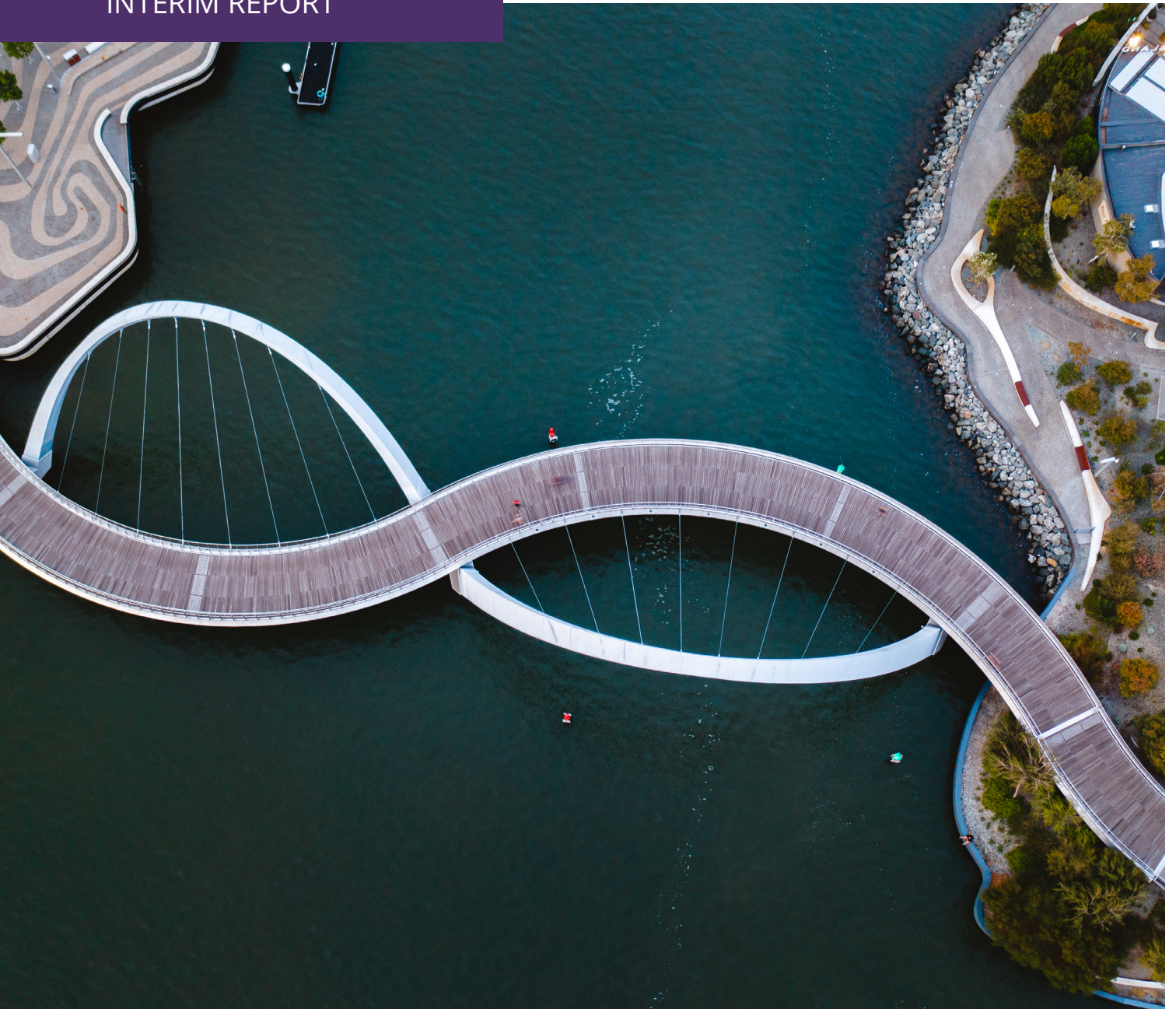




Entry and Assessment Steering Group

INTERIM REPORT



Contents

Foreword	1
Introduction	2
Background	3
Research and consultation	3
Membership grades	5
Pathways and competencies	7
Number of pathways	7
Number of competencies	8
Sustainability, data and new technologies	8
The assessment process	9
Testing levels of competency	9
The format of the interview	9
Counsellors	10
Assessors and consistency of assessment outcomes	10
Feedback to candidates	11
Accredited degrees and vocational routes to membership	12
Accredited degrees	12
Apprenticeships	12
Continuing professional development (CPD)	14
Other topics	15
Next steps	15

Foreword

In October 2021, the Standards and Regulation Board (SRB) asked the purposefully formed Entry and Assessment Steering Group (EASG) to both oversee the Entry and Assessment Review and make recommendations on future entry and assessment frameworks.

