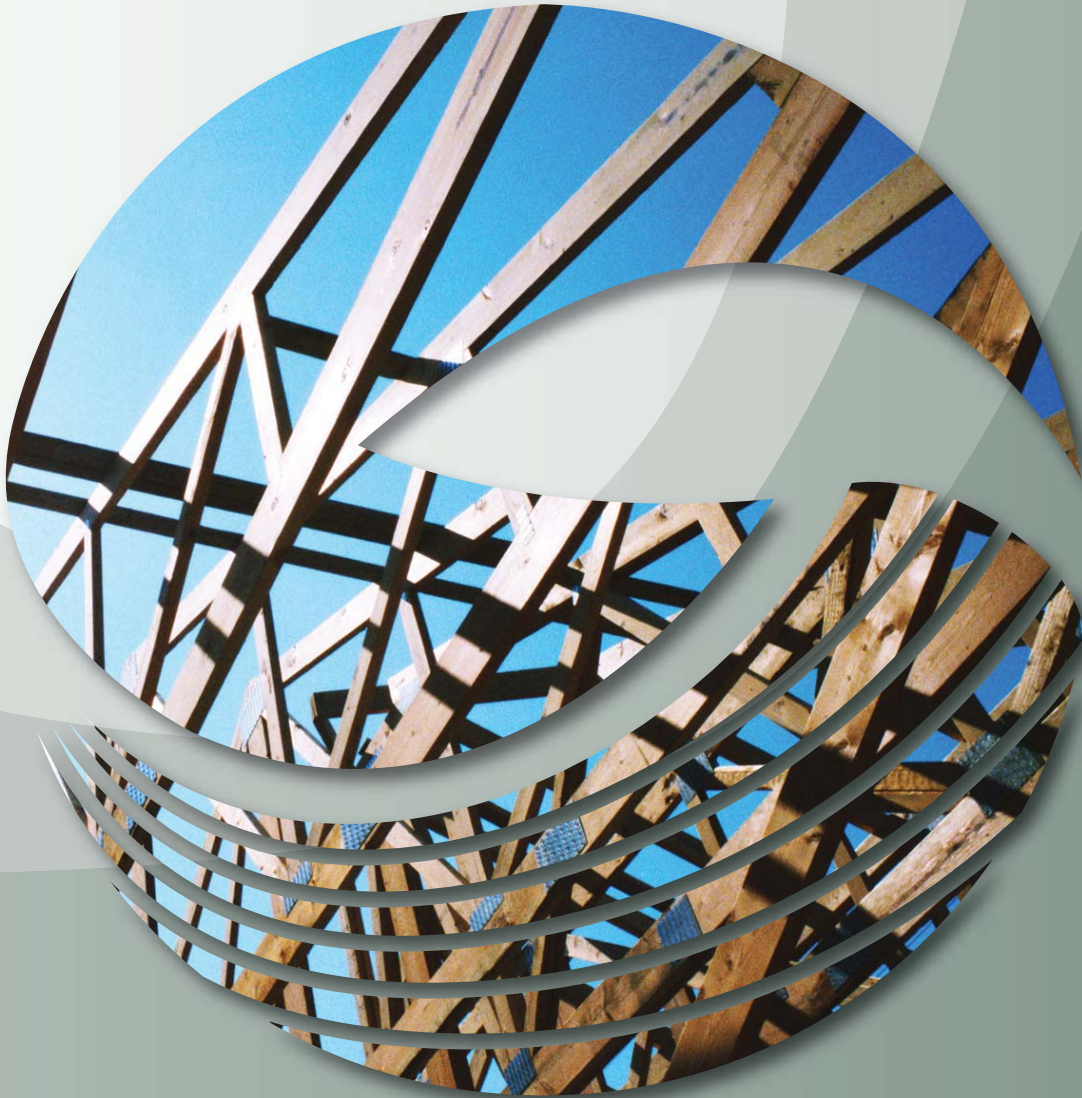


Your APC pathway guide to
Planning and Development



Your pathway guide to Planning and Development

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Introduction

About the APC

The RICS/SCSI Assessment of Professional Competence (APC) ensures that those applying for RICS/SCSI membership are competent to practise and meet the high standards of professionalism required by RICS/SCSI. There is a wide range of pathways available to qualify as an RICS/SCSI member covering 19 different areas of practice, at APC (Chartered).

