

Your APC pathway guide to Rural Surveying



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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 rural surveying. The guide is based on Irish market practice and may be unsuitable for candidates based in other countries. The material is set out in three sections.

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

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

Section three- describes the main technical competencies associated with rural 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 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 rural 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 *Requirements and Competencies guide*.

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

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

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

Choosing your competencies

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

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

How to find help

SCSI Education and Membership will be able to help you with any general APC queries:
T 01 6445500
F 01 6611797
education@scsi.ie
www.scsi.ie

About rural surveying

The countryside is ever evolving and professional advice on how emerging regulations and practices affect a client's business plans has never been more valuable. Rural surveyors enable the rural economy and environment to thrive and flourish in a variety of ways by virtue of their experience and expertise across a very broad and diverse range of activities. The work of a rural surveyor draws on a wide range of professional and technical skills and knowledge in key areas including agriculture, management of the natural environment and landscape, property management and valuation.

Specifically rural surveyors may find themselves working across a number of different but complimentary areas for example: rural estate management, agriculture, planning, valuation, auctioneering, and asset management to mention but a few. Being a rural surveyor means understanding how the countryside works and the interrelationships that exist in terms of the people who live and work there.

The role of the rural surveyor is increasingly involved not only in professional and technical aspects, but also in business, resources management, consultancy and as leaders in the rural community.

The role of the rural surveyor is changing. One of the most marked developments is the increasing level of specialisation that is occurring.

Rural APC

The rural pathway is ideal for anyone who has a particular interest in contributing to the maintenance and enhancement of a healthy rural environment and the functioning of a vibrant rural economy. The rural pathway places emphasis on competency in agriculture (which is required to a minimum of level 2 in this pathway). However, as with other pathways, a broad base of experience in general rural practice is also required. The rural pathway is quite individual and does not have the same level of crossover as others pathways

experience. There is a crossover with the valuation pathway however, and candidates undertaking the rural pathway may gain their experience in a valuation context.

Chartered alternative designations related to this pathway

All candidates qualifying under the rural APC pathway will be entitled to use the designation 'Chartered Rural Surveyor'.

Pathway Requirements

Pathway requirements Rural Surveying APC

Mandatory competencies

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

Core competencies

One competency to Level 3 from the list below.

- Agriculture (T002)
- Management of the natural environment and landscape (T055)
- Property management (T070)
- Valuation (T083)

Optional competencies

Three competencies to Level 3 and two competencies to Level 2 from the list below (including any core competencies not already used*).

- Access and rights over land (T001)
- Auctioneering (T004)
- Capital taxation (T009)
- Compulsory purchase and compensation (T011)
- Development appraisals (T023)
- Forestry and woodland management (T034)
- Investment management (including fund and portfolio management) (T046)
- Landlord and tenant (including rent reviews and lease renewals) (T048)
- Land use and diversification (T049)
- Planning (T061)
- Property finance and funding (T069)
- Purchase and sale (T073)
- Strategic real estate consultancy (T079)
- Accounting principles and procedures (M001)
or Conflict avoidance, management and dispute resolution procedures (M006) or Sustainability (M009)

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

Notes

*If agriculture has not been selected as the one core, it must be taken as one of the optional competencies to either Level 3 or Level 2.

Competency guidance

The pages that follow are intended to provide guidance for users on the main competencies associated with rural 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 rural 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 *Requirements and Competencies guide*.

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Access and rights over land

Reference no. T001

Description of competency in context of this sector

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

Examples of likely knowledge, skills and experience at each level

Level 1

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

Examples of knowledge comprised within this level are:

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

Level 2

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

Examples of activities and knowledge comprised within this level are:

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

Level 3

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

Examples of activities and knowledge comprised within this level are:

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

Accounting principles and procedures

Reference no. M001

Description of competency in context of this sector

This competency covers the basic principles of accounting and the interpretation of company accounts in order that reasoned advice can be given to clients.

Examples of likely knowledge, skills and experience at each level

Level 1

Demonstrate knowledge and understanding of accounting concepts and the format and preparation of management and company accounts, including profit and loss statements, cash flow statements and balance sheets.