It is a challenging review covering key issues such as the knowledge, skills and competence standards, pathways to qualification, and professional assessments.

What is clear is that we must evolve our membership assessment processes to underpin professional competence and ensure our qualifications attract and retain the most able and committed future surveyors.

Our responsibility to future surveyors, and the society that will benefit from their work, means that we must ensure the standard of entry to RICS membership assesses the right skills, knowledge and behaviours, in the right way. This interim report is an important step on that journey.

The report sets out the key findings from the research and consultation so far, what we have heard and what areas we are specifically focused on as a result. The final report will set out our recommendations to the SRB.

We would like to thank everyone who has engaged, and is engaging, with the Review so far. All the views are valued and are being incorporated into the analysis and development of new policies to ensure RICS is meeting the needs of members and continues to promote high-quality, robust standards for entry and progression through membership.

Sarah Hutchinson

Chair, Entry and Assessment Steering Group

Introduction

The decision to admit an individual to membership of the profession is the single most important decision the Institution makes during its relationship with that member. Entry and assessment processes for all grades of membership are critical to ensuring confidence in the profession. They provide the gateway to membership, ensuring individuals have the right knowledge, skills, experience and behaviours at the point of entry and throughout their career.

RICS has undertaken several reviews into aspects of the entry and assessment processes including

- the Fellowship Review in 2016
- the Pathways and Competencies Review in 2018 and
- the RICS Accredited Programmes Policy Review in 2019.

However, these have been ‘ad hoc’ and as such the approach since 2006 to entry and assessment to the profession has been evolutionary.

RICS’ Standards and Regulation Board (SRB) therefore established the Entry and Assessment to the Profession Review (the Review) in 2021 to undertake a comprehensive programme of work to research, design and implement any new assessment processes identified for the profession. While this work is intended to build on recent previous work, including the [Future of the Profession](#) and the [Defining Our Future](#) reports, it specifically focuses on entry and assessment.

In order to ensure the success of the Review, the SRB established the Entry and Assessment Steering Group (EASG) to both oversee the Review and make recommendations on future entry and assessment frameworks.

This is the EASG’s interim report on the Entry and Assessment to the Profession Review. It focuses on the work completed in the first year, specifically reporting on the consultation and research element of the programme. It sets out the feedback and key findings to the consultation based on six categories:

- 1 membership grades
- 2 pathways and competencies
- 3 the membership assessment process
- 4 accredited degrees and vocational routes to membership
- 5 continuing professional development and
- 6 other topics.

It also sets out the ongoing work and research areas.

It is important to note that as this is only an interim report, it does not contain any formal recommendations. Roundtables have continued since the initial survey and research and will continue to support the development of final recommendations.

Background

RICS is the principal global professional body for valuation, management and development of land, real estate, construction and infrastructure. The SRB acts on delegated authority from the Governing Council to exercise RICS' regulatory powers and functions, being accountable and reporting annually to Governing Council on its performance and activities.

Entry and assessment processes are among the activities that the SRB is responsible for, and the current process for assessing knowledge, skills and experience for chartered surveyors, Associates, and Fellows include a multitude of activities. The comprehensive nature of this review means that all these activities are included specifically; both entrance and progression through membership including eligibility, qualification, life-long learning, specialisms, roles and responsibilities, and quality assurance.

In addition, the Review also focuses on improving areas of diversity, accessibility and inclusion in the Institution, enabling the profession to positively evolve and embrace and promote evolving topics such as innovation, sustainability, data and new technologies.

The Review is being led by the EASG and a final report will be submitted to the SRB for their consideration. The final report will set out recommendations based on the research.

Research and consultation

The first phase of this Review was research and consultation. Between January and June 2022 over 1,200 people participated in the research and consultation exercise, which comprised of both an online global survey and roundtable meetings.

