



Chartered property,
land and construction
surveyors

ROADMAP 2027

STRATEGIC PLAN

INTRODUCTION

Dear Member

On behalf of the SCSI Board and Council, I am delighted to present our three-year Strategic Plan 'Roadmap 2027'. In an era when the built and natural environment faces significant challenges, our commitment to excellence in surveying and our dedication to fostering a community of skilled professionals remains unwavering. This new Strategy builds on the successes achieved through the implementation of Roadmap 2024, which helped the SCSI to solidify our position as a leading authority in the property, land, and construction sectors, earning recognition as a trusted advisor and influential thought leader for public advantage. Roadmap 2027 will build on all that has been achieved to date in increasing awareness and recognition of the expertise of the surveying profession, while also renewing our focus on specific member services in support of practice. By placing our members at the core of everything we do, we strengthen the very foundation upon which the SCSI stands.

A renewed focus on sustainability and digitisation, and the enhancement of our data-driven, digital-first approach, underpin the key goals to be delivered under the three pillars of the Strategy: 'Representing and Advocating for the profession'; Supporting and Connecting members'; and, 'Influencing and Advancing for the future'. Through tailored initiatives, ongoing CPD, and enhanced

resources, we aim to ensure that every member feels valued, equipped, and motivated to uphold the highest standards of surveying. In addition to supporting our current members, another key focus of Roadmap 2027 is to attract and inspire the next generation of surveying professionals to ensure the longevity and vitality of the profession.

This Strategic Plan represents a commitment to advancing the interests of our members, promoting sustainability, embracing digital innovation, and nurturing the future of surveying to realise the development of a sustainable construction, land and property sector. The SCSI looks forward to working collaboratively with members to deliver Roadmap 2027 for their benefit, in the public interest.

Shirley Coulter
SCSI CEO



VISION | MISSION | VALUES

SCSI VISION

A dynamic, innovative and visible organisation to promote members' professional expertise, harnessing members' collective knowledge to lead the development of a sustainable property, land and construction sector, in the public interest.

SCSI MISSION

To connect, support and represent our members, as leading experts working across property, land and construction.

OUR VALUES

Focus on members: We put members at the centre of all decision-making

Act with integrity: We always do the right thing, for the profession, our organisation, and in the public interest

Be respectful: To earn respect, we must show respect

Own and deliver: We are personally accountable for what we do and for on-time delivery

Work as one: To go fast, go alone;
to go far – we work as one.

STRATEGIC HOUSE AND KEY STRATEGIC PILLARS

SCSI
STRATEGY
HOUSE

VISION STATEMENT

MISSION STATEMENT

1. SUPPORTING
AND
CONNECTING
MEMBERS

2. REPRESENTING
AND ADVOCATING
IN THE PUBLIC
INTEREST

3. ADVANCING AND
INFLUENCING
FOR THE
FUTURE

ROADMAP
X3 YEARS

ROADMAP
X3 YEARS

ROADMAP
X3 YEARS

KEY STRATEGIC PILLARS

PERFORMANCE MILESTONES

DATA DRIVEN | SUSTAINABLE | DIGITAL FIRST

OPERATIONS | GOVERNANCE | ESG | PEOPLE AND TECHNOLOGY | FINANCE

COMMUNICATIONS AND PUBLIC AFFAIRS

SUPPORTED BY

KEY STRATEGIC PILLARS

STRATEGIC PILLAR 1

SUPPORTING AND CONNECTING MEMBERS



STRATEGIC PILLAR 1 | SUPPORTING AND CONNECTING MEMBERS



KEY STRATEGIC GOALS

1. Deliver helpful, responsive services in support of best practice, including relevant and accessible CPD, training and professional guidance.
2. Foster valuable networks of members across professional groups, regionally and through peer-to-peer mentoring.
3. Support the highest professional standards of members through best practice standards development, maintenance and monitoring.
4. Cultivate relevant strategic partnerships to further the enhancement of the profession.
5. Focussed assistance to members to meet the changing needs of surveying, including sustainability, digitisation and artificial intelligence (AI).

KEY STRATEGIC DELIVERABLES

1. **Deliver helpful, responsive services in support of best practice, including relevant and accessible CPD, training and professional guidance:**
 - prioritise areas to address emerging skills including mediation, ADR pupillage, building information modelling (BIM), AI, sustainability, Red Book valuation standard, and regulatory areas;
 - support specialised skills development and supports including for professional groups, career stage, diversity, equity, and inclusion (DEI), SMEs, and regions;
 - improve member user experience through enhanced website functionality, CPD app and online training;
 - creation of live reporting channels for timely member feedback on CPD and training; and,
 - establishment of relevant commercial partnerships in support of member service delivery.

