SOCIETY OF CHARTERED SURVEYORS IRELAND

Your APC pathway guide to Facilities Management

RICS®

SOCIETY OF CHARTERED SURVEYORS IRELAND

Your pathway guide to Facilities Management

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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 environmental surveying. The guide is based on Irish market practice and may be unsuitable for candidates based in other countries.

Section one- provides information on this area of practice with a general overview of the environmental surveying pathways.

Section two- lists the competency requirements of the environment APC.

Section three- describes the main technical competencies associated with environmental surveying, 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/technical 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 environmental surveying.

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 *APC 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 judgment. At the final assessment interview, the assessors will take these choices into account. They will expect you to present a sensible and realistic choice that reflects the skills needed to fulfill 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 Facilities Management

Facilities management (FM) is the total management of all services and built environment infrastructure that support the core business of an organisation. Good facilities management makes a huge difference to the efficiency and productivity of a company, its staff and even its clients.

Facilities Management is integral in workspace strategy as well as supporting business continuity and when delivered well can drive employee engagement as well as helping attract and retain the best talent. Using best business practice, a company's operating costs can be reduced while its productivity is increased. It is the discipline that ensures all the different buildings and services of a company work as efficiently as possible. The skills required of FM professionals encompass the whole range of asset and built environment knowledge whilst also embracing often significant change management and mobilisation programmes.

FM professionals are found in all sectors of industry, commerce and services and may be employed by consultants, facilities management providers, client departments, the public sector, etc.

RICS qualification pathways in this sector:

Facilities Management APC

This pathway is suitable for an individual embarking on a career as a professional advisor (in-house or external) in facilities management.

Professional facilities managers assist businesses to plan and execute essential property decisions, from day to day matters to strategy planning (for example, moving the company to bigger or better buildings).

Once established within the premises, businesses must make their buildings and offices as efficient as possible. Facilities managers will look at the best use of space, suitable technology solutions, human resources and safe surroundings. Running a company also means complying with legal responsibilities including health and safety, building regulations, fire regulations, access and security. Facilities managers advise on these and a wide range of other essential services including catering, cleaning, security as well as building fabric and M&E maintenance.

The scope for facilities managers is extremely varied and services are likely to include:

- Business operations
- Business re-location
- Business support
- Business continuity
- Change management
- Health and safety compliance
- Outsourcing
- Performance measurement
- Procurement
- Property management
- Strategic planning and advice
- Utilities and services

Chartered Alternate Designations related to this pathway

All candidates qualifying under the Facilities Management APC pathway will be entitled to use the designation 'Chartered Commercial Property Surveyor'.

Pathway Requirements

Pathway requirements Facilities Management APC

Mandatory	
Level 3	• Ethics, rules of conduct & professionalism
Level 2	• Client Care • Communication and negotiation • Health and safety
Level 3	• Accounting principles and procedures • Business planning • Conflict avoidance, management and dispute resolution procedures • Data management • Diversity, inclusion and teamworking • Inclusive environments • Sustainability

Core	
Two to Level 3 and two to Level 2	• Asset management • Business alignment • Client care (must be taken to Level 3) • Legal/regulatory compliance • Maintenance management • Performance management • Procurement and tendering • Project finance • Supplier management • Workspace strategy

Optional	
Two to Level 3 and one to Level 2, including any not already chosen from the core list	• Big data • BIM management • Business case • Change management • Commercial management • Conflict avoidance, management and dispute resolution procedures or Data management or Health and safety (must be taken to Level 3) or Inclusive environments or Sustainability • Construction technology and environmental services • Consultancy services • Contract administration • Contract practice • Design and specification • Environmental management • Landlord and tenant • Managing projects • Measurement • Risk management • Smart cities and intelligent buildings • Stakeholder management • Strategic real estate consultancy • Waste management • Works progress and quality management

Plus, one to Level 2 from the full list of technical competencies, including any not already chosen from the optional list.

Competency Guidance

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

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 environmental surveying.

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 *APC Requirements and competencies guide*

Asset management

Description of competency in context of this sector

This covers the principles of property, infrastructure and/or intangible asset identification and management to optimise, extend or terminate an asset's life. It includes the application of processes and activities across identification, assessment, planning, strategy, data management and implementation and how assets support wider business, social, economic or environmental objectives.

Examples of likely knowledge, skills and experience at each level

Level 1

Demonstrate knowledge and understanding of the aims, objectives, strategies and processes for identifying and managing assets.

Examples of knowledge comprised within this level are:

- What constitutes the assets and how they are separately identified
- Relevant case law and law relating to the legal protection of assets
- Ascertaining the precise nature of the asset from examination of the related articles of association, including agreements, contracts and instruments
- The benefits and objectives of asset management
- The distinction between planned maintenance, repair and replacement
- How to compile a systematic record of individual assets
- How to develop strategies for maintaining the aggregate body of assets
- How to implement and manage information systems.

Level 2

Apply your knowledge and understanding of asset ownership and the activities necessary including systematic record keeping, developing strategies of planned maintenance, repair and replacement and managing information systems.

Examples of activities and knowledge comprised within this level are:

- Knowledge of the process of identifying assets within a transaction
- Collation and interpretation of information relevant to the asset or business activity
- Analysis and interpretation of comparable evidence
- An understanding of the implications for the nature and character of the assets being valued from different forms of ownership
- The ability to provide reasonable estimates of the likely life span and sustainability of assets
- Demonstrate a clear understanding of differing results within a transaction when considered for different purposes, such as apportionment for fiscal purposes or inclusion in a purchase price allocation for financial reporting
- Preparing an asset management strategy or plan
- Establishing and managing an asset management information system
- Designing and maintaining asset management records.

Level 3

Provide evidence of reasoned advice on complex asset identification issues, including the nature of assets and liability.

Examples of activities and knowledge comprised within this level are:

- Detailed knowledge of how assets are separately identified and how this can vary within a transaction depending on the purpose of the apportionment valuation for financial reporting, litigation or fiscal purposes, including transfer pricing
- Ownership and how different forms of ownership such as legal, beneficial, economic or licensed ownership interact with the valuation
- Providing advice on complex asset identification issues that assist in defining the nature of the asset, liability or business to be valued
- Providing clients with advice on the nature of different types of intellectual property and how it is distinguished from other intangible assets
- Providing detailed advice on the nature of restricted securities under national taxation law
- Providing professional advice on the options available for asset management systems in the context of a corporate or project setting

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Asset management

Continued

Examples of likely knowledge, skills and experience at each level

Level 3(continued)

- Providing professional advice on the barriers and risks involved in both implementing and not implementing asset management in a corporate or project setting
- Providing professional advice on relevant standards, procedures, protocols and data-sets for asset management, including an evaluation of the various options and costs.

Big data

Description of competency in context of this sector

This competency involves the identification of complex problems as applied to the built and natural environment and the leveraging of data value. Candidates will be part of multidisciplinary project teams, including planners, city engineers, surveyors, data architects, data engineers, and analysts, working with big data. The work is likely to include liaison with policy and operations teams to understand how big data can be leveraged and combined to add value. It requires a knowledge of the technical challenges posed by big data, and the specialised IT architectures and techniques employed for the storage, retrieval and manipulation of big data structures.

Examples of likely knowledge, skills and experience at each level

Level 1

Demonstrate knowledge and understanding of the principles of big data processing, the range of available sources of big data, data dynamics and a critical appreciation of the latest big data research issues.

Examples of activities and knowledge comprised within this level are:

- The different phases of software lifecycle
- The value of analysis and which data sources, analytical techniques and tools can be used
- How algorithms are designed, optimised and applied at scale
- What data is important to ensure business performance
- The importance of presentation and applicability of any data that is captured through dashboards or client portals
- The possible benefits of Machine learning and Artificial Intelligence and how this can be supported through data
- The various Computer Aided packages that are available in the marketplace
- The principles of a technical security architecture and how these can be used to reduce information risk

continued next page >

Level 2

Demonstrate an understanding of the techniques and the tools required for the maintenance of data quality, data hygiene and the statistical modelling, analysis and visual data interrogation of big data sets.

