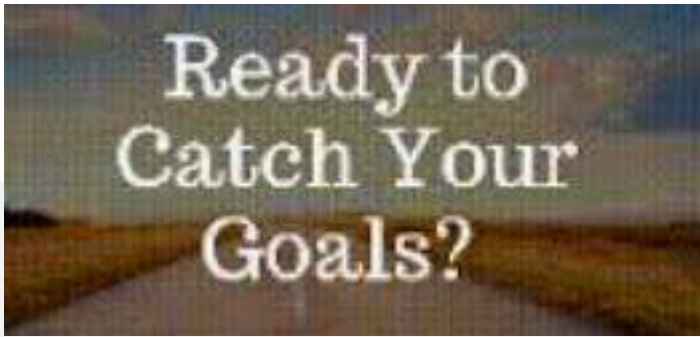




محاضرة رقم  
01



Become an (MRICS)

المعهد الملكي للمساحين القانونيين

4

Round

PATHWAY

# QUANTITY SURVEYING AND CONSTRUCTION –PM–APC

Dr. Moustafa I. Abu Dief, Ph.D, MRICS, CFCC™

Ready to  
Catch Your  
Goals?

Become an (MRICS)

محاضرة رقم 1

Pathway

Membership of the Royal Institution of Chartered Surveyors.

*How to become an (MRICS)*

# The Worthy Journey



*Never*

*Late*

*Just*

*Start!!*

# The Worthy Journey



*Never*

*Late*

*Just*

*Start!!*

MRICS ..... ملاحظات عن محاضرة اليوم		
ملاحظاتى	الموضوع	م
		1
		2
		3
		4



# INTRODUCTION

## Things to consider before you apply

### Remember



APC Prelim: do you have 5 or more years of relevant work experience?

Combine 5 years or more with **any degree**,

or with an RICS-approved professional body membership qualification, and you may be able to progress to a final APC assessment following a preliminary review.

You can enrol on APC Prelim at any time, but must have 12 months of experience post degree or **membership qualification** when you submit at the preliminary review stage.

[Create an online account now](#)

<https://myaccount.rics.org/registration>



# Chartered Memembr

## Chartered Member (MRICS)



You can enrol at any time in your career, but you must meet one of our eligibility requirements before applying for assessment:

- Relevant experience and an RICS-accredited degree
- 5 years of relevant experience and any bachelor's degree
- 10 years of relevant experience operating at an advanced level by seniority, specialisation, or in academia.

The most common way of qualifying as a Chartered Member is through the Assessment of Professional Competence (APC), but you can also qualify as a senior professional, industry specialist, or academic.



<https://www.rics.org/join-rics/rics-member-grades/chartered-member-mrics/assessment-of-professional-competence-apc>



# Chartered Memembr

Things to consider before you apply

Are you a senior professional, specialist or academic? ▼

Direct entry: you may be eligible if you already have professional qualifications ▼

APC Prelim: do you have 5 or more years of relevant work experience? ▼

Do you have an RICS accredited degree? ▼

Are you undertaking a work placement as part of an RICS accredited degree? ▼

Sector pathways: you must choose a specialist business area based on your experience ▼

Counsellor: you must find an RICS member to help you ▼

Continuing Professional Development (CPD) ▼

Structured training ▼

Formal assessment: understand the different parts of the assessment process ▼

Enrolment deadlines: when must you complete your assessment by? ▼

How much does it cost? ▼

How long will it take? ▼


<https://www.rics.org/join-rics/rics-member-grades/chartered-member-mrics/assessment-of-professional-competence-apc>


# Chartered Member

Things to consider before you apply


Are you a senior professional, specialist or academic? 

Direct entry: you may be eligible if you already have professional qualifications 

APC Prelim: do you have 5 or more years of relevant work experience? 

Do you have an RICS accredited degree? 

Are you undertaking a work placement as part of an RICS accredited degree? 

Sector pathways: you must choose a specialist business area based on your experience 

Counsellor: you must find an RICS member to help you 


Continuing Professional Development (CPD) 

Structured training 

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Enrolment deadlines: when must you complete your assessment by? 

How much does it cost? 

How long will it take? 

Try  
online

<https://www.rics.org/join-rics/rics-member-grades/chartered-member-mrics/assessment-of-professional-competence-apc>

# Chartered Member

## When you are ready to join

If you haven't already got an online account, you'll need to create one.

[Create an online account now](#)

## Now choose your entry route

Select the entry point to APC qualification that best suits your experience below:

If you qualify for a preliminary review:

> [Apply for Preliminary Review](#)

Studying for a part-time RICS accredited degree AND in full-time employment:

or

already have an RICS accredited degree AND less than 10 years of relevant work experience:

> [Apply for the APC with the structured training](#)

Have more than 10 years of relevant work experience AND an RICS accredited degree:

> [Apply for the APC without structured training](#)

<https://www.rics.org/join-rics/rics-member-grades/chartered-member-mrics/assessment-of-professional-competence-apc>

# Chartered Member

## What happens next?

### Verification

Before your assessment interview, checks will ensure you have provided the correct eligibility evidence.

### Support materials

We'll then email you more detailed information about the process, guidance notes for your counselor, and instructions for using our Assessment Platform.

### Joining enquiries

If you have any questions about joining RICS or our qualifications, please call 02476 868 555, email [join@rics.org](mailto:join@rics.org), or complete an inquiries form.

- [Joining enquiry form](#)

<https://www.rics.org/join-rics/rics-member-grades/chartered-member-mrics/assessment-of-professional-competence-apc>

<https://apply.rics.org/APCPrelim/ContactDetails>

- [Apply for Preliminary Review](#)

Studying for a part-time RICS accredited degree AND in full-time employment:

**or**

already have an RICS accredited degree AND less than 10 years of relevant work experience:

<https://www.rics.org/join-rics/rics-member-grades/chartered-member-mrics/assessment-of-professional-competence-apc>

# APC



All RICS.org



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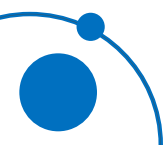
[Home](#) > [Join RICS](#) > [RICS Member Grades](#) > [Chartered Member \(MRICS\)](#) > [Assessment of Professional Competence \(APC\)](#)



## Assessment of Professional Competence (APC)



qualification





Assessment of Professional Competence  
Candidate guide  
February 2020



ASSESSMENT OF PROFESSIONAL COMPETENCE



## Candidate guide

February 2024





## APC candidate guide

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## English Writing

# English Writing

do not start with:

Years ago

# English Writing

## Quiz

Please provide your inputs in the blank cells			
no	Informal	Formal	Comments
1	Ask	Enquire/ require/demand/call/claim/call for	
2	Have to		
3		Finish	
4	Lack		
5		Reside	
6		Inform	
7	But	however/ unless	
8		Receive	
9	Chance		
10		Utilize	
11	Bad		
12		Appear	
13	Also		
14		Purchase	
15	Lively		
16		Damage	
17	Put in		
18		Verify	
19	Sorry		
20	Suppot/contribute	Assist	
Additional Words from your experience			

# Publications –

**RICS QS & Construction Practice Information (Black Book)**

# Publications –

# Publications –

## RICS QS & Construction Practice Information (Black Book)

### Black book notification

A project is currently underway to review and update the black book content with the aim of producing a comprehensive new edition, with improved presentation and navigation. While this review is taking place, we have withdrawn a number of guidance notes which have been rendered out-of-date by the publication of various forms of contract, legislation and case law. Although these documents cannot be relied on as guidance, they contain relevant principles of custom and practice and can be accessed from our archive for information only.

