

Facilities Management

Assessment of Professional Competence



RICS

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professionalism
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rics.org/pathwayguides

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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 19 different areas of practice, at APC (Chartered) level.

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 2006 APC and ATC documentation. It is designed to help you understand more about qualifying as an RICS member in facilities management. The guide is based on UK market practice and may be unsuitable for candidates based in other countries. The material is set out in three sections.

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

Section two – lists the competency requirements of the facilities management APC pathway (as set out in the APC/ATC Requirements and competencies guide July 2006).

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 2006 core APC and ATC documentation which is available on the RICS website and comprises:

- **APC/ATC Requirements and competencies guide – July 2006**
- **Candidate guides (2006) – (the particular candidate guide you need will depend on your route to membership)**
- **Guide for supervisors, counsellors and employers – graduate route to membership, July 2006.**

Introduction

About the competencies

The APC aims to assess that you are competent to carry out the work of a qualified chartered surveyor. To be competent is to have the skill or ability to perform a task or function. The RICS 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 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/ATC Requirements and competencies guide – July 2006**.

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

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

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

Choosing your competencies

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

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

How to find help

RICS has a fully trained Contact Centre team who will be able to help you with any general APC queries:

t +44 (0)870 333 1600

f +44 (0)20 7334 3811

contactrics@rics.org

www.rics.org

About Facilities management

Facilities management (FM) is the total management of all services that support the core business of an organisation.

Good facilities management makes a huge difference to the efficiency and productivity of a company, its staff and even its clients. Using best business practice, a company's operating costs can be reduced while its productivity is increased.

It is the discipline that ensures all the different buildings and services of a company work as efficiently as possible.

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

RICS qualification pathways in this sector:

Facilities management APC

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

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

Once established within the premises, businesses must make their buildings and offices as efficient as possible. Facilities managers will look at the best use of space, suitable technology solutions, human resources and safe surroundings.

Running a company also means complying with legal responsibilities including health and safety, building regulations, fire regulations, access and security. Facilities managers advise on these and other essential services such as catering, cleaning and maintenance.

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

- 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 guide

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 facilities management. The guidance does not cover the mandatory competency requirements.

The official competency definitions (at levels one, two and three) are provided, followed by a description of the key knowledge and activities that are likely to fall within the scope of each competency.

The information provided is designed to be helpful but informal guidance. The knowledge and activities described under each competency are not exhaustive, and should not be relied upon as any form of revision list. Candidates must satisfy themselves and their employers that they have reached the required level of attainment before applying for final assessment.

The competencies are arranged in alphabetical order.

The full list of RICS competencies and pathway requirements can be found in the APC/ATC Requirements and competencies guide – July 2006.

Competency guide

Analysis of client requirements

Reference no. 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 advising 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	Level 2	Level 3
<p>Demonstrate knowledge and understanding of the need to collect data, analyse and define the needs of clients.</p>	<p>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>	<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 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 preparing budget costs including elemental cost plans 	<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 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 	<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

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Analysis of client requirements (continued)

Reference no. 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 advising 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	Level 2	Level 3
<p>Demonstrate knowledge and understanding of the need to collect data, analyse and define the needs of clients.</p>	<p>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>	<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 knowledge comprised within this level are:</p> <ul style="list-style-type: none"> • The principles of preparing a project programme of works • The various contract procurement options • The need for specialist consultants and options for engaging them. 	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> • Considering the need for specialist consultants and the options for engaging them. 	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> • Advising on the need for specialist consultants and the options for engaging them • Presenting a feasibility study • Presenting a detailed project plan.

Conflict avoidance, management and dispute resolution procedures

Reference no. T004

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	Level 2	Level 3
<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>Provide evidence of practical application in your area of practice having regard to the relevant law.</p>	<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 knowledge comprised within this level are:</p> <p>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 (eg how forms of contract deal with dispute resolution, and the scope of such clauses): 	<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 PI cover of the candidate's organisation • Adopting – or encouraging the adoption of (as appropriate) – suitable dispute avoidance techniques • Negotiating actively on behalf of clients (eg negotiations of a dilapidations claim, a party wall award or final account on a construction project) prior to third party referral • Assisting in the collation or preparation of claims/counter-claims and submissions • Assisting in the identification, gathering and collation of facts and expert evidence for use in expert reports 	<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 third party resolution process and associated management of that process on behalf of client • NB: Please note that the roles of acting as a third party dispute resolver, expert witness, or advocate – 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.