The online global survey received just over 900 responses. The responses were broadly representative of the mix of members by region, membership grade and years of experience. Although it was notable that a higher majority of respondents held 10+ years' experience in the profession. Approximately 365 people also attended one of a series of roundtable meetings. The participants were similarly diverse and included members, firm representatives, assessors, counsellors, early career surveyors, candidates and RICS staff.

This interim report provides a summary of the key findings from the survey and roundtable sessions focusing on:

- membership grades
- pathways and competencies
- the membership assessment process (including APC)
- accredited degree and vocational routes
- continuing professional development (CPD)
- other topics.

Where possible the next steps on each of the topics have been split into shorter-term and longer-term considerations.

The EASG have been working closely with the Qualifications and Assessment Committee (QAC) – a standing Committee under the SRB – and, where appropriate, the shorter-term considerations have been submitted to the QAC for immediate consideration.

However, the majority of the next steps require further research and discussions with the membership before any changes or recommendations can be made.

Membership grades

RICS offers two main types of membership – Associate (AssocRICS) and Chartered (MRICS). Additionally, for those who have demonstrated individual professional achievements and as an international measure of excellence, there is also the RICS Fellow (FRICS) qualification and also a RICS student membership for those in education.

Since its inception in 2009, the Associate level of membership has had fewer than 1,000 candidates enrol, and of those who have enrolled, approximately 80% have been from the UK & Ireland. Responses to the online survey reflected this, with members generally believing there is little recognition for AssocRICS members in many global regions and there was a call for better recognition of the grade.

Additionally, while there was a general view that current member progression routes were suitable, some respondents cited a need for better progression routes from AssocRICS to MRICS, particularly for non-degree holders.

Equally, some of the feedback suggested that the current rules do not sufficiently embrace diversity or promote inclusion and reflect outdated societal norms (e.g. members viewing the degree requirement as a 'blocker' to progression). The feedback also reflected that good surveyors can feel precluded from progressing to chartered membership. The various entry routes were cited as not being the easiest to understand and it was felt a review of current routes, policy and guidance may be beneficial in defining membership grades and requirements and providing clarity.

There was also a reported lack of clarity around the process of becoming a Fellow. Members cited confusion as to the eligibility criteria, the process and the benefits of becoming a Fellow. The lack of clearly discernible 'value' has led some members to question whether they should be permitted to change their grade of membership from Fellow to Member.

In a similar vein, some respondents felt the RICS student status was currently 'under-utilised' and was not well understood or promoted. It was noted that developing and encouraging the student status provides an opportunity for RICS to start collaborative and engaging relationships with aspiring surveyors, and potential future RICS members.

Next steps

As a result of the feedback on membership grades, in the immediate term consideration will be given to:

- better define the student membership grade
- close the Fellowship by Nomination to membership (previously called Eminent Route)
- ensure the most appropriate mechanism for members to change their membership grade from FRICS to MRICS
- develop proposals to change the Fellowship assessment criteria
- review all 'direct entry'/reciprocal routes to RICS membership, ensuring that only those that meet our expected standards of membership assessment continue to be approved.

The EASG are also considering a variety of longer-term actions to better articulate the purpose, value and benefits of each level, and better define eligibility requirements. With regards to eligibility and entry routes, they are considering options to ensure diversity and inclusion are embraced and promoted.