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 is designed to help you understand more about qualifying as an RICS/SCSI member in planning and development. The guide is based on Irish market practice and may be unsuitable for candidates based in other countries. The material is set out in three sections.

Section one- provides information on this area of practice with a general overview of the planning and development pathways.

Section two- lists the competency requirements of the planning and development APC.

Section three- describes the main technical competencies associated with planning and development, providing expanded sector specific guidance on each of them. This forms the main part of the guide.

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/SCSI 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 planning and development.

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. These are explained in more detail in the *Requirements and Competencies guide*.

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.

This guide only deals with the principal core and optional competencies associated with this area. It does not cover the mandatory competencies.

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 final assessment, 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

SCSI Education and Membership will be able to help you with any general APC queries:

T 01 6445500

F 01 6611797

education@scsi.ie

www.scsi.ie

About planning and development

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

Planning and development, as an area of practice, is of strategic importance as governments are placing more emphasis on design and quality of the built environment, urban and rural regeneration, the impact of IT, climate and demographic change, transport and sources of (renewable) energy. Chartered planning and development surveyors are playing a vital role in promoting the use of effective land management and administration as one of the primary drivers behind sustainable development.

Planning and development chartered surveyors are spread across the globe, adjusting their work to the specific planning and development processes that each country operates. The client base ranges from local and national governments, planning authorities and other public agencies, to private sectors such as major property companies, house builders, valuations and the general public.

It is their flexibility combined with practicality that will allow planning and development chartered surveyors to integrate fully with the rest of the profession, and vice versa, allowing a more holistic approach to achieving the world's future sustainable development needs.

Planning and development APC

The planning and development pathway is ideal for anyone pursuing a career in property who has a particular interest in shaping the built environment through the planning and development processes.

Although planning legislation and regulation is applied across most chartered surveying specialisms, this pathway is aimed at individuals whose main areas of practice are planning and development, whether in the public or private sector.

The Planning and Development APC places emphasis on the Planning competency and Development appraisals competency, both of which are required to Level 3 in this

pathway. However, as with the other property pathways, a broad base of experience in general property practice is also required.

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

Chartered alternative designations related to this pathway

All candidates qualifying under the Planning and development APC pathway will be entitled to use the designation 'Chartered Planning and Development Surveyor'.

Pathway Requirements

Planning and development APC

Mandatory competencies

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

Core competencies

Level 3

- Development appraisals (T023)
- Planning (T061)

Level 2

- Legal/regulatory compliance (T051)

Level 1

- Mapping (T056)
- Measurement of land and property (T057)
- Valuation (T083)

Optional competencies

Two competencies to Level 3 from the list below.

- Access and rights over land (T001)
- Cadastre and land management (T007)
- Compulsory purchase and compensation (T011)
- Development/project briefs (T024)
- Economic development (T026)
- Housing strategy and provision (T041)
- Leasing/letting (T050)
- Management of the built environment (T054)
- Purchase and sale (T073)
- Sustainability (M009)

Plus one competency to Level 3 or two competencies to Level 2 from the full list of technical competencies, including any not already chosen from the list.

Competency guidance

The pages that follow are intended to provide guidance for users on the main competencies associated with planning and development.

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 planning and development. The guidance does not cover the mandatory competency requirements.

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.

The full list of RICS/SCSI competencies and pathway requirements can be found in the *Requirements and Competencies guide*.

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Access and rights over land

Reference no. T001

Description of competency in context of this sector

This competency is about access and easements for power, water and communications infrastructure, including wayleaves, and the differing methods of acquisition and compensation negotiations, including fees.

