

# Review of entry and assessment for RICS membership

June 2024



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# Foreword

Entry and assessment standards and processes for all grades of RICS membership are critical to ensuring public confidence in the profession.

**Our responsibility to future surveyors, and the society that will benefit from their work, means that we must ensure the entry qualifications for RICS membership assesses the right skills, knowledge and behaviours to a rigorous and consistent standard.**

This report is the culmination of an extensive review, including consultation and research with RICS members, candidates, employers and other stakeholders, overseen by the RICS Entry and Assessment Steering Group (EASG).

In this report, we set out the key findings and what we have heard from stakeholders. This report makes recommendations for transformative change across all aspects of RICS' assessment model and what it means to be a member of RICS.

We would like to thank everyone who has engaged with the review.

**Sarah Hutchinson**

**Chair of the Entry and Assessment Steering Group**

# 1 Executive summary

RICS must continue to uphold the highest professional standards in the public interest and be able to respond to increasing external scrutiny and regulation from governments across different jurisdictions. Oversight and requirements affecting the roles of surveying professionals is inevitable and is a clear challenge to RICS maintaining its role as a self-regulator.

The current RICS assessment model was introduced in the mid-1990s and has served RICS well. However, to remain fit for purpose, RICS assessments must evolve to keep pace with changes in current practice and legislation, and modern qualification and educational practices. Standards and assessments must be clearly articulated, consistent, fair and valid.

This review found the current model to be designed in a way that is vulnerable to subjectivity and not wholly conducive to diversity, equity and inclusion. The flexibility of the assessment, presenting candidates with a wide competency selection, can be confusing, and raises issues as to the consistency of the assessment.

Practical issues with assessment delivery exacerbate problems for RICS candidates, assessors and staff. RICS has always benefited from significant member engagement and a dedicated group of highly trained, expert RICS professionals volunteer their time as assessors. However, RICS' ongoing reliance on members and the growing demand for assessments is not sustainable. More recently, it has resulted in disruption and uncertainty for candidates.

Separately, eligibility for an RICS assessment is complex with different criteria to apply and a range of entry routes, especially for chartered membership.

There is a large pool of RICS Associate members who would like to progress to chartered status, frustrated at a lack of a viable route.

Furthermore, the review has identified a strength of support from members to prioritise and promote evolving topics such as innovation, sustainability and new technologies. This is both in terms of the competencies assessed and the assessment methods to ensure they embrace accessibility and encourage diversity and equity.

This report is structured across the topics of:

- pathways and chartered titles
- competencies
- assessment
- eligibility
- education

- fellowship
- other topics.

Each topic includes recommendations and there is a summary of these recommendations at [Appendix A](#).

The recommendations would support RICS in meeting the criteria to attain [UKAS ISO 17024](#) accreditation, a globally-recognised accreditation for certification of individuals, and/or [Ofqual](#) recognition.

This is important to ensure that RICS membership assessments retain the confidence of governments and external regulators, and it strengthens RICS' role as a self-regulating body. The current model, with the choice of optional competencies and different assessment approaches, makes this challenging.

Attaining status with either of these bodies would enhance UK and global internal and external assurance, providing further public confidence in RICS by demonstrating the highest standards in assessment design and delivery.

## Overarching recommendation

RICS should introduce a progressive, modular assessment model, that includes the following.

- 1 A new competency framework with clearly defined learning outcomes and assessment criteria. This will provide explicit threshold benchmark statements of what a qualified chartered surveyor (MRICS/FRICS) and Associate member of RICS must know and be able to do in practice.
- 2 A range of pathways, recognising the variety of surveying disciplines. Pathways should set out the essential skills and attributes for each discipline, be developed by RICS member experts and should not over-specialise at the point of entry.
- 3 A progressive, modular approach to assessment, including a range of assessment methods, to ensure consistent, accessible, fair and valid assessment outcomes.
- 4 A clear and inclusive single point of entry. Every candidate should be able to access the RICS assessment. Eligibility exemptions should be given in recognition of relevant industry experience and/or prior learning, including for holders of an RICS-accredited degree.

## 2 Background

RICS is a leading professional body working in the public interest to advance knowledge, uphold standards, and inspire current and future professionals.

RICS sets the entry and assessment standards for over 130,000 members and candidates operating across a range of surveying disciplines in 140 countries.

RICS members are proven professionals who have demonstrated expertise, knowledge, technical competence and professional behaviour appropriate to their role.

RICS Bye-Law B2.1 defines the classes of RICS membership as:

Chartered members, comprising:

- Fellow Member (FRICS)
- Professional Member (MRICS)

Plus:

- Non-Chartered Member (AssocRICS)
- Honorary Member (HonRICS)

There are 'Attached Classes' defined as 'persons as specified in Regulations who shall not be Members but who shall be attached to RICS'. This refers to:

- Trainee Surveyor/Candidate for Membership and Trainee Associate
- Student

The Standards and Regulation Board (SRB) acts on delegated authority from the Governing Council to undertake RICS' regulatory powers and functions, being accountable and reporting annually to Governing Council on its performance and activities.

The SRB established the review, led by the Entry and Assessment Steering Group (EASG), to research, design and consider new entry and assessment processes. The composition of the EASG is at [Appendix B](#).

The EASG's scope is therefore broad, including:

- grades of membership
- assessment methods
- pathways and competencies
- chartered titles
- the role of direct entry routes
- eligibility requirements and the role of apprenticeships
- links to post-entry Regulated Schemes and
- the role of training courses/support programmes in the membership assessment process.

The objectives of the review are as follows.

- 1 To ensure RICS memberships and the methods of assessment are relevant to the market, employers and students, remaining in demand and highly valued.
- 2 Routes into membership must:
  - a be readily understood, accessible and appealing to employers and students, and
  - b facilitate entry by the broadest possible range of capable students enabling a diverse membership.
- 3 Competencies must address current and future skills and market needs.
- 4 Assessment methods must:
  - a ensure that only candidates who have demonstrated they meet the high entry standards qualify, and
  - b be inclusive, objective, progressive and ensure a globally consistent entry standard.

Membership grades and attached classes		
Associate (AssocRICS) Member (MRICS) Fellow (FRICS) Trainee/Candidate Student		
Membership assessment routes		Pathways and competencies
Associate (AssocRICS) Member (MRICS) Fellow (FRICS) Trainee/Candidate Student	Senior professional Specialist Academic Associate Fellow	22 pathways 115 competencies 18 chartered titles
Direct entry routes	Eligibility requirements	Post-qualification schemes and credentials
Dispensations and exemptions MoUs Reciprocity arrangements	Accredited degrees Apprenticeships Experience	Regulated Schemes Training courses



## 2.1 Methodology timeline



To fully understand the journey this review has undertaken – culminating with the recommendations contained in this report – it is necessary to explore member feedback to the current framework of competency requirements, assessment criteria and the process of qualifying for each level of membership.