Examples of activities and knowledge comprised within this level are:

- Ability to source, access, manipulate and engineer data processes with data that typically have characteristics of volume, velocity and variety
- Can select and use appropriate statistical methods for sampling, distribution assessment, bias and error
- Different data engineering tools for repeatable data processing and can compare between different data models
- Build credible statistical models from the data and use best coding practices to generate reproducible work
- Problem structuring methods and evaluating when each method is appropriate
- Draw on relevant technical and analytical standards from across government and industry

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Level 3

Provide evidence of design and implementation of big data analysis using algorithms to handle data sets in a scientific computing environment for the analysis of big data.

Examples of activities and knowledge comprised within this level are:

- Be able to explore and visualise the data to present the 'story' of the data in a meaningful way to a range of technical and non-technical audiences
- Advise on how big data can be used to support strategic and operational decision making to create impact and add value from its use
- Advise on the selection, design, justification, implementation and operation of controls and management strategies to maintain the security, confidentiality, integrity, availability, accountability and relevant compliance of information systems with legislation, regulation and relevant standards
- Driving business change through the application of big data analytics
- Advise on the future of big data.

Big data

Continued

Examples of likely knowledge, skills and experience at each level

Level 1 (continued)

- The principles of Information Security Governance and the purpose of Information Security strategies
- Legislative and regulatory instruments relevant to Information Security, relevant to own area of practice and location
- Beyond RICS/SCSI's ethical standards, candidates should understand and adhere to the applicable data science ethics framework.

Level 2 (continued)

- Expose data from systems (for example, through APIs), link data from multiple systems and deliver streaming services
- Work with other technologists and analysts to integrate and separate data feeds to map, produce, transform and test scalable data products that meet client needs
- Apply scientific methods through experimental design, exploratory data analysis and hypothesis testing to reach robust conclusions
- The ability to data mine and discover trends or sequences that can inform and direct business direction.

Building information modelling (BIM) management

Description of competency in context of this sector

This competency encompasses the establishment and management of the information modelling systems on projects. It covers collaborative process and technological principles involved in implementing Building Information Modelling (BIM).

Examples of likely knowledge, skills and experience at each level

Level 1

Demonstrate knowledge and understanding of the technical, process and collaborative aspects of the use of BIM.

Examples of knowledge comprised within this level are:

- BIM strategies and implementation
- The various technical options and solutions for using information modelling in operations
- The collaborative processes necessary for BIM adoption
- Digital surveying techniques such as laser scanning
- Standard classification systems and their use in operational phases of buildings
- Standards such as PAS 1192 -2 and PAS 1192 -3 or local equivalence
- Relevant information exchange processes such as Construction Operations Building Information Exchange (COBie).

Level 2

Develop and apply management systems to facilitate the use of BIM on projects, including unified control and reporting procedures.

Examples of activities and knowledge comprised within this level are:

- Design and implementation of a BIM management process
- Utilise BIM data to provide options for lifecycle, maintenance and energy management strategies in use, define the data required within the BIM model to ensure optimum FM data
- Define and implement surveying programmes to ensure effective data capture
- Maintenance and upkeep of an information model in operational use
- Agree and implement contractual aspects of BIM such as separate protocol
- Facilitate and manage project team members for BIM implementation.

Level 3

Show how the knowledge and experience gained in this competency has been applied to advising clients and/or senior management on BIM strategy.

Examples of activities and knowledge comprised within this level are:

- Analysing, assessing, evaluating and reporting on options for BIM in operation strategies at a corporate or project level
- Designing and advising on collaborative strategies for the successful implementation of BIM on operational projects
- Advising on the contractual and commercial implications of using BIM on operational projects
- Advising on options for software and protocols on BIM
- Advising on technical information systems requirements for BIM at corporate or project level.

Business alignment

Description of competency in context of this sector

This competency is about the core drivers and objectives of a business and how it is imperative that FM is fully aligned to ensure maximum impact on value and business performance.

Examples of likely knowledge, skills and experience at each level

Level 1

Demonstrate knowledge and understanding of how the business's core drivers impact on the operation and Facilities management of property provision and vice versa.

Examples of knowledge comprised within this level are:

- Global economic and market conditions
- The changing nature of business
- Core business drivers
- Clear view of what is meant by a business's vision and mission
- Organisational structures, values and objectives
- Business performance
- Strategic use of real estate
- Decentralised vs centralised
- Organisational objectives.

Level 2

Provide evidence of the practical application that allow a closer working relationship between business functions and Facilities Management team.

Examples of activities and knowledge comprised within this level are:

- Demonstrate linkages with other business functions such as Human Resources and IT operations
- Clear understanding of measuring and monitoring business performance in a sustainable and balanced way
- Demonstrate working knowledge of core business and how FM impacts on it
- Benefits of business alignment
- Collating relevant data
- Using your knowledge of real estate to find strategic solutions to meet clients' requirements.

Level 3

Provide evidence of reasoned advice of developing appropriate strategies to develop and align real estate portfolio and workplace strategies with those.

Examples of activities and knowledge comprised within this level are:

- Demonstrate FM contribution within business planning process
- Demonstrate clear implications of FM strategy on operational performance
- Demonstrate FM contingency plans to maintain operational performance
- Strategic advice and recommendations to clients
- Presenting data to support recommendations
- Presentations to clients
- Providing solutions to achieve corporate objectives.

Business case

Description of competency in context of this sector

This competency is about the development and execution of a business case. It sets out the rationale for undertaking a project, investment or other course of action by setting out the benefits, costs and impacts of a proposal, along with a financial evaluation. Within Facilities Management the business case should ensure a whole life approach which details not just the capital expenditure required but also fully detailed costs in use data which will drive long term sustainable solutions where required.

Examples of likely knowledge, skills and experience at each level

Level 1

Demonstrate knowledge and understanding of business cases and their application in corporate real estate.

Examples of knowledge comprised within this level are:

- Financial analysis and metrics required to support a business case
- The elements and structure of a business case
- The people impact of the proposal both from a cost and organisational perspective
- The long-term impact of the investment
- Organisational structures
- Methods for collecting business case data
- Purpose of the business case
- Approval process, stakeholders and audience
- Clear articulation of the benefits of the proposal.

Level 2

Provide evidence of the practical application of the business case.

Examples of activities and knowledge comprised within this level are:

- Preparing a business case
- Engaging with stakeholders
- Application of business case data collection
- Utilisation of credible benchmarking and whole life data predictions where appropriate
- Understanding the financial impact of a real estate business case.

Level 3

Provide evidence of advising on the preparation and presentation of business cases for a variety of purposes.

Examples of activities and knowledge comprised within this level are:

- Identify impact on key business indicators of FM strategic proposals
- Offer alternative FM strategic options based on key business indicators
- Presenting a business case to stakeholders with a clear recommendation
- Providing reasoned advice and justification on business case findings
- Adapting business case to client specific requirements
- Receiving feedback and revising
- Obtaining approval.

Change management

Description of competency in context of this sector

This competency is about the development and execution of change programmes in relation to the use of real estate by an organisation. It involves the identification of requirements for change, development of a strategy and implementation of the project. Knowledge of the technical issues relating to the property being occupied, the delivery of its management and new processes and technologies associated with this area of work will be expected. However, candidates will also be expected to display an understanding of the importance of developing relationships with property users and decision makers. Candidates attempting to achieve this competency may use evidence from work carried out either on a consultancy basis or from working in house for an occupier.

Examples of likely knowledge, skills and experience at each level

Level 1

Demonstrate knowledge and understanding of change management and its application in real estate.

Examples of knowledge comprised within this level are:

- The drivers for change and how a requirement for change may be identified
- The process by which the appropriate outcome for change may be decided upon
- How a change plan can be developed
- The concepts, approaches, models, tools and techniques available to support work in this area
- The analysis techniques for appraising the options for change
- The common reasons why change projects fail and the implications of these failures.

Level 2

Provide evidence of practical involvement within change management projects.

Examples of activities and knowledge comprised within this level are:

- Identifying requirements for change
- Developing a strategy for change within an organisation
- Carrying out optional appraisals in respect of change strategies
- Undertaking a change impact assessment
- Producing communications and stakeholder engagement plans
- Undertaking stakeholder analysis and identifying appropriate interventions
- Project managing the implementation of a change programme
- Assessing and addressing risks presented by change
- Evaluating the success of an organisational change project.

