



Your pathway to qualifying in

Facilities Management

Assessment of Professional Competence

Facilities Management

RICS Property Group

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Introduction

About the APC

The RICS Assessment of Professional Competence (APC) ensures that those applying for RICS membership are competent to practise and meet the high standards of professionalism required by RICS. There is a wide range of pathways available to qualify as an RICS member covering 21 different areas of practice.

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 supports the core APC documentation. It is designed to help you understand more about qualifying as an RICS member in facilities management. The material is set out in three sections.

Section one – provides information on this area of practice with a general overview of the facilities management pathways.

Section two – lists the competency requirements of the facilities management APC pathway (as set out in the *APC Requirements and Competencies Guide*).

Section three – describes the main technical competencies associated with facilities management, providing expanded sector specific guidance on each of them. This forms the main part of the guide.

You MUST use this guide in conjunction with the core APC documentation which is available on the RICS website and comprises:

- *APC Requirements and competencies guide*
- *Candidate guides* – (the particular candidate guide you need will depend on your route to membership)
- *Guide for supervisors, counsellors and employers*

About the competencies

The APC aims to assess that you are competent to carry out the work of a qualified chartered/technical surveyor. To be competent is to have the skill or ability to perform a task or function. The RICS 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 facilities management.

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

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appropriate level. You must reach the required level in a logical progression and in successive stages:

- **Level 1** knowledge and understanding
- **Level 2** application of knowledge and understanding
- **Level 3** reasoned advice and depth of technical knowledge.

The competencies are in three distinct categories:

Mandatory competencies – the personal, interpersonal, professional practice and business competencies common to all pathways and compulsory for all candidates. These are explained in more detail in the *APC Requirements and competencies guide*.

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

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

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

Choosing your competencies

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

Where to find help

Completing the APC carries with it responsibility and commitment. Extensive support and guidance are available for candidates and employers. If you need any help during the training period please contact the National Association of your country of residence or the RICS Europe office in Brussels (see contact details on www.joinricsineurope.eu).

<p>About facilities management</p>	<p>Facilities management (FM) is the total management of all services that support the core business of an organisation.</p> <p>Good facilities management makes a huge difference to the efficiency and productivity of a company, its staff and even its clients. Using best business practice, a company's operating costs can be reduced while its productivity is increased.</p> <p>It is the discipline that ensures all the different buildings and services of a company work as efficiently as possible.</p> <p>FM professionals are found in all sectors of industry, commerce and services and may be employed by consultants, facilities management providers, client departments, the public sector etc.</p>
<p>RICS qualification pathways in this sector::</p>	<p>Facilities Management APC</p> <p>This pathway is suitable for an individual embarking on a career as a professional advisor (in-house or external) in facilities management for commercial occupiers.</p> <p>Professional facilities managers assist businesses to plan and execute essential property decisions, from day to day matters to strategy planning (for example, moving the company to bigger or better buildings.)</p> <p>Once established within the premises, businesses must make their buildings and offices as efficient as possible. Facilities Managers will look at the best use of space, suitable technology solutions, human resources and safe surroundings.</p> <p>Running a company also means complying with legal responsibilities including health and safety, building regulations, fire regulations, access and security. Facilities managers advise on these and other essential services such as catering, cleaning and maintenance.</p> <p>The scope for Facilities Managers is extremely varied and services are likely to include:</p> <ul style="list-style-type: none"> • Business operations • Business re--location • Business support • Health and safety • Outsourcing • Performance measurement • Procurement • Property management • Strategic planning and advice • Utilities and services..

Chartered alternative designations related to this pathway	All candidates qualifying under the facilities management APC pathway will be entitled to use the designation "Chartered Facilities Management Surveyor"

Pathway Requirements

Facilities management APC

Mandatory competencies

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

Core competencies

Two competencies to Level 3 **and** two competencies to Level 2 from the list below.

- Analysis of client requirements (T003)
- Corporate real estate management (T019)
- Maintenance management (T053)
- Procurement and tendering (T062)
- Project financial control and reporting (T067)
- Supplier management (T080)

Optional competencies

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

- Construction technology and environmental services (T013)
- Consultancy services (T014)
- Contract administration (T016)
- Contract practice (T017)
- Design and specification (T021)
- Environmental management (T030)
- Fire safety (T033)
- GIS (T036)
- Landlord and tenant (including rent reviews and lease renewals) (T048)
- Project audit (T065)
- Project financial control and reporting (T067)
- Property management (T070)
- Strategic real estate consultancy (T079)
- Works progress and quality management (T085)
- Conflict avoidance, management and dispute resolution procedures (M006) **or** Health and safety (M008) (must be taken to Level 3) **or** Sustainability (M009)

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

Competency guidance

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

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 quantity surveying and construction. The guidance does not cover the facilities management.

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 competencies and pathway requirements can be found in the *APC Requirements and competencies guide*.

