



Chartered Alternative Designations (CAD)

## Applicant guide

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# CAD applicant guide

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## Introduction

To qualify with RICS, you are assessed on your sector-specific skills, knowledge and experience – these are defined as competencies.

The RICS sector pathways set out the required competencies for each surveying discipline, which all allow you to use the designation Chartered Surveyor.

Some surveying disciplines and the activities involved require you to demonstrate specific competencies that employers and clients can recognise. To address this, chartered alternative designations (CADs) are available and linked to specific pathways and competencies.

All Chartered Surveyors can apply for the following CADs subject to the minimum requirements being met.

There are no CADs linked to the following pathways:

- Corporate Real Estate
- Infrastructure
- Property Finance and Investment
- Research – CADs are not available for secondary pathways selected
- Residential
- Taxation Allowances
- Valuation of Businesses and Intangible Assets

See the competency requirements section for more details.

### How to get a CAD

#### Your original RICS assessment

If the pathway (and competencies, where required) for your original RICS assessment (known as your pathway to qualification) is linked to a CAD, you are automatically eligible to use that CAD. You can check what CADs are on your record in the member portal (visit [rics.org/myrics](https://rics.org/myrics)). If you think there is an error on your record please contact us at [eqsenrolments@rics.org](mailto:eqsenrolments@rics.org)

#### Your other professional qualifications

If you hold a qualification that we recognise for direct entry to MRICS, you may already be eligible for a CAD. The approved list of direct entry qualifications sets out which CADs are approved against which qualification. You can use a direct entry qualification regardless of how you originally qualified with RICS.

Visit [rics.org/directentry](https://rics.org/directentry) for the list of qualifications we recognise.

### Chartered alternative designation [CAD]

### Linked pathway

Chartered Arts and Antiques Surveyor	Personal property / Arts and antiques
Chartered Building Control Surveyor	Building control
Chartered Building Surveyor	Building surveying
Chartered Commercial Property Surveyor	Commercial real estate
Chartered Engineering Surveyor	Geomatics, or Land and resources
Chartered Environmental Surveyor	Environmental surveying, or Land and resources
Chartered Facilities Management Surveyor	Facilities management
Chartered Forestry Surveyor	Environmental surveying, or Rural
Chartered Land Surveyor	Geomatics, or Minerals and waste management, or Planning and development, or Land and resources
Chartered Hydrographic Surveyor	Geomatics, or Land and resources
Chartered Machinery Valuation Surveyor	Valuation
Chartered Management Consultancy Surveyor	Management consultancy
Chartered Minerals Surveyor	Minerals and waste management, or Land and resources
Chartered Planning and Development Surveyor	Environmental surveying, or Minerals and waste management, or Planning and development, or Land and resources
Chartered Project Management Surveyor	Project management
Chartered Quantity Surveyor	Quantity surveying and construction
Chartered Valuation Surveyor	Valuation

## Process

You must complete an application form to demonstrate how you meet the requirements of a chartered alternative designation (CAD).

Your application will include the following.

### Qualifications

List and detail the academic or professional qualifications you hold that are relevant to the CAD you are applying for.

### Employment

List and detail your employment history, with reference to roles and responsibilities relevant to the CAD you are applying for.

### Statement of experience

Write a statement that explains how your career and current role are relevant to the CAD you are applying. Explain why you are applying for the CAD.

### Summary of experience

Write summary statements that demonstrate your skills, knowledge and experience for each competency required for the CAD you are applying for. You should use the linked pathway guide to ensure you cover the required information at each of the competency levels.

#### Level 1 – Knowledge and understanding

For level 1 you must provide a statement of learning – how you gained the knowledge and understanding. This should link to any relevant CPD in your CPD record.

#### Level 2 – Application of knowledge and understanding

For level 2 you must provide a statement of the range of experience you have achieved and include real-life project/process examples.

#### Level 3 – Reasoned advice and depth of knowledge

For level 3 you must provide a detailed statement of advice given and include real-life project/process examples where you have personally given advice. If the competency you select is a level 3 competency, you should ensure you write the summary covering levels 1, 2 and 3.