It is also necessary to better understand the quality assurance policy and process that leads this report to recommending a more robust means to ensure RICS standards remain resilient and can withstand external regulatory oversight and uphold public confidence.

# 3 Pathways

Pathways is how RICS define the specific surveying disciplines that candidates are assessed in. Each pathway sets out the competency requirement candidates must demonstrate at their assessment.

At chartered level, there are [22 pathways](#). At Associate level, there are 13.

## 3.1 Findings

Pathways received significant comment and some criticism in the feedback. Many members asserted that RICS offer too many pathways, and this choice is confusing for candidates.

Extensive research and analysis was completed to identify the feasibility of reducing the number of pathways and, while there are professional behaviours common to all pathways, the applied knowledge for each discipline varies. The sheer breadth of the surveying profession, lack of commonality and, in some cases, dissenting views among stakeholder groups, means a reduction is not possible except in a small number of pathways.

In recognition of the breadth of the surveying profession at the point of entry, it is recommended maintaining all current pathways to entry except for:

- Infrastructure
- Taxation allowances
- Valuation of businesses and intangible assets

The demand for the three pathways is minimal and they do not lead to pathway-specific chartered titles. Importantly, a mechanism to recognise expertise in each of these domains should be retained, possibly through the introduction of other programmes of learning and/or post-chartered surveyor assessments.

Survey feedback highlighted that pathways often have a complex mix of rules and caveats. Some have an extensive list of optional competencies, reflecting the broad nature of the profession, but the data reviewed shows candidates select from a limited range.

It is recommended pathways should be simplified, setting out the essential skills and attributes for each surveying discipline, and developed by RICS member experts. Optional competencies should be kept to the minimum and only relevant where appropriate.

The framework is further complicated as some pathways include a specialist area – a subset of the surveying discipline – with its own distinct competency rules. This early-specialisation requires individuals to make an early choice about the discipline they will be assessed against. It would be better for individuals to be assessed at chartered level through a chartered-title specific pathway, and then to specialise into expert domains as appropriate.

It is recommended specialist areas are removed at the point of entry to chartered or Associate membership, with further consideration being given to developing post-qualification credentials (e.g. as higher or further qualifications or as compulsory CPD for domain experts) based on regulatory risk and/or public interest need.

The review considered some requests to develop new point-of-entry pathways. Many of those suggestions represented higher-level specialisms that would be better developed at post-entry level and lead to new recognitions of highly-specialist expertise, similar to the above recommendation.

## 3.2 Chartered titles

RICS confers chartered titles linked to surveying disciplines.

In most cases, these chartered titles can be achieved through assessment in the related pathway. For example, a candidate who is assessed via the Quantity surveying pathway, is conferred the Chartered Quantity Surveyor designation. [Appendix C](#) includes a comparison of current pathways and chartered titles.

The additional chartered titles were established in 2001 and have not been changed since. However, there have been several iterations of the related pathways (2006, 2015 and 2018), which has resulted in anomalies, creating unnecessary complexity. Examples of this include:

- not all pathways include a chartered title
- some titles are linked to the specialist area within a pathway, e.g. candidates can specialise in machinery and business assets and achieve the Chartered Machinery Valuation Surveyor designation under the overarching Valuation pathway.

A recommendation is that pathways and chartered titles are redesigned so there is clearer alignment. This will mean the creation of additional chartered titles where there is not one currently, e.g. Chartered Corporate Real Estate Surveyor, Chartered Property Finance and Investment Surveyor, Chartered Residential Surveyor, Chartered Rural Surveyor.

## Recommendations

- In recognition of the breadth of surveying disciplines, most pathways should be retained except for Infrastructure, Taxation allowances, and Valuation of businesses and intangible assets. A mechanism to recognise expertise in each of these domains should be retained, possibly through the introduction of other programmes of learning and/or post-chartered surveyor assessments.
- Pathways should be simplified, setting out the essential skills and attributes for each surveying discipline, and developed by RICS member experts. Optional competencies should be kept to the minimum and only relevant where appropriate.
- Pathways should not overly-specialise at the point of entry. Specialist areas within pathways are removed at the point of entry to chartered or Associate membership with further consideration being given to developing post-qualification credentials (e.g. as higher or further qualifications or as compulsory CPD for specialists).
- No new pathways should be added to the framework at this time.
- The link between pathways and additional chartered titles should be simplified and aligned. This would include creating the following additional chartered titles:
  - Chartered Corporate Real Estate Surveyor
  - Chartered Property Finance and Investment Surveyor
  - Chartered Residential Surveyor
  - Chartered Rural Surveyor.

# 4 Competencies

There are two overarching competency frameworks in the current assessment model, one at chartered level and one at Associate.

The competencies are presented in two distinct categories.

Mandatory	Technical
11 competencies at chartered level	Typically, 8 at chartered level
8 competencies at Associate level	6 at Associate level
The personal, interpersonal, professional practice and business skills common/ relevant to all candidates across all pathways/disciplines, e.g. ethics, Rules of Conduct and professionalism, client care, health and safety, and communication and negotiation.	<ul style="list-style-type: none"> <li>• <b>Core</b> – pathway specific competencies.</li> <li>• <b>Optional</b> – selected as additional skill requirements for the pathway from a list of relevant competencies.</li> </ul>

At chartered level, each competency is defined at three levels of attainment. Candidates 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 knowledge.

Each surveying discipline is different. The knowledge, skills and experience required to become, for example, a Chartered Building Surveyor are different from a Chartered Valuation Surveyor, and the competency requirements reflect this.

Some chartered pathways are prescriptive with more core competencies than optional competencies. Some chartered pathways offer candidates a wide range of choice.

Most Associate pathways do not include any choice due to the narrower breadth of work an Associate candidate is expected to be undertaking.

## 4.1 Findings

Consultation responses and roundtable feedback emphasised the difficulties in identifying consistent benchmark criteria that the candidate must attain at both Associate and chartered level. Candidates are instructed to interpret the competencies in the context of their own area of practice and location.

Some limited feedback suggested that assessments are occasionally impacted by the practice experience of the assessors, which has created a perception of unfairness for candidates.

There is a lack of consistency, in relation to the breadth and depth of competencies. The descriptions are not always clear, and RICS staff need to regularly interpret certain competencies for candidates. Examples of this include the number of competencies required, and if it is appropriate for specific competencies to be chosen in the context of their job role.

The role of members in setting the assessment standard is a strength of the current model and should be retained.

The recommendation is for RICS to create a less ambiguous assessment structure to provide a far more robust framework able to withstand regulatory scrutiny.

The framework should do the following.