- Analysis of client requirements (T003)
- Conflict avoidance, management and dispute resolution procedures (M006)
- Construction technology and environmental services (T013)
- Consultancy services (T014)
- Contract administration (T016)
- Contract practice (T017)
- Corporate real estate management (T019)
- Design and specification (T021)
- Environmental management (T030)
- Fire safety (T033)
- GIS (T036)
- Health and safety (M008) (must be taken to Level 3)
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- Maintenance management (T053)
- Procurement and tendering (T062)
- Project audit (T065)
- Project financial control and reporting (T067)
- Property management (T070)
- Strategic real estate consultancy (T079)
- Supplier management (T080)
- Sustainability (M009)
- Works progress and quality management (T085)

Competency Name:		Analysis of Client Requirements (T003)
Description of competency in context of this sector	This competency is about the establishment and agreement of a client brief, but primarily deals with the inception stage of a building project. This requires a sound understanding of the law applying to building projects, the preparation of outline design proposals in various formats, the preparation of budget costs, project programmes, and advise on various procurement options. It also requires an understanding of matters concerning energy efficiency, sustainability and alternative energies.	
Examples of likely knowledge, skills and experience at each level		
Level 1	Demonstrate knowledge and understanding of the need to collect data, analyse and define the needs of clients.	
	<p>Examples of knowledge comprised within this level are:</p> <ul style="list-style-type: none"> • The methods of data gathering during the inception stage of a project including client briefings and site based information. • The law applicable to building projects and in particular those relating to consents and approvals. • The principles of energy efficiency • The principles of sustainability • The principles of alternative energy sources • The principles of the preparation of alternative outline design proposals including sketch drawings. • The methodology of preparing an option appraisal • The principles of preparing outline schedules of work along with approximate quantities. • The principles of the preparing budget costs including elemental cost plans. • The principles of preparing a project programme of works • The various traditional contract procurement options • The need for specialist consultants and options for engaging them 	
Level 2	Provide evidence of the practical application of that knowledge and understanding. This should include the development of strategies and methodologies and, where appropriate, undertaking feasibility studies, design proposals and costings.	
	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> • Analysing the data gathered through the client briefing process and formulating a detailed client brief. • Consulting with the statutory authorities on the consents and other approvals required. • Considering the impact of energy efficiency, sustainability and the need for alternative energy sources. • Preparing alternative outline design proposals including sketch drawings • Preparing of option appraisals • Preparing outline schedules of work with approximate quantities. • Preparing budget costs including elemental cost plans • Preparing a project programme of works • Analysing contract procurement options • Considering the need for specialist consultants and the options for engaging them. 	

Level 3	<p>Provide evidence of developing appropriate strategies to meet the client's requirements under minimum supervision, based on analysis and interpretation. Demonstrate the ability to report on and present tailored strategies to the client.</p>
	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> • Analysing the data gathered through the client briefing process and formulation of a detailed client brief. • Advising on the need for statutory and other consents and approvals • Advising on the impact of energy efficiency, sustainability and the need for alternative energy sources. • Presenting alternative outline design proposals including sketch drawings • Presenting option appraisals • Presenting outline schedules of work with approximate quantities. • Presenting budget costs including elemental cost plans • Presenting a project programme of works • Advising on contract procurement options • Advising on the need for specialist consultants and the options for engaging them. • Presenting a feasibility study • Presenting a detailed project plan

Competency Name:	Conflict Avoidance, Management And Dispute Resolution Procedures (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	<p>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.</p> <p>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:</p> <ul style="list-style-type: none"> • Common causes of disputes • The contribution of some of the following to dispute avoidance: <ul style="list-style-type: none"> – Risk management - its basic principles and techniques – Early warning systems – Partnering techniques – Clear and robust client briefings • Theories of negotiation and the role of effective communication and negotiation • The primary features, advantages and disadvantages of a range of dispute resolution procedures and their surrounding statutory and/or non-statutory legal/judicial context (e.g. how forms of contract deal with dispute resolution, and the scope of such clauses): <ul style="list-style-type: none"> – Mediation (could include contracted and project mediation) and conciliation – Early Neutral Evaluation (ENE) – Dispute Resolution Boards (DRBs) – Dispute Resolution Advisers (DRAs) – Adjudication (under the HGCRA '96 or geographically applicable law) – 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 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 Dispute Resolution Service and any specialized dispute resolution schemes it offers relevant to your market sector e.g. PACT
Level 2	<p>Provide evidence of practical application in your area of practice having regard to the relevant law.</p>

	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> - 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 P.I. cover of the candidate's organization. - Adopting - or encouragement of the adoption of (as appropriate) - suitable dispute avoidance techniques. - Negotiating actively on behalf of clients (e.g. 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 (e.g. in England & Wales, Arbitration Act 1996, or HGCRA '96 Part II, CPR, Party Wall Act 1996 etc) and its application.
Level 3	<p>Provide evidence of the application of the above in the context of advising clients in the various circumstances referred to above.</p>
	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> • 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.