- [Acceleration](#)
- [Appropriate contract selection](#)
- [Ascertaining loss and expense](#)
- [Cash flow forecasting](#)
- [Construction sectors and roles for chartered quantity surveyors](#)
- [Cost analysis and benchmarking](#)
- [Damages for delay to completion](#)
- [Defects and rectification](#)
- [Developing an appropriate procurement strategy and selecting an appropriate route](#)
- [Electronic document management](#)



<https://www.rics.org/profession-standards/rics-standards-and-guidance/sector-standards/construction-standards/black-book>

## Grammar Concerns in RICS APC Submissions

1. Make sure you proofread your submission carefully – ask a non-surveyor to do this.  
They can identify issues that you don't notice, and can check if the overall 'scenario' of your examples and submission are logic and understandable.
2. Apply the Spelling & Grammar check function on Word, or Grammarly.
3. Avoid Long sentences, as It can be difficult to read a submission where long sentences are used.
4. Keep sentences short and to the point, break the sentences up at a natural point.
5. Your submission is a formal work. It is recommended to avoid contractions such as 'don't' or 'can't' – instead use the full 'do not' or 'cannot'. Contractions reduces the quality, professionalism and formality of you're the submission.

# COMPETENCY GUIDE

## Grammar Concerns in RICS APC Submissions

3. Use of US rather than UK English (if you are a UK candidate or using UK English)
4. Use UK English if you are submitting in the UK (or in a country that adopts UK English conventions), use ‘s’ instead of ‘z’. Consider also some specific spellings (‘meter’ in the US and ‘metre’ in the UK. Set spell check function on WORD to English (UK) to help avoid such errors.

### 5. Apostrophes

‘the Employer’s Requirements.

The APC candidates' submissions.

### 6. Tense considerations:                    ~~We~~                    ~~our company~~————— I performed    I completed

Use the first person and the past tense. It requires talking about what you did – not what somebody is doing or what your company does. (I handled a task. I checked, visited, inspected, measured and analyzed the subject. Avoid using checked, visited, inspected, measured and analyzed the subject.

***Explain what you did (not what others did).***



## Grammar Concerns in RICS APC Submissions

### 7. Containing more words than necessary : Wordy

Be clear and concise:

- i. Avoid phrases that are too verbose, simplify it.
  - Example, '*It came to my attention* that the Employer's audit was overdue and I recommended that they request me to complete the task as soon as possible.

It can be: I have recognised an overdue audit and wanted instructions from the Employer to complete the task.

## Grammar Concerns in RICS APC Submissions

### 8. Listing

I collected the data, discussed the results, and recommended to select the first option.

### 9. Could have – **past only**

The Employer could have implemented the conservative approach. . But, due to the budget limitation I recommended to be risk taker and share the opportunity.

### 10. Repetitive meaning

Writing the same thing in a sentence, repeating just using different words.

### 11. YOU .....Thier

Use of ‘your’ and ‘you’re’

‘Your’ = your submission.....which belongs to you. ‘You’re’ = ‘you are’,. You are a candidate.

‘their’ submissions are kept there on the shelve.

## Grammar Concerns in RICS APC Submissions

12. Where and Were

Where were you yesterday?

Where is for locations.

Were is     Are     were     is a past tense verb.

## How to respond to RICS APC Questions.

Be a professional.

Address the 3 Cs,

a. Competence

b. Conflict

c. Complaints

a. **Competence** – Are you qualified in the area related to the task? If not, who will you work with to ensure the work is provided competently? You may opt to decline the task.

b. **Conflict** – Check for personal or professional conflicts of interest to disclose.

c. **Complaints** – Upon accepting the task, demonstrate your firm's complaint handling procedure to your client.

### Hint!

Please address this process during your RICS APC case study presentation to streamline the manner of the final interview.

## □ How to respond to RICS APC Questions.

### Example

“Upon ensuring that I would be competent to carry on the task, that there were no personal or professional conflicts of interest, and our client was aware of the firm’s Complaints Handling Procedure, I accepted/proceeded to ...”

- **Ease of your answers to the assessors’!**
- Use a simplified assumed method.
  - ✓ Break the answers as follows:
    - **Purpose & process | Information | Delivery**
      - I. **Purpose & process** – What is the best practice (is it reliable) - What do you need to do? Is it required to comply with mandatory or legislative requirements? Due diligence.
      - II. **Information** – provide the information you know and will impact your actions.
      - III. **Delivery** –how will you provide a professional service, implementing your experience/knowledge?
      - IV. Do you recognize **risk mitigation** while performing?



# Preliminary Submission

<https://www.rics.org/join-rics/sector-pathways>



# Competencies

## APC Components-Submission

### 2. Summary of Experience (SOE) / Competencies

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

Summary of Experience - Technical Competencies 4000 Words

**You are required to write a maximum of 4000 words in total for your technical competencies, this includes **the core** and optional competencies.**

Please complete the required number of competencies for your chosen pathway to the specified level.

**1500+4000= 5500 Word**

### 3. Case Study (3000 word-2years)

### 4. Professional Module (Ethics-Rules of Conduct) (**Care to be demonstrated in the SOE and CS**).

# Competencies

## APC Components-Submission

4. Professional Module (Ethics-Rules of Conduct) (Care to be demonstrated in the SOE and CS).





# Competencies

## Competencies

**Mandatory** – personal and professional practice and business skills (these are the same for all sector pathways)

**Core** – the main skills of your chosen pathway

**Optional** – additional skills for your chosen pathway.

**Each competency is assessed at three levels:**

Level 1 – **knowledge** and understanding

Level 2 – application of knowledge

**DO**

Level 3 – depth & synthesis/combination of technical knowledge & implementation. **advise your client**

The levels you are required to reach for each competency vary across sector pathways and depending on whether you are applying to be Associate Member (**AssocRICS**) or a Chartered Member (**MRICS**).

# Content requirements

## 1 Summary of experience

**Accuracy:** **correct use of terminology and references** to the correct process and policy.

- ✓ Do the statements indicate the candidate can perform the required activities?
- ✓ should make your judgment based on what is universally accepted within the industry and consistent with RICS expectations globally.

**Clarity:** This refers to the logical and clear expression of the candidate's experience.

Does the style of writing allow you to understand the candidate's experience?

You are not required to comment on the level or type of experience but should make your judgment based on what the competency states.

# Content requirements

## 1 Summary of experience

**Level of detail:** refers to the quality and quantity of the information provided. Do the statements allow the assessors to ask informed questions at interview? You are not required to comment on what questions assessors may ask but should make your judgement based on the objective of the interview to challenge on what the candidate has written and allow the candidate to expand on this. This is also an opportunity for you to highlight areas where the candidate can increase or reduce their word count.