- 1 Define the purpose of RICS' qualifications – the core knowledge, skills, behaviours and values – which are required of all RICS members, irrespective of their surveying discipline.
- 2 Set out a template for RICS member experts to populate for their disciplines.
- 3 Require competencies to be clearly articulated with explicit reference to what a chartered surveyor and Associate member must know and do for each discipline.
- 4 Provide a mechanism for all competencies to be reviewed and redefined, including the 11 mandatory competencies, which should be categorised and able to evolve based on market trends. This could be, for example:
  - Regulation and behaviour
    - Rules of Conduct and ethical principles
  - Acting in public interest
    - Health and safety
    - Inclusion/DEI
    - Conflict avoidance and dispute resolution
    - Sustainability
  - Organisational skills
    - Client/customer care
    - Communication and negotiation
    - Data and technology
    - Project and resource management
  - Commercial knowledge
    - Business planning
    - Financial accounting standards

Sustainability was consistently mentioned as needing more prominence as a competency. Its current place as a Level 1 mandatory competency did not reflect its importance. There should be greater emphasis within the redesign of pathways and competencies to ensure that sustainability issues, including climate change, are assessed to the required level in each technical discipline.

## Recommendations

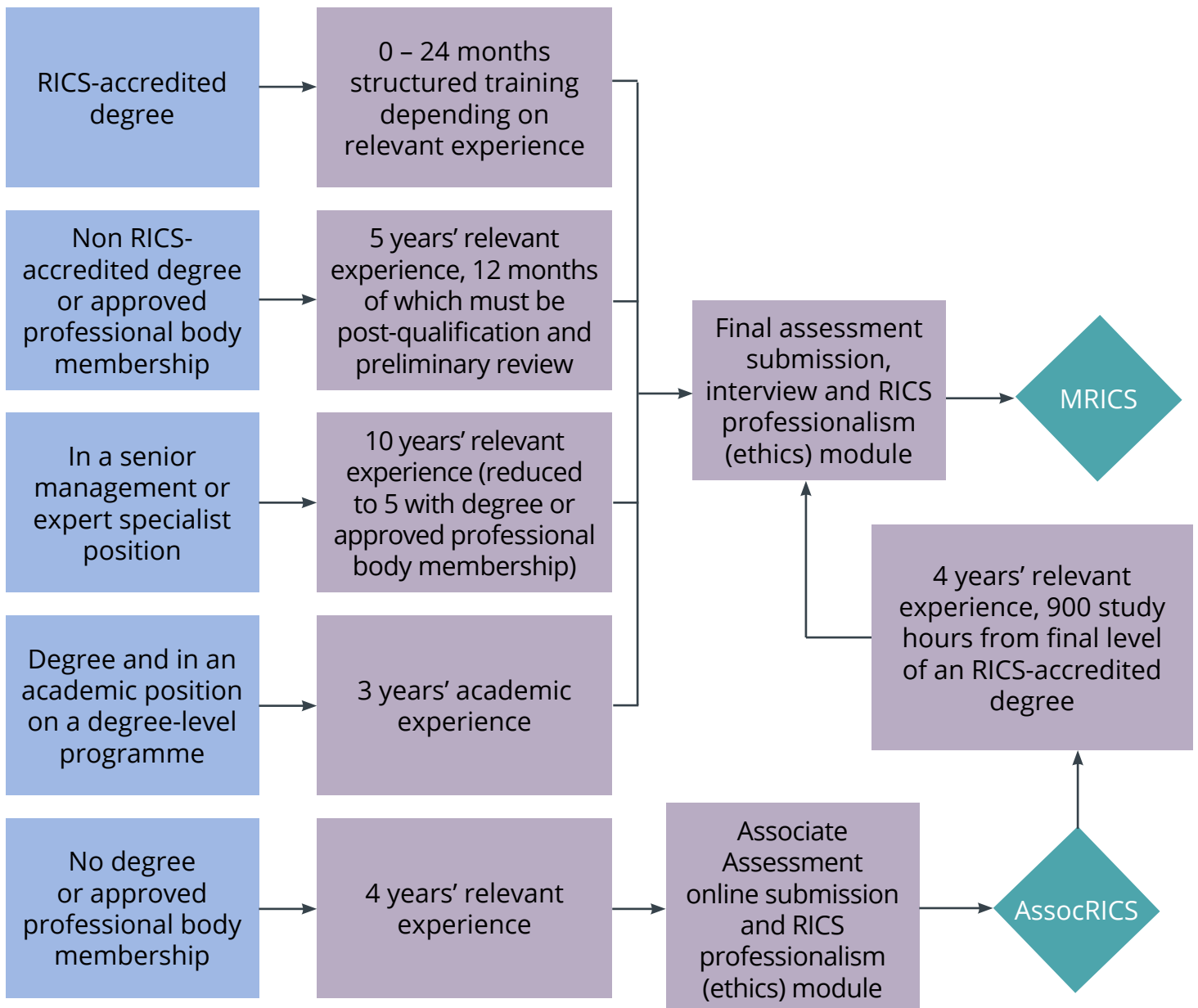
- All competencies – mandatory and technical – should be reviewed and redefined by RICS member experts, under one overarching framework for chartered and Associate candidates.
- All competencies should be clearly articulated with explicit reference to what a chartered surveyor and Associate member must know and do for each surveying discipline.
- All competencies – mandatory and technical – must reflect current practice and evolve to meet future industry requirements.
- There should be greater emphasis on sustainability within the redesign of pathways and competencies to ensure that sustainability issues, including climate change, are assessed to the required level in each pathway.

These recommendations link to the findings and recommendations of section 5 of this report.

# 5 Assessment

In the current model, the RICS assessment a candidate will undertake varies depending on pre-existing qualifications and experience.

The eligibility criteria for each assessment vary as highlighted in the figure below. At [Appendix D](#) is a detailed summary of assessment routes.





## 5.1 Findings

The review explored themes around the assessment process, including the current content and format of interview and the role of those associated with the assessment process (e.g. assessors, counsellors and auditors). This topic provoked high levels of debate and it is clear the peer-to-peer nature of the current assessment is highly regarded by assessors and other members.

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 interview (73% and 79% respectively), although some felt that some Level 2 competencies could be assessed using different, yet still robust, assessment technology.

However, equally, many respondents felt that the process was 'end-loaded' and did not support candidates to provide the best evidence of their competence. The process was also viewed by many as inaccessible, unfair and not allowing for equality of opportunity.

There was concern raised by some candidates undertaking the assessment who felt their interview fell outside prescribed guidelines but, as these interviews were not audited or recorded, there was no way of verifying these claims.

As noted earlier in this report, some operational issues were highlighted. The reliance on volunteer assessors is not sustainable and the assessment sessions held during the review period reflected this. Sessions were disrupted by assessors withdrawing their availability, often at late notice typically because of their own work commitments. While assessor training and engagement activities are helping to mitigate this issue, it is expected to be an ongoing challenge. This placed additional pressure on RICS staff, and the cancellation of assessments is unfair to candidates.

During COVID-19 and the resulting prolonged lockdown period, assessment interviews were moved online and continue in this format. This area provoked much debate among the assessor community with many (55% of respondents) calling for a return to in-person assessments, advocating these as the best way to assess a candidate's competence.