Competency Name:		Construction Technology and Environmental Services (T013)
Description of competency in context of this sector	This competency covers the design and construction of buildings and other structures. Candidates should have a clear understanding of the design and construction processes commonly used in the industry. They should have detailed knowledge of construction solutions relevant to their projects.	
Examples of likely knowledge, skills and experience at each level		
Level 1	Demonstrate knowledge and understanding of the principles of design and construction relating to your chosen field of practice.	
	Examples of knowledge comprised within this level are: <ul style="list-style-type: none"> • The stages of design from inception to completion • Impact of current legislation and regulations (both national and international.) • How the various elements of the building work and inter-relate • The process of constructing the works • Operational and maintenance processes post contract 	
Level 2	Apply your knowledge to the design and construction processes.	
	Examples of activities and knowledge comprised within this level are: <ul style="list-style-type: none"> • Appreciating how design solutions vary for different types of building such as clear span requirements for warehousing or acoustic requirements for accommodation. • Understanding alternative construction details in relation to functional elements of the design such as different types of piling or structural frame solutions. 	
Level 3	Advise on the selection and application of particular processes within your area of experience. This should include liaison with specialists and consultants to develop project specific design and construction solutions.	
	Examples of activities and knowledge comprised within this level are: <ul style="list-style-type: none"> • Advising on of the choice of construction solution on your project • Reporting on the impact of different design solutions and construction processes on cost and programme. 	

Competency Name:		Consultancy services (T014)
Description of competency in context of this sector	This competency is about the provision of management consultancy services to a range of different clients from inception to completion.	
Examples of likely knowledge, skills and experience at each level		
Level 1	Demonstrate knowledge and understanding of the procurement and execution of advisory and strategic consultancy services in the context of the real estate and construction sectors.	
	Examples of knowledge comprised within this level are: <ul style="list-style-type: none"> • Different forms of procurement for consultancy services • The range of different consultancy interventions and approaches • The consultancy cycle • The types of problems, risks and issues that may arise during each phase of the consultancy cycle. • The importance of agreeing a clear contract with clients • The need for the planning, timing and managing of consultancy interventions. • Managing the use of resources • Managing client expectations • Forms of reporting • How to manage ethical dilemmas • The principal tools and techniques relevant to consultancy services • Importance of confidentiality when dealing with sensitive information 	
Level 2	Apply your knowledge of the provision of consultancy services in the context of the real estate and construction sectors.	
	Examples of activities and knowledge comprised within this level are: <ul style="list-style-type: none"> • Preparing consultancy service plans • Preparing client briefs • Update reports to clients • Negotiating client contracts • Dealing with ethical dilemmas • Selecting appropriate tools and techniques for a given consultancy service • Using selected tools and techniques to achieve agreed outcomes • Keeping appropriate records 	
Level 3	Give reasoned advice, prepare and present consultancy reports, together with relevant analysis to clients, in the context of the real estate and construction sectors	
	Examples of activities and knowledge comprised within this level are: <ul style="list-style-type: none"> • Providing reports containing strategic advice and recommendations to a range of clients. • Presenting to clients • Implementing consultancy intervention 	

Competency Name:		Contract Administration (T016)
Description of competency in context of this sector	This competency covers the role of a surveyor administering a construction contract. Candidates should be aware of the roles and responsibilities of the administrator under the main forms of contract. They should have a detailed understanding of the contractual provisions relating to the forms of contract that they have administered	
Examples of likely knowledge, skills and experience at each level		
Level 1	Demonstrate knowledge and understanding of the contractual, legislative and statutory terminology/requirements, of a construction contract	
	Examples of knowledge comprised within this level are: <ul style="list-style-type: none"> • The various standard forms of contract and sub-contract used in the industry. • Basic contractual mechanisms and procedures applied at various stages of the contract. • The roles and responsibilities of the administrator 	
Level 2	Implement administrative procedures necessary for the smooth running of a construction contract.	
	Examples of activities and knowledge comprised within this level are: <ul style="list-style-type: none"> • Issuing instructions • Dealing with payment provisions • Managing change procedures • Involvement with dispute avoidance • Dealing with completion and possession issues • Issuing certificates 	
Level 3	Advise on the administrative procedures necessary for the smooth running of a construction contract including document control techniques and systems, meetings and reporting procedures.	
	Examples of activities and knowledge comprised within this level are: <ul style="list-style-type: none"> • Resolving disputes • Assessing entitlement for extension of time • Assessing entitlement for loss and expense • Advising all parties of their contractual rights and obligations 	

Competency Name:		Contract Practice (T017)
Description of competency in context of this sector	This competency covers the various forms of contract used in the Construction Industry. Candidates should have an awareness of all of the main standard forms of contract and a thorough understanding of contract law, legislation and the specific forms that they have used.	
Examples of likely knowledge, skills and experience at each level		
Level 1	Demonstrate knowledge and understanding of the various forms of contract used in the Construction Industry and / or your area of business	
	Examples of knowledge comprised within this level are: <ul style="list-style-type: none"> • Basic contract law and legislation • Contract documentation • The various standard forms of contract and sub-contract • When the different forms would be used • Basic contractual mechanisms and procedures at various stages of the contract. • Third party rights including relevant legislation and the use of collateral warranties. 	
Level 2	Apply your knowledge of the use of the various standard forms of contract at project level, including the implications and obligations that apply to the parties to the contract	
	Examples of activities and knowledge comprised within this level are: <ul style="list-style-type: none"> • Producing contract documentation • Carrying out the contractual mechanisms and procedures relevant to the financial management aspects of your project, such as change procedures, valuations, loss and expense and final accounts • Understanding general contractual provisions such as letters of intent, insurances, retention, bonds, liquidated and ascertained damages, early possession, practical completion and other common contractual mechanisms 	
Level 3	Provide evidence of reasoned advice, prepare and present reports on the selection of the appropriate form of contract and warranties for your chosen procurement route. This should include advising on the most appropriate contractual procedure at the various stages of a construction or other contract	
	Examples of activities and knowledge comprised within this level are: <ul style="list-style-type: none"> • Selecting the appropriate form of contract and/or sub-contract for your chosen procurement route. • Advising on the most appropriate contractual procedure at the various stages of a contract. • Evaluating the appropriateness and implications of proposed contractual amendments. 	