RICS Requirements and  
Competencies guide  
August 2018  
Updated February 2022 to reflect new Rules of  
Conduct

## Content requirements

### 1 Summary of experience

- For your summary of experience, you must write a brief statement about each of your mandatory and technical competencies. تكتب عن كل جدارة إجبارية أو فنية بيان مختصر
- It is important to ensure you have a copy of the pathway guide for your chosen pathway when completing this stage. إرجع إلى الدليل الإرشادي
- For Level 3 competency, you should ensure you write the summary covering levels 1, 2 and 3. أيضاً 1 و 2 م تعني أن تستوفي م 3 م
- Level 3 competencies are the most important: they demonstrate that you practice at a **professional level**. توضح أنك تمارس على المستوى الإحترافي م 3 م.

# Content requirements

### 1 Summary of experience

- For level 1 you must provide a statement of **learning** – how you gained the knowledge and understanding. This should link to any **relevant CPD in your CPD record**.
- For level 2 you must provide a statement of the range of experience you have achieved and include real-life project/process examples.
- For level 3 you must provide a detailed statement of advice given and include real-life project/process examples where you have personally given advice.
- Levels 2 and 3 require you to provide at least one example. The number of examples you need to provide will be determined by the experience and competence each example demonstrates.

**level 2  
example** Give at least one

level 3 Give at least one example

# Project Management Pathway

Competency requirements by pathway



## Project Management

Mandatory competencies	Core competencies	Optional competencies
<p><b>Level 3</b></p> <ul style="list-style-type: none"> <li>Ethics, Rules of Conduct and professionalism</li> </ul> <p><b>Level 2</b></p> <ul style="list-style-type: none"> <li>Client care</li> <li>Communication and negotiation</li> <li>Health and safety</li> </ul> <p><b>Level 1</b></p> <ul style="list-style-type: none"> <li>Accounting principles and procedures</li> <li>Business planning</li> <li>Conflict avoidance, management and dispute resolution procedures</li> <li>Data management</li> <li>Diversity, inclusion and teamworking</li> <li>Inclusive environments</li> <li>Sustainability</li> </ul>	<p><b>Level 3</b></p> <ul style="list-style-type: none"> <li>Contract practice</li> <li>Development/project briefs</li> <li>Leading projects, people and teams</li> <li>Managing projects</li> <li>Programming and planning</li> </ul> <p><b>Level 2</b></p> <ul style="list-style-type: none"> <li>Construction technology and environmental services</li> <li>Procurement and tendering</li> <li>Project finance</li> </ul>	<p><b>One to Level 2:</b></p> <ul style="list-style-type: none"> <li>Accounting principles and procedures or Communication and negotiation (must be taken to Level 3) or Conflict avoidance, management and dispute resolution procedures or Sustainability</li> <li>BIM management</li> <li>Commercial management</li> <li>Consultancy Services</li> <li>Contract administration</li> <li>Development appraisals</li> <li>Legal/regulatory compliance</li> <li>Maintenance management</li> <li>Performance management</li> <li>Purchase and sale</li> <li>Stakeholder management</li> <li>Supplier management</li> <li>Works progress and quality management</li> </ul> <p>Plus, one to Level 2 from the full list of technical competencies, including any not already chosen from the optional list.</p>



RICS Requirements and Competencies guide

August 2018

Updated February 2022 to reflect new Rules of Conduct

# Project Management Pathway

## Project Management

You occupy a central role in the development process, driving successful completion of construction projects. From developing the project brief to selecting, appointing and coordinating project teams, you represent clients through the full construction programme, managing the inputs clients, consultants, contractors and other stakeholders.

## Chartered Member (MRICS)

To become a chartered member on the project management pathway, you will be assessed against eight core competencies and two optional competencies.

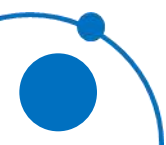
8 Core + 2 Optional

## Project Management

8 Core

+

2 Optional



# Project Management Pathway

## Project Management

### Core Competencies

Contract practice (Level 3).

Development/project briefs (Level 3).

Leading projects, people, and teams (Level 3).

Managing projects (Level 3).

**Programming and planning** (Level 3).

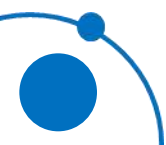
**Construction technology and environmental services** (Level 2).

**Procurement and tendering** (Level 2).

**Project finance** (Level 2).



**Common with Qs.**





# Project Management Pathway

## Project Management

### Optional Competencies: one to Level 2

Accounting principles and procedures or Communication and negotiation (must be to Level 3) or Conflict avoidance, management and dispute resolution procedures or Sustainability

BIM management

Commercial management

Consultancy Services

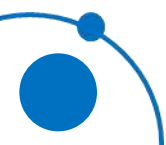
Contract administration

Development appraisals

Legal/regulatory compliance

Maintenance management

Performance management



## Project Management Pathway

### Project Management

#### Optional Competencies: one to Level 2

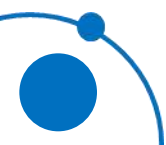
Purchase and sale

Stakeholder management

Supplier management

Works progress and quality management

Plus one to Level 2 from either the Core Competencies or Optional Competencies.



# Quantity Surveying and Construction pathway

## Quantity Surveying and Construction

Mandatory competencies	Core competencies	Optional competencies
<p><b>Level 3</b></p> <ul style="list-style-type: none"><li>• Ethics, Rules of Conduct and professionalism</li></ul> <p><b>Level 2</b></p> <ul style="list-style-type: none"><li>• Client care</li><li>• Communication and negotiation</li><li>• Health and safety</li></ul> <p><b>Level 1</b></p> <ul style="list-style-type: none"><li>• Accounting principles and procedures</li><li>• Business planning</li><li>• Conflict avoidance, management and dispute resolution procedures</li><li>• Data management</li><li>• Diversity, inclusion and teamworking</li><li>• Inclusive environments</li><li>• Sustainability</li></ul>	<p><b>Level 3</b></p> <ul style="list-style-type: none"><li>• Commercial management (of construction works) or Design economics and cost planning*</li><li>• Construction technology and environmental services</li><li>• Contract practice</li><li>• Procurement and tendering</li><li>• Project finance (control and reporting)</li><li>• Quantification and costing (of construction works)</li></ul>	<p><b>Two to Level 2</b></p> <ul style="list-style-type: none"><li>• Capital allowances</li><li>• Commercial management (of construction works) or Design economics and cost planning (whichever is not selected as core competency)</li><li>• Conflict avoidance, management and dispute resolution procedures or Sustainability</li><li>• Contract administration</li><li>• Corporate recovery and insolvency</li><li>• Due diligence</li><li>• Insurance</li><li>• Programming and planning</li><li>• Project feasibility analysis</li><li>• Risk management</li></ul> <p>* Candidates working in a <b>commercial or contracting environment</b> will likely choose <b>Commercial management to Level 3</b>. Candidates working in a <b>consulting environment</b> within either the public or private sector will likely choose <b>Design economics and cost planning to Level 3</b>.</p>

## Quantity Surveying and Construction

You are the cost manager for construction projects. This will initially involve the capital expenditure phase of a building or facility, from feasibility to design and construction. You can also be involved with extensions, refurbishment, maintenance and demolition of a facility. Your experience may be in residential, commercial, industrial, leisure, agricultural or retail facilities; for all you require the ability to manage cost effectively, equating quality and value with individual client needs.