Examples of likely knowledge, skills and experience at each level

Level 1

Demonstrate knowledge and understanding of the legislation and/or framework for acquiring sites or access for the provision of power, water, pipelines, other third party or communications infrastructure. This should include the methodology and techniques used in valuation for these purposes.

Examples of knowledge comprised within this level are:

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

Level 2

Provide evidence of identifying and understanding the appropriate routing for lines, cables and other third party infrastructure. This should include associated environmental assessment, undertaking inspections, and evaluating and negotiating payments for their use or acquisition.

Examples of activities and knowledge comprised within this level are:

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

Level 3

Provide evidence of reasoned advice, undertake valuations on, and write reports in relation to, all matters relating to provision of power, water, pipelines, other third party or communications infrastructure.

Examples of activities and knowledge comprised within this level are:

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

Cadastral and land management

Reference no. T007

Description of competency in context of this sector

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

Examples of likely knowledge, skills and experience at each level

Level 1

Demonstrate knowledge and understanding of field and office procedures for boundary and/or cadastral surveys appropriate to your national and/or international location. Understand legal and physical boundaries and provide examples of these. Understand the principles of land management.

Examples of knowledge comprised within this level are:

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

Level 2

Apply your knowledge of the principles of land registration, land management, administration and legislation related to rights in real estate internationally and nationally. Understand the relationship between the surveyor, client and legal profession and preparation of evidence for the legal process.

Examples of activities and knowledge comprised within this level are:

- Adopting appropriate scales for measured surveys to be used in cadastre
- Choosing which documentation to rely upon
- Practising with complete independence from the client
- Requesting documents from the legal profession
- Obtaining documents from the Land Registries
- Using and interpreting aerial photography and digital imagery
- Reporting relevant matters back to the legal profession
- Understanding of the requirements for determining boundaries.

Level 3

Provide evidence of reasoned advice, and fully understand the role and responsibility of an expert witness, on the resolution of disputes by litigation and alternative procedures.

Examples of activities and knowledge comprised within this level are:

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

Compulsory purchase and compensation

Reference no. T011

Description of competency in context of this sector

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

Examples of likely knowledge, skills and experience at each level

Level 1

Demonstrate knowledge and understanding of the powers and procedures of government and other bodies in relation to the compulsory purchase and compensation. This should cover interests in real estate and of the rights of owners and occupiers of the various interests in property.

Examples of knowledge comprised within this level are:

- The historical background, requirement for, and justification of, the use of compulsory purchase powers
- An overview of the various legislation covering acquisition of land and rights, planning and compensation
- The basic principles of compensation (the before and after principle), accommodation works, betterment, equivalence and the legal right to claim.

Level 2

Assist in the preparation of the various stages involved in the process of compulsory purchase including the estimation of a claim for compensation.

Examples of activities and knowledge comprised within this level are:

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

Level 3

Provide evidence of reasoned advice in relation to the validity and level of a claim for compensation, using a variety of valuation methodologies appropriate for the circumstances of the claim. Take an active role in the negotiation of claims, using a variety of bases of statutory and other valuation methodologies. Provide reasoned advice on the role of compulsory purchase in facilitating planning and regeneration initiatives.

Examples of activities and knowledge comprised within this level are:

- Supplying and justifying evidence for a statement of claim using both valuation and logical techniques to back up the quantum of the claim
- Dealing with best practice in the implementation of a compulsory purchase order on, for example, a road scheme
- Developing a rationale for the use of compulsory purchase powers in order to enable development, taking into account human rights legislation
- Being aware of the fee basis for chartered surveyors and the role of the Property Arbitrator as well as mediation/arbitration.
- Assisting in the preparation for and attendance at an Oral Hearing into a Compulsory Purchase Order including understanding of procedure and process.



Development appraisals

Reference no. T023

Description of competency in context of this sector

This competency is about the role of development appraisals in residential and commercial development. Development appraisals also have a role in residual valuations of development sites but it should be remembered that the two are different activities.

Examples of likely knowledge, skills and experience at each level

Level 1

Demonstrate knowledge and understanding of the principles and practices underlying a valid development appraisal.