Examples of knowledge comprised within this level are:

- An awareness of the Generally Accepted Accounting Principles (GAAP) relevant to the candidate's geographical area of experience and how property is treated in an entity's accounts
- An awareness of International Accounting Standards (IAS), broadly how IAS vary from National GAAP and how property is treated in an entity's accounts prepared under IAS
- An understanding of an entity's financial results and basic accounting principles including balance sheets, profit and loss and cash flow statements
- An understanding of the role of the auditor.

Level 2

Provide evidence of interpretation of company accounts and balance sheets in your area of practice and application of appropriate accounting and regulatory standards.

Examples of activities and knowledge comprised within this level are:

- The application of knowledge obtained to achieve Level 1 above and specific knowledge of the accounting standards that relate to property
- Considering financial statements to establish, for example, the financial strength of an entity
- Reviewing and understanding analysts' reports on financial statements, eg Dun & Bradstreet
- Considering and understanding common financial measures such as return on capital employed, NAV, net assets per share, gearing ratio, EBIT, EBITDA and PE ratio.

Level 3

Provide evidence of reasoned advice given to clients with regard to profit and loss statements and balance sheets.

Examples of activities and knowledge comprised within this level are:

- Providing clients, in an appropriately supervised manner, with reasoned advice relating to the financial standing of a company eg for agency activities such as leasing, buying and selling or to assess suitability for a commercial relationship
- Preparing, or assisting in the preparation of, service charge accounts
- Preparing, or assisting in the preparation of, management accounts for a property
- Preparing, or assisting in the preparation of, an entity's accounts ie balance sheet, profit and loss and cash flow statements
- Providing other professional advice related to the interpretation and/or preparation of accounts.

Agriculture

Reference no. T002

Description of competency in context of this sector

This competency is about farming systems and the management of agricultural land.

Examples of likely knowledge, skills and experience at each level

Level 1

Demonstrate knowledge and understanding of the principles, characteristics and organisation of agriculture according to different geographical, soil and climatic conditions.

Examples of knowledge comprised within this level are:

- Basic crop and animal husbandry
- Timings of relevant operations
- Legislation that affects agriculture and the bodies that are responsible for delivery and enforcement
- Current economic state of agriculture
- Farm support systems

Level 2

Demonstrate application of the principles and systems of practical farming methods. This includes the requirements and characteristics of yields; current market prices of agricultural produce and livestock; costs of production; and the utilization and cost of farm buildings.

Examples of activities and knowledge comprised within this level are:

- Arable – advising on crop rotations, cultivations, crop husbandry and marketing of product
- Livestock – advising on livestock enterprises, animal husbandry and welfare including record keeping and marketing
- Generic – dealing with relevant regulations that affect all aspects of agriculture
- Preparing detailed farm finance plans and budgets.

Level 3

Provide evidence of reasoned advice given to stakeholders on the management and practical application of appropriate methods and requirements of farming.

Examples of activities and knowledge comprised within this level are:

- Providing professional farm management advice in both written and oral form.

Auctioneering

Reference no. T004

Description of competency in context of this sector

This competency reflects the complex factors governing auctioneering. It includes aspects of law of sale and contract, misdescription etc, as well as requiring the candidate to have knowledge of the auction process and the reasons for recommending sale by auction (or otherwise) over and above other methods of disposal.

Examples of likely knowledge, skills and experience at each level

Level 1

Demonstrate knowledge and understanding of the basic principles and legal obligations of auction.

This should include preparation for, and procedures prior to or during, an auction.

Examples of knowledge comprised within this level are:

- The principles of the law governing auction and its implications
- An understanding of the process of how an auction works, including an understanding of the information required prior to auction and the process on the day.

Level 2

Provide evidence of the practical application of your knowledge to the preparation for the sale of property at auction and procedures prior to or during an auction.

Examples of activities and knowledge comprised within this level are:

- Compiling information relating to property to be sold at auction
- Assisting in the process of drawing up auction catalogues
- Dealing with queries and issues raised prior to the auction in consultation with others
- Dealing with issues arising post auction in consultation with others.