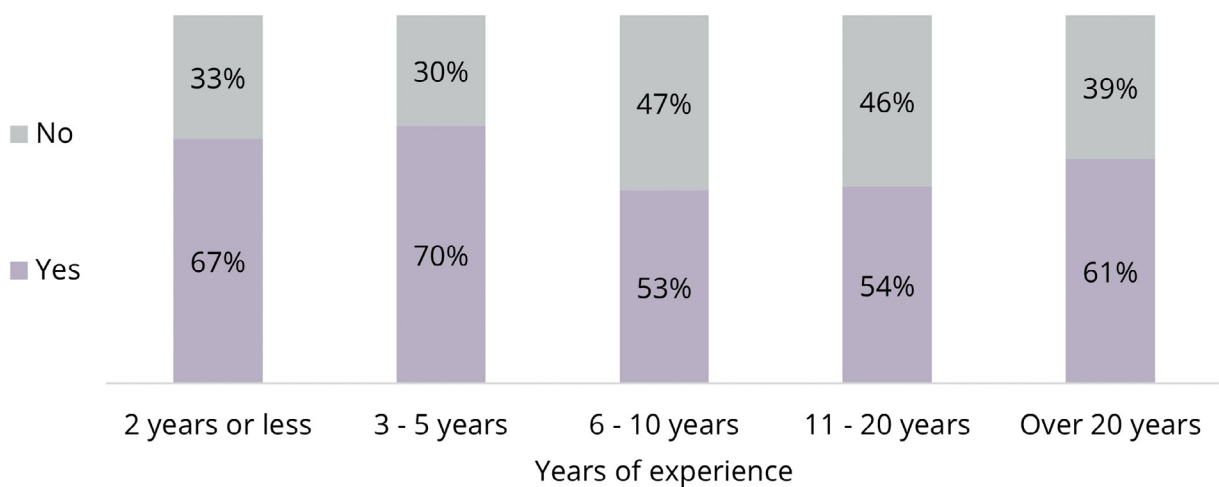
Pathways and competencies

Within each membership qualification there are various pathways available to candidates. These define the knowledge, skills, experience and competence required to become a chartered surveyor and are linked to different sectors within surveying. There are 13 sector pathways available for the Associate qualification (AssocRICS) and 22 sector pathways available for the Chartered qualification (MRICS). As part of the research and consultation, we asked questions on what number and type of pathways and number of competencies would ensure the profession remained relevant.

Number of pathways

Within the online survey we asked a specific question on the number of pathways and whether they were confusing. The results suggested that members broadly believed the pathways reflect the diverse nature of the surveying profession, however 59% of respondents considered the number of pathways to be confusing. This view was held more prominently with respondents holding 5 years or less experience, with 70% of those with 3 to 5 years experience stating it was confusing. This was reiterated in the feedback as some members with less experience specifically detailed how daunting they found making the initial choice of pathway.

The graph below shows more detail on the breakdown by experience of those who responded to whether the pathways were confusing:



Number of competencies

There was a much more even split of opinion as to whether there are too many competencies, with just 51% of respondents stating that there are not. However, it is a similar pattern to the responses on the number of pathways when looking at the breakdown of the length of experience of those who responded. Those with less than 5 years' experience stated that there are too many competencies assessed at the point of entry.

	2 years or less	3 to 5 years	6 to 10 years	11 to 20 years	Over 20 years
Yes	59%	67%	46%	42%	46%
No	41%	33%	54%	58%	54%

In addition, there was a common view that competency information in the pathway guides could be improved and made more consistent. Examples were provided of overlapping content between competencies, and where they could possibly be combined.

Sustainability, data and new technologies

As part of our consultation, we have heard that members are keen to ensure the profession remains relevant by keeping up to date with the latest issues affecting the profession. Similarly, members wanted to feel they could successfully adapt to change and felt RICS should keep members fully informed and educated on emerging areas such as sustainability, data and new technologies. For example, many members were keen to see RICS assess sustainability at a higher level than Level 1 (knowledge and understanding).

Next steps

As a result of the feedback on pathways and competencies, consideration will be given to whether optional competency lists and the use of specialist areas in MRICS assessments increases complexity and confuses the membership assessment process.

Additionally, the EASG will do further research into the viability of consolidating into fewer pathways and ways to better embed new industry practice, sustainability and other innovations within competencies and pathways.

The assessment process

In order to become an RICS member there is a need to complete an assessment process that tests a mix of technical and professional practice, interpersonal, business and management skills. The process itself involves written submissions, continual professional development (CPD) hours, specific modules on ethics/professionalism and specifically for the MRICS assessment there is a 60-minute interview. As part of this Review, we have looked at the overall assessment process and in particular at the levels of competencies, format of the interview, counsellors, assessors and the consistency of assessment outcomes and the feedback to candidates.

Throughout the consultation, the membership assessment process attracted a high level of debate. Many felt that one of the most important aspects of being a chartered surveyor is having the ability to advise clients, and that the final interview provides a good opportunity to assess this ability. However, while there was some strong support for the current interview process, 67% of survey respondents believed a staged approach would be a more appropriate and robust way to confirm qualification. In particular, some respondents felt there are elements of the chartered assessment (e.g. mandatory and Level 1 competencies) that could be tested prior to the final interview, allowing the final assessment interview to be the platform for assessing competencies at Levels 2 and 3.