Examples of knowledge comprised within this level are:

- The role of development appraisals in the marketplace and the situations where their use is appropriate
- The content of appraisals and how different issues such as planning
- The sensitivities of appraisals, what factors affect the appraisal
- Awareness of external factors which have an influence upon the appraisal process.

Level 2

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.

Examples of activities and knowledge comprised within this level are:

- Analysing appropriate sources of information and data
- Preparing appraisals for possible acquisition, disposal or valuation of development sites including residential, commercial and/or mixed use
- Using different techniques and software available for appraisals (whilst having an understanding of the basic principles of development appraisal)
- Undertaking a sensitivity analysis
- Assisting in the selection of appropriate sources of development finance.

Level 3

Interpret and provide evidence of reasoned advice on development appraisals and further opportunities.

Examples of activities and knowledge comprised within this level are:

- Using development appraisals to advise on the acquisition, disposal or valuation of development sites
- Producing reasoned analysis of risk using appropriate sensitivity analysis
- Advising on the appropriate sources of development finance.

Development/project briefs

Reference no. T024

Description of competency in context of this sector

The purpose of development briefs is to stimulate interest in development sites whilst project briefs is to influence the form that a desired development will take. Both provide a framework for developers in the conception of major types of development schemes.

Examples of likely knowledge, skills and experience at each level

Level 1

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

Examples of knowledge comprised within this level are:

- The objectives of development/project briefs
- Essential site details including history, location, accessibility, services and utilities
- Environmental features and issues
- The consultation process
- The planning policy background
- Relevant planning documentation
- Land ownership and disposal arrangements
- Market conditions
- Development budgets.

Level 2

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

Examples of activities and knowledge comprised within this level are:

- Producing a development/project brief
- Analysing gathered information and data for a development/project brief
- Programming or phasing of the stages of development
- Producing a risk analysis.

Level 3

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

Examples of activities and knowledge comprised within this level are:

- Using a development/project brief to design a development scheme
- Negotiating agreements with stakeholder interests
- Planning the implementation of a development scheme
- Formulating financial arrangements for a development scheme.

Economic development

Reference no. T026

Description of competency in context of this sector

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

Examples of likely knowledge, skills and experience at each level

Level 1

Demonstrate knowledge and understanding of the principles and practices underlying sound economic development policies in the context of international, national, regional and local economic issues. This should include inward investment strategies and urban regeneration strategies.

Examples of knowledge comprised within this level are:

- International, national, regional and local economic development policies
- Macro economics (international and national)
- Micro economics
- Development appraisal
- Funding regimes eg PFI, European funding, partnering
- Inward investment strategies
- Urban regeneration strategies.

Level 2

Identify and fully understand the organisational processes and mechanisms involved in implementing economic development policies, and their impact on urban regeneration, property development and infrastructure provision.

Examples of activities and knowledge comprised within this level are:

- Making appropriate use of relevant statistical sources
- Selecting funding and grant sources, qualifications and restrictions
- Understanding organisational responsibilities and local development partnerships/companies
- Explaining place marketing and inward investment.

Level 3

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

Examples of activities and knowledge comprised within this level are:

- Examining an employment analysis
- Examining census data
- Exploring a floorspace analysis
- Analysing business surveys
- Performing grant calculations.

Housing strategy and provision

Reference no. T041

Description of competency in context of this sector

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

Examples of likely knowledge, skills and experience at each level

Level 1

Demonstrate knowledge and understanding of the various methods used to assess and identify overall housing needs. Be aware of the options available for housing providers to meet these housing needs.

Examples of knowledge comprised within this level are:

- Economic and demographic indicators for residential development
- Sources of researched information into the factors that show housing demand
- How developers, local authorities and other housing providers source development opportunities.

Level 2

Apply your knowledge to identify and respond to housing needs. This should include house types, tenures, funding, planning, and other statutory or non-statutory considerations.