Level 3

Provide evidence of reasoned advice based on a thorough working knowledge and experience of the auction process, including experience of selling at auction.

Examples of activities and knowledge comprised within this level are:

- Advising clients on the suitability of sale by auction
- Attending an auction and selling lots
- Dealing with a sale by auction from start to completion.

Capital taxation

Reference no. T009

Description of competency in context of this sector

This competency includes valuations and negotiations for inheritance tax – capital gains tax – which may also include advising on stamp duty, capital allowances and advising on litigation. It involves measurement of and analysis of comparables and application of evidence to resolve negotiations. It also includes application of statute and case law.

Examples of likely knowledge, skills and experience at each level

Level 1

Demonstrate knowledge and understanding of the relevant provisions for capital taxation of real estate, equipment and/or other property.

Examples of knowledge comprised within this level are:

- Principles of measurement (including Code of measuring practice)
- Application of statute and case law
- Analysis of evidence and relevance of the law of landlord and tenant
- Valuation methods applicable to different types of property.

Level 2

Undertake valuations and negotiations for a variety of different property types using different valuation methods for the purposes of capital taxation.

Examples of activities and knowledge comprised within this level are:

- Undertaking measurement and inspection
- Undertaking valuation of a range of property types
- Using different methods of valuation: using comparables, the investment method, profits and discounted cash flow techniques where appropriate
- Negotiating valuations and settlement of cases.

Level 3

Provide evidence of reasoned advice to stakeholders (to include senior management within your organisation, clients and courts/tribunal members) in respect of specific cases and/or other capital taxation issues.

Examples of activities and knowledge comprised within this level are:

- Advising on settlement or litigation of cases
- Advising on the costs of options and actions
- Advising on the impact of such actions across the wider arena.



Compulsory purchase and compensation

Reference no. T011

Description of competency in context of this sector

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

Examples of likely knowledge, skills and experience at each level

Level 1

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

Examples of knowledge comprised within this level are:

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

Level 2

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

Examples of activities and knowledge comprised within this level are:

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

Level 3

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

Examples of activities and knowledge comprised within this level are:

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

Conflict avoidance, management and dispute resolution procedures

Reference no. M006

Description of competency in context of this sector

This competency covers knowledge, understanding and application of a range of processes related to dispute/conflict avoidance, management and dispute resolution.

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 APC 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 nonstatutory legal/judicial context (eg how forms of contract deal with dispute resolution, and the scope of such clauses):

- Mediation (could include contracted and project mediation) and conciliation
- Early Neutral Evaluation (ENE)
- Dispute Resolution Boards (DRBs)
- Dispute Resolution Advisers (DRAs)
- Adjudication
- Independent expert determination
- Arbitration; med-arb
- 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 the RICS/SCSI Practice Statements and Guidance Notes 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 specialized dispute resolution schemes it offers relevant to your market sector.

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Conflict avoidance, management and dispute resolution procedures

Continued

Reference no. M006

Examples of likely knowledge, skills and experience at each level

Level 2

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

Examples of 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 PI cover of the candidate's organisation
- Adopting – or encouragement of the adoption of (as appropriate) – suitable dispute avoidance techniques
- Negotiating actively on behalf of clients (eg negotiations of a dilapidations claim, a party wall award or final account on a construction project) 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 knowledge comprised within this level are:

- Involvement in, or assistance with, a referral to a 3rd party resolution process and associated management of that process on behalf of client
- **NB:** Please note that the roles of acting as a 3rd party dispute resolver, expert witness, or advocate, are – for the vast majority of APC 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.

Development appraisals

Reference no. T023

Description of competency in context of this sector

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

Examples of likely knowledge, skills and experience at each level

Level 1

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

Examples of knowledge comprised within this level are:

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

Level 2

Identify, select, assemble and analyse data relevant to carrying out development appraisals. Undertake appraisals using relevant techniques and methodology and identify possible sources of development funding.