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Conflict avoidance, management and dispute resolution procedures (continued)

Reference no. T004

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	Level 2	Level 3
<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>Provide evidence of practical application in your area of practice having regard to the relevant law.</p>	<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 knowledge comprised within this level are:</p> <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 <ul style="list-style-type: none"> • 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 specialised dispute resolution schemes it offers relevant to your market sector eg PACT. 	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> • Sufficient understanding of the main points of the statutory or non-statutory law relevant to/ underpinning any particular dispute resolution process (eg in England and Wales, Arbitration Act 1996, or HGCRA '96 Part II, CPR, Party Wall Act 1996 etc) and its application. 	<p>Examples of activities and knowledge comprised within this level are:</p>

Construction technology and environmental services

Reference no. 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	Level 2	Level 3
<p>Demonstrate knowledge and understanding of the principles of design and construction relating to your chosen field of practice.</p>	<p>Apply your knowledge to the design and construction processes.</p>	<p>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.</p>
<p>Examples of knowledge comprised within this level are:</p> <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. 	<p>Examples of activities and knowledge comprised within this level are:</p> <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. 	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> • Advising on the choice of construction solution on your project • Reporting on the impact of different design solutions and construction processes on cost and programme.

Consultancy services

Reference no. 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	Level 2	Level 3
<p>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.</p>	<p>Apply your knowledge of the provision of consultancy services in the context of the real estate and construction sectors.</p>	<p>Give reasoned advice, prepare and present consultancy reports, together with relevant analysis to clients, in the context of the real estate and construction sectors.</p>
<p>Examples of knowledge comprised within this level are:</p> <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. 	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> • Preparing consultancy service plans • Preparing client briefs • Updating reports to clients • Negotiating client contracts • Dealing with ethical dilemmas • Selecting appropriate tools and techniques for a given consultancy service • Using selected tools and techniques to achieve agreed outcomes • Keeping appropriate records. 	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> • Providing reports containing strategic advice and recommendations to a range of clients • Presenting to clients • Implementing consultancy intervention.

Contract administration

Reference no. 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	Level 2	Level 3
<p>Demonstrate knowledge and understanding of the contractual, legislative and statutory terminology/requirements, of a construction contract.</p>	<p>Implement administrative procedures necessary for the smooth running of a construction contract.</p>	<p>Advise on the administrative procedures necessary for the smooth running of a construction contract including document control techniques and systems, meetings and reporting procedures.</p>
<p>Examples of knowledge comprised within this level are:</p> <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. 	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> • Issuing instructions • Dealing with payment provisions • Managing change procedures • Being involved with dispute avoidance • Dealing with completion and possession issues • Issuing certificates. 	<p>Examples of activities and knowledge comprised within this level are:</p> <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.

Contract practice

Reference no. 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	Level 2	Level 3
<p>Demonstrate knowledge and understanding of the various forms of contract used in the construction industry and/or your area of business.</p>	<p>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.</p>	<p>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.</p>
<p>Examples of knowledge comprised within this level are:</p> <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. 	<p>Examples of activities and knowledge comprised within this level are:</p> <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. 	<p>Examples of activities and knowledge comprised within this level are:</p> <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.

Corporate real estate management

Reference no. 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	Level 2	Level 3
<p>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.</p>	<p>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.</p>	<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 knowledge comprised within this level are:</p> <ul style="list-style-type: none"> • 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 • 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. 	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> • Understanding 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 • Being aware 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. 	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> • Advising 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.

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Corporate real estate management (continued)

Reference no. 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	Level 2	Level 3
<p>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.</p>	<p>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.</p>	<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 knowledge comprised within this level are:</p>	<p>Examples of activities and knowledge comprised within this level are:</p>	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> • 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 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.

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Corporate real estate management (continued)

Reference no. 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	Level 2	Level 3
<p>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.</p>	<p>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.</p>	<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 knowledge comprised within this level are:</p>	<p>Examples of activities and knowledge comprised within this level are:</p>	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> • 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 developing an understanding of how these may be used to measure the contribution of property and facilities management to business efficiency, effectiveness and productivity.

Design and specification

Reference no. T021

Description of competency in context of this sector

This competency involves the skills needed 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 skill.