Examples of activities and knowledge comprised within this level are:

- Producing reports on land assembly outlining the position in terms of planning, residential mix, tenure types, infrastructure, values and funding
- Examining different types of housing demand
- Investigating ways of satisfying the different types of housing demand.

Level 3

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

Examples of activities and knowledge comprised within this level are:

- Giving advice on the acquisition or disposal of residential or mixed use development sites
- Evaluating market research and analysis on housing demand and values
- Acquiring or disposing of sites for residential or mixed use development.

Leasing/letting

Reference no. T050

Description of competency in context of this sector

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

Examples of likely knowledge, skills and experience at each level

Level 1

Demonstrate knowledge and understanding of how various types of property are let (or a similar interest is acquired for a client) and the different types of interests that may be placed on the market. Demonstrate an understanding of the economics of the market for such interests and the appropriate legal frameworks.

Examples of knowledge comprised within this level are:

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

Level 2

Apply your knowledge and skills to the leasing/letting of all types of property and demonstrate practical experience of the associated decision-making process, marketing, reporting and completion of the transaction. Demonstrate knowledge and understanding of other forms of property transaction, and of the reasons supporting the decision to proceed along the chosen leasing or letting route.

Examples of activities and knowledge comprised within this level are:

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

Level 3

Provide evidence of reasoned advice and report to clients on all types of leasing or letting transactions. Demonstrate the ability to see complex cases through from start to finish with appropriate assistance. Be able to provide clients with a holistic view of the entire transactional market, and advise them clearly and appropriately, not only on the letting or leasing market, but also on other areas.

Examples of activities and knowledge comprised within this level are:

- Experience of complex letting/leasing cases and explaining the factors which made the case deviate from the market norm
- Commenting clearly on why decisions were made in relation to the chosen route of leasing/letting
- Reporting to clients with recommendations including valuation advice
- Reporting to clients with recommendations on strategy in relation to all options for the property
- Dealing with externalities to the market which may affect leasing/letting
- Utilising negotiation and business skills in relation to challenging leasing situations.

Legal/regulatory compliance

Reference no. T051

Description of competency in context of this sector

Legal and regulatory compliance is an essential element in the work of a planning and development surveyor. All development schemes have to be conceived within the provisions of relevant legislation and associated regulations.

Examples of likely knowledge, skills and experience at each level

Level 1

Demonstrate knowledge and understanding of any legal/regulatory compliance requirements in relation to your area of practice.

Examples of knowledge comprised within this level are:

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

Level 2

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

Examples of activities and knowledge comprised within this level are:

- Using current case law, planning policy issues, appeals and representations
- Using the law relating to conservation areas, listed buildings, planning policy
- Applying health and safety at work practices, disability, and construction, design and management regulations.

Level 3

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

Examples of activities and knowledge comprised within this level are:

- Giving written, reasoned advice on legal and regulatory compliance for a particular development project
- Giving clients reasoned advice on planning appeals and representations on consultation matters, in written reports, in liaison with solicitors.

Management of the built environment

Reference no. T054

Description of competency in context of this sector

Planning and development surveyors have to ensure that sustainability of the built environment is integrated into every aspect of a development proposal for them to receive planning consent.

Examples of likely knowledge, skills and experience at each level

Level 1

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

Examples of knowledge comprised within this level are:

- Recognising the key factors and principles for the sustainable management of the built environment
- Identifying planning policies and guidance notes applicable to the sustainable management of the built environment for an urban regeneration project.

Level 2

Apply your knowledge of sustainable management of the built environment as part of the urban planning and regeneration process. Demonstrate an understanding of the roles played by public, private and not-for-profit sectors.

Examples of activities and knowledge comprised within this level are:

- Providing examples of urban regeneration developments where sustainable management of the built environment has been achieved successfully
- Demonstrating, with reference to an urban regeneration development, the practical application of the key factors and principles of the sustainable management of the built environment
- Explaining, with reference to an urban regeneration development, the roles played by different types of organisations in the sustainable management of the built environment.

