

Society of Chartered Surveyors

**Assessment of Professional Competence
Candidates guide**

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What is a Chartered Surveyor?

A Chartered Surveyor is a professional who practices in one of seven areas of the Property and Construction Industry as outlined below. There are over 120,000 Chartered Surveyors practicing world wide and Chartered Surveying is one of the most widely recognised professions in the world. Chartered Surveyors are at the forefront of decision which initiate real positive changes in both the built and natural environments in which we live.

The seven categories of Chartered Surveyor and the areas in which they practice are as follows:

The Chartered Quantity Surveyor

Advise building owners and architects on probable cost of construction schemes and on the costs of alternative designs. Sometimes known as Construction Cost Consultants, they prepare cost plans for projects which enable the design team to arrive at practical designs for projects and to stay within budget. They also act as Project Managers.

The Chartered Valuation Surveyor

Also known as the General Practice Surveyor, they undertake a variety of activities, but are mainly concerned with estate agency, valuation, development and management of property. Most valuation surveyors are engaged in private practice, but many are also employed in the Public Service.

The Chartered Planning & Development Surveyor

Specialises in all aspects of urban and rural planning. They are mainly employed by companies and organizations which carry out major urban and industrial development projects.

The Chartered Building Surveyor

Offers a specialised service in all matters relating to construction, including the restoration of old buildings and the construction of new. Among other services offered are structural surveys, schedules of dilapidations and insurance claims.

The Chartered Geomatics Surveyor

Surveys and maps the features of the earth's surface for a wide variety of purposes. Activities extend to mapping large and sometimes remote areas of the world or the sea bed, for oil exploration, engineering construction, port development etc.

The Chartered Mineral Surveyor

An expert in the economics and practice of mineral surveying, including the valuation and preparation of plans for the exploring and exploitation of minerals.

The Chartered Rural Practice Surveyor

Concerned with the management of agricultural land, including forestry. Work includes the valuation, sale and management of rural property.

The Society of Chartered Surveyors

The Society of Chartered Surveyors (SCS) is the professional body for Chartered Surveyors practicing in the Republic of Ireland. The Society currently has over 1,500 qualified members, practising in all areas of the Property and Construction Industry. The Society regulates the profession in the public interest and oversees all aspects of the profession, from education through to qualification and the continuing maintenance of the highest professional standards. The Society requires that its members carry professional indemnity insurance.

The Society traces its origins back to 1895 when a small group of Irish surveyors decided to amalgamate with the Royal Institution of Chartered Surveyors (RICS) in the UK. The Society remained a branch of the RICS until 1993, when it became an independent body granting its own qualifications of Associate (ASCS) or Fellow (FSCS). However, it retains strong links with the RICS and members of the Society maintain reciprocal membership of the RICS as Members, (MRICS) or Fellow (FRICS).

The Society is a founder member of RICS Europe with headquarters in Brussels and with seventeen other member associations of Chartered Surveyors throughout Europe. In addition, the Society also represents Irish construction and property interests on many other European organisations. The Society is a founder member of the Construction Industry Council (CIC) and is also a member of the Forum for the Construction Industry.

Services

In addition to establishing and maintaining the standards of its members, the Society also serves the public by commenting and making submissions to Government and other relevant authorities, on matters of construction and property interest. It publishes a number of widely respected publications.

In conjunction with the Industrial Property Databank (IPD) it publishes the SCS/IPD Index which charts movements in the commercial property market.

A Building Tender Index is also published which is the only totally independent index of its type in Ireland.

The Society publishes annually the highly successful Homeowners Guide to House Insurance, which is of great assistance to members of the public when renewing their annual house insurance.

Introduction

The Society maintains a web-site which carries a list of practices/companies and links to other relevant sites, etc. An important part of its function is ensuring that members are kept up to date on relevant developments in their profession by means of a special members section.

The Society runs, throughout the year, a series of continuing professional development lectures and seminars for members. Most of these lectures are now available to members on DVD or Video.

Structure

The Society headquarters is located at 5 Wilton Place in Dublin. It also has a Southern Region Group based in Cork and a Western Region Group based in Galway. The principal officer of the Society is the President who is elected annually by the members. The day to day management and administration is under the control of the Chief Executive.

The Society is governed by a Council which sets policy and by a Management and Professional Board, which reports directly to Council. There are a number of other boards and committees dealing with specific areas such as Research, Education, Discipline, etc.

The Society caters for its younger members through the Young Chartered Surveyors (YCS) group. The YCS plays an active part in the Society through liaison with educational institutions and by assisting younger members in the process of qualifying as Chartered Surveyors.

Qualifying as a Chartered Surveyor

To qualify as a Chartered Surveyor you must Gain a relevant SCS accredited academic qualification. Additionally, you must also undertake a minimum period of training and work experience relating to the specialised area in which you wish to practice. This period is known as the Assessment of Professional Competence. Having successfully completed the APC you will be elected as a member of the Society and of the RICS which entitles you to use the designation of "Chartered Surveyor".

This guide will help you prepare for the commitment and responsibility that goes with training for the Assessment of Professional Competence, known as the APC. Completing this successfully leads to membership of the Society of Chartered Surveyors and RICS. The commitment does not start on day one; indeed it is a state of mind, which is ongoing with surveyors who are committed to best practice.

To qualify as a chartered surveyor you must fulfil two requirements:

- Gain a relevant SCS accredited academic qualification
- Successfully complete structured training, which ends with an assessment of your competence to practice

You can commence your practical training once you have completed your full time qualification. Alternatively it can be done at the same time as part time or distance learning study, or incorporated as part of a 'year out' sandwich course. Whatever academic route you take, you must complete a minimum of 12 months practical training following successfully completing your course.