### Associate Member (AssocRICS)

To become an Associate Member on the Quantity Surveying and Construction pathway, you will be assessed against five Core Competencies and one of the Optional Competencies.

#### Core Competencies

1. Construction technology and environmental services.
2. Contract practice.
3. Procurement and tendering.
4. Project financial control and reporting.
5. Quantification and costing of construction works.

#### Optional Competencies

- BIM management
- Commercial management of construction
- Design economics and cost planning

### Chartered Member (MRICS)

To become a Chartered Member on the Quantity Surveying and Construction pathway, you will be assessed against six Core Competencies and two of the Optional Competencies.

#### Core Competencies: to Level 3

1. Commercial management (of construction works) or Design economics and cost planning.
2. Construction technology and environmental services.
3. Contract practice.
4. Procurement and tendering.
5. Project finance (control and reporting).
6. Quantification and costing (of construction works).

#### Optional Competencies: two to Level 2

- Capital allowances
- Commercial management (of construction works) or Design economics and cost planning (whichever is not selected as core competency)
- Conflict avoidance, management and dispute resolution procedures or Sustainability
- Contract administration
- Corporate recovery and insolvency
- Due diligence
- Insurance
- Programming and planning
- Project feasibility analysis
- Risk management

### **Associate Member (AssocRICS)**

To become an Associate Member on the Quantity Surveying and Construction pathway, you will be assessed against five Core Competencies and one of the Optional Competencies.

#### **Core Competencies**

1. Construction technology and environmental services.  
Contract practice.
2. Procurement and tendering.
3. Project financial control and reporting.
4. Quantification and costing of construction works.

#### **Optional Competencies**

- BIM management
- Commercial management of construction
- Design economics and cost planning

### **Chartered Member (MRICS)**

To become a Chartered Member on the Quantity Surveying and Construction pathway, you will be assessed against six Core Competencies and two of the Optional Competencies.

### **Core Competencies: to Level 3**

1. Commercial management (of construction works) or Design economics and cost planning.
2. Construction technology and environmental services.
3. Contract practice.
4. Procurement and tendering.
5. Project finance (control and reporting).
6. Quantification and costing (of construction works).

### Chartered Member (MRICS)

#### Optional Competencies: two to Level 2

- Capital allowances

Commercial management (of construction works) or Design economics and cost planning (whichever is not selected as core competency)

- Conflict avoidance, management, and dispute resolution procedures or Sustainability
- Contract Administration
- Corporate recovery and insolvency
- Due diligence
- Insurance
- Programming and planning
- Project feasibility analysis
- Risk management

# Competencies

## Example 4. Quantity Surveying and Construction



❑ Chartered Member (MRICS) 6x3+2 x2

you will be assessed against **(6) Core** Competencies and **(2)** of the Optional Competencies.

❑ Core Competencies: to Level 3

1. Commercial management (of construction works) or Design economics and cost planning.
2. Construction technology and environmental services. ( dewatering- Concrete vs steel structures)
3. Contract practice.
4. Procurement and tendering.
5. Project finance (control and reporting).
6. Quantification and costing (of construction works). (NRM1-NRM2-NRM3)

تقديم



# Competencies

## Example. Quantity Surveyor and Construction

### Chartered Member (MRICS)

#### Optional Competencies: two to Level 2- 2x2

1. Capital allowances
2. Commercial management **or** Design economics and cost planning (whichever is not selected as core competency)
3. Conflict avoidance, management and dispute resolution procedures or Sustainability
4. Contract administration
5. Corporate recovery and insolvency
6. Due diligence
7. Insurance العناية الواجبة
8. Programming and planning
9. Project feasibility analysis
10. Risk management

## Business Planning Level 1.

- Demonstrate knowledge and understanding of how business planning activities contribute to the achievement of corporate objectives.

### Examples of knowledge comprised within this level are:

- Types of business plan, e.g. strategic, departmental, operational, corporate.
- The essential elements of a business plan
- Organisational structures
- Methods for financial benchmarking (e.g. key financial ratios), Liquidity, Current Ratio

Profitability, Gross Margin

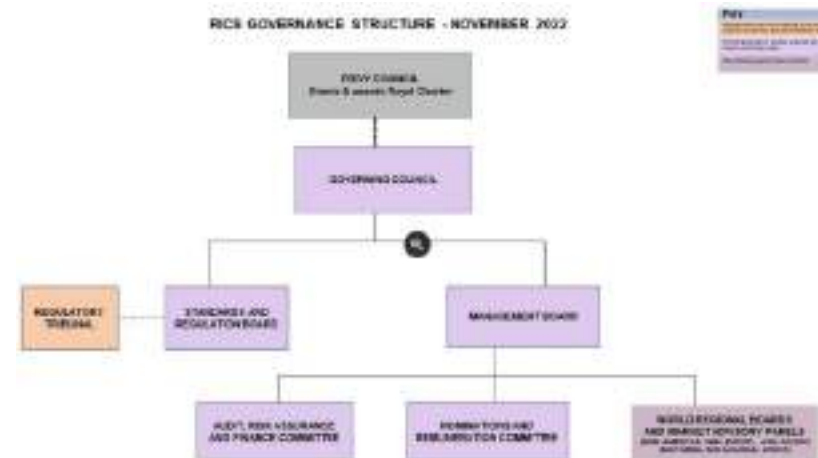
- Meaning of working capital, stock, debtors and creditors
- Accounting techniques      **Forecasting techniques**      Planning to meet corporate objectives.

# WRITING THE COMPETENCIES

## Ethics, rules of conduct and professionalism

### Level 1

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 code of conduct and conduct regulations, including the general principles of law and the legal system, as applicable in your country of practice



# WRITING THE COMPETENCIES

## Ethics, rules of conduct and professionalism

### Level 1

Examples of knowledge comprised within this level are:

- The structure of RICS
- RICS' global and professional ethical standards
- Mandatory Professional Statements e.g. Conflicts of Interest
- Guidance notes and their status
- RICS' CPD policy
- The role of Professional Groups



## Ethics, rules of conduct and professionalism

### Level 1

Examples of knowledge comprised within this level are:

Bodies within the RICS e.g. Matrics, LionHeart

- Rules of conduct for members
- Rules of conduct for firms
- Policy documents
- Help sheets
- RICS Bye-laws (10)
- Government, legislation and regulation
- Common law
- Construction and Technology Court.

# Writing the Competencies

## Ethics, rules of conduct and professionalism

### Level 2

Provide evidence of **practical application** in your area of practice, being able to justify actions at all times and demonstrate personal commitment to the rules of conduct, ethics and RICS standards.