Level 3

Provide evidence of reasoned advice, write reports and negotiate on all matters relating to sustainable management of the built environment as part of the urban planning and regeneration process. This should include the roles played by public, private and not-for-profit sectors.

Examples of activities and knowledge comprised within this level are:

- Preparing detailed reports to clients on matters of sustainable management of the built environment for planning policy consultation and representation, and planning applications
- Giving written advice on the commercial viability of the sustainable management of the built environment in urban regeneration development projects.

Mapping

Reference no. T056

Description of competency in context of this sector

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

Examples of likely knowledge, skills and experience at each level

Level 1

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

Examples of knowledge comprised within this level are:

- Full awareness of data capture techniques and the knock on effects regarding accuracy and precision
- Awareness of instrument checking techniques
- Awareness and understanding of the basic principles of geodesy and its application to mapping according to your area of practice
- Knowledge and use of basic survey software.

Level 2

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

Examples of activities and knowledge comprised within this level are:

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

Level 3

Provide evidence of reasoned advice on the design and specification of mapping and/or geo-information projects in a national and/or international context.

Examples of activities and knowledge comprised within this level are:

- Using all forms of survey/mapping/imagery contracts competently and describing the nuances of each (ie accuracy/fitness for purpose issues)
- Being fully conversant with all RICS Geomatics specifications and guidance in relation to mapping
- Explaining complex mapping issues to clients and discerning their 'actual' needs.

Measurement of land and property

Reference no. T057

Description of competency in context of this sector

This competency is relevant to all data capture and measurement of land or property. In the context of the property pathways it refers particularly to measurement of saleable/lettable areas for agency or valuation purposes.

Examples of likely knowledge, skills and experience at each level

Level 1

Demonstrate knowledge and understanding of the principles and limitations of measurement relevant to your area of practice.

Examples of knowledge comprised within this level are:

- Relevant data capture techniques including the use of lasers and tapes
- The limitations of different methods of measurement
- Checking procedures for the instruments used and the calculations undertaken
- Potential sources of error from use of the instruments
- Understanding the basis on which measurements should be undertaken ie the core definitions of measurement and their application (Gross External Area, Gross Internal Area And Net Internal Area)
- Awareness of the appropriate standards and guidance relating to measurement with particular reference to the RICS/SCSI Code Of Measuring Practice
- The degree of accuracy that is required for different types of property and the use to which the measurements will be put
- The use and limitations of plans and drawings.

Level 2

Apply your knowledge to undertake measurement. Use basic and/or advanced instrumentation to collect data. Present appropriate information gained from measurement.

Examples of activities and knowledge comprised within this level are:

- Using the appropriate instrumentation (including lasers and tapes) to capture sufficiently accurate data, based on an understanding of limitations of different instruments
- Dealing with and advising on sources of error from use of instruments
- Applying the appropriate guidance correctly in practice to undertake measurement of a variety of properties, understanding the basis on which measurements should be undertaken
- Undertaking necessary calculations
- Preparing and presenting measurements in a manner appropriate for the purpose they are to be used, understanding the level of accuracy that is required for different types of property.

Level 3

Evaluate, present, manage, analyse data and/or apply spatial data and information. Show an advanced understanding of accuracy, precision and error sources.

Examples of activities and knowledge comprised within this level are:

Please note, Level 3 is only recommended for candidates with specialist knowledge and experience of sophisticated measurement and data capture practice.

Most property candidates will only attain Level 2. For guidance on Level 3 please refer to RICS/SCSI Geomatics Pathway

Planning

Reference no. T061

Description of competency in context of this sector

The planning system plays a vital role in the opportunities available for any potential development scheme. This means it is important for developers to have good working knowledge and experience of the processes involved to ensure successful development outcomes.

Examples of likely knowledge, skills and experience at each level

Level 1

Demonstrate knowledge and understanding of the principles of planning.

Examples of knowledge comprised within this level are:

- The purpose of the planning system
- The importance of the strategic planning framework
- The decision making process on planning applications
- Awareness of special planning powers for conservation areas, listed buildings and trees
- The requirements for community involvement in the planning system.