Note: you cannot take the final assessment until your supervisor/counsellor certifies that you have reached the required levels of competence.

This guide provides background information to help you to get started, and gives guidance on structured training, competency planner, professional development and the final assessment.

Samples of the review templates are included with the guide.

Overview of the APC

What is the APC?

Think of the APC as a period of practical training and experience which, when added to your full-time study and learning received at university, leads to your SCS membership.

It is the process by which the SCS ensures you are competent to practice as a chartered surveyor.

The APC normally consists of:

- A minimum of 24 months training, during which you must achieve specific competences
- Pre Qualification Structured Learning (PQSL)
- Maintaining a diary and logbook of your relevant training and experience
- An interim assessment after 12 months, detailing your progress so far
- A final submission of paperwork including logbook, reports and assessment forms
- An assessment interview after 24 months, making a presentation at an assessment centre

Your APC training will continue for a minimum of 24 months, during which you must complete a minimum of 400 days relevant practical experience. It may take longer, depending on your supervisor's and counsellor's assessment of your progress, but the experience must be gained within five years.

During this time, your training must be structured to make sure you achieve the competencies as set out by the Society. You will need to gain extra knowledge, reinforcing your practical experience, to achieve these competencies. You can achieve this by attending extra courses or structure study. This extra study must reflect and enhance market practice, and can extend beyond the conventional boundaries of surveying.

Throughout the APC your supervisor and counsellor will continually monitor your progress of the specific competencies.

You will not be able to apply for the final assessment until your supervisor and counsellor certify, in their opinion, you have reached the level of competence required, and have fulfilled the minimum training period by the time of your interview.

Your objectives

The SCS will decide you meet its requirements to become a chartered surveyor by checking you:

- Have learned to apply your theoretical knowledge through professional training and experience to gain practical skills
- Have achieved a satisfactory level of understanding and application of skills that form an essential part of the knowledge base of the specialism of your choice
- Are accurate and pay attention to detail so that you safeguard the interests of employers and clients
- Can communicate effectively – verbally, in writing and graphically – and prepare reports that are well structured and correct
- Act in accordance to the Society's rules of conduct, possess the highest level of professional integrity and objectivity, and recognise your duties to clients, employers and the community (see the explanation of ethics given in the introduction of APC requirements and competencies guide)

You **must** also demonstrate you:

- Are aware of the professional and commercial implications of your work
- Understand your clients' and employer's objectives
- Have an up-to-date and developing knowledge of legal and technical matters relevant to the work you do and the law
- Are able to play a role in a team and build up experience in client contact
- Are aware of general economic principles
- Have the confidence to work unsupervised
- Have motivation, initiative and administrative ability

The APC guides

You and your employer must read the APC guides carefully. They set out the requirements vital to your successful completion of the APC. There are three documents detailing the APC requirements:

APC candidate's guide: this guide is for candidates but is also read by assessors. It must be read with the APC requirements and competencies guide.

APC guide for employers, supervisors and counsellors: designed to detail the responsibilities of your employer and the roles of supervisor and counsellor. It must also be read with the APC requirements and competencies guide.

APC requirements and competencies guide: details the professional and personal competencies you need to achieve, the common competencies and those specific to your specialism. It forms the basis of your record of progress.

Key elements of the APC

Diary: you **must** record your training and experience in a diary. You will use the diary to complete the logbook and record of progress.

Logbook: you **must** complete a log sheet at the end of 12 months and 24 months. It summarises your diary showing the training and experience gained, in numbers of days, grouped under the competency headings.

Record of progress: charts your progress against the competency levels of your chosen APC route. It is submitted to your supervisor and counsellor at regular intervals and is made up of a series of reports certified by the supervisor and counsellor:

- The three monthly supervisor's reports
- The six monthly supervisor's and counsellor's reports
- The interim and final assessment records

The record of progress records your supervisor's opinion on your progress and must be countersigned by your counsellor.

If you change employer you must continue the record of progress, diary and logbook in the usual way, but clearly showing the change.

Remember, it is your counsellor at the time of your application for the final assessment who must be satisfied that you have achieved the specific competencies.

Templates and specimens for all these documents are set out at the back of this guide and are available from our website www.scs.ie.

Pre-Qualification Structured Learning (PQSL): as part of the structured training you must complete a minimum of 96 hours of PQSL over two years. It helps you to obtain knowledge and skills that might not be available in your day-to-day training and experience. You can use it to complement the mandatory competencies or extend and build upon existing knowledge to a post-graduate level. PQSL is also recorded in a special section of the record of progress.

In the context of life-long learning, the APC Pre Qualification Structured Learning (PQSL) is an introduction to your CPD commitments upon qualification and requires similar activities.

Structured training: the formal, structured approach to the delivery of PQSL training over any given period.

Note: there is no minimum requirement of number of training days under each competency other than a total minimum of 400 days within 24 calendar months of structured training.

The competencies: a statement of the skills or abilities needed to perform the specific task or function. It is based upon attitudes and behaviours as well as skills and knowledge. The requirements for each surveying specialism (APC routes) are set out in the APC requirements and competencies guide.

The people

To achieve your goal of becoming a member of the Society of Chartered Surveyors you will work with several people during your training:

Your employer: your employer must complete the APC enrolment form giving details of the training you will receive. The Society must approve this before your registration is accepted. Your employer must encourage you, make facilities and time available to you and ensure you complete certain documents at the right time. Some employers may not be able to give you access to the full experiences needed. If this is the case you may need to change employers or gain a temporary secondment to supplement your experiences, or find another approach which, should be agreed with your supervisor/ counsellor and approved by the Society.