No evidence was proffered substantiating in-person assessments as being more reliable, other than opportunities for assessors to be able to network with contemporaries. Data analysis of assessment outcomes found no significant difference in pass rates that can be solely attributed to online or in-person assessment activity.

There was also support for online assessments from both candidates and assessors. Personal cost and time savings of traveling great distances to venues was cited as well as the impact on carbon footprint. It is evident that any assessment model requiring in-person interviews is unwieldy and significantly costly.

## 5.2 The APC Preliminary route

The Assessment of Professional Competence (APC) Preliminary route allows professionals with a degree or membership of another association (RICS approved) and five years or more relevant experience to go forward for the APC assessment.

There is a vetting stage, called the Preliminary Review, where the candidate's submission is reviewed by assessors. At this stage, the assessors decide whether the candidate can proceed to the final interview, or whether changes to the submission and/or more work is required before resubmitting.

Many respondents cited the vulnerability of this route and a perception there is a lack of structured training. Some APC Preliminary candidates felt they were less prepared and less likely to succeed at their chartered assessment interview than APC candidates who have undertaken a period of structured training.

Some feedback highlighted the apparent unpreparedness of some candidates was in part because of a lack of clarity in the competency framework, without clear thresholds for achievement.

## 5.3 Quality assurance

The robustness of the current assessment method and quality assurance processes was also a topic of debate for many respondents. Main themes emerging included inconsistency, the vulnerability for subjectivity, and not meeting appropriate criteria for equity, diversity and inclusion.

The absence of an externally-validated quality assurance process was cited as a reason for RICS not being recognised by the Health and Safety Executive (HSE)/Building Safety Regulator (BSR).

This echoes consultation feedback that calls for change and modernisation of the RICS assessment and associated quality assurance activities. RICS is exploring the potential for external recognition. Internal RICS desktop reviews were conducted against criteria of external regulators. It was considered the current assessment design and delivery does not meet the criteria to attain [UKAS ISO 17024](#) accreditation, a globally-recognised accreditation for certification of individuals. Nor does it meet criteria for [Ofqual](#) recognition within England. Examples of where appropriate criteria would not be met were similar to those found by the HSE BSR.

It is recommended that RICS develop a more robust framework for qualification and quality assurance with a view to achieving accreditation status from an external globally-recognised regulator. Attaining status with either of these bodies would enhance internal and external assurance in RICS' qualifications, thus providing further public confidence in RICS qualifications.

## 5.4 Advocating a modular approach

There was much support for the introduction of a modular approach to qualification, which would remove the 'end-loaded' nature of the current assessments and introduce more data points. This would help gauge the candidate's performance, allowing them opportunity to improve their knowledge and practice.

The online survey found that 67% of respondents believed a staged, modular approach towards qualification was most appropriate, offering a robust way to confirm qualification. Respondents were in favour of some competencies, especially those pitched at levels 1 and 2, being assessed outside the final interview.

It is recommended the subjective and end-loaded nature of the current assessment should be replaced with a modular based progressive approach, which should include a range of assessment methods and stages.

It is premature to recommend the exact nature of the new model, as RICS must first define what is being assessed (that is, the competency requirements for each surveying discipline) and then design an appropriate assessment methodology for each competency. Assessment methods need to reflect the competency being assessed, and an oral assessment interview is not appropriate for current Level 1 and Level 2 competencies.

Any new model must retain rigour and be delivered in a more transparent and consistent way. Each assessment stage must have accessible content and clearly defined moderation and quality assurance processes appropriate to the assessment method.

Such a model would contain content that clearly defines the expectations of what a candidate must know and do (learning outcomes) to achieve each competency module.

Learning outcomes provide clarity of standards required of candidates and enable consistency of standards where there are multiple markers/assessors involved.

Learning outcomes include assessment criteria, which provide an expansion of the specific knowledge, understanding and skills examiners expect a candidate to display in any assessment taken. At [Appendix E](#) is an example of a new competency descriptor in this format.

### Recommendations

- RICS should introduce a new progressive, modular assessment, including a range of assessment methods to ensure consistent, accessible, fair and valid assessment outcomes.
- RICS should explore working with an assessment design, development and delivery partner(s) with expertise to achieve an efficient and scalable model, in the design and delivery of assessments. This will require the support and involvement from members who contribute to the current assessment and quality assurance processes.
- RICS should ensure the design of any new model is developed with a view to achieving accreditation and recognition status with an external regulatory body.

# 6 Eligibility

RICS strives to attract the most committed and able future surveyors into our industries. We should offer routes to qualification that support and develop an inclusive and representative membership without artificial or exclusionary barriers to entry.

The eligibility requirements demonstrate the complexity of requirements for entry to the Associate and chartered assessments. This creates confusion and includes some arbitrary barriers based, in some cases, on time served.

Feedback reiterated the lack of opportunity for diversity and inclusion within the current rules, viewing the degree requirement as a norm to progression to becoming chartered. Feedback also reflected that talented surveyors (Associates) feel precluded from progressing to chartered membership.

It is paramount that RICS embraces diversity, equity and inclusion. There was strong support for combining learning and experience through vocational routes. Vocational routes towards qualification provide rich experiential learning opportunities and can be particularly beneficial to those who find access and financial barriers in pursuing traditional degree routes. Similarly, there was strong support for academic routes with work-experience placements.

In addition to a route to entry for holders of an RICS-accredited degree, RICS must develop alternative routes to certification that run parallel to the conventional degree pathways if it is to remain relevant.

## 6.1 AssocRICS to chartered progression

There are limited options to progress from AssocRICS to MRICS for those without a degree, and the options that are available are complex and time consuming.

There are currently over 7,000 AssocRICS members (of which 6,000 are based in the UK and Ireland) and, although it is difficult to quantify the demand, we heard from many Associates who would like to progress to MRICS.

During the review, EASG heard regularly that the current situation does not embrace the values of diversity and inclusion, which are promoted by RICS. As most routes to RICS chartered membership require a degree (whether RICS-accredited or not), AssocRICS membership is an alternative for those without a degree.

Some of the comments we received from members while conducting roundtables have been:

‘Many AssocRICS without a degree are completely stuck... They need a suitable AssocRICS–MRICS progression route – promised for years but no details ever released of the pilot course that took place.’

'A degree or study hours should not be required to progress from Associate to Chartered. Most people taking the Associate pathway have done so because they don't have a degree or have chosen work experience instead. Someone who has 4 years+ experience shouldn't then have to get a degree to progress to Chartered.'

'In my situation with 6 years' experience I cannot progress to APC Preliminary because I don't have a degree (in any subject). A degree in an entirely unrelated subject such as media studies would allow me now to proceed with Preliminary Review. This seems ridiculous to me.'

While conducting a roundtable with RICS staff, one staff member stated:

'It is really difficult for Associates to progress to Chartered member status. Unless we provide a solution to this problem current professionals working in residential property will struggle to progress from Associate to Member status...We should provide options as currently only the very determined will progress to Chartered status.'