Level 3

Provide evidence of advising on the development and implementation of strategies for change.

Examples of activities and knowledge comprised within this level are:

- Communicating the costs and benefits of a change project
- Offering alternative strategic options based on an organisation's requirements
- Presenting a proposed strategy to stakeholders with a clear recommendation
- Obtaining approval for implementation of a proposal
- Managing stakeholders to ensure resolution of issues
- Receiving feedback and revising the strategy for change.

Client care

Description of competency in context of this sector

This competency covers how a surveyor meets a client's brief in respect of a specific appointment and how they deal with a client from a business and professional perspective. The term 'client' as it is used in this competency means not only the contractual party who has appointed the surveyor, but also all of the stakeholders in a project with whom the surveyor has to engage. This competency is closely linked to Ethics, Rules of Conduct and professionalism, which defines professional behaviour and sets out some mechanisms for protecting clients.

Examples of likely knowledge, skills and experience at each level

Level 1

Demonstrate knowledge and understanding of the principles and practice of client care including:

The concept of identifying all clients/colleagues/third parties who are your clients and the behaviour that is appropriate to establish good client relationships

The systems and procedures that are appropriate for managing the process of client care, including complaints

The requirement to collect data, analyse and define the needs of clients.

Examples of knowledge comprised within this level are:

- The information contained within a client's brief
- Defining your scope of services within the limits of your competence and PI insurance
- How fees are established
- The use of standard forms of appointment
- Mechanisms contained within an appointment document
- Insurance requirements (legal and RICS/SCSI)
- How stakeholders are identified and how their status within the project is established

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Level 2

Provide evidence of practical application of the principles and practice of client care in your area of practice.

Examples of activities and knowledge comprised within this level are:

- Establishing a client's objectives
- Confirming a client's brief
- Establishing a scope of services
- Calculating fees for professional services
- Compiling an appointment document
- Establishing project stakeholders and their status
- Setting up communication systems with a client and stakeholders
- Issuing reports to a client, e.g. cost reports
- Dealing with a complaint
- Measurement of KPIs

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Level 3

Provide evidence of reasoned advice given to clients and others.

Examples of activities and knowledge comprised within this level are:

- Developing tailored proposals linked to business strategies
- Presenting a prioritised and informed brief to enable decision-making
- Value management with stakeholders to ensure delivery against client expectations
- Advising on the need for statutory and other consents and approvals
- Presenting alternative proposals including option appraisals
- Presenting outline schedules of work
- Agreeing the level of fees with a client
- Issuing an appointment document

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Client care

Continued

Examples of likely knowledge, skills and experience at each level

Level 1 (continued)

- Formal communication systems with clients and stakeholders
- Complaints handling procedures
- Key Performance Indicators (KPIs)
- The methods of data gathering during the inception stage of a project including client briefings and site based information
- The law applicable to your area of practice, in particular those relating to employment law, statutory compliance, consents and approvals
- The principles of the preparation of alternative outline proposals including the methodology of preparing option appraisals
- The principles of preparing outline schedules of work.

Level 3 (continued)

- Analysing the data gathered through the client briefing process and formulating a detailed client brief
- Consulting with the statutory authorities on the consents and other approvals required
- Preparing alternative outline design proposals, including option appraisals
- Preparing option appraisals
- Preparing outline schedules of work
- Assessing client relationships, team performance and stakeholder interfaces on international projects.

Level 3 (continued)

- Ensuring insurances are in place
- Setting performance levels and KPIs
- Monitoring compliance with the scope of services
- Reporting to clients and stakeholders
- Using KPIs to improve performance.

Commercial management

Description of competency in context of this sector

This competency covers commercial management of facilities management projects, including how commercial competitiveness balances against profitability. Candidates 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

Demonstrate knowledge and understanding of the principles of the management of the commercial aspects of a Facilities management project.

Examples of knowledge comprised within this level are:

- Identifying and understanding the components that make up the cost of the project and services being delivered
- The impact of various performance mechanisms and payment mechanisms on the profitability of a project
- The impact of KPIs, Service Level Agreements and any availability requirements associated with the project
- The effect that the design and construction processes have on the cost of constructing and operating a project
- The techniques used to reconcile the cost against income
- The techniques to financially manage sub-contractors and suppliers
- The use of cashflows
- The principles of running costs and costs in use
- People costs and the impact of minimum wage, pension and any TUPE liabilities.

Level 2

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

Examples of activities and knowledge comprised within this level are:

- Collecting data of monthly reports for both internal and client use
- Carrying out benchmarking or market testing activities
- Preparing cashflows
- Preparing reports such as liability statements, cost to complete and cost value reconciliations
- Applying value engineering processes to the delivery of the services
- Preparing and submitting cost data for in-house and/or external use in relation to areas such as running costs, whole life costs, capital and taxation allowances.

Level 3

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

Examples of activities and knowledge comprised within this level are:

- Monitoring, analysing, reporting and advising at a senior level on project cashflows and profitability for internal use
- Evaluating and advising on financial implications and appropriate management actions
- Advising clients on budget allowances.

Conflict avoidance, management and dispute resolution procedures

Description of competency in context of this sector

This covers the recognition, avoidance, management and resolution of disputes, involving an awareness of different dispute resolution processes and an understanding of the application of dispute resolution procedures appropriate to the area and jurisdiction of professional practice.

Examples of likely knowledge, skills and experience at each level

Level 1

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 pathway.

Examples of knowledge comprised within this level are:

- A basic knowledge and understanding of some of the following, as most appropriate to your market sector/areas of specialism:
- Common causes of disputes
- The contribution of some of the following to dispute avoidance:
  - Risk management (its basic principles and techniques)
  - Early warning systems
  - Partnering techniques
  - Clear and robust client briefings
- Theories of negotiation and the role of effective communication and negotiation
- The primary features, advantages and disadvantages of a range of dispute resolution procedures and their surrounding statutory and/or non-statutory legal/ judicial context (e.g. how forms of contract deal with dispute resolution, and the scope of such clauses):

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Level 2

Provide evidence of practical application in your area of practice having regard to the relevant law.

Examples of activities and knowledge comprised within this level are:

- Adopting – or encouraging the adoption of (as appropriate) – suitable dispute avoidance techniques
- Negotiating actively on behalf of clients (e.g. performance failure, unavailability, contract variations, contract interpretations and payment) prior to third-party referral
- Assisting in the collation or preparation of claims/counter-claims and submissions
- Assisting in the identification, gathering and collation of facts and expert evidence for use in expert reports
- Sufficient understanding of the main points of the statutory or non-statutory law relevant to/underpinning any particular dispute resolution process and its application.

Level 3

Provide evidence of the application of the above in the context of advising clients in the various circumstances referred to above.

Examples of activities and knowledge comprised within this level are:

- Advising clients of the most suitable means of dispute avoidance on their projects, and of dispute resolution procedures appropriate to their individual circumstances, demonstrating appreciation of when to seek further specialist advice and when to advise clients within the scope of the insurance cover of the candidate's organisation
- Involvement in, or assistance with, a referral to a third-party resolution process and associated management of that process on behalf of clients.

NB: Please note that the roles of acting as a third-party dispute resolver – or expert witness, are – for the vast majority of candidates – not likely to be an activity that is undertaken. It is only a small minority of candidates with substantive work experience for whom this is likely to be relevant.

Conflict avoidance, management and dispute resolution procedures

Continued

Examples of likely knowledge, skills and experience at each level

Level 1 (continued)

  - Mediation (could include contracted and project mediation) and conciliation
  - Adjudication
  - Independent expert determination
  - Arbitration
  - Litigation
- The possible roles of a surveyor as an expert witness and/ or an advocate, to include an awareness of the existence and scope of applicability of RICS/SCSI guidance for expert witnesses and advocates
- The range of nominating bodies and services available to resolve disputes, and particularly the role of the RICS/SCSI Dispute Resolution Service and any specialised dispute resolution schemes it offers relevant to your market sector
- The RICS Global Professional Statement on Conflict of Interest and any appropriate national RICS guidance.