Your supervisor: normally already a Chartered Surveyor, your supervisor is appointed at your employers. He/She is responsible for giving you guidance on your training and day-to-day work. If no Chartered Surveyor is available then a responsible professional person may act as supervisor provided they are approved by the Society.

Your counsellor: your counsellor is also appointed at your employers, again already a Chartered Surveyor, but not necessarily in the same organisation as you. They normally come from the same division or specialism for which you are studying. They work in partnership with your supervisor but will assess your record of progress. It is they who decide when you are ready to apply for final assessment. They also certify all the documents you submit for final assessment. And they ensure your training is structured to meet the needs of your APC route.

Requirement for counsellors

Throughout the book you will become aware of the importance of the counsellor's role in the APC process. In order to ensure that counsellors are fully appraised of their responsibilities, it is a requirement that all counsellors attend one of the APC information briefing sessions which will be held on a regular basis in central locations throughout the country.

No candidate will be permitted to enter for final assessment unless his/her counsellor has attended a briefing session at least one year prior to their final submission.

Both the supervisor and counsellor must be approved by the Society and should ideally be different people.

The assessors: the final assessment assessors are all Chartered Surveyors. Three members of the division for which you are training make up your interview panel. They are all specially trained for this purpose.

The APC doctor: the APC doctor is a Chartered Surveyor appointed by the Society for consultation in respect of any difficulties arising from your work experience. They are normally within and come from the same division as your chosen route. This may not be possible with smaller divisions. If at any time during your training you need to consult with an APC doctor contact the Society's Education Officer.

Before you start training

Eligibility

To register and to start your APC you must:

- Be in suitable employment after having gained full exemption from the Society's examinations, or hold a fully accredited degree.
- Have successfully completed a penultimate year of an approved accredited part-time degree or distance learning course, and be in suitable full time employment
- Have a suitable industrial placement for an approved accredited sandwich course
- Have an approved accredited degree, if you are a mature student

How to register for the APC

The Society provides you with the following enrolment documents:

- The *APC candidates guide*
- The *APC requirements and competencies guide*
- An application form

You need to send the enrolment form completed by you and your employer, counsellor and supervisor along with the appropriate fee to the Society of Chartered Surveyors. Details of the fees are on the sheet that accompanies the enrolment form.

The competency achievement planner **must** accompany the application form, otherwise the Society will put your enrolment on hold.

Once the application and enrolment is accepted, the Society will confirm the application and give you a start date for recording your experience, as well as an expected final assessment date.

Change of employer

If you change your employment you must obtain approval for professional training and experience from the Society by completing and submitting a "Change of Employment" form. You must also inform the Society if there is a change in the Counsellor / Supervisor. The "Change of Employment" form can be obtained on the website or from the Society's offices.

Pre-Qualification Structured Learning (PQSL)

It is your responsibility to plan and obtain your PQSL. For each 12 months of completed practical training, you must also complete 48 hours of PQSL. PQSL helps you to gain extra skills and knowledge, which are not always possible to obtain within the week-to-week business of the practice, or to extend existing knowledge to a post-graduate level. For example, you might study business management, professional ethics or information technology (ICT). You can make this up from formal training courses, distance learning programmes, informal structured reading and secondments. It is important your supervisor and counsellor take an active interest and help with the evaluation.

You and your employer must pay special attention to the principles underpinning PQSL. It should:

- Be obtained in a relatively structured manner
- Be relevant to your work and the competencies
- Be designed to be flexible to meet the needs of a wide range of candidates and employers
- Be based on an explicit process of selecting, planning and evaluating the activities
- Not simply be formal training courses but reflect learning from the informal training sources e.g. structured reading, secondments, distance learning

Flexible structured training

It is important for your PQSL plan and structure to be flexible. It needs to complement and support your various competencies. Each employer's practice is different as is each candidate's selected route, so a formal structure is unpractical.

The Society suggests the following typical framework to help you and your employer to design a flexible plan or programme which more accurately reflects your development needs. It is based on a three-part programme.

A typical annual plan could look like this:

PQSL plan

Technical skills development: linked to core/optional competencies - normally 16 hours

Skills development: linked to common competencies - normally 16 hours

Professional practice skills development: linked to professional practice competencies, code of ethics and conflicts of interest - a further 16 hours

However, it is possible for you and your employer to vary the weighting from this general guideline.

Part 1 – technical skills development

Development of competencies related to your chosen area of technical specialism. This could include short update sessions and skill-based training. Since there is a vast range of technical activities performed by aspiring Chartered Surveyors, the Society suggests you and your employer make the final choice of relevant topics.

Part 2 – skills development

The development of transferable personal and inter-personal skills such as:

- Collection, retrieval and analysis of information and data
- Communication skills – verbal, written and graphic
- Customer care
- Information technology
- Teamworking
- Time and self management

Part 3 – Professional practice skills development

Development of professional practice and professionalism issues:

- Conflict avoidance, management and dispute resolution procedures

- Structure and role of the Society
- Understanding clients and customer care
- Understanding the Society's bye-laws and regulations

Selection, planning and evaluation

In all cases it is up to you to choose the selection of topics, based on the discussions with your supervisor and counsellor. You must provide evidence of a planned, systematic approach to the choice of topics – not just an ad hoc or random pick-and-mix. You will also need to make the relationship between the topics and the development of the competence clear.

If you, your supervisor and counsellor decide to weight the three sections of the plan differently then you will also need to give reasons for any difference in the summary of experience.