Levels 2 and 3 require you to provide at least one example. The number of examples you need to provide will be determined by the experience and competence each example demonstrates. Remember, RICS is looking for evidence that you can do the relevant job at the required level: for some competencies one of your examples may be sufficient, for other competencies you may need to provide multiple examples. Once you have completed the statements you should review them as a whole: together, they form your summary of experience. In addition to showing your abilities in individual competencies, they should provide the assessors with an overview of your training and experience, the work that you are doing and the levels you are working at.

### Assessment process

Your completed application will be considered by an RICS assessment panel. If the panel determine the minimum competency requirements for the CAD have been demonstrated through your written statements, the CAD will be awarded.

Alternatively, an outcome of this application may be a recommendation to complete a final assessment interview to achieve the CAD.

## Competency requirements

### Chartered Arts and Antiques Surveyor

You must demonstrate the following core and optional competencies.

#### Core competencies

##### Level 3

- Object identification
- Research methodologies and techniques

##### Level 2

- Valuation (or Level 3\*)

##### Level 1

- Auctioneering

#### Optional competencies

##### Three to Level 3 and one to Level 2\*

- Accounting principles and procedures **or** Business planning **or** Communication and negotiation (Communication and negotiation must be taken to Level 3)
- Auctioneering
- Capital taxation
- Conservation and restoration
- Insurance
- Purchase and sale

Plus, **one to Level 2** from the full list of technical competencies, including any not already chosen from the optional list.

\* If Valuation is taken to Level 3 the optional requirements are;

**Two to Level 3 and one to Level 2 plus two to Level 2** from the full list of technical competencies

For more details download the [Personal Property / Arts and Antiques](https://www.rics.org/pathways) pathway guide from [rics.org/pathways](https://www.rics.org/pathways)

## Chartered Building Control Surveyor

You must demonstrate the following core and optional competencies.

### Core competencies

#### Level 3

- Building control inspections
- Fire safety
- Inspection
- Legal/regulatory compliance

### Optional competencies

#### Two to Level 3 and one to Level 2

- BIM management
- Building pathology
- Client care (to Level 3) **or** Data management
- Conservation and restoration
- Construction technology and environmental services
- Contaminated land
- Measurement
- Planning and development management
- Risk management
- Sustainability
- Works progress and quality management.

Plus, **one to Level 2** from the full list of technical competencies, including any not already chosen from the optional list.

## Chartered Building Surveyor

You must demonstrate the following core and optional competencies.

### Core competencies

#### Level 3

- Building pathology
- Construction technology and environmental services
- Contract administration
- Design and specification
- Inspection
- Legal/regulatory compliance

#### Level 1

- Fire safety

### Optional competencies

#### Two to Level 2

- BIM management
- Commercial management
- Client care (to Level 3) **or** Conflict avoidance, management and dispute resolution procedures **or** Health and safety (to Level 3) **or** Inclusive environments **or** Sustainability
- Conservation and restoration
- Contract practice
- Design economics and cost planning
- Development/project briefs
- Fire safety
- Housing maintenance, repair and improvements **or** Maintenance management
- Insurance
- Landlord and tenant
- Measurement
- Procurement and tendering
- Project finance
- Quantification and costing
- Risk management
- Works progress and quality management

Plus, **one to Level 2** from the full list of technical competencies, including any not already chosen from the optional list.

For more details download the [Building Surveying](https://www.rics.org/pathways) pathway guide from [rics.org/pathways](https://www.rics.org/pathways)

## Chartered Commercial Property Surveyor

You must demonstrate the following core and optional competencies.