Construction technology and environmental services

Description of competency in context of this sector

This competency covers the design, construction and operation 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

Demonstrate knowledge and understanding of the principles of design and construction relating to your chosen field of practice.

Examples of knowledge comprised within this level are:

- The stages of design from inception to completion
- Impact of current legislation and regulations
- How the various elements of the building work and inter-relate
- The process of constructing the works
- Operational and maintenance processes post contract.

Level 2

Apply your knowledge to the design and construction processes.

Examples of activities and knowledge comprised within this level are:

- Appreciating how design solutions vary for different types of building such as clear span requirements for warehousing or acoustic requirements for accommodation
- Understanding alternative construction details in relation to functional elements of the design such as the operational effect on the building.

Level 3

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, construction and operational solutions.

Examples of activities and knowledge comprised within this level are:

- Advising on the choice of construction solution on your project Reporting on the impact of different design solutions and construction processes on operational cost, sustainability, functional effectiveness and stakeholder satisfaction.

Consultancy services

Description of competency in context of this sector

This competency is about the provision of consultancy services to a range of different clients across the whole life cycle of the built environment.

Examples of likely knowledge, skills and experience at each level

Level 1

Demonstrate knowledge and understanding of the procurement and execution of advisory and strategic consultancy services in the context of the real estate and construction sectors.

Examples of knowledge comprised within this level are:

- Different forms of procurement for consultancy services
- The range of different consultancy interventions and approaches
- The consultancy cycle
- The types of problems, risks and issues that may arise during each phase of the consultancy cycle
- The importance of agreeing a clear contract with clients
- The need for the planning, timing and managing of consultancy interventions
- Managing the use of resources
- Managing client expectations
- Forms of reporting
- How to manage ethical dilemmas
- The principal tools and techniques relevant to consultancy services
- Importance of confidentiality when dealing with sensitive information.

Level 2

Apply your knowledge of the provision of consultancy services in the context of the real estate and construction sectors.

Examples of activities and knowledge comprised within this level are:

- Preparing consultancy service plans
- Preparing client briefs
- Updating reports to clients
- Negotiating client contracts
- Dealing with ethical dilemmas
- Selecting appropriate tools and techniques for a given consultancy service
- Using selected tools and techniques to achieve agreed outcomes
- Keeping appropriate records.

Level 3

Give reasoned advice, prepare and present consultancy reports, together with relevant analysis to clients, in the context of the real estate and construction sectors.

Examples of activities and knowledge comprised within this level are:

- Providing reports containing strategic advice and recommendations to a range of clients
- Presenting to clients
- Implementing consultancy intervention

Contract administration

Description of competency in context of this sector

This competency covers the role of a surveyor administering a facilities management or construction contract, including the roles and responsibilities of the administrator under the main forms of contract. They should have a detailed understanding of the contractual provisions relating to the forms of contract that they have administered.

Examples of likely knowledge, skills and experience at each level

Level 1

Demonstrate knowledge and understanding of the contractual, legislative and statutory terminology/requirements of facilities or construction contracts.

Examples of knowledge comprised within this level are:

- The various standard forms of contract and sub-contract used in the industry
- The use of bespoke contracts and how they fit into a wider legal framework. Basic contractual mechanisms and procedures applied at various stages of the contract
- The roles and responsibilities of all parties.

Level 2

Implement administrative procedures necessary for the smooth running of a facilities or construction contract.

Examples of activities and knowledge comprised within this level are:

- Issuing instructions
- Dealing with payment provisions
- Managing the impact of change
- Being involved with dispute avoidance
- Dealing with completion and possession issues
- Managing performance mechanisms
- Developing collaborative relationships.

Level 3

Advise on the administrative procedures necessary for the smooth running of a facilities or construction contract including document control techniques and systems, meetings and reporting procedures.

Examples of activities and knowledge comprised within this level are:

- Resolving disputes
- Developing partnership strategies
- Advising all parties of their contractual rights and obligations.

Contract practice

Description of competency in context of this sector

This competency covers the various forms of contract used in the facilities and construction industry, including the main standard forms of contract and a thorough understanding of contract law, legislation and the specific forms that candidates have used.

Examples of likely knowledge, skills and experience at each level

Level 1

Demonstrate knowledge and understanding of the various forms of contract used in the construction industry and/or your area of business.

Examples of knowledge comprised within this level are:

- Basic contract law and legislation
- Contract documentation
- The various standard forms of contract and sub-contract
- When the different forms would be used
- Basic contractual mechanisms and procedures at various stages of the contract
- Third-party rights including relevant legislation and the use of collateral warranties.

Level 2

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.

Examples of activities and knowledge comprised within this level are:

- Producing contract documentation
- 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
- 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.

Level 3

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.

Examples of activities and knowledge comprised within this level are:

- Selecting the appropriate form of contract and/or sub-contract for your chosen procurement route
- Advising on the most appropriate contractual procedure at the various stages of a contract
- Evaluating the appropriateness and implications of proposed contractual amendments.

Data Management

Description of competency in context of this sector

This competency covers how data relating to individual projects and a surveyor's work generally is collected, stored and retrieved. In addition to having knowledge of the different storage systems and data sources and how they work, a candidate should also understand the principles behind the systems and what makes them effective. Candidates should also have knowledge of how general information and data is managed on a project and the increasing use of computerised central project databases.

Examples of likely knowledge, skills and experience at each level

Level 1

Demonstrate knowledge and understanding of the sources of information, law and data management methods, and the systems applicable to your area of practice, including the methodologies and techniques most appropriate to collect, collate and store data.

Examples of knowledge comprised within this level are:

- The use of published sources of data
- How data is collected, analysed and stored within your employer's organisation
- How project information is stored within your employer's organisation
- How electronic database systems work
- The use of computerised central project databases or Building Information Modelling, the benefits, challenges and dangers
- How technical libraries are set up and used
- Legislation applicable to data management and data access.

Level 2

Provide evidence of practical application in your area of practice and understand the relevance of information gathered and the uses to which it can be applied. Analyse the information and data collected.

Examples of activities and knowledge comprised within this level are:

- Obtaining data from published sources for use on a project
- Obtaining data from in-house sources
- Extracting data for inclusion in a database
- Setting up and using paper based or electronic project filling systems
- Using a computerised central project database
- Inputting and extracting data from BIM
- Retrieving information from a technical library
- Setting up a technical library.

Level 3

Provide evidence of reasoned advice given to clients and others on the use and practical application of the information collected and systems used, and/or specify the most appropriate way for your own and/or client organisation to collect, analyse and apply relevant information and data.

Examples of activities and knowledge comprised within this level are:

- Advising on data storage system
- Advising on business filling systems
- Benchmarking from analysed historic data
- Advising on the use of a computerised central project database
- Complying with client's data security requirements

Design and specification

Description of competency in context of this sector

This competency involves the skills needed in the design and specification of a Facilities Management Solution or construction project. Facilities Management Surveyors are often asked to design and deliver FM solutions that support the core business of either an internal or external client, the services can be both Hard (i.e. M&E or building fabric maintenance) and Soft (i.e. cleaning, catering) FM surveyors may also be involved in refurbishment of property, and in many cases, new build projects for which they may ultimately take operational responsibility. Knowledge of the stages of design and specification for building, from inception to completion, is an essential skill as is a full understanding of the skills required to deliver a complex FM solution that supports a clients' key business drivers.

Examples of likely knowledge, skills and experience at each level

Level 1

Demonstrate knowledge and understanding of the design process and the scope and content of related documentation.

Examples of knowledge comprised within this level are:

Building

- The various stages of the design process
- The use of BIM to optimise design decisions
- The application of the relevant regulations in the design process
- The effect of the planning regime and technical standards on the design process
- The structural implications of alterations to the load bearing components of building fabric and any operational impact of changes within the design

Facilities

- The ability to interpret the requirements of a client's brief and gain a full understanding of their business drivers
- The general issues surrounding sustainability
- The options relating to bundled or unbundled services.

Level 2

Prepare designs and specifications, including at outline and detail levels.

