Associate Assessment

Counsellor Guide

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Introduction

A colleague or member of your team is working towards RICS/SCSI Associate qualification. S/he would like you to act as a counsellor. This guide will help you to understand the qualification and your role as a counsellor.

In addition to reading this guide, we recommend that you read the Candidate Guide and relevant pathway guide.

The qualification

The RICS/SCSI Associate qualification provides an opportunity for those with a suitable academic qualification and relevant work experience to gain recognition of their skills. It is based on written submissions.

Your role

A counsellor who knows the candidate's work – often the line manager, employer or simply a more experienced colleague – is a key part of directing, supporting and encouraging the candidate through the qualification. Ideally, you should be a "critical friend" to the candidate.

You should:

- ensure the candidate understands the assessment requirements
- give constructive feedback on the candidate's submission
- assist/encourage a candidate who is unsuccesful and wishing to resubmit.

You do not have to be an SCSI member, but you will need to understand the competencies. Reading the relevant pathway guide and working with the candidate to complete the competency selection sheet will help.

Items for assessment

Candidates submit:

- a summary of experience relating to their competencies
- a record of structured professional development
- a case study focused on a project, demonstrating the most relevant competencies in greater depth.

These are described in more detail in this guide. Candidates must also pass the online ethics module, consisting of learning material and a test that is completed at the end of the process.

Competencies

For each of the distinct roles covered by RICS/SCSI, there is a "pathway" [such as Residential Property Management, Valuation or Facilities Management]. Competencies have been identified for each pathway. The Associate qualification is achieved by demonstrating, through written submission, that the required competencies have been achieved.

Each pathway requires candidates to achieve six technical competencies, covering the key skills and abilities for the job role concerned. Candidates who hold over 10 years' experience can substitute two of the technical competencies for two supervisory competencies listed below to show the level of management in which they are now working:

• managing resources
• managing people
• accounting principles and procedures
• business planning

There is a pathway guide for each pathway, setting out:

• the technical competencies
• how they are defined in the context of the pathway
• the experience the candidate needs to achieve each competency.

All candidates must also achieve eight mandatory competencies, covering the general business skills all RICS/SCSI members need. They are:

• client care
• communication and negotiation
• conduct rules, ethics and professional practice
• conflict avoidance, management and dispute resolution procedures
• data management
• health and safety
• sustainability
• teamworking.

Definitions of the mandatory competencies are provided in the pathway guide.

Submission

Summary of experience

The summary of experience should demonstrate how the candidate's experience meets the competency requirements:

- the six technical competencies – an individual statement for each one, with a total of 2000 words

- the eight mandatory competencies – an individual statement for each one, with a total of 1000 words.

Please note that the mandatory competence "Conduct rules, ethics and professional practice" does not need to be covered in the summary of experience as this is assessed through the online ethics module and test.

Help the candidate review these statements. Compare them with the competency definitions and examples in the pathway guide. Check they make sense, and do not have any spelling or grammatical errors.

Challenge the candidate to justify what s/he has written and make sure you are satisfied that it gives a true representation of the candidate's work.

- Do the statements demonstrate the whole range and depth of experience required to achieve the competency?

- Do they demonstrate reasonably up-to-date skills, drawing on recent examples?

Confidentiality

Work produced by candidates is confidential and will not be disclosed by RICS/SCSI to any third party without the candidate's permission or used for any purpose other than assessing the candidate's competence.

Candidates may need to ensure, for commercial reasons, that the evidence does not include names of clients, the location of a development, etc. In this case, candidates should include a statement with the evidence, for example: "the names in this document have been changed to preserve confidentiality". You should advise the candidate if you think there are confidentiality issues.

Case study

The case study is an account of a project or piece of work, described in terms of the competencies. It should focus mainly on the two technical competencies most relevant to the candidate's day-to-day work but try to refer to other technical and mandatory competencies as well. The project should be recent, to show up-to-date skills.

The case study should show the following:

- the objective of the project

- the knowledge, skills and experience

- the role played and the contribution made

- technical skills employed

- the overall outcome of the project.

You should help and challenge the candidate to ensure the case study:

- demonstrates understanding of the competencies

- focuses on two technical competencies

- displays some of the general business skills [mandatory competencies]

- is of a standard of writing you would expect in a report prepared for a client

Continuing Professional Development [CPD]

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

CPD can be taken from various sources, including attending conferences, meetings or seminars, completing an academic course or informal reading.

Special attention must be given to the principles underpinning CPD:
- gained in a structured manner
- based on an explicit process of selecting, planning and evaluating the activities
- reflect learning from informal training sources, eg structured reading, secondments

All candidates are required to complete 48 hours of CPD over the 12 months prior to assessment.

Candidates' CPD must be split between formal development, such as professional courses, seminars or online events and informal development such as private study or on the job training. At least 50% of their CPD must be dedicated to formal development.

Candidates must record their CPD in the Associate submission document.

Once candidates have been awarded Associate membership (AssocSCSI AssocRICS) they will continue to undertake and record a minimum of 20 hours of CPD activity each calendar year as part of their commitment to professional development.

Ethics module

Before becoming an Associate, candidates must successfully complete the online ethics module to show their understanding of RICS/SCSI ethical requirements, rules and regulations.

The module consists of learning materials and case studies followed by a multiple choice test.

You can help by discussing ethical questions with the candidate at your regular meetings. You, or the candidate, may have faced ethical dilemmas in real work situations – you can explore these dilemmas and discuss the ideal solutions with the candidate.

Impress on the candidate the importance of understanding professional ethics, as this forms a significant part of the qualification process. Refer to the SCSI Rules of Conduct - these can be downloaded from scsi.ie/regulation/home.

Results

The result of the assessment will either be a pass or a referral.

Pass

Candidates who pass will have to follow the formal election procedures. As an RICS/SCSI member, they will be required to maintain continuing professional development. You should encourage and support this.

Refer

Referred candidates will receive a referral report from the assessors that informs them of what they need to do before they will be ready for reassessment.

The referral report will identify any individual elements of the assessment that were satisfactory. These are "banked" and will be valid for 12 months – if candidates submit for reassessment within 12 months the banked elements will not be reassessed.

You can help by reviewing the report with the candidate to ensure s/he understands the reasons for the referral, and what is now required. You should then decide on an action plan, and help ensure the candidate will be in a position to submit for reassessment within 12 months to ensure any banked evidence remains valid.

Actions to consider include:

- formal training provided by an external organisation
- exposure to other areas of work
- additional peer monitoring, or
- secondment or work placement in other departments, offices or firms.

Thank you for supporting your colleague and RICS/SCSI.

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Society of Chartered Surveyors Ireland
38 Merrion Square,
Dublin 2, Ireland
Tel: + 353 (0)1 644 5500
Email: info@scsi.ie
www.scsi.ie

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