### Recommendation

- RICS should develop a clear and inclusive single point of entry. Every candidate should be able to access the RICS assessment. Eligibility exemptions should be given in recognition of relevant industry experience and/or prior learning, including for holders of an RICS-accredited degree.

# 7 Education

## 7.1 Accredited degrees

RICS accredits 579 undergraduate and postgraduate degrees globally. 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 and meet RICS required standards.

As part of our research, we asked whether the accredited degree sufficiently equipped graduates with the appropriate theoretical surveying knowledge. Some respondents, recognising the disconnect between theory and practice, agreed that accredited degrees equip graduates with required knowledge 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, emphasis on soft skills, 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-surveying related programmes.

RICS recognise accredited partnerships are highly valued, essential and integral to the future of the profession and must continue to have a fundamental role in future routes to entry.

RICS must do more to make these partnerships truly effective; there is a need for a coordinated education strategy that ensures any new qualifying requirements are embedded into accreditation programmes, and that students are supported into the surveying profession.

## 7.2 Apprenticeships

RICS is the End Point Assessment Organisation (EPAO) for two apprenticeship standards in England.

### **Level 3 Surveying Technician**

Designed as an entry level to the profession, this typically takes two years to complete and covers a range of surveying disciplines. On successful completion of a Level 3 Diploma, apprentices undertake the RICS Associate assessment.

### Level 6 Chartered Surveyor Degree Apprenticeship (non-integrated)

Apprentices typically undertake 60 months 'on programme attending'. On successful completion of the RICS-accredited degree, apprentices move forward to the chartered assessment (APC). The apprenticeship is available on undergraduate and postgraduate programmes.

Apprenticeship standards are designed by trailblazer groups, under the auspice of the Institute for Apprenticeships (IfATE). These are groups of employers reflecting the occupation, so the standard reflects best practice and requirements of specific roles.

RICS is one of the few remaining EPAOs that have been conferred the right to self-regulate and conduct quality assurance activity on all its apprenticeship assessments. Much of this activity for other EPAO's sits within the remit of Ofqual.

A small number of assessors felt apprentices who came forward to assessment lacked necessary experience. However, the review found no evidence for this assumption, particularly as apprentices typically spend more time in work experience than other candidates undertaking the APC structured training route.

The review found the apprenticeship to be highly valued, and there is strong support for combining learning and experience through vocational routes, like apprenticeships.

Both apprenticeship standards are subject to review by IfATE Employer-led Trailblazer Working Groups, and RICS must continue to work closely with these groups to ensure new qualifying requirements are aligned with the apprenticeship standards.

### Recommendations

- Accredited partnerships and apprenticeships must continue to have a role in future routes to entry.
- RICS accreditation must have tangible benefits for university partners. The RICS Education and Accreditation functions should introduce a multi-year plan to embrace partnership working with accredited partners ensuring all parties derive the value of working in partnership.
- RICS-accreditation must be based on a rigorous set of criteria and requirements, including relevance to industry and supporting the pipeline of future professionals.
- RICS should develop a new coordinated education strategy that ensures learners are supported and new qualifying requirements are:
  - embedded into accredited programmes
  - aligned with apprenticeship standards through collaboration with IfATE's Trailblazer groups and other stakeholders.

# 8 Fellowship

RICS defines Fellowship (FRICS) as: 'An honoured class of membership awarded on the basis of individual achievement within the profession.'

FRICS is based on three core principles:

- acting to further RICS and the profession
- acting for the benefit of a third party to reflect RICS' public interest mandate
- promoting RICS objectives and the profession.

All Chartered Professional Members (MRICS) are eligible to apply, subject to being MRICS for a minimum of five years.

Applications are based on written submission to evidence FRICS 'characteristics' from a defined list. The submission is reviewed by a panel of RICS Fellows.

## 8.1 Findings

There was a lack of clarity around the process of becoming FRICS.

Members cited confusion as to who is eligible to apply, what the process is and what benefits there are to becoming a Fellow of the Institution. The lack of clearly discernible benefits has led some members to question the value of being FRICS.

We heard instances of members requesting to transfer their status from FRICS to MRICS. They are prevented from doing so by RICS Bye-Law 2.2.4, which states:

### **'Prohibitions**

The following transfers are not permitted:

- Fellow to the class of Professional Member; and
- Professional Member to the class of Non-Chartered Member.'

Other professions use senior status to great effect, with a highly competitive and transparent process for appointment. FRICS status and assessment could be reimagined to give better professional recognition translating into professional benefits beyond just status. EASG feels that this aspect goes beyond the remit of this review but should be further considered by RICS.

The principles of the current model (for example, giving back to profession) should be retained, combined with an open application, competence-based assessment based on a portfolio of evidence against published criteria.



## Recommendations

- RICS should review the current FRICS assessment and introduce a new, robust assessment with clear criteria for admission, balancing senior requirements, achievements and contribution to the Institution.
- RICS should do more to clearly articulate the benefits and value of Fellowship.
- RICS Governing Council should consider an amendment to Bye-Law 2.2.4, which prevents members from transferring from FRICS to MRICS, if it deems such an amendment appropriate.

## 9 Other topics

Our research and consultation also highlighted numerous other topics that would be impacted if the recommendations made in this report are followed.

### 9.1 Post-qualification CPD

The [CPD Framework Steering Group](#), reporting to the RICS' Standards and Regulation Board (SRB) is reviewing RICS' continuing professional development (CPD) framework.

The key objective of the CPD Framework Steering Group is to make recommendations for any revisions to RICS' current CPD framework and, potentially, the creation of a post-qualification recertification or reassessment programme (subject to consultation with the membership).

There are clear links to the work of the EASG, particularly where post-entry Regulated Schemes may be necessary to certify higher-level competency requirements and/or to maintain a register or list of competent professionals.

As the CPD Framework Steering Group has not completed its work yet, this area will need to be revisited at the appropriate time.

### 9.2 Valuer Registration Scheme

The Valuer Registration Scheme (VRS) is currently open to both Associate and chartered members who can demonstrate the necessary valuation competency.

Some chartered members feel this scheme should be limited to chartered members; however, an overwhelming number of members we consulted with are in favour of the Scheme continuing to recognise Associate members. This could be resolved through the introduction of clearer entry conditions for the Scheme, and a new assessment process recognising post-entry competence for all that can demonstrate the competency requirements.

### 9.3 Counsellor

The Review considered the role of the Counsellor. The expectation is that the Counsellor is the person assessing and verifying the candidate's ability to come forward for assessment; however, this is not happening in all cases, and is unfairly disadvantaging candidates.

Many respondents cited difficulties in obtaining a Counsellor, especially those from small and medium-sized firms.

There was also significant concern raised as to the quality of counselling and accountability when signing candidates as ready for assessment.