Examples of activities and knowledge comprised within this level are:

- Your involvement with RICS
- Identifying a conflict of interest
- Transparency in professional fees
- Checking a terms of an appointment document for compliance with RICS rules
- Handling gifts and hospitalities
- Complying with RICS' CPD policy for members
- Checking your employer's compliance with RICS rules for firms. ا

## **Ethics, rules of conduct and professionalism**

### Level 3

Provide evidence of application of the above in your area of **practice in the context of advising clients.**

Examples of activities and knowledge comprised within this level are:

- Dealing with a conflict of interest
- Dealing with a complaint
- Handling client's money
- Setting up professional indemnity insurance
- Registration of a firm with RICS.
- Checking your employer's compliance with RICS rules for firms.ار

# Competency list and descriptors

## Commercial management

### Level 1

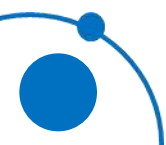
Demonstrate knowledge and understanding of the principles of the management of projects.

### Level 2

Apply your knowledge to the financial management of projects, including regular monitoring and reporting on cashflow and profitability.

### Level 3

Monitor, report and advise on project cashflows and profitability. Evaluate and advise on the financial implications and appropriate management actions.





# COMPETENCY GUIDE

## COMMERCIAL MANAGEMENT OF CONSTRUCTION

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 of 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>

# COMPETENCY GUIDE

## CONFLICT AVOIDANCE, MANAGEMENT AND DISPUTE RESOLUTION PROCEDURES

This competency covers the quantity surveyor's involvement with the avoidance, management and resolution of disputes in construction projects. Candidates should be aware of the various processes and techniques commonly used in the industry. They should have a detailed understanding of how these are applied in practice

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

Level 1	Level 2	Level 3
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.	Provide evidence of practical application in your area of practice having regard to the relevant law.	Provide evidence of the application of the above in the context of advising clients in the various circumstances referred to above.
<p>Examples of knowledge comprised within this level are:</p> <ul style="list-style-type: none"> <li>• Techniques for conflict avoidance, management and resolution, in particular by the appropriate selection of procurement routes and use of processes such as partnering</li> <li>• How various forms of contract deal with dispute avoidance and their provisions for resolving disputes</li> <li>• Legal and statutory requirements for the resolution of disputes in construction contracts</li> <li>• Conflict management and dispute resolution procedures within the construction process including negotiation, mediation and conciliation, adjudication, arbitration, independent expert determination and litigation.</li> </ul>	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> <li>• Developing further knowledge of the relevant law governing conflict avoidance and management and dispute resolution procedures</li> <li>• Being involved with adjudication procedures in particular and have an understanding of the default procedures where a construction contract does not make provision for adjudication</li> <li>• Being involved with other dispute resolution procedures</li> <li>• Compiling evidence for use in dispute resolution procedures.</li> </ul>	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> <li>• Developing an in depth knowledge of law governing conflict avoidance and management and dispute resolution procedures, including relevant legislation and case law</li> <li>• Giving reasoned advice on different dispute resolution procedures having reference to particular project circumstances</li> <li>• Giving advice on relevant law governing evidence of fact and expert evidence and the practice and procedures adopted by surveyors in the role of either advocate or expert witness</li> <li>• Giving advice as an expert witness.</li> </ul>

# COMPETENCY GUIDE

## CONSTRUCTION TECHNOLOGY AND ENVIRONMENTAL SERVICES

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.

Level 1	Level 2	Level 3
<p>Demonstrate knowledge and understanding of the principles of design and construction relating to your chosen field of practice.</p>	<p>Apply your knowledge to the design and construction processes.</p>	<p>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>
<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>

# COMPETENCY GUIDE

## CONTRACT ADMINISTRATION

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 contractual, legislative and statutory terminology/requirements, of a construction contract.	Implement administrative procedures necessary for the smooth running of a construction contract.	Advise on the administrative procedures necessary for the smooth running of a construction contract 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>• The various standard forms of contract and sub-contract used in the industry</li><li>• Basic contractual mechanisms and procedures applied at various stages of the contract</li><li>• The roles and responsibilities of the administrator.</li></ul>	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"><li>• Issuing instructions</li><li>• Dealing with payment provisions</li><li>• Managing change procedures</li><li>• Involvement with dispute avoidance</li><li>• Dealing with completion and possession issues</li><li>• Issuing certificates.</li></ul>	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"><li>• Resolving disputes</li><li>• Assessing entitlement for extension of time</li><li>• Assessing entitlement for loss and expense</li><li>• Advising all parties of their contractual rights and obligations.</li></ul>

# COMPETENCY GUIDE

## CONTRACT PRACTICE

This competency covers the various forms of contract used in the construction industry. Candidates should have an awareness of all of the main standard forms of contract and a thorough understanding of contract law, legislation and specific forms that they used

### 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>• Basic contract law and legislation</li><li>• Contract documentation</li><li>• The various standard forms of contract and sub-contract</li><li>• When the different forms would be used</li><li>• Basic contractual mechanisms and procedures at various stages of the contract</li><li>• Third party rights including relevant legislation and the use of collateral warranties.</li></ul>	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"><li>• Producing contract documentation</li><li>• Carrying out the contractual mechanisms and procedures relevant to the financial management aspects of your project, such as change procedures, valuations, loss and expense and final accounts</li><li>• Understanding general contractual provisions such as letters of intent, insurances, retention, bonds, liquidated and ascertained damages, early possession, practical completion and other common contractual mechanisms.</li></ul>	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"><li>• Selecting the appropriate form of contract and/or sub-contract for your chosen procurement route</li><li>• Advising on the most appropriate contractual procedure at the various stages of a contract</li><li>• Evaluating the appropriateness and implications of proposed contractual amendments.</li></ul>

# COMPETENCY GUIDE

## CORPORATE RECOVERY AND INSOLVENCY

This competency covers the involvement and actions of a quantity surveyor when insolvency occurs

on a construction project. Candidates should have an awareness of the processes and procedures that can apply when a party to a contract becomes insolvent and what help and support a quantity surveyor can give to the various parties involved, including the insolvency practitioner. They must have a thorough understanding of the how insolvency has affected their project and the legal and contractual position of the parties involved

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

Level 1	Level 2	Level 3
Demonstrate knowledge and understanding of the role of the Chartered Surveyor in corporate recovery and insolvency situations.	Demonstrate an understanding of the various types of appointment that can be made to administer/manage the affairs of insolvent and potentially insolvent companies and individuals.	Provide evidence of reasoned advice, prepare and present reports on the property assets of insolvent companies and individuals and/or in the administration of Fixed Charge Receivership appointments.
<p>Examples of knowledge comprised within this level are:</p> <ul style="list-style-type: none"><li>• The principles of the different insolvency procedures, such as liquidation, administration, receivership and company voluntary arrangement</li><li>• How standard form contracts deal with insolvency</li><li>• The nature of an insolvency practitioner's role and his expectations as a client</li><li>• How a quantity surveyor might support an insolvency practitioner.</li></ul>	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"><li>• Undertaking valuations and notional final accounts in relation to an insolvency on a project</li><li>• Taking action to facilitate the completion of a project where insolvency has occurred</li><li>• Undertaking work in support of an insolvency practitioner.</li></ul>	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"><li>• Giving reasoned advice to a contracted party on how to proceed following the insolvency of the other party to the contract</li><li>• Giving reasoned advice to a client on how to proceed to complete a project following an insolvency.</li></ul>

# COMPETENCY GUIDE

## DESIGN ECONOMICS AND COST PLANNING

This competency covers the impact of design and other factors on cost throughout the life of the building and the control of cost during the pre-contract stage. Candidates should have an awareness of how design decisions and construction processes impact on construction and operational costs. They must have a thorough understanding of techniques used to manage and control costs pre-contract.

