

# Assessment of Professional Competence Mandatory Competencies Guide



## Mandatory Competencies Guide

# Contents

About the competencies	5
The mandatory competencies	5
Senior Professional Assessment	5
Ethics, Rules of Conduct and professionalism	6
Client care	7
Communication and negotiation	9
Health and safety	10
Accounting principles and procedures	11
Business planning	12
Conflict avoidance, management and dispute resolution procedures	13
Data management	15
Diversity, inclusion and teamworking	16
Inclusive environments	17
Sustainability	18
Leadership (mandatory for Senior Professional applicants only)	19
Managing people (mandatory for Senior Professional applicants only)	20
Managing resources (excluding human resources) (mandatory for Senior Professional applicants only)	21

## 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.

RICS/SCSI has drawn up the technical competencies in a generic way so that they can be applied to different areas of practice and geographical locations. It is important that you interpret them within the context of your own area of practice or specialism and geography.

Each competency is defined at three levels of attainment. 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, depth and synthesis of technical knowledge and its implementation.

**The competencies are in three distinct categories:**

**Mandatory competencies** – personal, interpersonal, professional practice and business skills common to all pathways and mandatory for all candidates.

**Core competencies** – primary skills of your chosen APC pathway.

**Optional competencies** – selected as additional skill requirements for your APC pathway from a list of competencies relevant to that pathway. In most cases there is an element of choice.

## The mandatory competencies

All candidates, on all routes and all APC pathways, must achieve the defined level of the mandatory competencies. These competencies are a mix of the professional practice, interpersonal, business and management skills that are considered common to, and necessary for, all chartered members. You must achieve the minimum standards as set out below.

### To Level 3

- Ethics, rules of conduct & professionalism

### To Level 2

- Client Care
- Communication and negotiation
- Health and safety

### To Level 1

- Accounting principles and procedures
- Business planning
- Conflict avoidance, management and dispute resolution procedures
- Data management
- Diversity, inclusion and teamworking
- Inclusive environments
- Sustainability

Please note that the mandatory competencies were updated in December 2019. Those who registered for the APC prior to December 2019 may refer to the previous mandatory competencies or can choose to change to the new, updated competencies prior to submitting for final assessment.

## Senior Professional Assessment

There are three additional professional competencies for the Senior Professional assessment which must also be achieved to Level 2.

- Leadership
- Managing people
- Managing resources (excluding human resources)

An APC pathway may include a mandatory competency. If so it will be shown in the core or optional list for that pathway and will need to be achieved to a higher level than as a mandatory competency.

Please note that the examples provided in this guide are illustrative, not exhaustive. The assessment panel may ask questions relating to areas not specifically mentioned in this guide.

# Ethics, Rules of Conduct and professionalism

## Description of competency in context of this sector

This competency covers your professionalism. It requires you to understand the role of SCSi & RICS and how they work. You must have a thorough knowledge of regulations, rules of conduct and ethical codes. You should understand your role as a professional and society's expectations of professional practice. You should also understand the general principles of law and the legal system, as applicable in your country of practice.

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

### Level 1

**Demonstrate knowledge and understanding of the role and significance of SCSi/RICS and their functions. Your personal professional role and society's expectations of professional practice and SCSi/RICS code of conduct and conduct regulations, including the general principles of law and the legal system, as applicable in your country of practice.**

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

- The structure of SCSi & RICS
- SCSi & RICS' global and professional ethical standards
- Mandatory Professional Statements e.g. Conflicts of Interest
- Guidance notes and their status
- SCSi's CPD policy
- The role of Professional Groups
- Bodies within the SCSi & RICS e.g. YSCS, LionHeart
- Rules of conduct for members
- Policy documents
- SCSi Bye-laws
- Government, legislation and regulation
- Common law
- Relevant case law.

### Level 2

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

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

- Your involvement with SCSi
- Identifying a conflict of interest
- Transparency in professional fees
- Checking terms of appointment for compliance with SCSi/RICS rules
- Handling gifts and hospitality
- Complying with SCSi's CPD policy for members.

### Level 3

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

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

- Dealing with a complaint
- Handling client's money
- Setting up professional indemnity insurance
- Appropriate use of titles protected by the Building Control Act\*.

\* Applicable to Quantity Surveyors & Building Surveyors only



# 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 SCSI/RICS)
- How stakeholders are identified and how their status within the project is established
- Formal communication systems with clients and stakeholders

*Continued next page >*

### 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
- Analysing the data gathered through the client briefing process and formulating a detailed client brief

*Continued next page >*

### Level 3

**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:**

- 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
- Ensuring insurances are in place
- Setting performance levels and KPIs
- Monitoring compliance with the scope of services

*Continued next page >*

# Client care (continued)

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

### Level 1

- 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 2

- Consulting with the statutory authorities on the consents and other approvals required
- Preparing alternative outline design proposals, including option appraisals
- Preparing outline schedules of work
- Assessing client relationships, team performance and stakeholder interfaces on international projects.