Examples of activities and knowledge comprised within this level are:

Building

- Preparing of sketch designs to demonstrate compliance with a client's brief, while satisfying statutory requirements
- Developing of initial proposals to a detailed stage and obtaining statutory consents
- Completing of Design Risk
- Assessments, of the proposed design, to satisfy the requirements of the regulations, in connection with the future maintenance of the building

Facilities

- Providing of advice to clients regarding sustainability issues surrounding the proposals for their building
- Providing advice to clients on space utilisation, energy, asset management, whole life costings, benchmarking, cleaning regimes
- Providing advice to clients on compliance issues and statutory maintenance regimes and options.

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:

Building

- Carrying out or assisting in the preparation of the design and specification of a building project from outline proposals to completion of the design and specification process
- Value management to ensure delivery of solutions that matches life cycle expectations of stakeholders
- Demonstrate knowledge and application of the specification process, including detailed knowledge of the main methods of specification
- Demonstrate knowledge and application of the design and specification process, and its relevance and importance to the procurement and execution of the contract selected for the building works

continued next page >

Design and specification

Continued

Examples of likely knowledge, skills and experience at each level

Level 3 (continued)

Facilities

- Demonstrate preparing a full FM solution design from the initial client's brief through to a working deliverable solution that satisfies the client's aspirations
- Demonstrate examples of reconfiguring FM services to drive a better value solution that increases client benefit
- Demonstrate knowledge and application of BIM and how influencing design decisions during the construction period have driven cost effective operational strategies
- Providing estate utilisation strategy to match client accommodation requirements.

Environmental management

Description of competency in context of this sector

This competency deals with both the broad knowledge and application of environmental management practice, as well as the more specific knowledge and application of formal environmental management standards for land, property and the natural environment.

Examples of likely knowledge, skills and experience at each level

Level 1

Demonstrate knowledge and understanding of appropriate environmental management concepts, processes and systems.

Examples of knowledge comprised within this level are:

- Where environmental management applies in chartered surveyor practice
- The standards used in environmental management including EMS and ISO 14001 or National equivalent
- Application of sustainability principles in environmental management
- The regulatory and practical aspects of the restoration, remediation and reinstatement of land.

Level 2

Apply your understanding of appropriate environmental management and environmental land management concepts, processes and systems.

Examples of activities and knowledge comprised within this level are:

- Carrying out environmental management and reporting, including data management systems
- The scope and methods to be used for environmental management
- The specialisms and specialists required to conduct environmental management
- Carrying out monitoring and compliance with planning, legal or environment control of an environmental site
- Interpreting legislation and regulations to achieve compliance
- Ecosystem and carbon balance evaluation and biodiversity off setting and mitigation
- Application of renewable and energy recovery to environmental management
- Application of restoration, remediation and reinstatement of land.

Level 3

Give reasoned advice on appropriate environmental management and environmental land management concepts, processes and systems.

Examples of activities and knowledge comprised within this level are:

- Advising clients on the needs of environmental management Presenting and proposing actions following the findings of environmental management
- Negotiating and liaising with clients and regulators on the findings and actions arising from environmental management
- How environmental projects comply with principles of sustainability
- Authoring reports on habitat management schemes
- Integrating land management plans or National Equivalent
- Developing monitoring systems.

Health and safety

Description of competency in context of this sector

This competency covers the relationship between the work of the building 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

Demonstrate knowledge and understanding of the principles and responsibilities imposed by law, codes of practice and other regulations appropriate to your area of practice.

Examples of knowledge comprised within this level are:

- Personal safety on site and in the office
- Procedures imposed by law
- The impact on health and safety of:
  - Design
  - Construction processes
  - Building maintenance
  - Employment of staff
  - Compliance requirements
  - Safe systems of work
  - Undertaking risk assessments
- Fire safety standards and/or regulations.

Level 2

Apply evidence of practical application of health and safety issues and the requirements for compliance, in your area of practice.

Examples of activities and knowledge comprised within this level are:

- Obtaining formal health and safety qualifications including first aid, industry specific or nationally recognised qualifications
- Being involved with specific roles and responsibilities within the various regulations
- The importance of behavioural safety and implementing the systems for health and safety management and monitoring
- Assessing project plans for fire safety compliance.

Level 3

Provide evidence of reasoned advice given to clients and others on all aspects on health and safety.

Examples of activities and knowledge comprised within this level are:

- Giving reasoned advice on and/or taking responsibility for health and safety issues relating to:
  - Impact of design on operations
  - Current legislation
  - Embedding a positive health and safety culture
  - Design and implement.

Inclusive environments

Description of competency in context of this sector

This competency is about the principles and processes that deliver accessible and inclusive environments, recognising the diversity of user needs and the requirement to put people (of all ages and abilities) at the heart of the process.

An inclusive environment recognises and accommodates differences in the way people use the built and natural environment. It facilitates dignified, equal and intuitive use by everyone. It does not physically or socially separate, discriminate or isolate. It readily accommodates and welcomes diverse user needs.

These principles and processes apply to all buildings, places, and spaces, and to equipment, in and around new property or in the adaptation of existing property, as well as to services provided to the public. Particular regard should be given to buildings, places and spaces that are open to the public; sports and entertainment venues; schools, colleges and educational establishments; hospitals and health facilities; and residential care facilities; as well as commercial and employment buildings.

Examples of likely knowledge, skills and experience at each level

Level 1

Demonstrate an understanding of the principles and processes that deliver accessible and inclusive environments, recognising the diversity of user needs and the requirement to put people (of all ages and abilities) at the heart of the process. In doing so, have regard to the legal, economic, sustainable and social case for making inclusion the norm not the exception.

Examples of knowledge comprised within this level are:

- Knowledge of best practice technical standards relevant to country of practice
- Recognition of the diversity of user needs
- Local planning policy, building regulation and health and safety requirements as applied to inclusive environments
- Appreciate and distinguish between ethical issues as opposed to legal requirements.

Level 2

Provide evidence of practical application of the principles and processes that deliver accessible and inclusive environments.

Examples of activities and knowledge comprised within this level are:

- Practical applications as applied to different types of building and their associated uses
- Practical applications as applied to different types of outside areas and their associated uses
- A recognition of both real and perceived sensitive situations in the design or use of inclusive environments
- Ability to recognise the need for and use appropriate language in the discussion and resolution of inclusivity challenges.

Level 3

Provide evidence of reasoned advice given to clients and others of the principles and processes that deliver accessible and inclusive environments.

Examples of activities and knowledge comprised within this level are:

- The scoping and briefing of design work or new buildings, or in relation to remodelled buildings and external spaces
- The design and specification of a building, landscape/public realm project from outline proposals to completion of the design and specification process
- The drafting of clauses in leases or user agreements as to how places and spaces might be accessed or used.

Landlord & tenant

Description of competency in context of this sector

This competency is about the management of the landlord and tenant relationship. It has a broad scope covering all aspects of lease negotiations arising between landlord and tenant. The candidate will be expected to understand the issues and how they affect both parties.

Examples of likely knowledge, skills and experience at each level

Level 1

Demonstrate knowledge and understanding of the law and practice relating to landlord and tenant.

Examples of knowledge comprised within this level are:

- The principles of property law
- The statutory and common law framework applying to the landlord and tenant relationship
- The content, form, and structure of leases
- Relevant market conditions and property values.

Level 2

Apply the principles of the law and practice relating to landlord and tenant. Carry out relevant negotiations to provide solutions to issues affecting both owners and occupiers of real estate.

Examples of activities and knowledge comprised within this level are:

- Reading and interpreting leases Preparing reports containing recommendations prior to the commencement of negotiations
- Giving appropriate valuation advice
- Carrying out market research, collating and analysing comparable evidence
- Preparing, serving and responding to legal notices
- Entering into negotiations
- Reaching an agreed solution and reporting recommendations to clients Instructing legal advisers and seeing matters to conclusion.

Level 3

Provide evidence of reasoned advice, prepare and present reports on the law and practice relating to landlord and tenant. Apply your knowledge to assist in undertaking relevant dispute resolution procedures.