Competency Name:		Corporate Real Estate Management (T019)
Description of competency in context of this sector	This competency covers the strategic management of occupational property – the space a business or public body needs in order to operate – taking an overall strategic view about its suitability for that business operation and the financial implications of continued occupation whilst ensuring that the facility is managed on a day to day basis in a cost effective and high quality manner to maximise occupational productivity.	
Examples of likely knowledge, skills and experience at each level		
Level 1	Demonstrate knowledge and understanding of the principles and practices underlying the structuring and financing of corporate transactions, with particular reference to the role of real estate within these transactions.	
	Examples of knowledge comprised within this level are: <ul style="list-style-type: none"> • Understand the role of property, space use and the financial implications of acquisition/leasing accommodation as well as the ongoing occupational costs of running the facility in the context of business/public authority operations. • Understand the '4Ps': the key interaction of property [accommodation], people [staff/customers], place [location] and pounds [financial effects] in the context of business or public sector operations. 	
Level 2	Apply your knowledge and understanding to assist in advising corporate organisations on the capital structure options relating to both occupational and surplus real estate. This should include the calculation and modelling of the cost of capital, plus a working knowledge of the regulatory framework within which the corporate finance marketplace operates.	
	Examples of activities and knowledge comprised within this level are: <ul style="list-style-type: none"> • Understanding of the criteria which drive business/public authority strategy formulation and how aligned accommodation and facility service provision strategies are then developed. • Demonstrating the importance of aligning operational resource planning to meet strategic business requirements • Awareness of the financial implications of property and facility management to business operations - the effect on the balance sheet and on the P & L account. • Using analysis techniques associated with comparative returns on investment, for example in various fit-outs and the return to the business in the short, medium and longer term. Familiarity with life cycle costing and whole life returns on facility investment should be demonstrated. • Communicating the strategic importance of property and facility management within a boardroom context. 	

Level 3	<p>Give reasoned advice on the effects of different corporate financing techniques and structures on real estate (or plant and machinery) holdings in a corporate context. This should include impacts on accounts and contributions to both merger and acquisition activity, as well as general corporate financing/restructuring transactions.</p>
	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> • Advise on property and facilities management strategies demonstrating the following: <ul style="list-style-type: none"> – a full understanding of the business, its strategies and financial constraints; – corporate support at a senior and preferably, Boardroom level; – a strategic, not a tactical day to day approach to delivery; – an ability to procure and manage the effective and quality provision of a wide range of facilities services; – full knowledge and reliable data of the operational portfolio; – IT availability and user skills. • Develop property and facilities management plans which support the relevant business and include some or all of the following strategic requirements: <ul style="list-style-type: none"> – occupation cost minimisation; – flexibility of occupation and use; – promotion of corporate image; – promotion of a marketing, sales and/or selling messages; – improving staff facilities, workplace conditions and workstyle flexibility; – improved operational efficiency and productivity; – facilitating corporate culture changes; – protection, realisation and/or enhancement of asset value. • Using performance measurement techniques and benchmarking as valuable indicators by which to formulate and ‘test’ property and facilities management strategies, and to evidence the added value of strategically focused property and facilities management to the business. • Using and understanding the various methodologies and metrics used by businesses and public bodies to measure business performance and develop an understanding of how these may be used to measure the contribution of property and facilities management to business efficiency, effectiveness and productivity.

Competency Name:		Design and Specification (T021)
Description of competency in context of this sector	This competency involves the skills involved in the design and specification of construction projects. Building Surveyors are usually involved in refurbishment of property, and in some cases new build projects. Knowledge of the stages of design and specification, from inception to completion is an essential Building Surveying skill.	
Examples of likely knowledge, skills and experience at each level		
Level 1	Demonstrate knowledge and understanding of the design process and the scope and content of related documentation	
	Examples of knowledge comprised within this level are: <ul style="list-style-type: none"> • The various stages of the design process. • The application of the CDM Regulations in the design process • Knowledge of the effect of the planning regime and technical standards on the design process. • An understanding of the structural implications of alterations to the load bearing components of building fabric. • The ability to interpret the requirements of a client's brief, in order to satisfy the requirements of the statutory processes involved. • Knowledge of the general issues surrounding sustainability. • An understanding of the concepts of Modern Methods of Construction • Knowledge and understanding of Preliminaries and Preambles to contract documentation. 	
Level 2	Prepare designs and specifications, including at outline and detail levels	
	Examples of activities and knowledge comprised within this level are: <ul style="list-style-type: none"> • Preparation of sketch designs to demonstrate compliance with a client's brief, while satisfying statutory requirements. • Development of initial proposals to a detailed stage and obtaining statutory consents. • Completion of Design Risk Assessments, of the proposed design, to satisfy the requirements of the CDM Regulations, including DRA's in connection with the future maintenance of the building. • Provision of advice to client's regarding sustainability issues surrounding the proposals for their building. 	
Level 3	Co-ordinate and manage the design and specification process on projects	
	Examples of activities and knowledge comprised within this level are: <ul style="list-style-type: none"> • Carry out or assist in the preparation of the design and specification of a building project from outline proposals to completion of the design and specification process. • Demonstrate knowledge and application of the specification process, including detailed knowledge of the main methods of specification. • Demonstrate knowledge and application of the design and specification process, and its relevance and importance to the procurement and execution of the Contract selected for the building works. 	