You will need to evaluate the benefits of your structured learning and provide evidence of this as part of your summary of experience. A 'reflective review' must contain a list of the elements of your development, including the key learning gained from each element. The supervisor and counsellor sign off the review.

PQSL and higher education

If you are doing a part-time or correspondence route to qualification the Society will consider your final year as the equivalent of 48 hours of PQSL, fulfilling your obligation for that year. If you are a sandwich student, you may be taking structured study as part of your placement year. This will count for up to 48 hours of professional development. However, you will not provide all of your professional development this way, unless supplemented by other activities.

APC Training – what’s involved

How to choose your competencies

Each route to qualification defines the mandatory, core and optional competencies that make up the minimum requirements defined by your chosen division. The route you choose will also dictate the faculty you join in RICS once qualified.

You must fulfil the competencies that are specified in your chosen route to qualification. For most divisional routes you will find that there is an element of free choice for the optional competencies that are included in the full alphabetical list of competencies.

It is vital that you give careful thought to the combination of competencies that you will undertake. The philosophy of giving you the widest possible choice in most cases is to reflect the diversity of work undertaken by surveyors. It is therefore appropriate that you and your employer/supervisor/ counsellor take a pragmatic approach to the combination of competencies that you choose (where there is choice).

The combination must reflect not only the work you do in your day-to-day environment (driven by the needs of your clients/ employer) but also what is appropriate to your chosen division. It is important for you to understand that when you reach the end of your training you must have experience that is appropriate to your chosen area of practice.

It is impossible to give specific guidance for each route to qualification but you must be aware that the choice and combination of competencies that you achieve will be a reflection of your judgement. At the final assessment, the assessors will take these choices into account and will also assess you on the appropriateness of your choices.

You must ensure that your choice is a competency that is normally undertaken by surveyors practising in your chosen division or specialism. At final assessment the assessors will expect you to present a sensible and realistic choice that reflects the technical and, where appropriate, business skills needed to fulfil the role of a surveyor in your chosen field of practice.

The Mandatory Competencies

These competencies are a mix of technical practice, professional practice, interpersonal, business and management skills that are considered to be common to, and necessary for all surveyors. These competencies are compulsory for all candidates.

These competencies are structured in levels and you must achieve the minimum standards as follows:

- Ethics, professional identity and accountability – to Level 3 (see page 5 of requirements and competencies)

- Collection, retrieval and analysis of information and data – to Level 1
- Conflict avoidance, management and dispute resolution procedures – to Level 1
- Customer care – to Level 2
- Environment awareness – to Level 1
- Health and safety – to Level 1
- Information Technology – to Level 1
- Law – to Level 1
- Self management – to Level 3
- Team working – to Level 1
- Verbal communication – to Level 2
- Written/graphic communication – to Level 2

Plus:

You **must** also achieve two further business management and interpersonal related competencies to Level 1 from the list shown below. All of these competencies are defined in the *APC requirements and competencies guide*.

- Accounting principles and procedures – to Level 1
- Business management – to Level 1
- Corporate and public communications – to Level 1
- Leadership – to Level 1
- Managing people – to Level 1
- Managing resources – to Level 1
- Negotiating skills – to Level 1
- Recruitment and selection – to Level 1

If you are undertaking the experience route to membership, with over 10 years experience you are also required to achieve three further competencies to Level 2 in:

- Leadership
- Managing Resources
- Managing People

You will be expected to meet the minimum standards set in respect of the mandatory competencies. These will be in addition to the core and optional competencies for the particular route set out by the division. These are regarded as minimum standards but may also be included at a higher level if appropriate to the route/division.

If a mandatory competency is included in a route to a higher level it will appear again in the core competency list for that route to the higher level. These requirements are set out for each route in the APC requirement and competencies guide and must be strictly adhered to.

Chronology of reviews and assessments

Supervisor’s reviews – at the end of 3, 9, 15 and 21 months

Counsellor’s overview – at the end of 6 and 18 months

Interim Assessment – at the end of 12 months

Pre-assessment submissions – at the end of 21 months

Preparing for final assessment – between 21 and 24 months

Day-to-day

The supervisor and the counsellor must keep regular contact with you but ultimately you are responsible for your day-to-day activities:

- Ensure your day-to-day work keeps up with the competencies
- Discuss before, and evaluate after, any planned training or professional development events
- Keep your diary in a format that will encourage meaningful discussions at the formal quarterly reviews of progress against the competencies
- Get involved with work-based activities, and be prepared to assist when interesting opportunities arise
- Keep notes of performance examples at regular intervals – something to refresh your memory in your quarterly reviews

Interim Assessments

You must, with you supervisor and counsellor, complete an Interim Assessment within a month of recording 12 months of training, either from your enrolment date or on completion of your sandwich placement. This will help you review your progress to date and plan the remainder of your training. That way you will meet your chosen route’s requirements, including the number and level of competencies and professional development.

Remember, you can not apply for your final assessment if your supervisor and counsellor do not think you meet the requirements, despite how many days of training you complete.

Your supervisor and counsellor will also check that your record of progress, diary, logbook and PQSL are a complete and accurate record of your training to date.

This is a vital stage of your training, as it will:

- Act as a self-assessment tool against your training plan
- Provide guidance as to the breadth and depth of your training
- Ensure that you achieve a balanced approach in the first and last 12 months of your training, involve your supervisor and counsellor at this critical mid-point
- Help with your written communication skills ready for the reports you will write for the final assessment

The interim documentation is submitted at the final assessment stage, where it forms part of your pre-assessment submissions.