Examples of activities and knowledge comprised within this level are:

- Providing strategic advice upon landlord and tenant matters, relating to individual properties or blocks of properties
- Providing advice as to alternative dispute resolution options in the event of breakdown of negotiations and taking any necessary action to protect the client's position
- Demonstrating involvement with third-party determination and associated submissions.

Legal/regulatory compliance

Description of competency in context of this sector

Legal and regulatory compliance is an essential element in the Facilities management. The facilities management team is often responsible for ensuring full compliance with all the provisions of relevant legislation and associated regulations associated with the operation of the asset.

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 building compliance and the risks associated with poorly maintained or operated assets or equipment
- 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, appeals and representations
- Understanding the impact of wider regulatory compliance around Ethics, Safety, Procurement, Modern Slavery, Information and Data Security
- 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 project
- Giving clients reasoned advice on representations on consultation matters, in written reports, in liaison with solicitors.

Maintenance management

Description of competency in context of this sector

Deliver maintenance services to a plan based on organisational need, either using an in-house work force, or maintenance contractors.

Examples of likely knowledge, skills and experience at each level

Level 1

Demonstrate knowledge and understanding of the maintenance requirements of buildings, structures and other real estate.

Examples of knowledge comprised within this level are:

- Statutory and regulatory compliance requirements
- Maintaining record systems
- Management reporting
- Developing and implementing maintenance plans, e.g. planned, reactive, statutory
- Supply chain management Confirming satisfactory completion of work
- The potential interfaces between various computerised systems used for facilities management purposes Integrating maintenance activity with the occupant's operational needs
- Concepts of lifecycle.

Level 2

Determine and implement operational maintenance policies.

Examples of activities and knowledge comprised within this level are:

- Implementing maintenance policy through establishing maintenance plans – to ensure agreed availability at a minimum resource cost
- Understanding cost/benefit of various maintenance regimes
- Trend analysis and recommendations for continuous improvement
- Creation and implementation of lifecycle plans
- Forward maintenance planning
- Develop and implement systems that will measure the performance of the maintenance organisation.

Level 3

Provide evidence of reasoned advice to clients on optimised maintenance operations.

Examples of activities and knowledge comprised within this level are:

- Providing advice and recommendations on issues relating to the management of maintenance policy
- Determine maintenance policy, strategy and objectives linked to organisational objectives and whole life considerations
- Determine and implement the type of maintenance regime and organisation that is required, including CAFM /BIM requirements
- Interpret results from performance measurement of the maintenance organisation and provide reasoned advice and recommendations.

Managing projects

Description of competency in context of this sector

This competency is about the stages a project goes through during its life-cycle and the role of the project manager in that process. This includes its inception, briefing, financial feasibility, quality controls, completion timescales and subsequent programming. It also includes the contractual and legislative/statutory requirements, stakeholder management, management reporting and auditing, and the assessment of the performance of a project and its individual stakeholders.

Examples of likely knowledge, skills and experience at each level

Level 1

Demonstrate knowledge and understanding of all the stages of a project life-cycle including the feasibility study process, the tools and techniques associated with project controls, and the essential requirements of a project audit/closeout report.

Examples of knowledge comprised within this level are:

- The role of a project manager
- Project team structures and procedures such as PIDs, PEPs and PMPs
- How and why tasks are carried out at a particular stage and when it's appropriate to deviate from the norm
- The principles of contractual, legislative and statutory requirements of projects (including town planning legislation and building regulations), document control, the requirements and information management systems, administrative processes, and management reporting requirements associated with a project
- The client's requirements and the development/project brief including the business case drivers for the development
- The techniques for the effective control of time and cost during the life-cycle of a project including the reasons for any design, cost and programme variations
- Project risks and contingency planning
- The management of change.

Level 2

Apply the principles of the project life-cycle process including the implementation of management procedures necessary for the smooth running of a project life-cycle/whole life costing and risk assessment.

Examples of activities and knowledge comprised within this level are:

- Preparing a project execution plan and/or other similar management tools
- Implementing a development appraisal or feasibility study for a project
- Managing document control, information management systems and management reporting systems
- Using value management/value engineering techniques to advise on and improve the viability of the development
- Carrying out a life-cycle/whole life costing exercise including analysing reasons for, and implementation of, any design, cost and programme variations
- Reporting on project processes and procedures, performance and lessons learnt
- Analysing the actual performance of the project and the team and identifying potential improvements.

Level 3

Provide evidence of reasoned advice to the client on the detailed procedures associated with the project life-cycle, including strategies and procedures to analyse, predict and control time and cost on projects.

Examples of activities and knowledge comprised within this level are:

- Designing and advising on a project execution plan and/or other similar management tools
- Providing reasoned and interpretive advice on development appraisals, feasibility studies and business plans
- Advising on the contractual, legislative and statutory requirements for a project
- Advising on and designing document control and information management systems and management reporting systems
- Assessing and advising upon the chosen procurement route, project team structures and procedures
- Interpreting the results of a life cycle/whole life costing exercise and give advice on how these results can be used to improve a development's viability
- Assessing potential design changes to improve the development viability
- Assessing and advising upon the performance of the project team
- Preparing audit reports and advising the client including identifying lessons learnt and recommending appropriate responses.

Measurement

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. Within Facilities Management measurement is important for benchmarking and operational cost considerations when comparing delivery across various portfolios or properties.

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
- The basis on which measurements should be undertaken, i.e. the core definitions of measurement and their application
- The appropriate standards and guidance relating to measurement with particular reference to the RICS/SCSI Property measurement
- 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:

- 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 SCSI Geomatics pathway guide.

Performance management

Description of competency in context of this sector

This competency is about a broad range of performance management approaches and methodologies in Facilities Management. Performance management will be focussed on delivering, improving and enhancing the service provided. Performance management will encompass cost, responsiveness, compliance, quality and end user satisfaction as a minimum.

Examples of likely knowledge, skills and experience at each level

Level 1

Demonstrate knowledge and understanding of performance management approaches and methodologies.

Examples of knowledge comprised within this level are:

- The different types of FM data
- Requirement for any performance metrics to be SMART and focused on improvement.
- The different types of data collection techniques
- The strengths and weaknesses of data collection techniques
- The various techniques for measuring performance
- The benefit and usage of intelligent Management Information
- How data can drive greater workplace satisfaction as well as efficiency.

Level 2

Apply your knowledge and understanding of performance management within a business context.

Examples of activities and knowledge comprised within this level are:

- Collection of benchmarking data
- Collection of occupier satisfaction data
- Development and use of KPIs
- Preparing data/information
- Using selected methodologies and techniques such as balanced scorecard to achieve agreed outcomes
- Methods to improve performance management
- Development of engaging and intuitive ways to present and review data to add value
- Ensure feedback from the end users.

Level 3

Provide evidence of reasoned advice on the organisational requirements of performance management and show evidence of performance metric tracking across FM services and capabilities.

Examples of activities and knowledge comprised within this level are:

- Interpreting benchmark data leading to clear action plan
- Interpreting occupier satisfaction data leading to clear action plan
- Interpreting key KPIs leading to clear action plan
- Providing feedback on performance
- Implementing a performance management plan
- Continuous performance improvement
- Continuous development of capturing and streamlining management information to drive improvement.

Procurement and tendering

Description of competency in context of this sector

This competency relates to services and goods. It covers the selection of service providers – pre-qualification, tender lists, selection criteria; contract selection – alternative forms of contract; and pricing documentation. In this context a contract might cover single service providers or multiservice management and implementation.

Examples of likely knowledge, skills and experience at each level

Level 1

Demonstrate knowledge and understanding of the main types of procurement. Demonstrate knowledge and understanding of the tendering and negotiation processes involved in procurement.

Examples of knowledge comprised within this level are:

- A practical knowledge of the following areas:
  - Pre-qualification procedures
  - Selection criteria
  - Tender lists
  - Specifications
  - Service level agreements
  - Pricing documentation
  - Tender negotiation
  - Performance indicators
  - Service delivery models
  - Contract law.

Level 2

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.

Examples of activities and knowledge comprised within this level are:

- Implementing pre-qualification procedures using selection criteria to draw up tender lists
- Devising tender documentation including statements of scope of service and pricing schedule
- Participating in pricing and/or vetting of tenders
- Balancing risk and reward.