Competency Name:		Environmental Management (T030)
Description of competency in context of this sector	This competency deals with both the broad knowledge and application of environmental management practice, as well the more specific knowledge and application of formal environmental management standards for land and property.	
Examples of likely knowledge, skills and experience at each level		
Level 1	Demonstrate knowledge and understanding of appropriate environmental management concepts, processes, and systems.	
	Examples of knowledge comprised within this level are: <ul style="list-style-type: none"> • An understanding of environmental management. • An understanding of where environmental management applies in professional property and land practice. • An understanding of standards used in environmental management including EMS and ISO 14001. 	
Level 2	Apply your understanding of appropriate environmental management concepts, processes, and systems.	
	Examples of activities and knowledge comprised within this level are: <ul style="list-style-type: none"> • Advising clients on the needs of environmental management. • Advising clients on the scope and methods to be used for environmental management. • Advising clients on the specialisms and specialists required to conduct environmental management. 	
Level 3	Maintain and report on environmental management and/or environmental management systems.	
	Examples of activities and knowledge comprised within this level are: <ul style="list-style-type: none"> • Carrying out environmental management and reporting, including data management systems. • Presenting and proposing actions following the findings of environmental management. • Negotiating and liaising with clients and regulators on the findings and actions arising from environmental management. 	

Competency Name:		Fire Safety (T033)
Description of competency in context of this sector	This competency is about having the skills to assess the level of fire safety in buildings, and in proposed building projects, and being able to advise how to achieve required levels of safety when they are not present.	
Examples of likely knowledge, skills and experience at each level		
Level 1	Demonstrate knowledge and understanding of the consequences of fire in a building, how it is modified by the enclosure and how the impact may be controlled. Apply fire safety principles to practical situations so as to minimise the risk from fire to personal injury or death, physical loss and adverse environmental impact.	
	Examples of knowledge comprised within this level are: <ul style="list-style-type: none"> • Relevant country's fire safety standards or regulations • Understanding of current means of escape and compartmentation guidance. • Current construction techniques related to fire precautions 	
Level 2	Demonstrate knowledge and understanding of the combustion process; the physics and chemistry of fire; the physiological and psychological effects of fire; and the ability to assess means of escape systems according to circumstance, including fire safety management systems.	
	Examples of activities and knowledge comprised within this level are: <ul style="list-style-type: none"> • Attend relevant fire safety course • Assessing project plans for fire safety compliance • Inspecting projects to assess satisfactory implementation of fire safety features. 	
Level 3	Apply the principles and understanding by preparing a fire safety strategy for a moderately complex assembly or commercial building with multiple uses and a relatively high occupancy.	
	Examples of activities and knowledge comprised within this level are: <ul style="list-style-type: none"> • Preparing a fire safety strategy for a building as described. 	

Competency Name:	GIS (Geographical Information Systems) (T036)
Description of competency in context of this sector	A GIS uses computer technology to integrate, manipulate and display a wide range of information to create a picture of an area's geography, environment and socio-economic characteristics. Beginning with a computerised topographic map as its base, a GIS overlays and integrates graphic and textual information from separate databases. The end result is a tool that can support decision making and problem solving and provide almost instantaneous answers to complex questions.

Examples of likely knowledge, skills and experience at each level	
Level 1	<p>Demonstrate knowledge and understanding of the principles of geographic information science and systems. Be aware of industry standard GIS, data structures, types and their applications, and of appropriate capture and output systems.</p> <p>Examples of knowledge comprised within this level are:</p> <ul style="list-style-type: none"> • Understand and be able to explain the generic concepts in GIS appropriate to different audiences. • Compare and contrast different commercial GIS software packages and explain their relative merits. • Proficiently operate at least one commercially available off-the-shelf GIS software package e.g. create, store, access, view, analyse and plot spatial data. • Understand and be able to describe the data types and data structures used for spatial data and explain their relative merits. • Understand and be able to explain different open source and proprietary data formats and explain their relative merits. • Understand and be able to describe the different methods of primary, and especially secondary, data capture and their underpinning technologies. • Understand and be able to describe the different output options and their underpinning technologies.
Level 2	<p>Apply your knowledge and assess data quality; define and use appropriate input and data transfer methods; analyse data and prepare databases; identify digital data sources and assess "fitness for use". Understand and be aware of national and international data standards.</p> <p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> • Specifying capture methods appropriate to the data source and the application, explaining and justifying the rationale used. • Managing data capture projects and providing quality control over the acquisition of spatial data for use in GIS. • Understanding the principles underlying the analysis of spatial data and implement these with typical GIS algorithms using standard functionality and/or a high level programming language.e • Applying query languages in relation to database management systems e.g. data modelling, data loading, data maintenance, query, translate data formats, data export. • Identifying, assessing and sourcing datasets appropriate to user requirements and assessing their quality and fitness for purpose in the context of quantitative and qualitative measures such as: spatial resolution, accuracy/precision, temporal resolution, purpose of original capture etc. • Understanding international de jure and de facto industry standards and how these apply in local jurisdictions and to local customs and practices. • Understanding metadata for third party datasets and be able to prepare, creating and maintaining appropriate metadata for new datasets.