### Level 3

- Monitoring performance internally and externally against client/stakeholder performance levels
- Reporting to clients and stakeholders
- Using KPIs to improve performance.

# Communication and negotiation

## Description of competency in context of this sector

This competency covers the way in which a surveyor communicates, in writing, graphically and orally. It also looks at the process and strategy of a negotiation. Effective communication is a fundamental aspect of professionalism and candidates must be able to communicate complex technical matters to both technical and non-technical people in a clear fashion. Negotiation is a regular part of a surveyor's work and this competency deals with taking a systematic approach to achieving a satisfactory conclusion.

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

### Level 1

**Demonstrate knowledge and understanding of effective oral, written, graphic and presentation skills including the methods and techniques that are appropriate to specific situations.**

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

- Good grammar and spelling
- The etiquette of written communication in emails, letters and reports
- Common formats for reports
- Presentation of figures and data using spreadsheets, graphs and charts
- How to deliver a report at a meeting
- How to structure and deliver a presentation
- Establishing your objectives and strategy for a negotiation
- The process of negotiation.

### Level 2

**Provide evidence of practical application of oral, written, graphic and presentation skills that are appropriate in a variety of situations, specifically including where negotiation is involved.**

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

- Writing letters or other formal documents
- Compiling a report
- Compiling minutes of meetings
- Producing pricing documents
- Delivering reports at meetings
- Taking part in interviews e.g. for contractor selection
- Giving presentations to staff or project teams
- Negotiating a loss and expense claim, extension of time, acceleration programme, contract sum or final account
- Agreeing the value of an instruction.

### Level 3

**Provide evidence of evaluation of your communication in a variety of situations.**

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

- Issuing reports to clients
- Producing in-house management communications
- Chairing meetings
- Conducting interviews
- Presenting at seminars
- Public speaking on behalf of your business
- Agreement of fees with a client
- Advising on complex negotiations or disputes e.g. claims for loss and expense.

# Health and safety

## Description of competency in context of this sector

This competency covers the relationship between the work of the surveyor and health and safety issues. Candidates should understand the 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
- Specific regulations relevant to your area of work e.g. Fire safety standards
- The impact on health and safety of: design, construction processes, building maintenance
- Health and safety training requirements as it relates to the employment of staff.

### 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
- Being involved in specific health and safety audits/reviews
- Reviewing health and safety proposals as part of a contractor's tender.

### 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 construction
  - Alternative construction processes
  - Impact of design on occupation and maintenance
  - Undertaking risk assessments
  - Advising on current legislation
  - Advising on adequacy of health and safety allowances within tenders.



# Accounting principles and procedures

## 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:

- 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
- International Accounting Standards (IAS), broadly how IAS vary from National GAAP and how a property/asset is treated in an entity's accounts prepared under IAS
- An entity's financial results and basic accounting principles including balance sheets, profit and loss, and cash flow statements
- 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:

- Considering financial statements to establish, for example, the financial strength of an entity
- Reviewing and understanding analysts' reports on financial statements
- 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 regards 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 e.g. 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 i.e. balance sheet, profit and loss, and cash flow statements
- Providing other professional advice related to the interpretation and/or preparation of accounts.

# Business planning

## Description of competency in context of this sector

This competency is about the principles and tools of business planning.

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

### Level 1

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

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

- Types of business plan (e.g. strategic, departmental, operational, corporate)
- The essential elements of a business plan
- Organisational structures
- Methods for financial benchmarking (e.g. key financial ratios)
- Meaning of working capital, stock, debtors and creditors
- Accounting techniques
- Forecasting techniques
- Planning to meet corporate objectives.

### Level 2

**Provide evidence of application of the principles and demonstrate your ability to use the tools of business planning appropriate to your area of practice.**

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

- Setting objectives and targets
- Undertaking risk analysis
- Preparing a business plan
- Creating an organisational chart
- Using financial ratios
- Using company accounts.

### Level 3

**Provide evidence of reasoned advice given to clients and others of the principles and tools of business planning and be able to evaluate your performance and outcomes.**

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

- Undertaking presentations and reports
- Undertaking option appraisals
- Setting performance indicators
- Reviewing performance against targets and indicators.