There needs to be clearer guidance to counsellors, outlining their role and responsibilities; and they should only be signing-off candidates who have met the minimum competency thresholds.

A specific recommendation has not been included in this report. A review of the Counsellor role in the current assessment model is being undertaken by the Qualifications and Assessments Committee (QAC) to ensure the Counsellor role is subject to appropriate accountability, consistency and training as recommended in the EASG's Interim Report.

In a future modular assessment model, there is potential for the role of the Counsellor to be quite different, whereby a Counsellor is required to not only have direct knowledge of a candidate's work experience but could also take responsibility for attesting to the attainment of certain competencies in a work setting.

Candidates may also be able to attempt some module assessments without needing a Counsellor, ensuring the Counsellor role is more closely aligned with higher-level requirements.

This would depend on the effectiveness of the QAC's review of the Counsellor role and the successful implementation of those changes.

## 9.4 Student membership

Some respondents felt the RICS student status was currently 'under-utilised' and was not well understood or promoted. Developing and encouraging student status gives RICS the opportunity to start collaborative and engaging relationships with aspiring surveyors. This is of particular importance in the UK where early years' education and early careers activities are more relevant.

A review of student membership is being undertaken by the RICS Qualifications and Assessments Committee (QAC). That review should consider whether it would be appropriate for RICS student membership to directly link to RICS accredited programmes, bolstering the link between students studying accredited programmes and their future professional membership journey.

## 9.5 Honorary membership

To be eligible for election as an Honorary Member (HonRICS), a person must not practise as a surveyor but must, in the opinion of the Governing Council, be able to assist in promoting the objects of RICS by reason of their position, experience or eminence.

There continues to be confusion about the role of Honorary membership and previous Fellowship by Nomination routes to membership. The EASG recognised that the QAC has suspended the ability of the Institution to admit individuals to FRICS without an assessment.

The EASG makes no recommendations as to the role of HonRICS as it recognises that this is beyond the remit of this review, and is a responsibility granted to Governing Council in the Institution's Bye-Laws and Regulations.

## 9.6 Affiliate membership

The EASG considers that the current grades and classes of membership are appropriate for regulatory purposes.

A non-regulated Affiliate grade of membership was suggested during the consultation. The possible introduction of non-regulated grades or classes of membership is beyond the remit of this review and would be something for the RICS Board (working with Governing Council) to explore if appropriate, recognising the need to clearly differentiate between designations that are regulated and those that are not.

It should be noted RICS has offered Affiliate membership grade before, circa 2010. There was a lack of demand and it was discontinued soon after.

## 9.7 Renaming AssocRICS

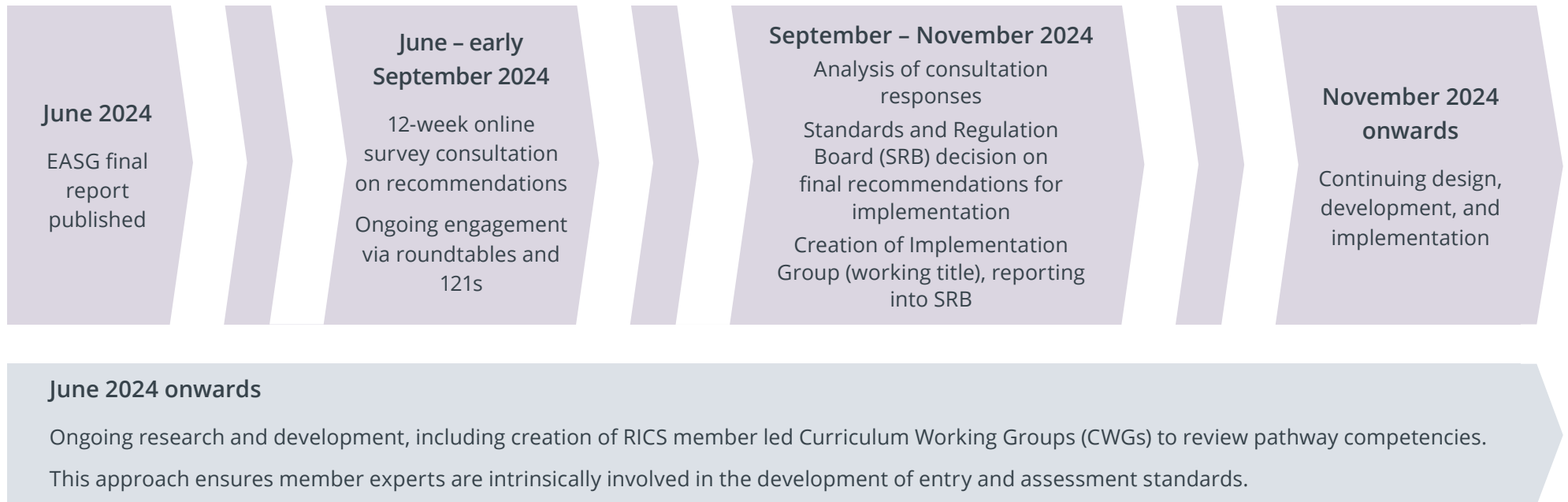
It has been proposed that RICS change the designation for an Associate member from AssocRICS to AssociateRICS.

This will help understanding of 'Assoc' and help make the designation easier to understand from a public perspective; ensuring that the hierarchy of membership grades is clearer:

- Fellow Member (FRICS)
- Professional Member (MRICS)
- Non-Chartered Member (AssocRICS or AssociateRICS if the title is changed)
- Trainee Surveyor/Candidate for Membership and Trainee Associate
- Student

Feedback has been provided to the appropriate teams within RICS.

# 10 Next steps



# Appendix A Summary of recommendations

## A1 Overarching recommendation

RICS should introduce a progressive, modular assessment model, that includes the following.

- 1 A new competency framework with clearly defined learning outcomes and assessment criteria. This will provide explicit threshold benchmarks statements of what a qualified chartered surveyor (MRICS/FRICS) and Associate member of RICS must know and be able to do in practice.
- 2 A range of pathways, recognising the variety of surveying disciplines. Pathways should set out the essential skills and attributes for each discipline, be developed by RICS member experts and should not over-specialise at the point of entry.
- 3 A progressive, modular approach to assessment, including a range of assessment methods, to ensure consistent, accessible, fair and valid assessment outcomes.
- 4 A clear and inclusive single point of entry. Every candidate should be able to access the RICS assessment. Eligibility exemptions should be given in recognition of relevant industry experience and/or prior learning, including for holders of an RICS-accredited degree.

## A2 Pathways and chartered titles

- 1 In recognition of the breadth of surveying disciplines, most pathways should be retained except for Infrastructure, Taxation allowances, and Valuation of businesses and intangible assets. A mechanism to recognise expertise in each of these domains should be retained, possibly through the introduction of other programmes of learning and/or post-chartered surveyor assessments.
- 2 Pathways should be simplified, setting out the essential skills and attributes for each surveying discipline, and developed by RICS member experts. Optional competencies should be kept to the minimum and only included where appropriate.
- 3 Pathways should not overly specialise at the point of entry. Specialist areas in pathways are removed at the point of entry to chartered or Associate membership with further consideration being given to developing post-qualification credentials (e.g. as higher or further qualifications or as compulsory CPD for specialists).
- 4 No new pathways should be added to the framework at this time.