Level 3	<p>Assess clients' needs and advise them accordingly. Define specifications including data and process modelling, customise systems, carry out advanced spatial analyses, and manage data and observe data standards.</p>
	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> • Designing and conducting user requirements analysis at consultancy level • Analysing and synthesising user requirements into a coherent and convincing strategy. • Presenting, explaining and justifying findings and advice in a language appropriate to the customer. • Defining data standards to meet specific user requirements • Analysing customer processes and presenting options to model these as appropriate with respect to availability of resources, criticality and customer expectations. • Customising GIS software using a high level programming language in order to implement data specifications, data models, process models etc. • Analysing, defining and implementing appropriate analytical methods • Defining appropriate data management standards with respect to; currency requirements, conflict resolution, archiving, availability, backup & recovery, system resilience etc. • Explaining all of the above in the context of the customers wider information systems. • Identifying and explaining the implications and limitations of advice with respect to any of the above. • Preparing project proposals and draft tender documentation for system procurement, conducting benchmark tests, and overseeing implementation programmes.

Competency Name:		Health and Safety (M008)
Description of competency in context of this sector	This competency covers the relationship between the work of the Quantity Surveyor and health and safety issues within the construction industry. Candidates should be aware of legal, practical and regulatory requirements. They should have a detailed understanding of the health and safety processes and guidelines used to achieve this	
Examples of likely knowledge, skills and experience at each level		
Level 1	Demonstrate knowledge and understanding of the principles and responsibilities imposed by law, codes of practice and other regulations appropriate to your area of practice	
	Examples of knowledge comprised within this level are: <ul style="list-style-type: none"> • Personal safety on site and in the office • Procedures imposed by law • The impact on health and safety of: <ul style="list-style-type: none"> – Design – Construction processes – Building maintenance – 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: <ul style="list-style-type: none"> • 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 	
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: <ul style="list-style-type: none"> • Giving reasoned advice on and/or taking responsibility for health and safety issues relating to: <ul style="list-style-type: none"> – Impact of design on construction – Alternative construction processes – Impact of design on occupation and maintenance – Undertaking risk assessments – Current legislation 	

Competency Name:	Landlord and Tenant including Rent Reviews and Lease Renewals (T048)
Description of competency in context of this sector	This competency is about the management of the Landlord and Tenant relationship. It has a broad scope covering all aspects of lease negotiations arising between landlord and tenant. The candidate will be expected to understand the issues and how they affect both parties.
Examples of likely knowledge, skills and experience at each level	
Level 1	Demonstrate knowledge and understanding of the law and practice relating to landlord and tenant.
	Examples of knowledge comprised within this level are: <ul style="list-style-type: none"> • The principles of property law • The statutory and Common Law framework applying to the Landlord and Tenant relationship. • The content, form, and structure of leases • Relevant market conditions and property values
Level 2	Apply the principles of the law and practice relating to landlord and tenant. Carry out relevant negotiations to provide solutions to issues affecting both owners and occupiers of real estate.
	Examples of activities and knowledge comprised within this level are: <ul style="list-style-type: none"> • Reading and interpreting leases • Preparing reports containing recommendations prior to the commencement of negotiations • Giving appropriate valuation advice • Carrying out market research, collate and analyse comparable evidence • Preparing, serving and responding to legal notices • Entering into negotiations • Reaching an agreed solution and reporting recommendations to client • Instructing legal advisers and seeing matters to conclusion
Level 3	Provide evidence of reasoned advice, prepare and present reports on the law and practice relating to landlord and tenant. Apply your knowledge to assist in undertaking relevant dispute resolution procedures.
	Examples of activities and knowledge comprised within this level are: <ul style="list-style-type: none"> • Providing strategic advice upon landlord and tenant matters, relating to individual properties or blocks of properties. • 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.

Competency Name:		Maintenance Management (T053)
Description of competency in context of this sector	Deliver maintenance services to a plan based on organisational need, either using an in-house work force, or maintenance contractors.	
Examples of likely knowledge, skills and experience at each level		
Level 1	Demonstrate knowledge and understanding of the maintenance requirements of buildings, structures and other real estate.	
	Examples of knowledge comprised within this level are related to: <ul style="list-style-type: none"> • Planned maintenance • Reactive maintenance • Maintenance inspections • Statutory inspections • Compliance requirements • Prioritising forward maintenance • Integrating maintenance activity with the occupant's operational needs. 	
Level 2	Manage and keep up-to-date maintenance information to determine and implement operational maintenance policies.	
	Examples of activities and knowledge comprised within this level are: <ul style="list-style-type: none"> • Maintaining record systems • Identifying maintenance requirements • Implementing maintenance policy • Placing contracts (orders) for maintenance. • Confirming satisfactory completion of work. 	
Level 3	Provide evidence of reasoned advice, write and present reports on maintenance management.	
	Examples of activities and knowledge comprised within this level are: <ul style="list-style-type: none"> • Providing advice and recommendations on issues relating to the management of maintenance policy. 	