Examples of activities and knowledge comprised within this level are:

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

Level 3

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

Examples of activities and knowledge comprised within this level are:

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

Forestry and woodland management

Reference no. T034

Description of competency in context of this sector

This competency covers silvicultural and environmental management of woodland. It includes the management of plantations from planting to felling, with all associated relevant operations for effective maintenance.

Examples of likely knowledge, skills and experience at each level

Level 1

Demonstrate the ability to describe the silvicultural requirements, and the tree identification and silvicultural characteristics, of the main commercial and amenity species. Demonstrate knowledge and understanding of current grant regimes.

Examples of knowledge comprised within this level are:

- The main commercial and amenity tree species
- The silvicultural requirements of those species
- Knowledge and understanding of current legislation and grant regimes.

Level 2

Demonstrate the ability to apply your understanding of silviculture to the establishment and management of different forest and woodland systems. Demonstrate an understanding of the practice of silviculture from seed through establishment of crops, through to thinning and harvesting. Demonstrate an understanding of current forestry policy and its impact on grant regimes.

Examples of activities and knowledge comprised within this level are:

- Providing advice on a range of woodland management issues
- Advising on the planting and establishment of trees and grant applications
- Advising on silvicultural practice including harvesting and marketing.

Level 3

Demonstrate experience of the economics and financial implications of various types of forest and woodland systems; preparation and submission of forest and woodland grant scheme applications; calculation of timber yields, forecasting, and use of plans and recording systems; carrying out valuation of trees and stands of timber; and drawing up of thinning and harvest programmes.

Examples of activities and knowledge comprised within this level are:

- Preparing woodland management plans
- Providing strategic advice to clients to support decision making by estate managers.

Investment management

Reference no. T046

Description of competency in context of this sector

To be conversant with the key principles of investment management theory and practice. Acquire and develop detailed asset management expertise and knowledge across a broad range of sectors and be able to apply these in a strategic context.

Examples of likely knowledge, skills and experience at each level

Level 1

Demonstrate knowledge and understanding of the principles of financial investment in property.

Examples of knowledge comprised within this level are:

- Grasping the fundamental elements of property returns including capital and retail returns, plus how these are generated in practice
- Understanding the mainstream types of property valuation and being conversant with the theory behind these
- Gaining a good working knowledge of the principles of portfolio management and asset management.

Level 2

Apply the principles of managing property as a financial investment.

Examples of activities and knowledge comprised within this level are:

- Assisting on selected asset management activity and demonstrating how this fits into the portfolio strategic performance plan
- Working with fellow project professionals from a diverse range of backgrounds, drawing various skill bases together to achieve an asset or portfolio objective
- Being aware of appropriate legislation and regulations relating to the management of property as a financial investment.

Level 3

Provide evidence of reasoned and strategic advice on property as a financial investment, including the preparation and presentation of reports.

Examples of activities and knowledge comprised within this level are:

- Generating and implementing strategic advice independently both at portfolio and asset specific level
- Reporting in a manner that appropriately communicates this to clients and/or advisers in a focused, relevant manner
- Working knowledge of key legislation and regulation.

Landlord and tenant

Reference no. T048

Description of competency in context of this sector

This competency is about landlord and tenant relationships within the context of land law relating to rural property.

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 land/ 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 and preparing leases and tenancies
- Reaching an agreed solution and reporting recommendations to client
- Instructing legal advisers and seeing matter 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
- Dealing with more unusual/ challenging cases
- Providing advice as to alternative dispute resolution options in the event of breakdown of negotiations and taking any necessary action to protect the clients position
- Demonstrating involvement with third party determination and associated submissions.

Land use and diversification

Reference no. T049

Description of competency in context of this sector

This competency is about understanding land use and the diversification options available to rural property.

Examples of likely knowledge, skills and experience at each level

Level 1

Demonstrate knowledge and understanding of how a variety of land uses, policies and options for diversification have an impact on real estate and business.

Examples of knowledge comprised within this level are:

- The principles and rationale for diversification projects
- Knowledge and understanding of the relevant planning issues
- Knowledge of agencies likely to be involved when diversifying into new enterprises
- Knowledge of the basic taxation issues.