Testing levels of competency

In considering the levels of competency required, our research and consultation found that while many respondents agreed that the APC interview was a good way to assess competencies at different levels, 73% of respondents felt that some elements could be tested earlier in the process.

For instance, 55% of respondents suggested that Level 1 competencies could be assessed outside the final interview. There was stronger support for competencies at Levels 2 and 3 being assessed via the APC interview (73% and 79% respectively), although some felt that some Level 2 competencies could be assessed using different, yet still robust, assessment technology.

The format of the interview

During COVID-19 and the resulting prolonged lockdown period the MRICS assessment interviews were moved online. There were challenges faced by assessors, candidates and RICS staff in adjusting to this approach, as well as navigating the disruptions caused by IT infrastructure.

Many assessors who responded to the survey advocated a return to face-to-face assessments. There was however a more mixed response noted in the roundtable sessions with candidates and employers – some respondents were happy for the final interview to remain online, and others advocated for a return to face-to-face. The most common rationale cited for the return to in person assessments was to engage and network with fellow assessors – as opposed to assessment outcomes or consistency of assessment factors.

Of those favouring the online approach for final interview, some respondents felt candidates should be given the choice to attend face-to-face or online. Other respondents cited benefits of online assessments including meeting personal childcare and other family needs. Some cited limiting factors, for example the time and cost factor involved with travelling and overnight accommodation for face-to-face assessments.

It was further noted that the use of online interviews allows for the ease of recording the interview. Respondents who were in favour of recording assessment interviews cited a number of potential advantages including mitigating the number of complaints and appeals, and identifying instances of fairness, discrimination and bias.

Counsellors

Within the assessment process counsellors have an important role in ensuring that those undertaking the assessments have can fulfil the RICS ethical standards and professional competency requirements before progressing to final assessment.

The responses to the consultation recognised that counsellors have an important guiding role and are essential to supporting candidates through to successful outcomes. However, it was felt more could be done to increase their knowledge about the assessment requirements and provide more training. Similarly, responses indicated more could be done to develop the role of the counsellor to enable them to play a more active and accountable part in the candidate's learning journey – making the members who volunteer feel more 'wanted' and valued.

Assessors and consistency of assessment outcomes

Similarly to counsellors, RICS assessors play a crucial role in ensuring that only those who fulfil the RICS ethical standards and professional competency requirements become RICS qualified professionals.

The consultation highlighted concern relating to the final assessment process being prone to 'subjectivity', with a perceived overreliance on the views of individual assessors, their preparation and technical knowledge. Equally, respondents also noted that the assessment panels often lacked diversity in respect of age, gender and ethnicity. This 'subjectivity' created concern over the equality of outcomes.

Consequently, there was a desire for clear guidance on what the 'pass standard' is to avoid subjective decision-making.

Further, it was felt there was a need to review assessor training and assessment processes to ensure assessors are fully supported to carry out this important role.

Feedback to candidates

Another area that was discussed was the feedback provided by assessors to candidates, as some candidates felt they were not provided with sufficient information in referral reports.

Next steps

As a result of the feedback on the assessment process, consideration will be given to:

- developing an appropriate process to record final assessment interviews – including considering audio and/or video recording, which could be used for quality assurance purposes, and/or assessor training, and/or the appeal processes
- reviewing the appeals process
- publishing new guidance on reasonable adjustments that is clear and transparent
- implementing a full review of all assessor training requirements, including ongoing training and audit requirements
- publishing a list of approved counsellors, and amending the requirements to be a counsellor, including training
- publishing clearer guidance on thresholds for passing assessments
- whether local legislative knowledge is required to be assessed in chartered surveyor assessment interviews.

The EASG will also undertake further research and consultation with members and industry experts to review and better understand how some competencies may be tested outside the final interview, including the potential development of more modular approaches that would better support more diverse and inclusive routes to membership.

In November 2022 the Qualifications and Assessments Committee decided that chartered surveyor final assessment interviews will continue to take place online while this review takes place.