### Core competencies

#### Level 3

- Inspection

#### Level 2

- Measurement
- Valuation (or Level 3\*)

### Optional competencies

#### Three to Level 3

- Accounting principles and procedures **or** Conflict avoidance, management and dispute resolution **or** Data management **or** Sustainability
- Auctioneering
- BIM management
- Building pathology
- Capital taxation
- Compulsory purchase and compensation
- Contaminated land
- Corporate recovery and insolvency
- Development appraisals
- Insurance
- Indirect investment vehicles
- Investment management
- Landlord and tenant
- Leasing and letting
- Legal / regulatory compliance
- Loan security valuation
- Local taxation / assessment
- Planning and development management
- Property finance and funding
- Property management
- Purchase and sale
- Strategic real estate consultancy

Plus, **one to Level 3** or **two to Level 2** from the full list of technical competencies, including any not already chosen from the optional list.

\* If Valuation is taken to Level 3 the requirements are as follows;

From the optional competency list you must select **two at Level 3** and **one at Level 2**

**plus**

From the full list of technical competencies you must select **one to Level 3** or **two at Level 2**

Although commercial real estate is the focus for the pathway, up to 30% of your experience can come from other property sectors, e.g. residential.

For more details download the [Commercial Real Estate](https://www.rics.org/pathways) pathway guide from [rics.org/pathways](https://www.rics.org/pathways)

## Chartered Engineering Surveyor

You must demonstrate the engineering surveying competency to level 3.

### Engineering surveying

Engineering surveying is the art of determining, and/or setting-out the position of features on, above, or below the earth's surface to facilitate the design and construction of engineering projects, and buildings.

#### Examples of likely knowledge, skills and experience at each level

##### Level 1

Demonstrate knowledge and understanding of the principles of construction setting out, deformation and as-built surveys. Be fully conversant with all forms of construction drawings, plans and surveys.

Examples of activities and knowledge comprised within this level are:

- Types of ground markers, installation techniques and suitability for use
- Requirements for survey data capture and presentation for design purposes in your field of operation
- Setting-out techniques
- The importance of comparison of designed and as-built spatial locations
- Be conversant with construction drawings, plans and surveys
- Site health and safety issues
- Basic principles of civil engineering, terminology and construction techniques.

##### Level 2

Apply your knowledge and understanding of safety, site management procedures and civil engineering/structural principles.

Examples of activities and knowledge comprised within this level are:

- Recognising options, choosing and justifying instrument suitability for use in engineering projects
- Understanding accuracies and errors and how they apply
- Checking the work of others
- Leading the work of teams and individuals
- Identifying hazards and undertaking risk assessments
- Producing method statements for site survey activities
- Communicating and presenting results of surveys to others.

##### Level 3

Plan, specify and give reasoned advice on engineering surveys; define and assess accuracies and tolerances; manage the engineering surveying element in large projects; and understand the principles of good engineering practice.

Examples of activities and knowledge comprised within this level are:

- Designing and supervising provision, observation, computation and checking of plan and height control
- Advising other construction/design professionals on all aspects of site measurement; contributing to project management team decision making
- Producing project resource plans and budgets for programmes of work
- Defining survey processes and assessing accuracy and tolerances of survey systems
- Managing the engineering survey element within a large project
- Understanding and analysing the impact of your decisions on all aspects of the project
- Implementing project health and safety strategy for site surveying elements of a project.

For more details download the [Land and Resources](#) pathway guide from [rics.org/pathways](#)

## Chartered Environmental Surveyor

You must demonstrate the environmental management competency to level 3.

### Environmental management

This competency deals with both the broad knowledge and application of environmental management practice, as well as the more specific knowledge and application of formal environmental management standards for land, property and the natural environment.