Examples of likely knowledge, skills and experience at each level

Level 1	Level 2	Level 3
<p>Demonstrate knowledge and understanding of the design process and the scope and content of related documentation.</p>	<p>Prepare designs and specifications, including at outline and detail levels.</p>	<p>Co-ordinate and manage the design and specification process on projects.</p>
<p>Examples of knowledge comprised within this level are:</p> <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. 	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> • Preparing of sketch designs to demonstrate compliance with a client's brief, while satisfying statutory requirements • Developing of initial proposals to a detailed stage and obtaining statutory consents • Completing of Design Risk Assessments, of the proposed design, to satisfy the requirements of the CDM Regulations, including DRAs in connection with the future maintenance of the building • Providing of advice to clients regarding sustainability issues surrounding the proposals for their building. 	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> • Carrying out or assisting in the preparation of the design and specification of a building project from outline proposals to completion of the design and specification process • 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.

Environmental management

Reference no. 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 as 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	Level 2	Level 3
<p>Demonstrate knowledge and understanding of appropriate environmental management concepts, processes, and systems.</p>	<p>Apply your understanding of appropriate environmental management concepts, processes, and systems.</p>	<p>Maintain and report on environmental management and/or environmental management systems.</p>
<p>Examples of knowledge comprised within this level are:</p> <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. 	<p>Examples of activities and knowledge comprised within this level are:</p> <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. 	<p>Examples of activities and knowledge comprised within this level are:</p> <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.

Fire safety

Reference no. 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 on how to achieve required levels of safety when they are not present.

Examples of likely knowledge, skills and experience at each level

Level 1	Level 2	Level 3
<p>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.</p>	<p>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.</p>	<p>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.</p>
<p>Examples of knowledge comprised within this level are:</p> <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. 	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> • Attending relevant fire safety course • Assessing project plans for fire safety compliance • Inspecting projects to assess satisfactory implementation of fire safety features. 	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> • Preparing a fire safety strategy for a building as described.

GIS (Geographical Information Systems)

Reference no. 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	Level 2	Level 3
<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>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>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 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 eg 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. 	<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 • Applying query languages in relation to database management systems eg 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 	<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

continued on next page>

GIS (Geographical Information Systems) (continued)

Reference no. 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	Level 2	Level 3
<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>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>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 knowledge comprised within this level are:</p>	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> • 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, create and maintain appropriate metadata for new datasets. 	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> • Defining appropriate data management standards with respect to: currency requirements, conflict resolution, archiving, availability, backup and recovery, system resilience etc • Explaining all of the above in the context of the customer's 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 guide

Health and safety

Reference no. M008

Description of competency in context of this sector

This competency covers the relationship between the work of the facilities manager 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	Level 2	Level 3
<p>Demonstrate knowledge and understanding of the principles and responsibilities imposed by law, codes of practice and other regulations appropriate to your area of practice.</p>	<p>Apply evidence of practical application of health and safety issues and the requirements for compliance, in your area of practice.</p>	<p>Provide evidence of reasoned advice given to clients and others on all aspects on health and safety.</p>
<p>Examples of knowledge comprised within this level are:</p> <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. 	<p>Examples of activities and knowledge comprised within this level are:</p> <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. 	<p>Examples of activities and knowledge comprised within this level are:</p> <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.

Landlord and tenant (including rent reviews and lease renewals)

Reference no. 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	Level 2	Level 3
<p>Demonstrate knowledge and understanding of the law and practice relating to landlord and tenant.</p>	<p>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.</p>	<p>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.</p>
<p>Examples of knowledge comprised within this level are:</p> <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. 	<p>Examples of activities and knowledge comprised within this level are:</p> <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, collating and analysing comparable evidence • Preparing, serving and responding to legal notices • Entering into negotiations • Reaching an agreed solution and reporting recommendations to clients • Instructing legal advisers and seeing matters to conclusion. 	<p>Examples of activities and knowledge comprised within this level are:</p> <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 client's position • Demonstrating involvement with third party determination and associated submissions.

Maintenance management

Reference no. 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	Level 2	Level 3
<p>Demonstrate knowledge and understanding of the maintenance requirements of buildings, structures and other real estate.</p>	<p>Manage and keep up-to-date maintenance information to determine and implement operational maintenance policies</p>	<p>Provide evidence of reasoned advice, write and present reports on maintenance management.</p>
<p>Examples of knowledge comprised within this level are:</p> <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. 	<p>Examples of activities and knowledge comprised within this level are:</p> <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. 	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> • Providing advice and recommendations on issues relating to the management of maintenance policy.