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

Level 1	Level 2	Level 3
<p>Demonstrate knowledge and understanding of the main factors that affect design economics over the whole life of a building. Demonstrate knowledge and understanding of how cost planning assists in the financial control of projects during the design development stage.</p>	<p>Apply your knowledge to the cost management of design development on a project from feasibility to design completion. Prepare and submit cost data to in-house and/or external data collection agencies.</p>	<p>Give strategic and reasoned advice, including the preparation and presentation of reports with reference to cost, time, quality and buildability. Advise on various market factors and trends in construction costs. Comment on accuracy and risk.</p>
<p>Examples of knowledge comprised within this level are:</p> <ul style="list-style-type: none"><li>• The main factors that affect design economics over the whole life of the building including capital and life cycle costs</li><li>• How cost planning assists in the financial control of projects during the design development stage</li><li>• The various stages of cost planning</li><li>• Sources of cost data</li><li>• Adjustments that may be required for factors including location, specification, time and market forces.</li></ul>	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"><li>• Producing estimates and cost plans</li><li>• Carrying out life cycle costing exercises</li><li>• Applying value engineering processes</li><li>• Preparing cost reports</li><li>• Preparing and submitting cost data to in-house and/or external data collection agencies.</li></ul>	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"><li>• Preparing and presenting reports with reference to cost, time, quality and buildability, including qualifications and exclusions</li><li>• Evaluating building design efficiency</li><li>• Assessing/evaluating market factors and trends in construction costs</li><li>• Analysing the accuracy of predicted cost using benchmarking techniques</li><li>• Interrogating historical cost data</li><li>• Using value and risk management techniques.</li></ul>

# COMPETENCY GUIDE

## HEALTH AND SAFETY

This competency covers the relationship between the work of the quantity surveyor and health and safety issues within the construction industry. Candidates should be aware of legal, practical and regulatory requirements. They should have a detailed understanding of the health and safety processes and guidelines used to achieve this.

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

Level 1	Level 2	Level 3
Demonstrate knowledge and understanding of the principles and responsibilities imposed by law, codes of practice and other regulations appropriate to your area of practice.	Apply evidence of practical application of health and safety issues and the requirements for compliance, in your area of practice.	Provide evidence of reasoned advice given to clients and others on all aspects on health and safety.
<p>Examples of knowledge comprised within this level are:</p> <ul style="list-style-type: none"><li>• Personal safety on site and in the office</li><li>• Procedures imposed by law</li><li>• The impact on health and safety of:<ul style="list-style-type: none"><li>– Design</li><li>– Construction processes</li><li>– Building maintenance</li><li>– Employment of staff.</li></ul></li></ul>	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"><li>• Obtaining formal health and safety qualifications including first aid, industry specific or nationally recognised qualifications</li><li>• Being involved with specific roles and responsibilities within the various regulations.</li></ul>	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"><li>• Giving reasoned advice on and/or taking responsibility for health and safety issues relating to:<ul style="list-style-type: none"><li>– Impact of design on construction</li><li>– Alternative construction processes</li><li>– Impact of design on occupation and maintenance</li><li>– Undertaking risk assessments</li><li>– Current legislation.</li></ul></li></ul>



# COMPETENCY GUIDE

## INSURANCE

This competency covers specific insurance provisions related to property and development.

Candidates should be aware of how insurance is used to manage risk in development and have a detailed understanding of the contractual requirements under the various standard forms of contract.

### 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 of insurance in relation to your area of practice.	Apply your knowledge and/or be involved with the insurance of construction and/or property related matters.	Demonstrate a thorough understanding of the regulations and practice governing the insurance of construction and/or property related matters.
<p>Examples of knowledge comprised within this level are:</p> <ul style="list-style-type: none"><li>• The insurance provisions within the standard forms of contract</li><li>• Specific insurance mechanisms such as joint names, subrogation, net contribution clauses, in the aggregate, each and every event and excess provisions</li><li>• Specialist insurances such as performance bonds, professional indemnity and retention bonds.</li></ul>	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"><li>• Developing specialist knowledge in areas such as asbestos and terrorism</li><li>• Compiling cost data for an insurance claim</li><li>• Compiling cost data for a fire insurance valuation.</li></ul>	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"><li>• Reporting on cost impact of insurance claims to loss adjustor</li><li>• Reporting on re-construction costs for fire insurance valuations</li><li>• Advising clients on trends in the construction insurance market</li><li>• Advising on how insurances can be used to mitigate risk.</li></ul>

## PROCUREMENT AND TENDERING

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 should have a clear understanding of the different types of procurement and tendering

commonly used and the advantages and disadvantages of each to the parties involved. They 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> <li>• Codes of practice and procedures commonly used.</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>

# COMPETENCY GUIDE

## PROGRAMMING AND PLANNING

This competency covers a surveyor's involvement with the programming and planning of construction projects. Candidates should have an awareness of the various principles, techniques and issues that relate to the programming and planning of projects generally. They must have a thorough understanding of how these principles and techniques have been used and how specific issues have been dealt with on their projects.

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

Level 1	Level 2	Level 3
Describe the principals of financial and programme monitoring of projects, including planning techniques such as Gantt charts etc. Demonstrate knowledge 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 principals of, executive programme control of projects. Your advice should demonstrate a good understanding of planning techniques (pert diagrams, network analysis/critical path methods).
<p>Examples of knowledge comprised within this level are:</p> <ul style="list-style-type: none"> <li>• Understand the need for pre-contract planning and programming techniques</li> <li>• Different planning techniques eg Gantt Charts, Network Analysis and Critical Path Analysis etc</li> <li>• The principles of how a programme is affected by change</li> <li>• The need for good programming when forecasting accurately materials, man-power, machinery and money</li> <li>• The use of planning and programming when forecasting expenditure</li> <li>• The importance of a project or a contract programme when used together with different forms of contract.</li> </ul>	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> <li>• Formulating and reporting on a project programme for different construction projects using planning techniques</li> <li>• Reporting the client's financial forecast expenditure of a project using planning techniques</li> <li>• Calculating a critical path network analysis and/or PERT network analysis as appropriate to determine the longest path</li> <li>• Identifying the impact of contractual provisions on the effective planning of projects.</li> </ul>	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> <li>• Interpreting the effectiveness of a project programme</li> <li>• Providing reasoned advice on the financial planning of construction projects (eg a client/ developer might have a particular way of funding a project, either fully financed or generating finance from sales in phase one to finance later phases. This would give rise to very different strategies affecting both the timing and the cost of a project)</li> <li>• Analysing and advising on the possible outcomes in the event of a strategy change eg financing provisions, time of construction, scope changes</li> <li>• Advising on a project programme when determining different procurement options.</li> </ul>

# COMPETENCY GUIDE

## PROJECT EVALUATION

This competency covers the financial aspects of feasibility studies and development appraisals.

Candidates should be aware of the various elements of a feasibility study and development appraisal and the factors that can affect them.