Note: You may be randomly selected to submit your interim submission, failure to provide this evidence will result in your final assessment date being delayed. You will have to do a further 12 months training from the interim assessment date. It is therefore vital you complete it on time and it is readily available.

See templates 10, 11 and 12 for details on how to complete a self-assessment form.

Pre-assessment submissions

You must send in the following documents before your final assessment:

- logbook (three copies)
- Pre Qualification Structured learning (three copies)
- Record of progress – including your interim assessment and summary of your progress to date (three copies)
- Critical analysis (three copies) – an original essay by you analysing a project or projects you have worked on

Your summary of experience and critical analysis will give your assessors the opportunity to start to form an opinion of you.

These documents are a major part of your final assessment and the panel will use them:

- To assess the breadth and depth of your professional experience
- To assess your written and graphic communication skills
- As a basis for some of the questions at your final assessment interview

Logbook and diary

Note: you do not have to submit your diary. The diary is to assist you and your supervisor/counsellor in recording your progress and maintaining your logbook.

However, you must continue to record your experiences in your logbook as you may be requested to present it at the final interview.

Record of progress

Your supervisor and counsellor must sign your record of the competencies you have achieved, otherwise you will not be considered ready for your final assessment. The record of progress will include details of your interim assessment, your final assessment record and Pre qualification record - the summary of your experience to date.

For the interim summary of progress you should aim to write 1,800 words, approximately 500 words against each heading: mandatory, core, optional and 300 words against the heading PQSL. For your final summary of experience this should also be approximately 1,800 words. This will provide the final assessment panel with a clear indication of how you have been building your experience during this period.

For the interim forward plan you should give details of further action that is proposed. You should also give details on how you propose to complete the remainder of your professional development, showing the links between the topics proposed and your development of competence. This should comprise of approximately 1,000 words.

Critical analysis

The critical analysis is a written report, which, at its simplest, is a detailed analysis of a project, or projects, with which you have been involved during the training period, the conclusion to which includes a critical appraisal of the project together with an outline of the lessons learned.

Choice of topic is very important. Perhaps you may be working for a big firm and have been involved with a large, complex project or client, or the project and client

is typical of the work you have been involved with during your training. You may want to use a number of projects, highlighting an issue or aspect of your work common across these projects.

We do not expect you to be running the project or projects. It is your involvement or role in the team that you outline, analyse and provide comment on. If the project has been running for some time you may not have been involved from the start or your involvement may not have been continuous. We also recognise that the project may not be finished when you write and submit your critical analysis. In this case you can provide a prognosis of the outcomes. If you know the outcomes between the time of sending in your critical analysis and your interview you can include them in your presentation.

Critical analysis content

The critical analysis must give the assessors detailed evidence of your ability to work competently and your ability to apply the core knowledge relevant to your division/ specialism. This includes the core and optional competencies and aspects of the mandatory competencies. After your presentation the assessors will ask questions on these and other matters.

You need to not only understand the project itself but the processes you followed and the rationale behind your decision-making. The assessors will ask about what you did – and why, and possibly why you did not take an alternative approach. They will also ask about your understanding of wider issues surrounding your project.

While the assessors are trying to determine your general level of ability, they are not expecting you to be an expert in every area of professional activity, they are looking to see if you meet a satisfactory level of competence in key areas, for the client you serve, and that you meet the level of professional conduct expected as a member of the Society of Chartered Surveyors.

Note: the information contained in your critical analysis will be treated in the strictest confidence by the panel.

Critical analysis format

One of the main reasons for referral is that the format of the critical analysis becomes similar to the type of report you write at work. So put yourself in a potential client's shoes who is looking at the report for the first time – would you be impressed with the style of presentation and structure?

The critical analysis must:

- Be word processed
- Be a maximum of 3,000 words (not including the appendices)
- Include photographs and plans (no larger than A4 size when folded)
- Be signed and dated by you and certified by your supervisor and counsellor

It is quality not quantity that counts so please use the word count. Appendices should support your report not add or expand on it.

You need to include the following headings:

- Key issues
- Options
- Reasons for rejection of certain options
- Your proposed solution to the problem(s) and reasons supporting this choice
- A critical appraisal of the outcome and reflective analysis of the experienced gained

Key issues: your project may be complex and if you select too many key issues you will merely skim the surface instead of providing a detailed analysis, so be selective. Think about the depth of the various competencies involved, they need to be approximately Level 3. You may have come across one key issue that is so large that it can form the basis of your critical analysis. On the other hand, it may be an issue common across a number of your projects.

Options: before proposing a solution to a client, you need to consider all of the options, demonstrating your ability to think logically and laterally. You must also demonstrate you have genuinely considered the options over and above your preferred solution, and give reasons why some solutions may not be feasible.

Do not fall into the trap of going down one route only. You need to look at alternative courses of action to cover the key issues in your project. Give reasons for rejecting those options not selected. **Note: the option to accept or not accept the instruction is not what this section is about.**

Your proposed solution: you must give a detailed account of the reasons supporting your adopted course of action. Relate your reasons to the core or optional competencies. Try to widen your thought processes to think about all the aspects that can support your decision: customer care, financial, technical, professional, rules of conduct, ethics and conflicts of interest. You do not have to look at each of these if they did not form part of your decision.

Critical appraisal and analysis of experience gained: finally, and most importantly, your conclusion must include a critical appraisal of the outcomes, together with your own thoughts and feelings on what you learned from the experience. This part of your report can make up to a quarter to a third of the total number of words.

The critical appraisal is about being introspective. You need to look at the project, consider what has gone well - and identify what did not go well. That way you can

plan how you might improve the next time you carry out a similar task. Next, stand back from the project and reflect on what you have learned.

