical path determined by the programme</li> <li>• Providing advice on progress achieved against programme</li> <li>• Providing advice on corrective measures required to maintain and/or accelerate progress where delays have occurred in relation to the programme</li> <li>• Establishing project objectives.</li> </ul>

## Project administration

### Description of competency in context of this sector

This competency concerns the contractual, legislative/statutory and other processes required to administer a project. It also covers the reporting and information management systems for projects.

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

Level 1	Level 2	Level 3
Demonstrate knowledge and understanding of contractual, legislative and statutory terminology/requirements in the management of a project.	Implement management procedures necessary for the smooth running of a project.	Advise on the management procedures necessary for the smooth running of a project including document control techniques and systems, meetings and reporting procedures.
<p>Examples of knowledge comprised within this level are:</p> <ul style="list-style-type: none"> <li>• Understanding of the principles of contractual, legislative and statutory requirements of projects</li> <li>• Understanding of the principles of document control requirements and information management systems</li> <li>• Understanding of the administrative processes and management reporting requirements associated with a project.</li> </ul>	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> <li>• Identifying and implementing the contractual, legislative and statutory requirements needed for a development project including any collateral documents eg insurances, warranties etc</li> <li>• Managing document control and information management systems</li> <li>• Managing management reporting systems.</li> </ul>	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> <li>• Advising on the contractual, legislative and statutory requirements for a development project</li> <li>• Advising on and designing document control and information management systems</li> <li>• Advising on and designing management reporting systems</li> <li>• Providing guidance on project organisation structures.</li> </ul>

## Project audit

### Description of competency in context of this sector

This competency concerns the assessment of the performance of a project and its individual stakeholders. This can be used to identify areas for improvement on a live project and/or to identify lessons learnt for application on future projects.

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

Level 1	Level 2	Level 3
Describe the essential requirements of a project audit/close-out report.	Explain the procedures associated with producing a project audit/closeout report.	Undertake and report on a project audit/close-out report.
<p>Examples of knowledge comprised within this level are:</p> <ul style="list-style-type: none"> <li>• An understanding of the client's requirements and the development/project brief</li> <li>• An understanding of the reasons for any changes to the client's requirements and the development/project brief</li> <li>• An understanding of the reasons for the chosen procurement route and the actual and planned performance of the project team</li> <li>• An understanding of the project team structures and procedures</li> <li>• An understanding of the reasons for any design, cost and programme variations</li> <li>• An understanding of the project risks and any unforeseen problems.</li> </ul>	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> <li>• Analysing the reasons for, and implementation of, changes to the client's requirements and the development/project brief</li> <li>• Analysing the appropriateness of the chosen procurement route</li> <li>• Analysing the actual performance of the project team and identifying potential improvements</li> <li>• Analysing project team structures and procedures</li> <li>• Analysing reasons for, and implementation of, any design, cost and programme variations</li> <li>• Recording lessons learnt.</li> </ul>	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> <li>• Preparing audit reports and advising the client</li> <li>• Identifying lessons learnt and recommending appropriate responses</li> <li>• Assessing and advising upon the performance of the project team</li> <li>• Assessing and advising upon the chosen procurement route, project team structures and procedures</li> <li>• Assessing and advising upon design cost and programme variations.</li> </ul>

## Project evaluation

### Description of competency in context of this sector

This competency concerns the evaluation process – assessing the technical and financial feasibility of a project including the resultant economic return. The assessment should consider both initial capital costs as well as whole life costs.

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

Level 1	Level 2	Level 3
Describe the feasibility study process, including the financial and town planning aspects associated with a development appraisal.	Apply the techniques used in value management/value engineering, life cycle/whole life costing and risk assessment, together with a balance sheet analysis.	Initiate and monitor a feasibility study. Advise on the economics of design, on the use of value management and value engineering techniques, and on how to undertake a full risk and balance sheet analysis.
<p>Examples of knowledge comprised within this level are:</p> <ul style="list-style-type: none"> <li>• Awareness of the various techniques of development appraisal</li> <li>• Understanding of the business case drivers for the development</li> <li>• Awareness of the principles of town planning legislation</li> <li>• Awareness of the principles of building regulations</li> <li>• Awareness of other statutory and non statutory regulations.</li> </ul>	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> <li>• Preparing a development appraisal and feasibility study</li> <li>• Reviewing the business case drivers for the development</li> <li>• Using value management/value engineering techniques to advise on and improve the viability of the development</li> <li>• Carrying out a life cycle/whole life costing exercise</li> <li>• Preparing a risk register to advise on and improve the management of a development.</li> </ul>	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> <li>• Providing reasoned and interpretive advice on development appraisals, feasibility studies and business plans</li> <li>• Interpreting value management/value engineering studies and applying the results to improve development viability</li> <li>• Interpreting the results of a life cycle/whole life costing exercise and give advice on how these results can be used to improve a development's viability</li> <li>• Assessing potential design changes, using the whole life costing techniques, to improve the development viability</li> <li>• Interpreting the results of, and give reasoned advice on, a risk register.</li> </ul>

## Project process and procedures

### Description of competency in context of this sector

This competency concerns the stages a project goes through during its life-cycle and the role of the project manager in that process.

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

Level 1	Level 2	Level 3
Describe all the stages of the project development process.	Apply the principles of the project development process and relate these to the aims and structure of the client's organisation.	Provide evidence of reasoned advice to the client on the detailed procedures associated with the project development process.
<p>Examples of knowledge comprised within this level are:</p> <ul style="list-style-type: none"> <li>• The stages of a project's development</li> <li>• An understanding of how and why tasks are carried out at a particular development stage and when its appropriate to deviate from the norm</li> <li>• An understanding of the role a project manager undertakes during the various stages of a development.</li> </ul>	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> <li>• Preparing a project development appraisal to assess a project's viability</li> <li>• Preparing a project execution plan and/or other similar management tools</li> <li>• Reporting on project processes and procedures</li> <li>• Reporting on project performance.</li> </ul>	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> <li>• Interpreting the results of, and giving reasoned advice on, a development appraisal</li> <li>• Designing and advising on a project execution plan and/or other similar management tools</li> <li>• Assessing project processes and procedures and identifying opportunities to improve project performance</li> <li>• Recommending appropriate action to improve project performance.</li> </ul>



## Risk management

### Description of competency in context of this sector

This competency is about the effective use of risk management relating to projects. It includes a knowledge, understanding and use of the tools and techniques available.

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

Level 1	Level 2	Level 3
Demonstrate your knowledge and understanding of the nature of risk and, in particular, of the risks associated with your area of business/practice.	Apply your knowledge to carry out risk assessments taking into account all relevant factors. Understand the application of the various methods and techniques used to measure risk.	Provide evidence of reasoned advice and implement systems to manage risk by competent management in relation to specific projects.
Examples of knowledge comprised within this level are: <ul style="list-style-type: none"> <li>• The concepts of risk</li> <li>• The tools and techniques commonly used to evaluate and manage risk</li> <li>• The use of risk registers and the models used to quantify risk.</li> </ul>	Examples of activities and knowledge comprised within this level are: <ul style="list-style-type: none"> <li>• Applying the various methods and techniques to measure risk</li> <li>• Participating in risk workshops</li> <li>• Preparing reports resulting from risk workshops.</li> </ul>	Examples of activities and knowledge comprised within this level are: <ul style="list-style-type: none"> <li>• Facilitating risk workshops including preparation prior to the workshop</li> <li>• Evaluating the qualitative and quantitative output from risk workshops</li> <li>• Ongoing monitoring of risk issues through the project lifecycle.</li> </ul>



## Confidence through professional standards

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