Accredited degrees and vocational routes to membership

Accredited degrees

RICS has accredited more than 500 undergraduate and postgraduate degrees. These provide valuable assurance to employers, candidates and RICS of the academic standards that have been demonstrated through the degree programme and reflect RICS' competence requirements. RICS works in partnership with universities to ensure that the accredited degree courses are relevant to industry.

As part of our research, we asked whether the accredited degrees sufficiently equipped graduates with the appropriate surveying knowledge. Some respondents agreed that accredited degrees equip graduates with required skills but felt that more could be done to better align education and practice. Specifically, there were common concerns around the lack of practical elements contained in the courses, the lack of emphasis on soft skills, the lack of depth in certain, relevant topic areas, and a misalignment between degrees and RICS competencies.

A number of respondents also questioned the value and benefits of an accredited degree, while others suggested there were wide gaps in quality between accredited programmes. Firms also had differing views as to the benefits of graduates from RICS-accredited programmes compared to graduates from non-cognate programmes.

Apprenticeships

Vocational routes towards qualification, such as apprenticeships, provide rich experiential learning opportunities and can be particularly beneficial to those who find access and financial barriers in pursuing traditional degree routes. There are many different types of surveying apprenticeships on offer worldwide, and depending on the type of apprenticeship, it can take between one and six years to qualify.

We looked at apprenticeships as part of our research and consultation, and responses to the survey and roundtable discussions suggested strong support for combining learning and experience through vocational routes. (Similarly, there was strong support for academic routes with work-experience placements.)

However, while there was appetite among respondents for RICS to fully embrace alternative qualifications routes to encourage diversity and promote equality to the profession, there were also respondents who felt that the degree route towards chartership should be the only route to entry.

Next steps

As a result of the feedback on accredited degrees and vocational routes, consideration will be given to:

- the current accreditation policy
- how alternative forms of education (vocational) can be developed to meet the RICS standards and requirements
- how we can engage with schools to promote apprenticeships, vocational and degree options to future chartered surveyors.

Continuing professional development (CPD)

CPD is a commitment by RICS members to continually update their skills and knowledge to remain professionally competent. It prompts members to understand changes to legislation or standards and to continue to provide the best possible service. It can be used to strengthen the member's business skills and to acquire new skills/specialisms. Currently there is a requirement that members complete 20 hours of CPD activities in a year with at least 10 of those comprising 'formal' CPD. Formal CPD can be any form of structured learning that has clear learning objectives and outcomes, such as a professional course or structured online training.

Our survey highlighted that 31% of respondents believed the 20-hour requirement should be increased. However, there was more discussion about the quality and relevance to individual fields of work. Some suggested that areas of specific learning/CPD could be mandated for particular pathways, for example when new RICS standards are released.

Our consultation also highlighted some practical issues as there were frustrations with the website and app when logging CPD. Members felt the process of recording their professional development could be improved and automated. There was also a call for a clearer distinction between formal and informal CPD.

Next steps

All of these comments have been passed to the CPD Framework Steering Group who will take forward any changes relating to membership CPD requirements. More information about this group can be found on [our website](#).

Other topics

Our research and consultation also highlighted numerous other suggestions, including the need to promote the profession more. Respondents suggested more could be done to better promote the profession within schools, colleges and universities. Equally it was suggested that more focused engagement with the general public would promote the breadth of fields that chartered surveyors operate in.

Some respondents also suggested that there could be more support available to candidates. It was specifically suggested that there could be more guidance on the website to assist candidates preparing their submissions. Potentially this could be a dedicated platform for candidates to 'meet', share learning experiences, discuss submission tips, tutorials, etc. It was felt this extra level of support would specifically benefit those candidates working in smaller firms, who do not always have the same access to expertise as those working in larger firms might.

Next steps

All of the findings and next steps outlined in this report will be kept under consideration. Where appropriate improvements to existing processes will be considered in the short term by the QAC. However, substantive changes are the subject of further discussions with members through roundtables and consultation. Following further research, the EASG aims to make its final recommendations to the SRB no earlier than January 2024.

Delivering confidence

We are RICS. Everything we do is designed to effect positive change in the built and natural environments. Through our respected global standards, leading professional progression and our trusted data and insight, we promote and enforce the highest professional standards in the development and management of land, real estate, construction and infrastructure. Our work with others provides a foundation for confident markets, pioneers better places to live and work and is a force for positive social impact.

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