Level 2

Apply your knowledge to matters relevant to the planning process.

Examples of activities and knowledge comprised within this level are:

- Completing the submission of planning applications
- Applying pre-consultation and negotiation processes to the planning application process
- Participating in the formulation of spatial planning strategies
- Interpreting strategic planning policies.

Level 3

Give reasoned advice, including the preparation and presentation of reports on planning matters, brief other professional consultants and understand the application of specialist knowledge to the resolution of planning problems.

Examples of activities and knowledge comprised within this level are:

- Producing viability/feasibility reports
- Providing reasoned client advice on planning applications including advice on appeals
- Advising clients on reasonableness of planning conditions and involvement in related negotiations
- Justifying environmental and other impact assessments
- Overseeing the work of external consultants such as architects or engineers etc.

Purchase and sale

Reference no. T073

Description of competency in context of this sector

This competency relates to the purchase and sale of land/property on a freehold and leasehold basis. Sales and purchases of investment property are therefore included. Candidates should have regard to all property markets and alternative uses and values. Similarly, the candidate should have awareness of other forms of disposal.

Examples of likely knowledge, skills and experience at each level

Level 1

Demonstrate knowledge and understanding of how various types of property are sold (or a similar interest is acquired for a client) and the different types of interests that may be placed on the market. Demonstrate an understanding of the economics of the market for such interests, and the appropriate legal frameworks.

Examples of knowledge comprised within this level are:

- Awareness of the different types of interests that can be sold or purchased, and the factors affecting value
- Knowledge of factors governing the methods of disposal/acquisition and the advantages/disadvantages of each
- Understanding of the legal processes needed to complete a sale/purchase
- Demonstrate what factors affect value of property in the purchase/sales market.

Level 2

Apply your knowledge and skills to the purchase or sale of all types of property and demonstrate practical experience of the associated decisionmaking process, marketing, reporting and completion of the transaction. Demonstrate knowledge and understanding of other forms of property transaction, and be aware of the reasons supporting the decision to proceed along the chosen purchase or sale route.

Examples of activities and knowledge comprised within this level are:

- Selling or purchasing land/property
- Decision making and recommending courses of action including valuation advice
- Undertaking transactions from initial inspections through to completion of documentation
- Negotiating with both prospective parties and where appropriate interested third parties
- Understanding of the legal frameworks governing sale/purchase and the implications and penalties.

Level 3

Provide evidence of reasoned advice and report to clients on all types of purchase or sale transactions. Demonstrate the ability to see complex cases through from start to finish with appropriate assistance. Be able to provide the client with a holistic view of the entire transactional market, and advise him/her clearly and appropriately, not only on the sale or disposal market but also on other areas.

Examples of activities and knowledge comprised within this level are:

- Participating in complex or difficult cases, and explaining the factors which made the case deviate from market norm
- Advising on why decisions were made in relation to chosen route of sale or purchase; especially in relation to strategic advice given to your client on land/property
- Experience of externalities to the market which may affect sale/purchase
- Reporting to clients with recommendations
- Applying negotiation and business skills to handle difficult situations effectively.

Sustainability

Reference no. M009

Description of competency in context of this sector

This competency covers the role of the surveyor in dealing with the impact of sustainability issues on design and development. Candidates should have an awareness of the various ways in which sustainability can impact on these activities. They must have a thorough understanding of the impact made by sustainability on their projects including financial impact.

Examples of likely knowledge, skills and experience at each level

Level 1

Demonstrate knowledge and understanding of why and how sustainability seeks to balance economic, environmental and social objectives at global, national and local levels in the context of land, property and the built environment.

Examples of knowledge comprised within this level are:

- The principles of sustainability within the planning and development process
- The relationship between property and the environment
- How national and international legislation, regulations and taxation relating to sustainability affect planning and development
- Criteria by which sustainability is measured in relation to finished developments
- The principles of how the technology and construction processes can contribute to sustainable design.

Level 2

Provide evidence of the practical application of sustainability appropriate to your area of practice, and of awareness of the circumstances in which specialist advice is necessary.