Level 3

Give reasoned advice on the appropriateness of various procurement routes. Manage the tendering and negotiation process and present reports on the outcome.

Examples of activities and knowledge comprised within this level are:

- Providing reasoned advice and recommendations to clients on alternative procurement routes and tendering procedures
- Taking a lead role in the award of contracts and providing reasoned advice on the decisions reached.

Project finance

Description of competency in context of this sector

This competency covers the effective cost control of property/construction projects and/or facilities management contracts whilst in progress, including the principles of controlling and reporting costs on any project. They should have a detailed understanding of the control and reporting processes used on their projects.

Examples of likely knowledge, skills and experience at each level

Level 1

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.

Examples of knowledge comprised within this level are:

- The effective control of costs while a property/construction project is in progress
- The legal and contractual constraints on the cost of a project such as changes in property or building legislation and design risk allocation
- The reporting and forecasting of costs
- The principles of contingencies/ risk allowances.

Level 2

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.

Examples of activities and knowledge comprised within this level are:

- Managing project costs
- Reporting and forecasting costs for different procurement routes and client types
- Using cashflows in financial management
- Managing client budget/ contingencies/risk allowances.

Level 3

Provide evidence of reasoned advice on strategies and procedures to control predicted expenditure in line with a budget.

Examples of activities and knowledge comprised within this level are:

- Implementing change control procedures within the contract
- Establishing reporting regimes/ protocols
- Using risk management and analysis techniques
- Advising on capital and operational expenditure.

Risk management

Description of competency in context of this sector

This competency covers the effective cost control of property/construction projects and/or facilities management contracts whilst in progress, including the principles of controlling and reporting costs on any project. Candidates should have a detailed understanding of the control and reporting processes used on their projects.

Examples of likely knowledge, skills and experience at each level

Level 1

Demonstrate your knowledge and understanding of the nature of risk and in particular, the risks associated with your area of business/ practice.

Examples of knowledge comprised within this level are:

- The concepts of risk
- The tools and techniques commonly used to evaluate and manage risk
- The use of risk registers and the models used to quantify risk.

Level 2

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.

Examples of activities and knowledge comprised within this level are:

- Applying the various methods and techniques to measure risk
- Participating in risk workshops
- Preparing reports resulting from risk workshops.

Level 3

Provide evidence of reasoned advice and implement systems to manage risk by competent management in relation to specific projects.

Examples of activities and knowledge comprised within this level are:

- Facilitating risk workshops including preparation prior to the workshop
- Evaluating the qualitative and quantitative output from risk workshops
- Ongoing monitoring of risk issues through the project lifecycle.

Smart cities and intelligent buildings

Description of competency in context of this sector

This competency involves the integrated and disparate IT systems and spatial data science. The role will include the solution of complex problems through the leveraging of data and technology as applied to the individual building level or the wider neighbourhood or city level.

Candidates will be part of multidisciplinary project teams, including planners, city engineers, surveyors, data architects, data engineers, and analysts, working with smart city and building technology. The work is likely to include liaison with policy and operations teams to develop and understand how smart city and intelligent buildings might benefit the stakeholders involved.

It requires knowledge and understanding of component elements of an IT service, including hardware, software, applications, sensors and networks and their integration into complete services to satisfy an operational requirement.

Examples of likely knowledge, skills and experience at each level

Level 1

Demonstrate knowledge of the types of data that can be collected through building, personal and infrastructure sensors and how sensor data can be processed to support the management and visualisation in the built environment.

Examples of knowledge comprised within this level are:

- The different phases of software development lifecycle
- Understand the role that technology can play in the operation and monitoring of buildings in use
- How technology can enhance the experience for end users
- Look at how complimentary technologies can be combined to produce rich management information that can drive decision making
- The risks and opportunities associated with the gathering, storing and utilisation of building data

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Level 2

Apply your knowledge to the collection, storage and management of spatial sensor data, demonstrating the achievement of data quality, data hygiene and data security.

Examples of activities and knowledge comprised within this level are:

- Develop, codes, tests, corrects and documents simple programmes or scripts under the direction of others as part of a multi-disciplinary team
- Build and test simple interfaces between systems, or can work on more complex integration as part of a wider team
- Collaborate with others to review specifications where appropriate
- Assist with the design, development and implementation of Business Continuity, Crisis Management and/or Disaster Recovery Plans under supervision
- Recognise and articulate the impact to city efficiency based on effective use of open data sources

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Level 3

Provide evidence of the ability to use and generate application scenarios that capture and store sensor data in structures that allows the analysis of the data by conventional and visual representation.

Examples of activities and knowledge comprised within this level are:

- Able to recognise risks and non-compliance and makes recommendations for change or investigation by information security specialists
- Advise clients on the design, development and implementation of Business Continuity, Crisis Management and/or Disaster Recovery Plans
- Develop and/or document application scenarios combining multiple API sources to allow for the analysis of spatial, building and the city data to solve inefficiencies or creating value-added services
- Develop business cases supported by the data to drive organisational change and improve business outcomes.

Smart cities and intelligent buildings

Continued

Examples of likely knowledge, skills and experience at each level

Level 1 (continued)

- IT infrastructure and services and the impact of legacy services to protect the integrity of the operational environment
- Demonstrate understanding of the principles of the Internet of Things (IoT) and the appreciation of the impact and relevance to smart cities
- Can describe the principles of a technical security architecture and how these can be used to reduce information risk
- Beyond RICS and SCSI's ethical standards, candidates should understand and adhere to the applicable data science ethics framework.

Level 2 (continued)

- Apply the knowledge gained from the data collected to increase utilisation, improve efficiency and drive productivity within the buildings and end users.

Stakeholder management

Description of competency in context of this sector

This competency deals with the techniques associated with managing stakeholders on large, complex projects. Candidates should demonstrate an effective understanding and application of the various ways to identify, analyse and engage with the relevant project stakeholders.

Examples of likely knowledge, skills and experience at each level

Level 1

Demonstrate knowledge and understanding of the principles and techniques associated with engaging and communicating with all relevant project stakeholders, including an understanding of decision-making in pluralistic clients.

Examples of knowledge comprised within this level are:

- The challenges, opportunities and benefits of stakeholder management
- The key aspects of the individual, team and the project regarding stakeholder management
- The process of stakeholder management and tools such as the Iceberg Model.

Level 2

Apply the knowledge to ensure that all parties are aligned with the project objectives using identification, analysis, matrix and engagement techniques.

Examples of activities and knowledge comprised within this level are:

- Preparing a stakeholder management strategy report covering planning and resourcing
- Applying the techniques to discover, understand, plan, engage and assess value to undertake the management of stakeholder
- Preparing a structure chart and a RACI (Responsible, Accountable, Consulting and Informed) table to clarify roles and responsibilities.

Level 3

Provide evidence of reasoned advice and implement systems to manage risk by competent management in relation to specific projects.

Examples of activities and knowledge comprised within this level are:

- Advising on the options for stakeholder management, bearing in mind the size, complexity and objectives of the project
- Advising on the benefits, value and costs of stakeholder management
- Advising on different methodologies for stakeholder management bearing in mind the maturity of the client and geographic spread of the project.

Strategic real estate consultancy

Description of competency in context of this sector

This competency is about the provision of strategic consultancy advice to clients on real estate issues influencing the business.

Examples of likely knowledge, skills and experience at each level

Level 1

Demonstrate knowledge and understanding of the business context of real estate, and an appreciation of the role of the real estate professional as a strategic adviser.

Examples of knowledge comprised within this level are:

- Organisational structures, values and objectives
- Business performance
- The role and importance of real estate in organisational/business performance
- The role of real estate in business strategies
- Strategic uses of real estate
- Methods for appraising options for real estate strategy
- The role of the real estate professional as a strategic business adviser
- Styles of consultancy intervention.

Level 2

Apply your knowledge and understanding of the business context of real estate in a corporate or another context.

Examples of activities and knowledge comprised within this level are:

- Researching organisational background
- Preparing relevant data
- Analysing data
- Undertaking option appraisals for real estate strategies
- Using different styles of consultancy intervention for different client needs
- Using your knowledge of real estate to find strategic solutions to meet client requirements.