They should have a detailed understanding of the techniques used to assess financial viability.

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

Level 1	Level 2	Level 3
<p>Describe the feasibility study process, including the financial and town planning aspects associated with a development appraisal.</p>	<p>Apply the techniques used in value management/value engineering, life cycle/whole life costing and risk assessment, together with a balance sheet analysis.</p>	<p>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>
<p>Examples of knowledge comprised within this level are:</p> <ul style="list-style-type: none"><li>• Understand the process of carrying out a development appraisal using techniques such as residual valuation</li><li>• Understand the various financial elements of a development appraisal such as land and construction costs, fees, finance costs, value or income stream and profit</li><li>• Awareness of the impact of non-financial factors such as town planning on an appraisal</li><li>• Understand the basic principals of techniques used in association with development appraisals such as value management, value engineering, life cycle and whole life costing and risk management.</li></ul>	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"><li>• Providing cost data for a development appraisal, particularly in respect of construction costs</li><li>• Understanding how financial data might be obtained for elements of a development appraisal (other than construction costs), for example land and financing costs, fees, taxation, property valuation, income stream and profit</li><li>• Carrying out life cycle cost exercises in relation to an appraisal</li><li>• Being involved in value and risk management exercises in relation to an appraisal.</li></ul>	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"><li>• Carrying out an appraisal; reporting and advising on the outcome</li><li>• Advising on the impact of costs associated with the various elements of the appraisal on the overall viability.</li></ul>

# COMPETENCY GUIDE

## PROJECT FINANCIAL CONTROL AND REPORTING

This competency covers the effective cost control of construction projects during the construction phase. Candidates should be aware of the principles of controlling and reporting costs on any construction project. They should have a detailed understanding of the control and reporting processes used on their projects (please note: for surveyors working in contracting this competency covers externally issued cost advice and reports).

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

Level 1	Level 2	Level 3
<p>Demonstrate knowledge and understanding of the effective control of costs during a project. Demonstrate understanding of the legal and contractual constraints and the effect of time and quality on the cost of a project.</p>	<p>Apply your knowledge to the management of project costs. This should include the preparation and presentation of financial reports on the performance of a project at appropriate intervals, to provide effective forecasting of costs, risks and their financial implications.</p>	<p>Advise on strategies and procedures to control predicted expenditure in line with a budget.</p>
<p>Examples of knowledge comprised within this level are:</p> <ul style="list-style-type: none"><li>• The effective control of costs during the construction phase of a project</li><li>• The legal and contractual constraints on the cost of a project such as changes in building legislation and design risk allocation</li><li>• The reporting and forecasting of costs during the construction phase</li><li>• The principles of contingencies/ risk allowances.</li></ul>	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"><li>• Managing project costs during the construction phase</li><li>• Reporting and forecasting costs for different procurement routes and client types</li><li>• Using cashflows in financial management</li><li>• Managing provisional sums/contingencies/ risk allowances.</li></ul>	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"><li>• Implementing change control procedures within the contract</li><li>• Establishing reporting regimes/protocols</li><li>• Using risk management and analysis techniques.</li></ul>

# COMPETENCY GUIDE

## QUANTIFICATION AND COSTING OF CONSTRUCTION WORKS

This competency covers the measurement and definition of construction works in order to value and control costs. Candidates should have an awareness of the various methods of quantifying and pricing construction works used throughout a project. They must have a thorough understanding of the specific methods 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 principles of quantification and costing of construction works as a basis for the financial management of contracts.	Apply your knowledge to the quantification and costing of construction works, including the use of appropriate standard methods of measurement and forms of cost analysis. Carrying out measurement and costing of works at all stages of the construction process.	Advise on appropriate methods of quantification and costing for specific projects. Take responsibility for the preparing and issuing pricing documents. Price or analyse such documents. Give advice on and/or supervise the valuation of construction works throughout a project.
<p>Examples of knowledge comprised within this level are:</p> <ul style="list-style-type: none"><li>• The quantification of construction works (including both measurement and definition)</li><li>• The various standard methods of measurement</li><li>• The costing of construction works</li><li>• The measurement of buildings and structures to agreed standards.</li></ul>	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"><li>• Quantifying construction works at the various stages of a project</li><li>• Producing pricing documents such as bills of quantities, schedules of activities/works, schedules of rates or contract sum analyses.</li><li>• Carrying out the costing of construction works by methods such as tendered rates, quotations or dayworks.</li></ul>	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"><li>• Advising on appropriate methods of measurement and costing</li><li>• Selecting of appropriate pricing documents</li><li>• Negotiating and agreeing the valuation of construction works at various stages of the project such as the contract sum, construction and final account.</li></ul>

# COMPETENCY GUIDE

## RISK MANAGEMENT

This competency covers the management of risk on construction projects.

Candidates should be aware of the benefits to be gained and the techniques and processes used to manage risk.

They should have a detailed understanding of how risk is dealt with on their projects.

### 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.
<p>Examples of knowledge comprised within this level are:</p> <ul style="list-style-type: none"><li>• The principles of risk management</li><li>• How the various procurement routes deal with risk</li><li>• Mitigation strategies</li><li>• The techniques used to quantify risk</li><li>• The effect of risk on programme and cost.</li></ul>	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"><li>• Contributing towards the identification of risk</li><li>• Identifying who owns the risk in relation to the chosen procurement route on your project</li><li>• Contributing towards strategies to mitigate risk</li><li>• Contributing data towards the quantification of risk</li><li>• Considering the effect of risk on programme and management cost specific to their project.</li></ul>	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"><li>• Advising on the appropriate procurement route in relation to the client's attitude to risk</li><li>• Recognising and advising on the appropriate methodologies and approach to risk on a project</li><li>• Taking ownership of the risk register and advising on appropriate risk mitigation strategies</li><li>• Applying techniques to quantify risk and advising client's on the appropriate level of contingency.</li></ul>

## SUSTAINABILITY

This competency covers the role of the quantity surveyor in dealing with the impact of sustainability issues on development and construction. Candidates should have an awareness of the various ways in which sustainability can impact on development and construction. They must have a thorough understanding of the impact made by sustainability on their projects and have been involved with the financial management of that impact.

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

Level 1	Level 2	Level 3
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.	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.	Provide evidence of reasoned advice given to clients and others on the policy, law and best practice of sustainability in your area of practice.
<p>Examples of knowledge comprised within this level are:</p> <ul style="list-style-type: none"> <li>• The principles of sustainability within development and the construction process</li> <li>• The relationship between property and the environment</li> <li>• How national and international legislation, regulations and taxation relating to sustainability affect construction</li> <li>• Criteria by which sustainability is measured in relation to finished buildings</li> <li>• The principles of how design, technology and construction processes can contribute to sustainable building</li> <li>• The principles of material resource efficiency within the supply chain.</li> </ul>	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> <li>• Carrying out capital cost and value engineering exercises to determine the impact of sustainability issues on design and construction processes</li> <li>• Carrying out life cycle cost exercises which take account of sustainability issues</li> <li>• Understanding the measures undertaken by governments and international bodies to encourage the reduction of the environmental impact of development.</li> </ul>	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> <li>• Giving reasoned advice to your client and members of the project team on the financial impact of sustainability on a project</li> <li>• Giving reasoned advice on the application of environmental law and policy</li> <li>• Interpreting environmental reports and giving reasoned advice on the financial impact and programme implications on a project</li> <li>• Giving advice on sustainable material selection and how performance baselines can be estimated.</li> </ul>



# COMPETENCY GUIDE

## DUE DILIGENCE

This competency covers the due diligence work and/or fund monitoring on construction projects. It may also cover the duties of quantity surveyors monitoring the financial management of management style contracts. Candidates should have an awareness of the areas of concern for funders and clients within a project and the techniques used in the forensic interrogation and monitoring of those areas. They must have a thorough understanding of the techniques used on their projects.