Examples of activities and knowledge comprised within this level are:

- Carrying out sustainability appraisal or strategic environmental assessment exercises to determine the impact of sustainability issues on design and construction processes
- Understanding the principles of life cycle cost exercises which take account of sustainability issues
- Understanding the measures undertaken by governments and international bodies to encourage the reduction of the environmental impact of development.

Level 3

Provide evidence of reasoned advice given to clients and others on the policy, law and best practice of sustainability in your area of practice.

Examples of activities and knowledge comprised within this level are:

- Giving reasoned advice to your client and members of the project team on the financial impact of sustainability on a project
- Giving reasoned advice on the application of environmental law and policy
- Interpreting environmental reports and giving reasoned advice on the financial impact and programme implications on a project
- Giving advice on sustainable design solutions for projects
- Advising clients on planning policy relating to sustainable development.

Valuation

Reference no. T083

Description of competency in context of this sector

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

Examples of likely knowledge, skills and experience at each level

Level 1

Demonstrate knowledge and understanding of the purposes for which valuations are undertaken; the relevant valuation methods and techniques; the appropriate standards and guidance; and any relevant statutory or mandatory requirements for valuation work.

Examples of knowledge comprised within this level are:

- A general appreciation of the main drivers that have an impact on value
- The principles and application of the relevant valuation standards
- The principles of Professional Indemnity Insurance
- The underlying principles of land/property law, planning and other relevant regulations or controls and their impact on property/land values
- The different purposes for which valuations may be required
- The principles of the various methodologies needed to provide both capital and rental valuation advice
- An understanding of the importance of independence and objectivity.

Level 2

Demonstrate practical competence in undertaking both capital and rental valuations and detailed involvement with the preparation and presentation of client reports. Demonstrate your ability to use valuation methods and techniques appropriate to your area of practice. Show how the relevant valuation standards and guidance have been applied to your valuation experience.

Examples of activities and knowledge comprised within this level are:

- Understanding client requirements and preparing Terms of Engagement
- Inspecting and information gathering relevant to the valuation work being undertaken
- Analysing and interpreting of comparable evidence
- Applying a range of valuation methods and techniques
- The principles and application of the relevant valuation standards
- Being able to demonstrate competence to conduct a valuation task from beginning to end with appropriate supervision.

To achieve Level 2 candidates will not necessarily be carrying out valuations as part of their full time day to day activities.

Level 3

Demonstrate practical competence in undertaking valuations, either of a range of property types or for a range of purposes. Demonstrate the application of a wide range of valuation methods and techniques. Be responsible for the preparation of formal valuation reports under proper supervision and provide reasoned advice. Demonstrate a thorough knowledge of the appropriate valuation standards and guidance and how they are applied in practice.

Examples of activities and knowledge comprised within this level are:

- The assets considered may relate to a particular area of practice but the candidate's experience should cover a range of purposes (in a properly supervised manner), such as loan security, financial statements, internal management, purchase or sale reports, tax, stock exchange and litigation, but not necessarily all of these
- The types of property/land should ideally be varied both in terms of sector and also interest (ie freehold and leasehold)
- Knowledge of standards in other areas of business, eg accounting standards

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Valuation continued

Reference no. T083

Examples of likely knowledge, skills and experience at each level

Level 3 continued

Demonstrate practical competence in undertaking valuations, either of a range of property types or for a range of purposes. Demonstrate the application of a wide range of valuation methods and techniques. Be responsible for the preparation of formal valuation reports under proper supervision and provide reasoned advice. Demonstrate a thorough knowledge of the appropriate valuation standards and guidance and how they are applied in practice

- The candidate's knowledge of the main drivers which impact on property value should include an understanding of the wider influences such as government policy, the economic climate, technological change and other investment medium
- The candidate should demonstrate knowledge as to how their valuation advice inter-relates with their client's other professional advisers
- Have an understanding of the different levels of service that may be required, eg desk top advice versus a full valuation.



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