STRATEGIC PILLAR 1 | SUPPORTING AND CONNECTING MEMBERS

2. Foster valuable networks of members across professional groups, regionally and through peer-to-peer mentoring:

- review regional structure to ensure enhanced connectivity and representation for members nationwide;
- establish valuable local business networks with relevant professionals;
- introduce new and returning member SCSi familiarisation programme;
- expand SCSi mentoring programme to include reverse mentoring, ad hoc mentor panel, member partner programme, and relevant training; and,
- facilitate improved personalised connection for members with professional group (PG) colleagues and content including via online PG hubs.

3. Support the highest professional standards of members through best practice standards development, maintenance and monitoring:

- continue alignment with RICS in relation to professional standards, APC, final assessment, accreditation, and fellowship, honorary and associate membership, as appropriate;
- publish updated rules of conduct and disciplinary procedures, complaints handling guide and templates for members;
- establish a mediators' panel to support new mediation provisions within the SCSi rules of conduct;
- enhance the role of PGs and working groups in standards review and development; and,
- embed the new CPD framework into the CPD and monitoring process for members.

4. Cultivate relevant strategic partnerships to further the enhancement of the profession:

- maximise the benefit of RICS partnership, including global market recognition of charter;
- explore enhancement of established relationships with other relevant bodies, including potential for joint initiatives and training;
- develop a policy and fee structure for the accreditation and formal recognition of third-party CPD; and,
- develop an 'APC in Partnership' programme with member organisations to evaluate and formally recognise organisations that provide best-in-class APC supports.

5. Focussed assistance to members to meet changing needs of surveying, including sustainability, digitisation and artificial intelligence (AI):

- develop and implement a dedicated sustainable digitisation strategy to provide necessary supports and services to members;
- devise relevant accreditation for members to recognise specific skills, knowledge, and expertise;
- enhance member training and education with a CPD programme in emerging skills areas aligned with preferential software offerings;
- utilise new technology to improve member connectivity to SCSi data and resources, professional guidance and member colleagues; and,
- establish networking and knowledge-sharing platforms through online forums, discussion groups, and networking events to facilitate knowledge sharing, collaboration, and peer-to-peer learning among members interested in sustainability, digitisation, and AI in surveying.

KEY STRATEGIC PILLARS

STRATEGIC PILLAR 2
REPRESENTING AND ADVOCATING
IN THE PUBLIC INTEREST



STRATEGIC PILLAR 2 | REPRESENTING AND ADVOCATING IN THE PUBLIC INTEREST



KEY STRATEGIC GOALS

1. Promote members' professional expertise and contribution across construction, land and property.
2. Data-driven thought leadership, including through the publication of independent reports and submissions.
3. Positively impact policy development for a sustainable natural and built environment.
4. Enhance and enforce regulatory protection of the public through a system of independently led regulation.
5. Harness digitisation opportunities to deliver market innovation and efficiencies.

KEY STRATEGIC DELIVERABLES

1. **Promote members' professional expertise and contribution across construction, land and property:**
 - harness all opportunities to share member insights, including via participation on external working groups and via the media;
 - ensure relevant, relatable, and consistent messaging in all public affairs activities, with an emphasis on regional engagement;
 - create a member expert/speaker directory, supported by media training;
 - assist members to maximise membership value with clients, including the promotion of SCSi consumer guides and the Red Book valuation standard; and,
 - promote expertise of surveyors as alternative dispute resolution (ADR) providers, including the establishment of a boundary disputes service.

STRATEGIC PILLAR 2 | REPRESENTING AND ADVOCATING IN THE PUBLIC INTEREST

2. Data-driven thought leadership, including through the publication of independent reports and submissions:

- maintain and enhance a pipeline of regular publications to positively influence policy development;
- employ shared data intelligence to establish info dashboards for members;
- review opportunities for expanded research, including participation in research tenders, grant applications, and commissioning external research; and,
- consider establishment of member research panels for focused, regular data collection.