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

Level 1	Level 2	Level 3
Demonstrate knowledge of the techniques used for cost, quality and time related forensic examination in your area of practice.	Apply your knowledge of cost, quality and time related forensic examination in your area of practice.	Provide evidence of reasoned advice and report to clients on cost, quality and time related forensic examination in your area of practice.
<p>Examples of knowledge comprised within this level are:</p> <ul style="list-style-type: none"><li>• The main areas of risk for a funder/client</li><li>• The process of analysing contract documentation</li><li>• How to interrogate pricing data in relation to development appraisals, cash flows, construction costs and risk allowances</li><li>• Techniques for assessing suitability of programmes</li><li>• Relevant statutory approvals, such as planning and building control</li><li>• How to monitor interim payments and planned progress.</li></ul>	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"><li>• Reviewing development appraisals</li><li>• Reviewing specialist reports and checking statutory and other approvals</li><li>• Analysing the suitability of procurement strategies and contract documentation, including third party rights issues and insurances</li><li>• Interrogating pricing data in relation to development appraisals, cash flows, construction costs and risk allowances</li><li>• Establishing suitability of project programmes, quality control procedures and health and safety arrangements</li><li>• Checking suitability and appointments of project team</li><li>• Analysing project and construction risks</li><li>• Reviewing interim valuations for draw-down</li><li>• Monitoring progress against planned programmes</li><li>• Reviewing final accounts.</li></ul>	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"><li>• Checking compliance with loan agreements and agreements to lease</li><li>• Delivering reports to the funder/client on time, cost and quality matters covered by your monitoring activities</li><li>• Giving advice to the funder/client on suitable action to be taken in respect of issues identified by your monitoring activities.</li></ul>

## Technical Due Diligence of Commercial Property

RICS Guidance Note Technical Due Diligence of Commercial Property.

The Guidance Note took effect from 1 April 2020. It replaced a number of former RICS Guidance Notes, namely Building Surveys and Technical Due Diligence of Commercial Property 4th Edition in the UK.

### What is Technical Due Diligence (TDD)?

Technical Due Diligence is defined by RICS as the ‘systematic review, analysis, discovery and gathering of information about the physical characteristics of a property and/or land’.

TDD includes an inspection and assessment of the property, followed by a report including the surveyor’s professional opinion on condition.

## □ Technical Due Diligence of Commercial Property

- **The aim of TDD.**

The aim of a TDD report is to facilitate the client (e.g. prospective purchaser or occupier) in making an informed decision from a technical perspective.

A TDD report is requested by a client for the following purposes:

1. Optimising the design of new development or refurbishment
2. Understanding the condition and design of a property
3. Establishing suitability for use
4. Understanding future repair liabilities and associated costs
5. Understanding risk
6. Informing price negotiations for an acquisition
7. Improving health & safety standards
8. Improving performance and sustainability metrics

## □ Technical Due Diligence of Commercial Property

### ▪ TDD report Content.

1. A TDD report will consider the short, medium and long-term risks relating to the property.
2. It will also include identification and advice on defects and associated repairs, relating to:
  1. Quality issues in design or construction
  2. Lack of maintenance
  3. Neglect
  4. Misuse
  5. Remaining economic or useful life
  6. Deleterious materials
  7. Non-compliance with statutory requirements, e.g. planning or building control

### ▪ The Guidance Note structure

The Guidance Note is split into key sections; Types of Inspections, Taking Instructions, The Inspection and The Report.

# Competencies

## Fees

**For APC Preliminary route**

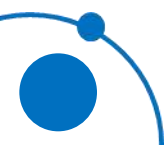
**Enrolment Fee £575**

**+Annual Membership Fee 2023**

**162+VAT+Fee 2024(162)+ 5=**

**£ 742**

# APC Mistakes



## Common RICS Mistakes

### 1. Not understanding the competency descriptors and referring to inappropriate knowledge or experience

- i. It is important to ensure that your competency choice reflects your role, experience and responsibilities.
- ii. Some candidates have chosen 'standard' competencies prepared by company, training course or colleagues which they do not have enough experience to demonstrate levels 2 and 3 (as appropriate).
- iii. You may manage to read about the level **1** knowledge.
- iv. You cannot write for Level 2 without the right experience of work practice (level 2)
- v. It will be almost impossible to provide reasoned client advice/recommendation (level 3)
- vi. Read the RICS APC pathway and competency guides at the beginning and during your RICS APC journey, to ensure that the competencies and levels you select fit your professional role.

### Common RICS APC Mistake

- If your role is changed or you had a new position, I recommend that you move roles or departments, you may want to consider exchange your competencies or levels to be armed with the required knowledge for the proper submission and during your final assessment.
- Study RICS published Documents related to the competency, and read about the specific details of the competencies.
- Some candidates include measurement in the Inspection competency while the both are different.
- Some candidates refer to Residual Land Valuations in the **Development Appraisals competency**, regardless of RICS is confirming that 'development appraisals have another role in residual valuations of development sites, the candidate should consider that they are different activities'. (may lead to referral) if you do not understand the difference between them. Development appraisals (i.e. to assess profitability or viability of a scheme, rather than land value).



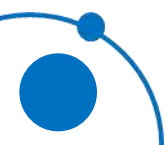
## Common RICS APC Mistake

### 2 Standard of writing

Spelling, punctuation and grammar: The expectation is that there should not be any errors however you should be considerate where the candidate's first language may not be the language they are being assessed in. If the candidate has notified us of a disability that may affect their submission we will provide you with advice. We will always recommend that candidates ask others to read their submissions to check for errors.

Structure: This refers to the order in which they present their experience. Does it demonstrate the candidate's progression? Is it logical? If No, state how the candidate could arrange their evidence more effectively and if possible highlight significant areas the candidate should focus on.

Element	Suitable	Comments
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# APC Mistakes

## Common RICS APC Mistakes

Spelling, punctuation and grammar	N	<p>Whilst accepting that English may not be your first language, your submission is very difficult to read and understand in places.</p> <p>You write with a very 'wordy' style that often comes across as 'text book' quotations. You often provide your theory about a competency, rather than describing your own experience.</p> <p>It would be helpful to understanding if you were to break up your writing with the use of separate paragraphs and use shorter sentences.</p> <p>The panel suggest that you have your document read over and corrected prior to any further submission.</p>
Structure of evidence	N	As above, the structure of your evidence makes it difficult to read and understand.

End of Lecture 2

*Thanks for attentions*

شكرا لكم

السلام عليكم ورحمة الله وبركاته