#### Examples of likely knowledge, skills and experience at each level

Level 1	Level 2	Level 3
Demonstrate knowledge and understanding of appropriate environmental management concepts, processes and systems.	Apply your understanding of appropriate environmental management and environmental land management concepts, processes and systems.	Give reasoned advice on appropriate environmental management and environmental land management concepts, processes and systems.
<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> <li>Where environmental management applies in chartered surveyor practice</li> <li>The standards used in environmental management including EMS and ISO 14001 or National equivalent.</li> <li>Application of sustainability principles in environmental management.</li> <li>The regulatory and practical aspects of the restoration, remediation and reinstatement of land.</li> </ul>	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> <li>Carrying out environmental management and reporting, including data management systems</li> <li>The scope and methods to be used for environmental management</li> <li>The specialisms and specialists required to conduct environmental management.</li> <li>Carrying out monitoring and compliance with planning, legal or environment control of an environmental site.</li> <li>Interpreting legislation and regulations to achieve compliance</li> <li>Ecosystem and carbon balance evaluation and biodiversity off setting and mitigation.</li> <li>Application of renewable and energy recovery to environmental management.</li> <li>Application of restoration, remediation and reinstatement of land.</li> </ul>	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> <li>Advising clients on the needs of environmental Management</li> <li>Presenting and proposing actions following the findings of environmental management</li> <li>Negotiating and liaising with clients and regulators on the findings and actions arising from environmental management.</li> <li>How environmental projects comply with principles of sustainability</li> <li>Authoring reports on habitat management schemes</li> <li>Integrating land management plans or National Equivalent</li> <li>Developing monitoring systems.</li> </ul>

For more details download the [Land and Resources](https://www.rics.org/pathways) pathway guide from [rics.org/pathways](https://www.rics.org/pathways)

## Chartered Facilities Management Surveyor

You must demonstrate the following core and optional competencies.

### Core competencies

#### Two to Level 3 and two to Level 2

- Asset management
- Business alignment
- Client care (must be taken to Level 3)
- Legal/regulatory compliance
- Maintenance management
- Performance management
- Procurement and tendering
- Project finance
- Supplier management
- Workspace strategy

### Optional competencies

Two to Level 3 and one to Level 2, including any not already chosen from the core list

- Big data
- BIM management
- Business case
- Change management
- Commercial management
- Conflict avoidance, management and dispute resolution procedures **or** Data management **or** Health and safety (must be taken to Level 3) **or** Inclusive environments **or** Sustainability
- Construction technology and environmental services
- Consultancy services
- Contract administration
- Contract practice
- Design and specification
- Environmental management
- Landlord and tenant
- Managing projects
- Measurement
- Risk management
- Smart cities and intelligent buildings
- Stakeholder management
- Strategic real estate consultancy
- Waste management
- Works progress and quality management

Plus, **one to Level 2** from the full list of technical competencies, including any not already chosen from the core and optional lists.

For more details download the [Facilities Management](#) pathway guide from [rics.org/pathways](#)

## Chartered Forestry Surveyor

You must demonstrate the forestry and woodland management competency to level 3.

### Forestry and woodland management

This competency covers silvicultural and environmental management of woodland. It includes the management of plantations from planting to felling, with all associated relevant operations for effective maintenance.

#### Examples of likely knowledge, skills and experience at each level

##### Level 1

Demonstrate the ability to describe the silvicultural requirements, and the tree identification and silvicultural characteristics, of the main commercial and amenity species. Demonstrate knowledge and understanding of current grant regimes.

Examples of activities and knowledge comprised within this level are:

- The main commercial and amenity tree species
- The silvicultural requirements of those species
- Current legislation and grant regimes.

##### Level 2

Demonstrate the ability to apply your understanding of silviculture to the establishment and management of different forest and woodland systems. Demonstrate an understanding of the practice of silviculture from seed through establishment of crops, through to thinning and harvesting. Demonstrate an understanding of current forestry policy and its impact on grant regimes.

Examples of activities and knowledge comprised within this level are:

- Providing advice on a range of woodland management issues
- The planting and establishment of trees and grant applications
- Silvicultural practice including harvesting and marketing.

##### Level 3

Demonstrate experience of the economics and financial implications of various types of forest and woodland systems; preparation and submission of forest and woodland grant scheme applications; calculation of timber yields, forecasting, and use of plans and recording systems; carrying out valuation of trees and stands of timber; and drawing up of thinning and harvest programmes.

Examples of activities and knowledge comprised within this level are:

- Preparing woodland management plans
- Providing strategic advice to clients to support decision-making by estate managers.

For more details download the [Environmental Surveying](#) pathway guide from [rics.org/pathways](#)

## Chartered Land Surveyor

You must demonstrate the surveying and mapping competency to level 3.