3. Positively impact policy development for a sustainable natural and built environment:

- proactively identify key issues for policy development in addition to responding to topical issues;
- co-ordinated approach to promotion of policy output, including cross-party engagement, departmental and media briefings, and supporting events;
- utilise additional channels to share member insights, including podcasts and video; and,
- structured follow-up on key report recommendations to seek implementation in the public interest.

ENHANCE FREQUENCY AND DETAIL OF REGULATORY REPORTING IN THE PUBLIC DOMAIN.

4. Enhance and enforce regulatory protection of the public through a system of independently led regulation:

- ensure high professional standards are maintained through continuous quality audit in areas such as CPD, valuer registration, complaint handling, and professional conduct;
- further improvements to the SCSi complaints, disciplinary and inquiry process to enhance public and member understanding of processes;
- develop and implement a 'Check they're Registered' and 'Check they're Chartered' campaign, including a review of cease and desist policy for misuse of protected titles/SCSi designations and branding;
- develop a robust application and onboarding process for new registrants that meets the requirements of the Building Control Act; and,
- enhance frequency and detail of regulatory reporting in the public domain.

5. Harness digitisation opportunities to deliver market innovation and efficiencies:

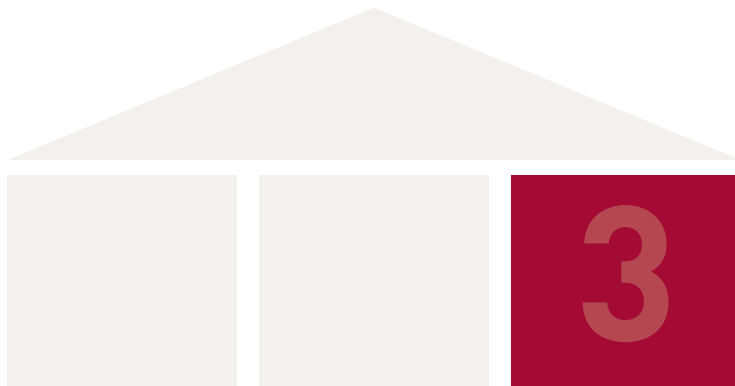
- collaborate with industry partners to develop a comprehensive, integrated approach to digitisation in the built environment;
- enhance public access to SCSi data via digital tools akin to rebuild calculator and land calculator;
- harness technology to assist in identification of misuse of protected titles of Building Surveyor and Quantity Surveyor and SCSi/RICS designation; and,
- enhance internal systems to ensure a vigorous process for verification of qualifications for registrants and members on application.

KEY STRATEGIC PILLARS

STRATEGIC PILLAR 3
ADVANCING AND INFLUENCING
FOR THE FUTURE



STRATEGIC PILLAR 3 | ADVANCING AND INFLUENCING FOR THE FUTURE



KEY STRATEGIC GOALS

1. Harness collective knowledge and skills of members and partners to futureproof the profession in support of a sustainable construction, land and property sector.
2. Expand initiatives to increase diversity, equity and inclusion (DEI) in the profession, and positively contribute to our local communities.
3. Ensure the future pipeline of surveyors by promoting career opportunities, monitoring skills needs and engaging with relevant stakeholders.
4. Promote routes to Chartered membership through strong linkages and engagement with students, senior professionals, academic partners and related stakeholders.
5. Maximise the opportunities of digitisation and AI to ensure the appeal of the profession to the next generation of surveyors.

KEY STRATEGIC DELIVERABLES

1. **Harness collective knowledge and skills of members and partners to futureproof the profession in support of a sustainable construction, land and property sector:**
 - develop and implement a volunteer recruitment strategy to ensure sufficient expertise across all pathways to support future growth;
 - develop programmes to further assist members in attaining additional accreditation relevant to their profession;
 - undertake skills needs assessments for emerging areas including sustainability, digitisation, BIM, International Construction Measurement Standards (ICMS), and International Property Measurement Standards (IPMS);
 - broaden awareness and application of best practice standards for built environment via expansion of professional training programmes; and,
 - establish Nexus/student partner scheme to support the next generation of surveyors.

STRATEGIC PILLAR 3 | ADVANCING AND INFLUENCING FOR THE FUTURE

2. Expand initiatives to increase diversity, equity and inclusion (DEI) in the profession, and positively contribute to our local communities:

- conduct DEI research to support the development of a DEI action plan, including targeted communications and programmes;
- establish key metrics to track progress on DEI initiatives within the profession;
- enhance partnership with Lionheart to increase awareness of available supports to members;
- engagement with DEIS local schools on corporate social responsibility (CSR) initiatives, including grants/scholarships, partnering with member firms as appropriate; and,
- identify opportunities to support the NGO and charity sector, harnessing members' expertise.