- 5 The link between pathways and additional chartered titles should be simplified and aligned. This would include creating the following additional chartered titles:
  - Chartered Corporate Real Estate Surveyor
  - Chartered Property Finance and Investment Surveyor
  - Chartered Residential Surveyor
  - Chartered Rural Surveyor

### A3 Competencies

- 1 All competencies – mandatory and technical – should be reviewed and redefined by RICS member experts, under one overarching framework for chartered and Associate candidates.
- 2 All competencies should be clearly articulated with explicit reference to what a chartered surveyor and Associate member must know and do for each surveying discipline.
- 3 All competencies – mandatory and technical – must reflect current practice and evolve to meet future industry requirements.
- 4 There should be greater emphasis on sustainability within the redesign of pathways and competencies to ensure that sustainability issues, including climate change, are assessed to the required level in each pathway.

### A4 Assessment

- 1 RICS should introduce a new progressive, modular assessment, including a range of assessment methods, to ensure consistent, accessible, fair and valid assessment outcomes.
- 2 RICS should explore working with an assessment design, development and delivery partner(s) with expertise to achieve an efficient and scalable model in the design and delivery of assessments. This will require the support and involvement from members who contribute to the current assessment and quality assurance processes.
- 3 RICS should ensure the design of any new model is developed with a view to achieving accreditation and recognition status with an external regulatory body.

### A5 Eligibility

- 1 RICS should develop a clear and inclusive single point of entry. Every candidate should be able to access the RICS assessment. Eligibility exemptions should be given in recognition of relevant industry experience and/or prior learning, including for holders of an RICS-accredited degree.

## A6 Education

- 1 Accredited partnerships and apprenticeships must continue to have a role in future routes to entry.
- 2 RICS accreditation must have tangible benefits for university partners. The RICS Education and Accreditation functions should introduce a multi-year plan to embrace partnership working with accredited partners ensuring all parties derive the value of working in partnership.
- 3 RICS-accreditation must be based on a rigorous set of criteria and requirements, including relevance to industry and supporting the pipeline of future professionals.
- 4 RICS should develop a new coordinated education strategy that ensures learners are supported and new qualifying requirements are:
  - embedded into accredited programmes
  - aligned with apprenticeship standards through collaboration with IfATE's Trailblazer groups and other stakeholders.

## A7 Fellowship

- 1 RICS should review the current FRICS assessment and introduce a new, robust assessment with clear criteria for admission, balancing senior requirements, achievements and contribution to the Institution.
- 2 RICS should do more to clearly articulate the benefits and value of Fellowship.
- 3 RICS Governing Council should consider an amendment to Bye-Law 2.2.4, which prevents members from transferring from FRICS to MRICS, if it deems such an amendment appropriate.



# Appendix B Entry and Assessment Steering Group (EASG)

Accountable to RICS' Standards and Regulation Board (SRB), the EASG members are:

- Sarah Hutchinson, EASG Chair (Independent)
- Keith Thomas (FRICS), Chair of RICS Qualifications and Assessments Committee (QAC)
- David H Hourihan MSc Prop Inv (FRICS), RICS Governing Council
- Antoniette Antoine, Candidate Member
- Craig Bentley (MRICS)
- Megan Cawthorne (MRICS)
- Paul Collins (FRICS)

[Entry and Assessment Steering Group \(rics.org\)](https://www.rics.org)

# Appendix C Comparison of chartered pathways and chartered titles

Chartered pathway	Chartered title
Quantity surveying and construction	Chartered Quantity Surveyor
Commercial real estate	Chartered Commercial Property Surveyor
Valuation	Chartered Valuation Surveyor <b>or</b> Chartered Machinery Valuation Surveyor
Building surveying	Chartered Building Surveyor
Project management	Chartered Project Management Surveyor
Rural	No additional designation
Residential	No additional designation
Planning and development	Chartered Planning and Development Surveyor
Facilities management	Chartered Facilities Management Surveyor
Property finance and investment	No additional designation
Land and resources	Chartered Engineering Surveyor <b>or</b> Chartered Environmental Surveyor <b>or</b> Chartered Hydrographic <b>or</b> Chartered Land Surveyor <b>or</b> Chartered Minerals Surveyor <b>or</b> Chartered Planning and Development Surveyor
Corporate real estate	No additional designation
Management consultancy	Chartered Management Consultancy Surveyor

Chartered pathway	Chartered title
Geomatics	Chartered Engineering Surveyor <b>or</b> Chartered Hydrographic <b>or</b> Chartered Land Surveyor
Building control	Chartered Building Control Surveyor
Infrastructure	No additional designation
Valuation of businesses and intangible assets	No additional designation
Research	No additional designation
Minerals and waste management	Chartered Minerals Surveyor
Environmental surveying	Chartered Environmental Surveyor
Taxation allowances	No additional designation
Personal property/Arts and antiques	Chartered Arts and Antiques Surveyor

# Appendix D Summary of current assessment requirements

## D1 Chartered level (MRICS)

At chartered level, the main route is via the Assessment of Professional Competence (APC).

Candidates with an RICS-accredited degree undertake a period of work-based structured training.

Candidates with a non-accredited degree (or membership of an approved professional body) are eligible for the APC preliminary review route.

Other routes are open to senior professionals, industry specialists and academics.

For all chartered routes, the assessment comprises:

- a summary of experience meeting competency requirements for their pathway at the three levels of (knowledge, application, synthesis)
- at least one case study
- CPD record comprising 48 hours of CPD over the previous 12 months
- successful completion of the RICS professionalism (ethics) module
- a final assessment interview with a panel of RICS-qualified assessors. The one-hour interview includes a ten-minute presentation from the candidate and questions from the panel on the candidate's written submission.

## D2 Associate level (AssocRICS)

The Associate level assessment is via a written submission and successful completion of the RICS professionalism (ethics) module.

Candidates with no formal qualifications are eligible for assessment if they have four years' experience relevant to the competencies in their RICS pathway.

The period of experience is reduced for candidates with recognised qualifications.