# 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 procedures 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:

- Common causes of disputes
- The contribution of some of the following to dispute avoidance:
  - Risk management
  - 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, for example:
  - Mediation and conciliation
  - Dispute Resolution Boards (DRBs)
  - Dispute Resolution Advisers (DRAs)
  - Adjudication
  - Independent Expert determination
  - Arbitration

*Continued next page >*

### 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 prior to third-party referral
- Assisting in the collation or preparation of claims/counterclaims and representations
- 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
- Providing advice to clients over protection on the issue of costs of dispute resolution proceedings (e.g. Calderbank offers or liaising with solicitors over the content of Part 36 Offers)
- Involvement in, or assistance with, a referral to a third-party resolution process and associated management of that process on behalf of client

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

*Continued next page >*

# Conflict avoidance, management and dispute resolution procedures

(continued)

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

### Level 1

- Professional Arbitration on Court Terms (PACT)
- Court proceedings/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 SCSI/RICS guidance for expert witnesses and advocates
- The range of nominating bodies and services available to resolve disputes, and particularly the role of the SCSI/RICS Dispute Resolution Service and any specialised dispute resolution schemes it offers relevant to your market sector
- The SCSI/RICS Global Professional Statement on Conflict of Interest and any appropriate national SCSI guidance.

### Level 2

### Level 3

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.



# 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 understanding the different storage systems and data sources available and knowing how they work; a candidate should also understand the principles behind the systems and what makes them effective. Candidates should also understand 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 and data, 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 filing systems
- Using a computerised central project database
- Retrieving information from a technical library
- Setting up a technical library
- Interpreting plan/map data
- Ensuring security of data
- Retrieving data from existing records, manual or electronic.

### 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 filing systems
- Benchmarking from analysed historic data
- Advising on the use of a computerised central project database
- Advising on security.

# Diversity, inclusion and teamworking

## Description of competency in context of this sector

This competency covers the role of the surveyor within the team and their involvement with the establishment of the team. It deals with how team members interact, their behaviour and communication. It also looks at how to build a diverse and inclusive team and the resulting benefits for both the individual and the team.

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

### Level 1

**Demonstrate knowledge and understanding of the principles, behaviour and dynamics of successfully working in a team.**

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

- How team members are selected and appointed
- The role played by the various team members
- The importance and business value of diversity in a team
- Formal communication processes within the team
- Inclusive communications
- How partnering and collaborative working affects the team
- Internal diversity and inclusion policies, including any applicable to non-discrimination or anti-harassment in the workplace
- Unconscious bias
- Supply chain management
- Relevant legislation within your area of practice.

### Level 2

**Provide evidence of practical application of working as a team member in your area of practice.**

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

- Involvement with the selection and appointment of team members (consultants, contractors, sub-contractors, suppliers)
- Commitment to diversity and inclusion throughout the attraction and recruitment process
- Implementing processes to identify and address any barriers faced by different groups within the team
- Participating in project meetings
- Using project communication systems
- Ensure internal and external communications reach minimum standards for accessibility.

### Level 3

**Provide evidence of evaluation of your teamworking skills in a variety of situations**

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

- Chairing project meetings
- Promote flexible working policies and work-life balance within the team
- Provide visible support to underrepresented groups
- Facilitating risk or value workshops
- Setting up project communication systems
- Setting up partnering agreements
- Establishing frameworks
- Post-completion project analysis of the team's performance
- Participation in diverse recruitment panels
- Taking action to identify and address unconscious bias.

# 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:

- 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
- Knowledge of best practice technical standards relevant to country of practice.

### 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 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 new design work 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.

# Sustainability

## Description of competency in context of this sector

This competency covers the role of the surveyor in dealing with the impact of sustainability issues. Achievement of this competency demonstrates a broad-based understanding of the theory of sustainability as set in its political and legal framework, together with an appreciation of its economic, social and environmental context and the tools and techniques used to measure cost and return and evaluate options for action.

## 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 development process
- The relationship between property and the environment
- How national and international legislation, regulations and taxation relating to sustainability affect a project
- Criteria by which sustainability is measured in relation to finished buildings
- The principles of how design, technology and construction processes can contribute to sustainable building
- Design considerations – site, location, building form, materials, lighting, ventilation, heating, water and drainage
- Sources of renewable energy and energy recovery
- The principles of material resource efficiency within the supply chain.

### Level 2

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

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

- Planning guidance, sustainability checklists
- Focus on energy – EU Directive on Energy Performance of Buildings or National equivalent
- Renewable energy options – photovoltaics, wind turbines, biomass, central heating and power (CHP), ground source heating, thermal mass
- National Infrastructure projects and energy conservation
- Carrying out capital cost and value engineering exercises to determine the impact of sustainability issues
- Carrying out 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 material selection and how performance baselines can be estimated
- Sustainable valuation, triple bottom line, economic, social and environmental considerations, short-medium- long term impacts
- Hard and soft valuation issues, health, well-being and productivity.