3. Ensure the future pipeline of surveyors by promoting career opportunities, monitoring skills needs and engaging with relevant stakeholders:

- increase surveying careers promotion to include new apprenticeships and those in development, through expanding career fairs presence;
- continue the process of updating accreditation, including aligning accreditation with programme reviews and identifying new opportunities to expand to non-traditional courses for alternative routes of entry to the profession;
- maintain and enhance relationships with key educational stakeholders to ensure that the SCSi is engaged on relevant matters relating to accreditation, apprenticeships and promotion of careers in the built environment;
- expand the SCSi Transition Year (TY) programme with support from national academic partners and member organisations; and,
- work with stakeholders towards achieving Level 9 status for Chartership.

4. Promote routes to Chartered membership through strong linkages and engagement with students, senior professionals, academic partners and related stakeholders:

- augment routes to membership through continual APC review in partnership with RICS and membership;
- continue collaboration with academic partners, SOLAS and related stakeholders on the development of apprenticeship programmes across property, land and construction;
- review all awards and prizes for third-level partners and develop a single coherent system of student awards;
- develop a student ambassador programme to foster greater relationships and engagement with student members on SCSi-accredited third-level programmes; and,
- engage with C-suite members through a president's roundtable series to grow links and foster the strategic objectives of the SCSi in these firms.

5. Maximise the opportunities of digitisation and AI to ensure the appeal of the profession to the next generation of surveyors:

- collaborate with academic partners to embed digital skills in surveying courses;
- review APC pathways to ensure digital skills are appropriately reflected;
- identify further opportunities to highlight the use of digital skills and technology in careers in surveying via school programmes akin to the Space Surveyors Students Programme 5*S; and,
- utilise SCSi data and digital capabilities to personalise communications and supports for career guidance for current and future members.

OPERATIONS AND GOVERNANCE



OPERATIONS AND GOVERNANCE



SUSTAINABLE

The SCSi is dedicated to taking a lead in sustainability efforts. We are committed to driving necessary changes within the SCSi and inspiring member organisations to become frontrunners in adopting sustainable surveying practices. Continuously striving to reduce our environmental footprint, we also aim to assist our members in doing the same. Guided by our three strategic pillars – Representing and Advocating, Supporting and Connecting, and Advancing and Influencing – we will drive sustainability initiatives forward.

The SCSi is committed to serving in the public interest and making positive contributions to local communities through our corporate social responsibility (CSR) endeavours and community outreach initiatives.

DIGITAL FIRST

A digital-first approach is a key part of Roadmap 2027. Embracing a digital-first mindset will entail prioritising digital channels and technologies to enhance member engagement, streamline operations, and maximise reach.

This approach will involve leveraging digital platforms for member communication, potentially offering more online resources and services, and utilising data analytics for informed decision-making. By placing digital initiatives at the forefront of the strategic agenda, the SCSi will adapt swiftly to evolving member needs, foster community connections, and maintain a competitive edge in the digital age. Providing best-in-class information systems will also support effective decision-making and efficient operations within the SCSi. A dedicated sustainable digitisation strategy to support members on the path to digitisation is a key deliverable of this strategy.

OPERATIONS AND GOVERNANCE

DATA DRIVEN

The SCSi will continue our journey towards becoming even more data driven over the next three years. Central to this ambition is the strategic imperative to collect insights and feedback from members within the property, land, and construction sectors. By recording and analysing this data, the SCSi aims to stay close to, and to have an even better understanding of the challenges, opportunities, and aspirations of these key industries. Armed with this knowledge, the SCSi will continue to plan for targeted representation and advocacy initiatives that resonate with its members and serve the broader public interest.

To support this, the SCSi will commit the resources to devise the infrastructure necessary to effectively manage and leverage this important data. This will be supported by strong systems and processes designed to streamline data collection, analysis, and dissemination. By instilling greater structure and rigour into its data-driven approach, the SCSi aims to unlock even more insights that will drive tangible outcomes under its three key strategic pillars. Whether supporting members, advocating for industry change, or championing broader societal interests, the SCSi's commitment to data-driven decision-making promises to bring a new era of impact and efficacy.