Competency Name:		Procurement and Tendering (T062)
Description of competency in context of this sector	This competency relates to services and goods rather than construction. It covers the selection of service providers – pre-qualification, tender lists, selection criteria; contract selection – alternative forms of contract; pricing documentation. In this context contracts might cover single service providers or multi service management and implementation.	
Examples of likely knowledge, skills and experience at each level		
Level 1	Demonstrate knowledge and understanding of the main types of procurement. Demonstrate knowledge and understanding of the tendering and negotiation processes involved in procurement.	
	Examples of knowledge comprised within this level are related to: <ul style="list-style-type: none"> • A practical knowledge of the following areas: <ul style="list-style-type: none"> – Pre-qualification procedures – Selection criteria – Tender lists – Specifications – Service level agreements – Pricing documentation – Tender negotiation 	
Level 2	Apply your knowledge to the implementation of the procurement routes selected for your projects and to carrying out tendering and negotiation processes relevant to them.	
	Examples of activities and knowledge comprised within this level are: <ul style="list-style-type: none"> • Implementing prequalification procedures using selection criteria to draw up tender lists. • Devising tender documentation including statements of scope of service and pricing schedule. • Participating in pricing and/or vetting of tenders 	
Level 3	Give reasoned advice on the appropriateness of various procurement routes. Manage the tendering and negotiation process and present reports on the outcome.	
	Examples of activities and knowledge comprised within this level are: <ul style="list-style-type: none"> • Providing reasoned advice and recommendations to clients on alternative procurement routes and tendering procedures • Taking a lead role in the award of contracts and providing reasoned advice on the decisions reached. 	

Competency Name:		Project Audit (T065)
Description of competency in context of this sector	This competency concerns the assessment of the performance of a project and its individual stakeholders. This can be used to identify areas for improvement on a live project and/or to identify lessons learnt for application on future projects.	
Examples of likely knowledge, skills and experience at each level		
Level 1	Describe the essential requirements of a project audit/close-out report.	
	Examples of knowledge comprised within this level are: <ul style="list-style-type: none"> • An understanding of the client's requirements and the development/project brief. • An understanding of the reasons for any changes to the client's requirements and the development/project brief. • An understanding of the reasons for the chosen procurement route and the actual and planned performance of the project team. • An understanding of the project team structures and procedures. • An understanding of the reasons for any design, cost and programme variations. • An understanding of the project risks and any unforeseen problems 	
Level 2	Explain the procedures associated with producing a project audit/close-out report.	
	Examples of activities and knowledge comprised within this level are: <ul style="list-style-type: none"> • Analysing the reasons for, and implementation of, changes to the client's requirements and the development/project brief. • Analysing the appropriateness of the chosen procurement route • Analysing the actual performance of the project team and identifying potential improvements • Analysing project team structures and procedures • Analysing reasons for, and implementation of, any design, cost and programme variations. • Recording lessons learnt 	
Level 3	Undertake and report on a project audit/close-out report.	
	Examples of activities and knowledge comprised within this level are: <ul style="list-style-type: none"> • Preparing audit reports and advising the client. • Identifying lessons learnt and recommending appropriate responses • Assessing and advising upon the performance of the project team. • Assessing and advising upon the chosen procurement route, project team structures and procedures. • Assessing and advising upon design cost and programme variations. 	

Competency Name:		Project Financial Control and Reporting (T067)
Description of competency in context of this sector	This competency covers the effective cost control of property/construction projects whilst in progress. Candidates should be aware of the principles of controlling and reporting costs on any project. They should have a detailed understanding of the control and reporting processes used on their projects. [Please note: for surveyors working in contracting this competency covers externally issued cost advice and reports]	
Examples of likely knowledge, skills and experience at each level		
Level 1	<p>Demonstrate knowledge and understanding of the effective control of costs during a project. Demonstrate understanding of the legal and contractual constraints and the effect of time and quality on the cost of a project.</p> <p>Examples of knowledge comprised within this level are:</p> <ul style="list-style-type: none"> • The effective control of costs while a property/construction project is in progress. • The legal and contractual constraints on the cost of a project such as changes in property or building legislation and design risk allocation • The reporting and forecasting of costs. • The principles of contingencies / risk allowances 	
Level 2	<p>Apply your knowledge to the management of project costs. This should include the preparation and presentation of financial reports on the performance of a project at appropriate intervals, to provide effective forecasting of costs, risks and their financial implications.</p> <p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> • Managing project costs • Reporting and forecasting costs for different procurement routes and client type.s • Using cashflows in financial management • Managing provisional sums / contingencies / risk allowances 	
Level 3	<p>Advise on strategies and procedures to control predicted expenditure in line with a budget.</p> <p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> • Implementing change control procedures within the contract • Establishing reporting regimes / protocols • Using risk management and analysis techniques 	

Competency Name:		Property Management (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: <ul style="list-style-type: none"> • Understand the key factors determining the landlord and tenant relationship in relation to the running of a property. • Understand key lease terms and their implications to property management. • Understand how disputes and problematical issues can be resolved, and be 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: <ul style="list-style-type: none"> • managing property from both a landlord and tenant perspective, and understand 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 RICS. • 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: <ul style="list-style-type: none"> • 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. 	