Procurement and tendering

Reference no. 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; and 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	Level 2	Level 3
<p>Demonstrate knowledge and understanding of the main types of procurement. Demonstrate knowledge and understanding of the tendering and negotiation processes involved in procurement.</p>	<p>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.</p>	<p>Give reasoned advice on the appropriateness of various procurement routes. Manage the tendering and negotiation process and present reports on the outcome.</p>
<p>Examples of knowledge comprised within this level are:</p> <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. 	<p>Examples of activities and knowledge comprised within this level are:</p> <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. 	<p>Examples of activities and knowledge comprised within this level are:</p> <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.

Project audit

Reference no. 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	Level 2	Level 3
Describe the essential requirements of a project audit/close-out report.	Explain the procedures associated with producing a project audit/close-out report.	Undertake and report on a project audit/close-out report.
<p>Examples of knowledge comprised within this level are:</p> <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. 	<p>Examples of activities and knowledge comprised within this level are:</p> <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. 	<p>Examples of activities and knowledge comprised within this level are:</p> <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.

Project financial control and reporting

Reference no. 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	Level 2	Level 3
<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>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>Advise on strategies and procedures to control predicted expenditure in line with a budget.</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. 	<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 types • Using cashflows in financial management • Managing provisional sums/ contingencies/ risk allowances. 	<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.

Property management

Reference no. T070

Description of competency in context of this sector

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

Examples of likely knowledge, skills and experience at each level

Level 1	Level 2	Level 3
<p>Demonstrate knowledge and understanding of property management and the relationship between owner and occupier.</p>	<p>Apply the principles of property management to provide solutions to issues affecting both owners and occupiers of real estate.</p>	<p>Provide evidence of reasoned advice including the preparation and presentation of reports in relation to property management.</p>
<p>Examples of knowledge comprised within this level are:</p> <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. 	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> • Managing property from both a landlord and tenant perspective, and understanding the key factors from each viewpoint • Understanding legal requirements associated with multi let property and/or managed property • Understanding property management accounting principles from the landlord and tenant perspective, and also the requirements of law and RICS • Understanding courses of action in relation to breaches of lease by landlord and tenant. 	<p>Examples of activities and knowledge comprised within this level are:</p> <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.

Strategic real estate consultancy

Reference no. T079

Description of competency in context of this sector

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

Examples of likely knowledge, skills and experience at each level

Level 1	Level 2	Level 3
<p>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.</p>	<p>Apply your knowledge and understanding of the business context of real estate in a corporate or other context.</p>	<p>Provide evidence of reasoned oral and written advice on the principles and application of real estate knowledge.</p>
<p>Examples of knowledge comprised within this level are:</p> <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. 	<p>Examples of activities and knowledge comprised within this level are:</p> <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. 	<p>Examples of activities and knowledge comprised within this level are:</p> <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.

Supplier management

Reference no. 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	Level 2	Level 3
<p>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.</p>	<p>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.</p>	<p>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.</p>
<p>Examples of knowledge comprised within this level are:</p> <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. 	<p>Examples of activities and knowledge comprised within this level are:</p> <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. 	<p>Examples of activities and knowledge comprised within this level are:</p> <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.

Sustainability

Reference no. 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	Level 2	Level 3
<p>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.</p>	<p>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.</p>	<p>Provide evidence of reasoned advice given to clients and others on the policy, law and best practice of sustainability in your area of practice.</p>
<p>Examples of knowledge comprised within this level are:</p> <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. 	<p>Examples of activities and knowledge comprised within this level are:</p> <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. 	<p>Examples of activities and knowledge comprised within this level are:</p> <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.

Work progress and quality management

Reference no. 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 of site quality requirements.

Examples of likely knowledge, skills and experience at each level

Level 1	Level 2	Level 3
<p>Inspect and record progress and quality of building works.</p>	<p>Report and advise upon the adequacy of progress and quality of building works.</p>	<p>Manage and co-ordinate progress and quality of building works as a contract administrator/supervising officer or equivalent.</p>
<p>Examples of knowledge comprised within this level are:</p> <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. 	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> • Carrying out inspections of works being completed on site, and preparing the necessary reports showing progress and quality issues that have arisen • Preparing reports and advice for clients detailing the effects of additional instructions, amendments to specifications, and the likely effect on progress • Recording for in house and external purposes reports on quality of works on site, including any works rejected, and the reasons for doing so. 	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> • Preparing cost reports for clients, on works progress, showing any deviation from expected progress • Implementing systems for recording progress and quality issues as part of CA/SO duties, and preparing reports for external circulation • Showing 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 • Acting as a CA/SO, and incorporate into your duties the requirements for progress and quality reporting.

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