ENVIRONMENTAL, SOCIAL AND GOVERNANCE (ESG)

The SCSi is committed, as part of our Corporate Social Responsibility Policy and Sustainability Policy, to operating in a responsible and sustainable manner. We will operate with heightened consideration of the impact our activities have on the environment, the communities we impact, and wider society. We are guided by our vision, which seeks to lead the development of a sustainable property, land and construction sector, in the public interest. We will ensure that we rigorously apply the highest level of governance, including appropriate structures, policies and procedural practices, supported by regular external evaluation. The SCSi is committed to following sustainable business practices in our day-to-day operations. We include an advocacy impact statement and ESG impact statement in our Annual Report.

RISK

The lower risk appetite of the Board, balanced with the ambition for growth, was taken into account in deciding the strategic priorities for the next three years. Key risks were identified in SWOT and PESTEL analyses, and the SCSi takes a proactive approach to managing risk with an actively monitored risk register reviewed quarterly by the Executive and twice annually by the Board.

PEOPLE AND TECHNOLOGY

The SCSi's skilled executive team has continued to improve and expand services to members, with additional resources being applied to key growth areas, such as research and policy. To ensure that the SCSi can deliver on the ambitious objectives of this three-year plan, further review of the staffing structure will be required, with investment in areas such as education and regulation. Staff training and development is also key, particularly in the use of customer relationship management (CRM) to support segmented member communications and services. We strive to be a collaborative, inclusive and supportive workplace.

Further efficiencies will be achieved through the digital-first approach to improve the member experience. The SCSi will maintain and enhance its technological capabilities to assist innovative service delivery.

THE LOWER RISK APPETITE OF THE BOARD, BALANCED WITH THE AMBITION FOR GROWTH, WAS TAKEN INTO ACCOUNT IN DECIDING THE STRATEGIC PRIORITIES.

OPERATIONS AND GOVERNANCE

FINANCE

The SCSi employs rigorous accounting practices and processes, overseen by the Honorary Treasurer and Finance and Audit Committee. The SCSi's annual budgeting process is aligned to the Strategic Plan Roadmap to ensure the appropriate allocation of resources to deliver on objectives. The budgeting process is overseen by the Finance and Audit Committee, with the annual budget approved by the Board.

Capital fund investment activities relating to member reserves of the SCSi are undertaken as per the terms of the SCSi Treasury Policy. This is managed by the finance function as directed by the Finance and Audit Committee. The finance function operates with the general objective of maximising income but in a risk-averse manner, consistent with the SCSi's ESG strategy and the code of ethics of the organisation, staff and members.

The SCSi continues to develop specific member retention and recruitment strategies to ensure that membership income is sustained in order to continue to invest in improved member services.

Commercial ventures, as a source of income to support member service development, will also be considered where the benefit to members and the organisation is clearly evident.

THE SCSi'S ANNUAL BUDGETING PROCESS IS ALIGNED TO THE STRATEGIC PLAN ROADMAP TO ENSURE THE APPROPRIATE ALLOCATION OF RESOURCES TO DELIVER ON OBJECTIVES.

MONITORING AND REPORTING

The Strategic Plan is a live document that provides the roadmap for the organisation over the next three years. It will be supported by dedicated business plans, plus appropriate marketing and communications plans. Regular reports on its implementation will be shared with members including via our monthly *MetriCS* communication and annually via the Annual Report.

THE STRATEGIC PLAN IS A LIVE DOCUMENT THAT PROVIDES THE ROADMAP FOR THE ORGANISATION OVER THE NEXT THREE YEARS.

MEASUREMENT

MEASUREMENT

The following key metrics/measures will be used to monitor implementation and impact of Roadmap 2027:

SUPPORTING AND CONNECTING

Metrics for CPD, education and training events, current and emerging skills, member engagement and connectivity, standards and guidance development, regulatory guidance, website usage, and sustainability and digitisation supports.

REPRESENTING AND ADVOCATING

Measurement of data-driven publications, including reports and submissions, promotion of surveying expertise, and impact on policy. Metrics relating to media and public affairs activities, data gathering and dissemination, regulatory reporting, ADR, and digitisation/innovation.

INFLUENCING AND ADVANCING

Numbers of accredited courses and apprenticeships, student members, school outreach, 5*S programme, firm partnering, careers promotion, routes to membership, diversity in the profession, volunteer members. Metrics concerning APC, professional training programmes, enhanced/specialist skills, specialist accreditations, digitisation/AI engagement, and CSR activities.



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