Competency Name:		Strategic real estate consultancy (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: <ul style="list-style-type: none"> • 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: <ul style="list-style-type: none"> • Researching organisational background • Preparing relevant data • Analysing data • Using different styles of consultancy intervention for different clients needs • Using your knowledge of real estate to find strategic solutions to meet clients 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: <ul style="list-style-type: none"> • Providing strategic advice and recommendations to clients • Presenting to clients • Conducting meetings with clients • Presenting data to support recommendations 	

Competency Name:		Supplier Management (T080)
Description of competency in context of this sector	This competency relates to the management of facilities service providers rather than construction contractors or consultants	
Examples of likely knowledge, skills and experience at each level		
Level 1	Demonstrate knowledge and understanding of how to manage suppliers using a logical process to ensure that the cost and quality of the service received meets organisational requirements.	
	Examples of knowledge comprised within this level are: <ul style="list-style-type: none"> • A practical knowledge of the following areas: <ul style="list-style-type: none"> – Contracts – Service level agreements – Key performance indicators – Performance monitoring – Benchmarking 	
Level 2	Apply your knowledge and understanding by using an existing process to manage suppliers to ensure that the cost and quality of the service received meets organisational requirements.	
	Examples of activities and knowledge comprised within this level are: <ul style="list-style-type: none"> • Involvement in a range of the activities listed above (level1) through: <ul style="list-style-type: none"> – performance review meetings, – auditing of suppliers, – budgeting, – ordering variations to the service, – payment of suppliers 	
Level 3	Help define organisational requirements for supplier services and develop an appropriate approach to the management of an individual supplier or group of suppliers based on the scale of the service and the risk of service failure.	
	Examples of activities and knowledge comprised within this level are:- <ul style="list-style-type: none"> • Using user/customer feedback to provide effective supplier management, ensuring that performance matches the needs of the organisation. • Preparing management reports providing recommendations in relation to supplier management. 	

Competency Name:		Sustainability (M009)
Description of competency in context of this sector	This competency covers the impact of sustainability issues on development and construction. Candidates should have an awareness of the various ways in which sustainability can impact on development and construction. They must have a thorough understanding of the impact made by sustainability on their projects and have been involved with the financial management of that impact.	
Examples of likely knowledge, skills and experience at each level		
Level 1	Demonstrate knowledge and understanding of why and how sustainability seeks to balance economic, environmental and social objectives at global, national and local levels in the context of land, property and the built environment	
	Examples of knowledge comprised within this level are: <ul style="list-style-type: none"> • The principles of sustainability within development and the construction process • The relationship between property and the environment • How national and international legislation, regulations and taxation relating to sustainability affect construction. • Criteria by which sustainability is measured in relation to finished buildings • The principles of how design, technology and construction processes can contribute to sustainable building. • 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 of awareness of the circumstances in which specialist advice is necessary	
	Examples of activities and knowledge comprised within this level are: <ul style="list-style-type: none"> • Carrying out capital cost and value engineering exercises to determine the impact of sustainability issues on design and construction processes • 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: <ul style="list-style-type: none"> • 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. 	

Competency Name:		Works progress and Quality Management (T085)
Description of competency in context of this sector	This competency involves the supervision of works on site. It is essential that candidates selecting this competency demonstrate a detailed knowledge of construction technology techniques, and the relevance of the techniques on site. Quality of workmanship is vital to ensure the long term functional ability of the element of the building design, and candidates will be expected to demonstrate detailed knowledge site quality requirements.	
Examples of likely knowledge, skills and experience at each level		
Level 1	Inspect and record progress and quality of building works	
	Examples of knowledge comprised within this level are: <ul style="list-style-type: none"> • The ability to carry out a site inspection, and the importance of recording progress of works. • A knowledge of the requirements of recording progress, and comparing to programmed works progress. • Knowledge of the requirement for quality descriptors as set out in the contract documentation. 	
Level 2	Report and advise upon the adequacy of progress and quality of building works	
	Examples of activities and knowledge comprised within this level are: <ul style="list-style-type: none"> • Carry out inspections of works being completed on site, and prepare the necessary reports showing progress and quality issues that have arisen. • Prepare reports and advice for clients detailing the effects of additional instructions, amendments to specifications, and the likely effect on progress. • Record for in house and external purposes reports on quality of works on site, including any works rejected, and the reasons for doing so. 	
Level 3	Manage and co-ordinate progress and quality of building works as a contract administrator/supervising officer or equivalent	
	Examples of activities and knowledge comprised within this level are: <ul style="list-style-type: none"> • Prepare cost reports for clients, on works progress, showing any deviation from expected progress. • Implement systems for recording progress and quality issues as part of CA/SO duties, and prepare reports for external circulation. • Show an understanding of the differences between the duties of a CA/SO, and those of a person appointed solely to report on progress and quality issues. • Act as a CA/SO, and incorporate into your duties the requirements for progress and quality reporting. 	