Level 3

Provide evidence of reasoned oral and written advice on the principles and application of real estate knowledge.

Examples of activities and knowledge comprised within this level are:

- Strategic advice and recommendations to clients
- Presentations to clients
- Presenting data to support recommendations.

Supplier management

Description of competency in context of this sector

This competency relates to managing the supply chain and the providers of those services.

Examples of likely knowledge, skills and experience at each level

Level 1

Demonstrate knowledge and understanding of how to manage suppliers using a logical process to ensure that scope and value of the service received meets organisational requirements.

Examples of knowledge comprised within this level are:

- A practical knowledge of the following areas:
  - Contracts
  - Service level agreements
  - Key performance indicators
  - Performance monitoring
  - Benchmarking.

Level 2

Apply your knowledge and understanding by using an existing process to manage suppliers to ensure that the scope and value of the service received meets organisational requirements.

Examples of activities and knowledge comprised within this level are:

- Involvement in a range of the activities listed above at Level 1 through:
  - Performance review meetings
  - Auditing of suppliers
  - Budgeting
  - Ordering variations to the service
  - Payment of suppliers
  - Developing collaborative relationships.

Level 3

Provide evidence of appropriate approach to the management of an individual supplier or group of suppliers based on the scale of the service and the risk of service failure.

Examples of activities and knowledge comprised within this level are:

- Using user/customer feedback to provide effective supplier management, ensuring that performance matches the needs of the organisation
- Developing partnership relationships to deliver joint objectives with the supply chain
- Developing learning and innovation within the supply chain.

Sustainability

Description of competency in context of this sector

This competency covers the impact of sustainability issues. Candidates should have a thorough understanding of the impact made by sustainability on their area of responsibility and have been involved with the financial management of that 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 facilities management
- The relationship between property and the environment
- How national and international legislation, regulations and taxation relating to sustainability affect construction
- Criteria by which sustainability is measured in relation to operational buildings
- The principles of how design, technology, construction and operational processes can contribute to sustainable building
- The principles of material resource efficiency within the supply chain.

Level 2

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

Examples of activities and knowledge comprised within this level are:

- Carrying out capital cost and value engineering exercises to determine the impact of sustainability issues on design and construction processes
- Carrying out whole life analysis exercises which take account of sustainability issues
- Corporate responsibility
- 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 stakeholders on the impact of sustainability
- 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 material selection and how performance baselines can be estimated.

Waste management

Description of competency in context of this sector

This competency deals with the practical aspects of waste management including the regulatory framework, compliance issues, an appreciation of economic viability, technical design, planning and Pollution Prevention & Control (PPC) permitting, estates and project management.

Examples of likely knowledge, skills and experience at each level

Level 1

Demonstrate a broad appreciation of practical aspects of waste management and regulatory regime. Undertake inspections of waste management facilities.

Examples of knowledge comprised within this level are:

- An understanding of current and emerging legislation including Landfill Directive, Waste Strategy, Groundwater Protection Act, Landfill Tax and similar legislation
- The various waste management technologies dealing with collection, recycling, treatment and disposal together with trends in the industry
- Estates and planning management functions
- Inspection of facilities to assess property issues including ownership boundaries, rights of way, easements, discharge consents, regulatory compliance.

Level 2

Demonstrate an appreciation of the economic and technical viability and/or management application of the practical requirements and monitoring of waste facilities.

Examples of activities and knowledge comprised within this level are:

- Advising on legal agreements, royalties, rents, rating and compliance issues
- Carrying out evaluation of facilities to assess economic and technical viability
- Knowledge of landfill engineering and design, gas utilisation, environmental control systems and aftercare measures or similar aspects relating to another waste treatment technology
- Carrying out environmental monitoring of a waste management facility.

Level 3

Design, advise on, and/or manage waste management schemes, their implementation and/or property interests therein.

Examples of activities and knowledge comprised within this level are:

- Carrying out detailed valuations/ financial appraisals and preparing reports to clients in support of development opportunities
- Designing and/or project managing planning and/or PPC permit application or waste treatment/disposal tenders
- Managing property interests including purchase and sale of waste assets
- Identifying and evaluating related business opportunities including new technologies.

Works progress and quality management

Description of competency in context of this sector

This competency involves the supervision of a Facilities Management contract or programme as well as the disciplines required to oversee project works on site. It is essential that candidates selecting this competency demonstrate a detailed knowledge of construction technology techniques and an in-depth knowledge of the requirements of FM delivery. Quality of workmanship through the construction phase and service delivery during operation are vital to ensure the long term functional ability of buildings, and candidates will be expected to demonstrate detailed knowledge of project quality requirements both in the construction and operational phase.

Examples of likely knowledge, skills and experience at each level

Level 1

Inspect and record progress and quality of building works. Monitor and report on service delivery throughout the lifetime of the FM contract.

Examples of knowledge comprised within this level are:

- The ability to carry out a project review, and the importance of recording progress of works, and the quality of delivery
- The requirements of recording progress, and comparing to programmed works progress
- The requirement for quality descriptors as set out in the contract documentation
- The difference between an input and output specifications and how these are being monitored
- The relevant standards that govern each of the service lines that are being delivered
- The Key performance indicators (KPIs) and Service Level Agreements (SLAs) relating to service delivery
- The monthly reporting obligations
- Innovative techniques and developments within service delivery disciplines.

Level 2

Report and advise upon the adequacy of progress and quality of building works. Report on advice on options relating to service delivery and building functionality.

Examples of activities and knowledge comprised within this level are:

- Carrying out inspections of works being completed on site, and preparing the necessary reports showing progress and quality issues that have arisen
- Preparing reports and advice for clients detailing the effects of additional instructions, amendments to specifications, and the likely effect on progress
- Recording for in house and external purposes reports on quality of works on site, including any works rejected, and the reasons for doing so
- Preparing business cases and options for clients that will enhance utilisation or staff wellbeing
- Preparing options relating to whole life cost and energy issues
- Advising on benchmarking options to test and challenge current and future services delivery
- Constantly challenging the service delivery model to drive improvement for your client.

Level 3

Manage and co-ordinate progress and quality of building works or Facilities Management delivery as a contract administrator/ supervising officer/ FM or equivalent.

Examples of activities and knowledge comprised within this level are:

- Preparing cost reports or monitoring maintenance/capital and operating budgets for clients, on works progress, showing any deviation from expected progress or expenditure
- Implementing systems for recording progress and quality issues, and preparing reports for external circulation
- Showing an understanding of the differences between the duties of the various parties within either a building or FM contract, and those of a person appointed solely to report on progress and quality issues
- Incorporating into your duties the requirements for progress and quality reporting
- Preparing alternative quality options for clients which may drive cost savings without any detrimental effect on business delivery.

Workspace strategy

Description of competency in context of this sector

This competency explores the critical alignment of workspace with business strategy and operations to improve productivity.

Examples of likely knowledge, skills and experience at each level

Level 1

Demonstrate knowledge and understanding of how workspace strategy is integral to business.

Examples of knowledge comprised within this level are:

- The role of the work environment to organisational performance
- The role of different types of work environment
- The activities undertaken in the work environment
- How the efficiency of the work environment is measured
- Different types of workplace strategies
- How workplace strategy can impact a business.

Level 2

Provide evidence of the practical application utilising workspace strategy to enhance and improve business performance.

Examples of activities and knowledge comprised within this level are:

- Evaluate performance of the work environment based on cost
- Evaluate performance of the work environment based on utilisation studies
- Evaluate performance of workplace based on occupant feedback
- Identifying impacts of implementing a workplace strategy
- Understanding KPIs to determine a successful implementation.

Level 3

Provide evidence of reasoned advice relating to workspace strategies to enable the improvement of business performance.

Examples of activities and knowledge comprised within this level are:

- Demonstrate alignment of the work environment to business processes
- Demonstrate alignment of the work environment to occupier needs and preferences
- Demonstrate how the work environment alignment impacts on business performance
- Identifying the change management element of implementing a strategy
- Preparing and presenting a change of strategy to a client
- Identifying the impact a work environment strategy will have on a business and how this will be measured

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