### Surveying and mapping

Mapping, in this context, is an exceptionally broad potential area of practice. Encompassing everything from LIDAR, IFSAR, aerial photography and other primary data capture techniques to ground control using GPS and/or traditional techniques and the production of digital elevation models, DTMs or any form of geographical output including GIS data capture and output. Candidates should also understand the principles of Fit for purpose mapping and its use in low/middle income nations.

#### Examples of likely knowledge, skills and experience at each level

##### Level 1

Demonstrate knowledge and understanding of the principles of mapping and geographic information sciences appropriate to your area of practice, including the accuracy, scale, currency and fitness for purpose of hardcopy and/or digital maps, drawings, imagery and plans.

Examples of activities and knowledge comprised within this level are:

- Data capture techniques and the knock-on effects regarding accuracy and precision
- Instrument checking techniques
- The basic principles of geodesy and its application to mapping per your area of practice
- Basic survey software.

##### Level 2

Apply your knowledge of mapping and geographical sciences in relation to your area of practice.

Examples of activities and knowledge comprised within this level are:

- Using post processing survey/mapping software competently
- Using digital terrain modelling/digital elevation models
- Understanding the principles of data integration and compatibility, integrating different data sets to achieve client needs
- Understanding scalability in the context of both mapping and user requirements
- Using imagery software and GIS data capture tools
- Using modern survey instrumentation and understanding checking/calibration techniques.

##### Level 3

Provide evidence of reasoned advice on the design and specification of mapping and/or geo-information projects in a national and/or international context.

Examples of activities and knowledge comprised within this level are:

- Using all forms of survey/mapping/imagery contracts competently and describing the nuances of each (i.e. accuracy/fitness for purpose issues)
- Being fully conversant with all RICS Geomatics specifications and guidance in relation to mapping
- Explaining complex mapping issues to clients and discerning their 'actual' needs.

For more details download the [Land and Resources](#) pathway guide from [rics.org/pathways](#)

## Chartered Hydrographic Surveyor

You must demonstrate the hydrographic surveying competency to level 3.

### Hydrographic surveying

Hydrographic surveying involves precise positioning and data acquisition in marine environments ranging from inland waters and rivers, to ports and the deep oceans. This competency involves the ability to provide precise three-dimensional position and measurement of various physical features within the marine environment such as bottom depth and structure, currents, tides and waves.

#### Examples of likely knowledge, skills and experience at each level

##### Level 1

Demonstrate a working knowledge and understanding of the principles and limitations of hydrographic survey. Conduct measurements in the marine environment.

Examples of activities and knowledge comprised within this level are:

- Providing navigation and data collection for oil, gas and mineral resource exploration and extraction
- Conducting data collection for environmental monitoring, aquaculture and oceanographic research
- Providing surveying support for dredging, coastal works, nearshore and/or off-shore construction projects
- Quality control and processing of hydrographic data
- Presenting hydrographic data using a range of paper (chart) and electronic formats.

##### Level 2

Plan the conduct of marine surveys, including any safety issues. Specify appropriate instrumentation and ensure correct calibration. Understand the principles of geodesy on a local and international basis, and its application in a marine environment. Fully understand the principles, application and limitations of navigation, geophysical and marine survey instrumentation and software.

Examples of activities and knowledge comprised within this level are:

- Being actively involved in project initiation and execution as senior surveyor/navigator, including assessment of survey requirements, equipment specifications and suitability.
- Conducting safety risk assessments and reviewing project safety plans for various activities
- Being responsible for, and ensuring that, equipment is fully calibrated and understanding the importance of calibration methods and the relationship to data quality.
- Ensuring geodetic parameters specified for the project are correctly defined and implemented within acquisition software.

##### Level 3

Assess the client's needs and define specifications, tenders and/or contracts. Manage marine surveys. Analyse the data collected and use it to prepare reports and briefings. Be conversant with the International Law of the Sea and/or maritime boundaries.