# Appendix E Example competency descriptors

## Current Health and safety descriptor (chartered):

### Description of competency in context of this sector

This competency covers the relationship between the work of the surveyor and health and safety issues. Candidates should understand the 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
Demonstrate knowledge and understanding of the principles and responsibilities imposed by law, codes of practice and other regulations appropriate to your area of practice.	Apply evidence of practical application of health and safety issues and the requirements for compliance, in your area of practice.	Provide evidence of reasoned advice given to clients and others on all aspects on health and safety.
<p>Examples of knowledge comprised within this level are:</p> <ul style="list-style-type: none"> <li>personal safety on site and in the office</li> <li>procedures imposed by law</li> <li>specific regulations relevant to your area of work, e.g. fire safety standards</li> <li>the impact on health and safety of: design, construction processes, building maintenance</li> <li>health and safety training requirements as it relates to the employment of staff.</li> </ul>	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> <li>obtaining formal health and safety qualifications including first aid, industry specific or nationally recognised qualifications</li> <li>being involved with specific roles and responsibilities within the various regulations</li> <li>being involved in specific health and safety audits/reviews</li> <li>reviewing health and safety proposals as part of a contractor's tender.</li> </ul>	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> <li>giving reasoned advice on and/or taking responsibility for health and safety issues relating to: <ul style="list-style-type: none"> <li>impact of design on construction</li> <li>alternative construction processes</li> <li>impact of design on occupation and maintenance</li> <li>undertaking risk assessments</li> <li>advising on current legislation</li> <li>advising on adequacy of health and safety allowances within tenders.</li> </ul> </li> </ul>

## Current Health and safety descriptor (Associate):

Health and safety
<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>Demonstrate practical application of health and safety issues and the requirements for compliance, in your area of practice.</p>

The following is an example of a new competency descriptor for Health and safety if designed with learning outcomes and assessment criteria. Reference to UK legislation is for illustrative purposes only.

## Unit 1 Health and Safety in a work environment

Guided learning hours: 20

### Unit aim

The aim of this unit is to support learners understand how health and safety principles are applied in practice both in own place of work and on site.

Learners will demonstrate that they can identify the principles and responsibilities imposed upon them by law, codes of practice and other regulatory frameworks relating to health and safety. Learners will go on to apply knowledge to practical work activities and demonstrate how they use their knowledge to maintain own and other's health and safety.

## Essential resources

CPD Record: Learners will use CPD evidence section to include evidence of carrying out activities. Evidence should be signed off by employers/counsellors/clients to authenticate work has been undertaken. Learners are advised to complete reflective accounts of evidence submitted and assess the success of activities and any changes they would make for future development.

## Learning outcomes, assessment criteria and unit amplification

Learning outcomes (LO)		Assessment criteria (AC)		Content	Assessment guidance
1	Know the legal requirements of health and safety legislation relating to own area of work practice	1.1	Explain the main pieces of legislation applicable to area of own work practice	<p>Primary legislation in Management of Health and Safety at Work Act 1974</p> <p>Method statements, e.g. Construction (Design and Management) Regulations 2015</p> <p>Primary regulations including Health and Safety at Work Regulations 1999; Control of Substances Hazardous to Health (COSHH) Regulations 2002; Control of Asbestos Regulations 2012; Reporting of Incidents and Dangerous Occurrences 2013; Personal Protective Equipment at work (Amendment) Regulations 2022</p> <p>Regulations specific to own work practice, e.g. Manual Handling Operations Regulations 1992 (MHOR); Work at Height Regulations 2005 (WAHR); Fire Safety (England) Regulations 2022 (or Fire Safety regulations in own country)</p>	<p>Know the principal pieces of primary and subsidiary legislation applicable to own work practice in own country</p> <p>Know the impact of legislation and regulations on own practice and design construction processes and building maintenance</p>

Learning outcomes (LO)		Assessment criteria (AC)		Content	Assessment guidance
		1.2	Discuss the purpose of risk assessments and method statements	<p>Risk assessments and their purpose, e.g. reducing/removing risk in workplace to workforce; compliance with relevant legislation, e.g. Management of Health and Safety at Work Regulations 1999</p> <p>Method statements and their purpose, e.g. demonstration of sequence of events conducted to carry out risk assessments including all control measures</p>	<p>Know own role and responsibilities under primary and subsidiary legislation and regulations in own work practice, e.g. duty of care, requirements for ensuring safe working practices, e.g. conducting regular risk assessments</p>
2	Know how to ensure own and other's safety in own place of work and on client sites	2.1	Explain how to apply safe work practices, and following required procedures for reporting risks/issues in own workplace	Principles of risk assessments and managing risks in own area of practice including the identification of hazards, assessing and controlling risks, recording findings and reviewing controls, induction and refresher training	<p>Know how to conduct risk assessments in own work environment</p> <p>Carry out risk assessment to include relevant information, e.g. who might be harmed and how; current control measures; further action required; responsible people for carrying out action and time frames for acting</p> <p>Record examples of own practice in carrying out risk assessments in CPD log</p>

Learning outcomes (LO)		Assessment criteria (AC)		Content	Assessment guidance
		2.2	Explain how to manage and take responsibility for risk assessments at client's site	Principle requirements for working on a variety of site locations and undertaking relevant risk assessments to ensure own and client's safety	<p>Be able to identify and carry out risk assessments at client's sites</p> <p>Carry out risk assessment to include relevant information e.g. areas of risk; who might be harmed and how; current control measures; further action required; responsible people for carrying out action and time frames for acting</p> <p>Providing risk assessment report to clients</p>
3	Gain formal qualification in health and safety and first aid	3.1	Provide evidence of own learning and development through accessing formal training relevant to own work practice	<p>First Aid at Work Qualification up to level 3</p> <p>Health and Safety at Work qualification</p>	<p>Undertake formal training to develop own role working in own area of practice</p> <p>Records of formal and informal training to be logged in own CPD record</p>



## Forms of assessment

LO	AC	
1	1.1; 1.2	Assessment method 1: Timed MCQ, short and extended question paper
2	2.1 2.2	Assessment method 1: Case study exam: Learners to respond to case scenarios and apply knowledge to practical situations Assessment method 2: Demonstration of adherence to HASWA in APC interview/case study submission

## Example question paper

### Example MCQ question

Under the Health and Safety at Work Act 1974, an employer must:

- a provide a relaxed environment at work
- b safeguard the safety and health of all employees
- c ensure everyone has their own safety policy
- d ensure everyone wears a hard hat in the office

### Example short answer question

Describe three hazard signs that you might expect to see in workplace or on site.

### Example extended question

Discuss how you would provide reasoned advice to a client on health and safety issues for impact of design on construction in the following scenario:

Jack works for The Really High Construction Company. He has been assigned a project with a local firm 'Not so high buildings Ltd'. He has been asked to visit a proposed property which they wish to renovate and turn into a small shopping mall ... details setting the scene....

Your answer should include: (provide direction if required. Generally, this is provided for L1 or 2 but for L3 minimal guidance can be given).

## Delivering confidence

We are RICS. As a member-led chartered professional body working in the public interest, we uphold the highest technical and ethical standards.

We inspire professionalism, advance knowledge and support our members across global markets to make an effective contribution for the benefit of society. We independently regulate our members in the management of land, real estate, construction and infrastructure. Our work with others supports their professional practice and pioneers a natural and built environment that is sustainable, resilient and inclusive for all.

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