The Assessment panel will use your Critical Analysis as a starting point to assess your knowledge of the profession, by probing both your understanding of the direct issues raised within the Critical Analysis and those of wider importance to the Chartered Surveyor.

Start these processes while you are still writing your critical analysis so you are well prepared for the interview. Focus on matters that cross the whole project. Do not try to match every experience to every individual competency.

Points to watch

Confidentiality: you must ensure you get your employer's consent to disclose sensitive details in your summary of experience and critical analysis. If you cannot get this consent you may disguise facts that might otherwise make the project identifiable.

References: extracts from acts of parliament, case law and other sources should not be quotes at length but essential references must be given.

Total word count: you must also include a word count at the end of these submissions. You can include notes on what you have included in the count.

Finally: above all, your critical analysis and summary of experience must reflect your abilities:

- Written and graphic communication
- Professional standards of organisation and presentation
- Analysis, reflective thought and problem solving
- Learning from experience gained

Note: you, your supervisor and counsellor must certify that the critical analysis and summary of experience are your own work, and a true and faithful reflection of your experience during your training.

Final assessment

Final assessments are held twice a year and take place at an assessment centre. It will last approximately an hour and is made up of pre-assessment submissions, the final assessment presentation and interview. It is designed to show that:

- You can express yourself clearly in a verbal presentation and interview
- You can demonstrate, in support of your submitted documentation, your understanding of the knowledge gained during your training
- You have an acceptable understanding of the role and responsibilities of a Chartered Surveyor

It is your responsibility to contact the Society for a final assessment pack. All documents for final assessment must be submitted on the dates listed below. Failure to do so will result in a six month delay in your final assessment

The dates for final submission are as follows:

Spring Submissions		
Division	Submission Date	Interview
General Practice/ Planning & Development/ Minerals/ Rural Practice/ Geomatics	15th December- 5th January	March/ April
Building Surveying/ Quantity Surveying	14th – 28th February	May

Autumn Submissions		
Division	Submission Date	Interview
General Practice/ Planning & Development/ Minerals/ Rural Practice/ Geomatics	15th – 31st July	September
Building Surveying/ Quantity Surveying	15th – 31st August	November

These submissions **must** be complete otherwise you will not be eligible to take the final assessment.

Once these submissions are approved by the Society, you will be sent confirmation of the date, time and venue of your final assessment.

Special needs and disabilities: you must give suitable notice to the assessment centres of any special needs or disabilities you have, so they can arrange appropriate assistance.

Presentation

You will give a 10 minute presentation to the assessment panel on the purpose, investigations and conclusions in your critical analysis.

Note: presentation facilities at assessment centres may not match those at your employers'. You should not rely on the use of an overhead projector with laptop link being available. You may use a stand alone laptop if the format is suitable for an audience of three. However it is your ability to communicate effectively, rather than your use of technology, which is being assessed.

Interview

At the interview you will be questioned on:

- Your presentation
- Your critical analysis and summary of experience
- The broader aspects of your experience and knowledge, including ethics, the Society's rules of conduct and current issues of concern to the profession
- Your PQSL record

The assessors take a holistic view of your pre-assessment submissions, your presentation and interview. No one component constitutes a pass or referral. A poor performance in one area may be balanced out by an excellent performance elsewhere.

Note: because the summary of experience and critical analysis are not prepared under exam conditions, the assessors will expect a high standard of technical, literacy and presentation accuracy.

You will need to satisfy the assessors that you have received reasonably balanced and properly structured training and experience, and that you meet the requirements set out in the APC competencies.

After the assessment

Results

The Society will send your results by post, normally with in one month after your interview. It is your responsibility to check that the Society has your up-to-date address. If you are successful you will then be formally elected as an Associate of the Society of Chartered Surveyors (ASCS). Once elected, the Society will then notify RICS and they will take the necessary steps to formalise your election as a member of the RICS (MRICS).

The Society **WILL NOT** issue results over the telephone, by fax or to a third party.

Referrals

If the outcome is a referral, the results will include a referral report explaining why the panel reached its decision. It will also provide help on preparing for a future re-assessment. To be eligible for re-assessment you must:

- Record a minimum of a further 100 days relevant professional experience. The assessors will give some guidance on this.
- Complete a minimum of a further 24 hours PQSL.
- Prepare a new critical analysis or if requested, re-submit the original, suitably amended with updates.
- Agree with your supervisor and counsellor a forward plan of how you will address the deficiencies in the referral.
- Submit a copy of the record of progress.
- Be re-interviewed and give a presentation on your critical analysis

Notes for referred candidates

At the outset of the additional training period you should complete template **15 - summary of forward plan - in preparation for re-assessment**. This should comprise around 500 words against each heading Mandatory, Core, and optional, with 300 words against the heading, PQSL.

Evidence of having undertaken these proposals must then be shown on **template 16 - referred candidate summary of progress** - as you approach the end of the additional training period, and in preparation for your re-assessment. This should also comprise around 500 words against each heading Mandatory, Core and optional, with 300 words against the heading, PQSL.

Appeals

You will have 21 working days (from the date the result is posted by the Society) to make an appeal.