# Leadership (mandatory for Senior Professional applicants only)

## Description of competency in context of this sector

This competency covers the characteristics and behaviour of leaders. Candidates should be aware of the alternative styles of leadership and motivation. Candidates should understand how these techniques can be applied in their area of practice.

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

### Level 1

**Demonstrate knowledge and understanding of the characteristics and behaviour of a leader.**

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

- The different styles of leadership
- The different motivation theories
- Effective organisational design and communication strategies
- The climate necessary for the creation of high performing teams.

### Level 2

**Provide evidence of application of your role as a leader appropriate to your area of practice.**

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

- How leadership and motivation theories can be applied in practice
- How organisational design and communication strategies can affect leadership
- The ingredients necessary to create high performing teams.

### Level 3

**Provide evidence of evaluation of your leadership role.**

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

- Adapting your natural leadership style to meet challenges in your area of practice
- Adapting your leadership style to improve personal and team performance
- Demonstrating successful outcomes from your leadership and decision making
- Receiving acceptable peer group reviews of your performance as a leader.

# Managing people (mandatory for Senior Professional applicants only)

## Description of competency in context of this sector

This competency covers the principles and practice of managing people. Candidates should be aware of the skills required to manage people. Candidates should understand the appropriate application of these skills.

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

### Level 1

Demonstrate knowledge and understanding of the principles and practice of managing people.

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

- Human resource management legislation and techniques
- Effective organisational design and communication strategies
- The climate and culture necessary for the creation of high performing teams.

### Level 2

Provide evidence of the application of the skills required to manage people.

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

- The principles of human resource legislation
- Applying human resource techniques
- Effecting improved human resource performance
- How use of effective organisational design and communication strategies improves human resource performance
- How climate and culture affect human resource performance.

### Level 3

Provide evidence of the evaluation of your people management skills.

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

- Managing people and teams and achieving performance targets
- Carrying out performance appraisals and receiving acceptable individual and team peer reviews
- Carrying out training needs analyses
- Recruiting people.

# Managing resources (excluding human resources) (mandatory for Senior Professional applicants only)

## Description of competency in context of this sector

This competency is about managing the effective use, allocation and costing of resources (not including human resources).

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

### Level 1

**Demonstrate knowledge and understanding of the resources required and their cost for the effective operation of a business.**

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

- Types of resources required
- How to manage financial resources
- Accounting techniques
- Budgeting techniques
- Forecasting techniques
- Methods for obtaining resources and monitoring their use
- Personal resource management
- Costing of resources
- Relationship between cost and value of resources.

### Level 2

**Provide evidence of the application in your area of practice, giving reasoned advice on the most effective use, allocation and cost of resources.**

**Examples of activities and knowledge comprised within this level are:**

- Setting financial objectives
- Constructing a budget
- Monitoring and managing financial resources
- Setting personal objectives
- Preparing reports and recommendations for the use and allocation of resources.

### Level 3

**Provide evidence of the evaluation of managing resources in specific business cases.**

**Examples of activities and knowledge comprised within this level are:**

- Undertaking cost benefit analysis
- Monitoring performance against budgets
- Taking action to improve poor performance against budgets/plans
- Reviewing personal performance
- Reviewing project performance.

Dating back to 1895, the Society of Chartered Surveyors [www.scsi.ie](http://www.scsi.ie)

Ireland is the independent professional body for Chartered Surveyors working and practicing in Ireland.

Working in **partnership with RICS**, the pre-eminent Chartered professional body for the **construction, land and property** sectors around the world, the Society and RICS act in the public interest: setting and maintaining the **highest standards of competence and integrity** among the profession; and providing **impartial, authoritative** advice on key issues for business, society and governments worldwide.

**Advancing standards** in construction, land and property, the Chartered Surveyor professional qualification is the **world's leading qualification** when it comes to professional standards. In a world where more and more people, governments, banks and commercial organisations demand greater certainty of professional standards and ethics, attaining the Chartered Surveyor qualification is the recognised mark of **property professionalism**.

Members of the profession are typically employed in the construction, land and property markets through private practice, in central and local government, in state agencies, in academic institutions, in business organisations and in non-governmental organisations.

**Members'** services are diverse and can include offering strategic advice on the economics, valuation, law, technology, finance and management in all aspects of the construction, land and property industry.

All aspects of the profession, from **education** through to **qualification** and the continuing **maintenance of the highest professional standards** are **regulated** and overseen through the partnership of the Society of Chartered Surveyors Ireland and RICS, in the public interest.

This valuable partnership with RICS enables access to a worldwide network of **research, experience and advice**.

---

**[www.scsi.ie](http://www.scsi.ie)**

Society of  
Chartered Surveyors Ireland  
38 Merrion Square  
Dublin 2  
[education@scsi.ie](mailto:education@scsi.ie)  
T 01 6445500  
F 016611797