Level 2

Apply your knowledge to recognize and evaluate the economic, social and environmental needs of different land uses and options for diversification in relation to location and markets.

Examples of activities and knowledge comprised within this level are:

- Preparing and analysing a full feasibility study and financial appraisal
- Preparing a planning appraisal for a potential scheme
- Preparing and analysing both development and management options
- Interpreting findings.

Level 3

Provide evidence of reasoned advice, write reports and undertake the management of land use and, where appropriate, diversification and related projects.

Examples of activities and knowledge comprised within this level are:

- Providing advice on the more complex aspects of diversification
- Providing advice on the valuation, progress and management of a diversification project.

Management of the natural environment and landscape

Reference no. T055

Description of competency in context of this sector

This competency is about the management of andscape, natural resources and habitat in the context of property management.

Examples of likely knowledge, skills and experience at each level

Level 1

Demonstrate knowledge and understanding of the importance and role of nature conservation and the landscape in real estate, business management and development.

Examples of knowledge comprised within this level are:

- Landscape and designations and agri-environmental schemes
- Relevant legislation governing designation schemes
- Bodies charged with bringing in and delivering such legislation.

Level 2

Apply your knowledge of nature conservation and landscape in the management of real estate and development.

Examples of activities and knowledge comprised within this level are:

- Advising on planning relating to the natural environment
- Advising on grants available for protection of landscape, natural habitat and natural resources.

Level 3

Provide evidence of reasoned advice, write reports and negotiate on all matters relating to nature conservation and landscape.

Examples of activities and knowledge comprised within this level are:

- Providing strategic advice on land use, management practice, and management of specific habitats and species
- Interpreting and filtering advice
- Providing balanced report writing to provide over-arching view of management of a landscape.

Planning

Reference no. T061

Description of competency in context of this sector

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

Examples of likely knowledge, skills and experience at each level

Level 1

Demonstrate knowledge and understanding of the principles of planning.

Examples of knowledge comprised within this level are:

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

Level 2

Apply your knowledge to matters relevant to the planning process.

Examples of activities and knowledge comprised within this level are:

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

Level 3

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

Examples of activities and knowledge comprised within this level are:

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

Property finance and funding

Reference no. T069

Description of competency in context of this sector

This competency focuses on the candidate's understanding of the range of finance available, their understanding of how this is sourced and how this may be used to assist with property investment and development scenarios. Candidates will be expected to apply this knowledge in order to provide advice to clients on their financing options and the impact of this on their returns.

Examples of likely knowledge, skills and experience at each level

Level 1

Demonstrate knowledge and understanding of the role and importance of finance in property, including the principal forms of investment finance and their sources.

Examples of knowledge comprised within this level are:

- A broad knowledge of the various senior debt providers, and their expectations in terms of pricing and security
- An understanding of the impact of gearing on equity returns
- The ability to demonstrate this gearing effect numerically
- A knowledge of how mezzanine and equity finance might be priced
- A broad understanding of the financing process
- Use of financial information such as audited report and accounts.

Level 2

Identify the factors that affect the ability to obtain finance to fund any investment project. Identify appropriate sources of finance and understand the principles that apply to securing finance for different purposes.

Examples of activities and knowledge comprised within this level are:

- Analysing investment and development projects to ascertain the level of senior debt that could be raised within the mathematical limits
- Applying likely finance pricing required by senior debt providers
- Using market knowledge to assess whether the level of senior debt mathematically capable of being sustained is acceptable to the debt providers
- Sourcing and collating information which is necessary to support a presentation to secure a financing
- Sourcing and understanding the role of valuation advice
- Analysing and illustrating the impact of financial covenants.

Level 3

Provide evidence of reasoned advice on maximising the viability of any funding situation. Demonstrate your appreciation of the impact of property matters on valuation and funding. Demonstrate your understanding of the impact of funding matters on the property market.