Broadly speaking appeals may be made for one of three reasons:

- Administrative or procedural matters
- Questioning and testing of competence that has concentrated too much outside of the main areas of training and experience
- Any form of discrimination

When an appeal is made it must:

- Be in writing, accompanied by an administrative fee of €50
- Be made by you and not a third party
- Clearly state the grounds upon which the appeal is being made, supported by appropriate evidence

Where to find help

We hope this guide has given you an overview of the APC requirements. Completing the APC carries with it a lot of responsibility and commitment, however, you are not alone so if you need help during the training period contact:

The Education Officer
Society of Chartered Surveyors
5 Wilton Place
Dublin 2

Phone: 01 6765500
Fax: 01 6761412

info@scs.ie
www.scs.ie

Template 1 - Cover page for Diary and Logbook



Assessment of Professional Competence

Candidate's diary and logbook

Candidate's name

Date of registration for APC

APC route

Division

Supervisor's name

Counsellor's name

Supervisor's and Counsellor's declaration

We confirm that the entries in this diary and logbook are an accurate record of the candidate's work.

Interim Submission

Supervisor's Signature..... Date.....

Counsellor's Signature..... Date.....

Final Submission

Supervisor's Signature..... Date.....

Counsellor's Signature..... Date.....

Template 2 - Candidate's Diary

(see specimen entries on following page)

Note: All candidates are obliged to maintain a diary on an on-going basis to assist them with their logbook entries and record of progress. Diaries should not be submitted to the Society unless specifically requested. The Diary entries should be recorded in days and not hours.

Name:.....(IN BLOCK LETTERS)

Week:.....

Date	Nature of professional work carried out	Competency reference

Specimen entries for candidate's diary

Please note that the diary entries should be recorded in days and not hours

Name:.....(IN BLOCK LETTERS)

Week:.....

Date	Nature of professional work carried out	Competency reference
7.7.05	Commercial Practice Inspection for valuation - shops and flats. (_ day) Valuation of industrial warehouse (_ day).	57 69
8.7.05	Negotiation and agreement for repair works undertaken under a Terminal Schedule of Dilapidations (1 day).	22
7.7.05	Planning and Development Inspection of site at Bloggs Road, Neverland (_ day) Preparation and submission of planning application for Beech Rd. flats (_ day)	14 47
8.7.05	Investigation of planning history on proposed development site. Valuation and advice to client. (1 day)	69
8.7.05	Minerals and Waste Management Surveying Mineral workings. (1 day)	67
9.7.05	Planning - preparation and submission of planning application. (_ day) Subsidence - checking structural precautions. (_ day) Subsidence - checking structural precautions. (_ day)	47 28
7.7.05	Construction Surveyors Participation in design team discussion with Partner on procurement methods for serial tendering for a Housing Association project. First phase value £500,000. (1 day)	53
8.7.05	Rural Practice Visit plantation to mark trees for thinning programme (_ day). Prepare and submit outline planning application for change of use of farm building (_ day).	73 61
7.7.05	Geomatics Reconnaissance of a 10 ha site for engineering surveys (1 day).	18
8.7.05	Discussion of attributes for GIS for Local Authority Planning (2 days)	26
7.7.05	Sick (2 days)	
9.7.05	Annual Leave (15 days)	

Template 4 - Pre-Qualification Structured Learning

(see specimen entries on following pages)

Name:(IN BLOCK LETTERS)

Division:

Route:.....

(Please state number of hours spent in total on each PQSL activity within each 12 month period of professional training.)

Pre-Qualification Structured Learning (PQSL)												
Please record the number of hours and type of PQSL.												
	Month											
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec

Specimen Pre-Qualification Entries

Name:.....(IN BLOCK LETTERS)

Division: General Practice

Route: General Practice - Commercial

Pre-Qualification Structured Learning (PQSL)												
Please record the number of hours and type of PQSL.												
	Month											
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
20.9.05 Attended safe pass course			8									
13.11.05 SCS CPD Lecture Professionalism & Ethics			1									
10.12.05 SCS – PQSL Talk Final assessment and the Critical Analysis (1 HR)												
17.12.05 CPD Lecture: Acting as an Expert Witness (1 HR)					2							

Template 5 - Cover for record of progress



Assessment of Professional Competence Candidate's record of Progress

Candidate's name

Date of registration for APC

APC route

Division

Supervisor's name

Counsellor's name

Supervisor's and Counsellor's declaration

We confirm that the candidate has undertaken the monitored training period and has achieved the minimum competency requirements of the APC.

Interim Submission

Supervisor's Signature..... Date.....

Counsellor's Signature..... Date.....

Final Submission

Supervisor's Signature..... Date.....

Counsellor's Signature..... Date.....

Template 6 - The mandatory competencies

	Supervisor Signature	Counsellor Signature
<p>Collection, retrieval and analysis of information and data</p> <p>Demonstrate knowledge and understanding of the sources of information and data applicable to your business/area of practice including the methodologies and techniques most appropriate to collect, collate and store the information.</p>		
<p>Conflict avoidance, management and dispute resolution procedures</p> <p>Demonstrate knowledge and understanding of the techniques for conflict avoidance and management, (in particular by appropriate procurement, management and drafting); conflict management and dispute resolution including; negotiation; mediation and conciliation; adjudication; arbitration; independent expert determination and litigation (dispute resolution procedures).</p>		
<p>Customer care</p> <p>Demonstrate knowledge and understanding of the principles and practice of customer/client care including a) the concept of identifying all the clients/colleagues/third parties who are your customers/client, b) the behaviours that are appropriate to establish customer relationships and c) the systems and procedures that are appropriate for managing the process of customer care, including complaints.</p>		
<p>Environmental awareness</p> <p>Demonstrate knowledge and understanding of global environmental issues, including an appreciation as to how human activities at the local level may have wider environmental implications.</p> <p>Etc.</p>		

(see specimen entries on following page)

Template 7 - The core and optional competencies

(see specimen entries on following pages)

Name:(IN BLOCK LETTERS)

Division:

Route:.....

(Note: if completing a competency to Level 3, Levels 1 and 2, should also be signed off.)

Code	Title	Level	Supervisor Signature	Counsellor Signature
		1		
		2		
		3		
		1		
		2		
		3		
		1		
		2		
		3		
		1		
		2		
		3		
		1		
		2		
		3		

Specimen record of progress entries

Name:(IN BLOCK LETTERS)

Division:

Route:.....

(Note: if completing a competency to Level 3, Levels 1 and 2, should also be signed off.)

Code	Title	Level	Supervisor Signature	Counsellor Signature
098	Valuation	1	10/03/05 WC	15/06/05 SR
		2		
		3		
066	Measurement	1	24/09/05 WC	
		2		
		3		
052	Property Inspection	1	10/03/05 WC	15/06/05 SR
		2		
		3		
082	Real Estate Management Including Maintenance and Repair	1		
		2		
		3		
054	Landlord & Tenant	1		
		2		
		3		

Template 10 - Interim Assessment record
(summary of progress - months 1-12)

COMPETENCE TITLE and REFERENCE	DATES	SUMMARY OF EXPERIENCE/TRAINING COMPLETED	TRAINING PLANNED
MANDATORY (max. 500 words)			
CORE (max. 500 words)			
OPTIONS (max. 500 words)			
PQSL (max. 300 words)			

Template 11 - Interim Assessment record
(Summary of forward plan - months 12-24)

COMPETENCE TITLE and REFERENCE	DATES	TRAINING PLANNED/DETAILS OF FURTHER ACTION WITH DATE AND TIMING	
MANDATORY (max. 500 words)			
CORE (max. 500 words)			
OPTIONS (max. 500 words)			
PQSL (max. 300 words)			

Template 12 - Interim Assessment record (Supervisor's and counsellor's report - months 1-12)

OBSERVATIONS ON TRAINING / PROGRESS TO DATE, EXPERIENCE GAINED AND FORWARD PLAN

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Candidate's comments

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Certification by supervisor/counsellor that:

- a) Training and Development has been reviewed after 12 months
- b) Candidate will receive a further minimum of 12 months training before final assessment
- c) Record of progress, diary, logbook and PQSL records are complete and up-to-date.

Signed:.....(Supervisor) Date:.....

Signed:.....(Counsellor) Date:.....

Signed:.....(Candidate) Date:.....

Template 13 - Final Assessment record (Summary of progress - months 12-24)

COMPETENCE TITLE and REFERENCE	DATES	SUMMARY OF EXPERIENCE/TRAINING COMPLETED	TRAINING PLANNED (BETWEEN APPLICATION DATE AND FINAL ASSESSMENT- IF APPLICABLE)
MANDATORY (max. 500 words)			
CORE (max. 500 words)			
OPTIONS (max. 500 words)			
PQSL (max. 300 words)			

Template 14 - Final Assessment record
(Supervisor's and counsellor's report - months 12-24)

OBSERVATIONS ON TRAINING / PROGRESS TO DATE AND EXPERIENCE GAINED

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Candidate's comments

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Certification by supervisor/counsellor that:

a) Training and development has been reviewed in preparation for final assessment

b) Record of progress, diary, logbook and PQSL records are complete and up-to-date.

Signed:.....(Supervisor) Date:.....

Signed:.....(Counsellor) Date:.....

Signed:.....(Candidate) Date:.....

Template 15 - Referred Candidate record
(Summary of forward plan - in preparation for re-assessment)

COMPETENCE TITLE and REFERENCE	DATES	TRAINING PLANNED/DETAILS OF FURTHER ACTION WITH DATES AND TIMING
<p>MANDATORY (max. 500 words)</p>		
<p>CORE (max. 500 words)</p>		
<p>OPTIONS (max. 500 words)</p>		
<p>PQSL (max. 300 words)</p>		

Template 18 - Competency Achievement Planner

(To be submitted with APC application form)

Competency achievement planner									
Name:									
Company name:									
Ref. No	Quarter 1	Quarter 2	Quarter 3	Quarter 4	Quarter 5	Quarter 6	Quarter 7	Quarter 8	Date:-
Mandatory competencies									
037	Ethics, and Codes of Conduct	Level 1	Level 2	Level 2	Level 2	Level 2	Level 2	Level 2	Level 3
011	Collection & retrieval of Data	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1
014	Conflict Avoidance, management & Dispute resolution procedures	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1
025	Customer care	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1
034	Environmental awareness	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1
042	Health & safety	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1
049	Information technology	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1
056	Law	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1
090	Self-management	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1
096	Team working etc.	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1
099	Verbal communication	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1
101	Written/ Graphic Communication	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1
Compulsory core competencies									
		Level 1	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1
		Level 1	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1
		Level 1	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1
Optional competencies									
		Level 1	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1
		Level 1	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1
Commentary									

Competency achievement planner									
Name:									
Company name:									
Ref. No	Quarter 1	Quarter 2	Quarter 3	Quarter 4	Quarter 5	Quarter 6	Quarter 7	Quarter 8	Date:-
Mandatory competencies									
037	Ethics, and Codes of Conduct	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1
011	Collection & retrieval of Data	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1
014	Conflict Avoidance, management & Dispute resolution procedures	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1
025	Customer care	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1
034	Environmental awareness	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1
042	Health & safety	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1
049	Information technology	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1
056	Law	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1
090	Self-management	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1
096	Team working etc.	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1
099	Verbal communication	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1
101	Written/ Graphic Communication	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1
Compulsory core competencies									
		Level 1	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1
		Level 1	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1
		Level 1	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1
Optional competencies									
		Level 1	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1
		Level 1	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1
Commentary									