Examples of activities and knowledge comprised within this level are:

- Analysing and understanding a stand alone financing from the outset to completion and draw down of funds
- Reviewing and comprehending financing documents and in particular loan agreements and facility letters
- Confirming that financing documents reflect the commercial terms agreed and how the controls of the provider may impact on the borrower's management flexibility
- Illustrating multi-tiered financing arrangements numerically and using this to assess the true cost of finance at each level
- Advising accordingly on the above.

Property management

Reference no. T070

Description of competency in context of this sector

This competency covers all aspects of day to day functions associated with property management. It includes issues relating to works, health and safety, landlord and tenant relationships, and service charges. In general, any matter associated with the smooth running of a property.

Examples of likely knowledge, skills and experience at each level

Level 1

Demonstrate knowledge and understanding of property management and the relationship between owner and occupier.

Examples of knowledge comprised within this level are:

- Understanding the key factors determining the landlord and tenant relationship in relation to the running of a property
- Understanding key lease terms and their implications to property management
- Understanding how disputes and problematical issues can be resolved, and being able to prioritise key tasks.

Level 2

Apply the principles of property management to provide solutions to issues affecting both owners and occupiers of real estate.

Examples of activities and knowledge comprised within this level are:

- Managing property from both a landlord and tenant perspective, and understanding the key factors from each viewpoint
- Understanding legal requirements associated with multi let property and/or managed property
- Understanding property management accounting principles from the landlord and tenant perspective, and also the requirements of law and SCSl
- Understanding courses of action in relation to breaches of lease by landlord and tenant.

Level 3

Provide evidence of reasoned advice including the preparation and presentation of reports in relation to property management.

Examples of activities and knowledge comprised within this level are:

- Participating in all aspects of property management including works, emergency reactive maintenance, planned programmes, budgets etc
- Applying your negotiation, communication, and business skills in relation to contentious issues with both landlord and tenant
- Participating in issues such as applications for licence to assign or for works, together with the associated legal frameworks.



Purchase and sale

Reference no. T073

Description of competency in context of this sector

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

Examples of likely knowledge, skills and experience at each level

Level 1

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

Examples of knowledge comprised within this level are:

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

Level 2

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

Examples of activities and knowledge comprised within this level are:

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

Level 3

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

Examples of activities and knowledge comprised within this level are:

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

Strategic real estate consultancy

Reference no. T079

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
- 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 other context.

Examples of activities and knowledge comprised within this level are:

- Researching organisational background
- Preparing relevant data
- Analysing data
- Using different styles of consultancy intervention for different client's needs
- Using your knowledge of real estate to find strategic solutions to meet client's 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:

- Providing strategic advice and recommendations to clients
- Presenting to clients
- Conducting meetings with clients
- Presenting data to support recommendations.

Sustainability

Reference no. M009

Description of competency in context of this sector

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

Examples of likely knowledge, skills and experience at each level

Level 1

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

Examples of knowledge comprised within this level are:

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

Level 2

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

Examples of activities and knowledge comprised within this level are:

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

Level 3

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

Examples of activities and knowledge comprised within this level are:

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

Valuation

Reference no. T083

Description of competency in context of this sector

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

Examples of likely knowledge, skills and experience at each level

Level 1

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

Examples of knowledge comprised within this level are:

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

Level 2

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

Examples of activities and knowledge comprised within this level are:

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

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

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Valuation Continued

Reference no. T083

Examples of likely knowledge, skills and experience at each level

Level 3

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

Examples of activities and knowledge comprised within this level are:

- The assets considered may relate to a particular area of practice but the candidate's experience should cover a range of purposes (in a properly supervised manner) such as loan security, financial statements, internal management, purchase or sale reports, tax, stock exchange and litigation, but not necessarily all of these
 - The types of property/land should ideally be varied both in terms of sector and also interest (ie freehold and leasehold)
 - Knowledge of standards in other areas of business, eg accounting standards.
- The candidate's knowledge of the main drivers which impact on property value should include an understanding of the wider influences such as government policy, the economic climate, technological change and other investment medium
 - The candidate should demonstrate knowledge as to how their valuation advice inter-relates with their client's other professional advisers
 - Have an understanding of the different levels of service that may be required, eg desk top advice versus a full valuation.

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