Examples of activities and knowledge comprised within this level are:

- Assuming full responsibility for the initiation of the works in accordance with the approved project specific and standard survey procedures, customer requirements and technical specifications
- Preparing tender documents and being responsible for financial control of projects
- Liaising and advising clients regarding contract execution and having overall responsibility for the successful performance of the technical team
- Evaluating and presenting survey results and advising clients with respect to survey findings
- Assisting clients with their further requirements and helping develop future potential
- Advising clients on national/ international policy and legislation and its influence on survey activities.

For more details download the [Land and Resources](https://www.rics.org/pathways) pathway guide from [rics.org/pathways](https://www.rics.org/pathways)

## Chartered Machinery Valuation Surveyor

You must demonstrate the following core and optional competencies.

### Core competencies

#### Level 3

- Inspection
- Valuation

#### Level 2

- Measurement

### Optional competencies

#### Three to Level 3 or two to Level 3 and two to Level 2\*

- Accounting principles and procedures **or** Conflict avoidance, management and dispute resolution procedures **or** Data management **or** Sustainability
- Auctioneering
- Building pathology
- Capital taxation
- Compulsory purchase and compensation
- Construction technology and environmental services
- Contaminated land
- Corporate recovery and insolvency
- Development appraisals
- Indirect investment vehicles
- Insurance
- Investment management (including fund and portfolio management)
- Landlord and tenant
- Leasing and letting
- Legal/regulatory compliance
- Loan security valuation
- Local taxation/assessment
- Planning and development management
- Property finance and funding
- Property management
- Purchase and sale
- Strategic real estate consultancy
- Valuation of businesses and intangible assets

Plus, **one to Level 2** from the full list of technical competencies, including any

not already chosen from the optional list.

You must choose **two to Level 3** from the following list as part of your optional competency requirements:

- Auctioneering
- Accounting principles and procedures **or** Conflict avoidance, management and dispute resolution procedures **or** Sustainability
- Capital taxation
- Compulsory purchase and compensation
- Corporate recovery and insolvency
- Insurance
- Investment management (including fund and portfolio management)
- Leasing and letting
- Legal/regulatory compliance
- Local taxation/assessment
- Purchase and sale

For more details download the [Valuation](https://www.rics.org/pathways) pathway guide from [rics.org/pathways](https://www.rics.org/pathways)

## Chartered Management Consultancy Surveyor

You must demonstrate the following core and optional competencies.

### Core competencies

#### Level 3

- Business case
- Business planning
- Consultancy services
- Research methodologies and techniques

### Optional competencies

#### One to Level 3 and one to Level 2

- Business alignment
- Change management
- Corporate finance
- Corporate recovery and insolvency
- Data Management
- Development appraisals
- Development projects/briefs
- Economic development
- Managing resources
- Performance management
- Programming and planning
- Property finance and funding
- Smart cities and intelligent buildings
- Strategic real estate consultancy
- Workspace strategy

Plus, **one competency to Level 2** from the full list of technical competencies, including any not already chosen from the optional list.

## Chartered Minerals Surveyor

### Option 1

You must demonstrate the minerals management competency to level 3.

### Minerals management

This competency deals with the practical aspects of waste management including the regulatory framework, compliance issues, an appreciation of economic viability, technical design, planning and permitting, estates and project management.

### Examples of likely knowledge, skills and experience at each level

#### Level 1

Demonstrate a broad appreciation of geology, exploration techniques (including site investigation), and surface and/or underground mining methods.

Examples of activities and knowledge comprised within this level are:

- Current and emerging legislation including relevant minerals planning and aggregates levy, and Groundwater Protection Act or similar
- The various minerals management technologies dealing with minerals types, extraction methods and how they are utilised
- Estates and Planning management functions
- How to inspect facilities to assess property issues including ownership boundaries, rights of way, easements, discharge consents, regulatory compliance.

#### Level 2

Analyse site investigations and interpret results. Demonstrate an appreciation of the economic and technical viability and/or management of minerals extraction and restoration.

Examples of activities and knowledge comprised within this level are:

- Advising on legal agreements, royalties, rents, rating and compliance issues
- Carrying out evaluation of facilities to assess economic and technical viability
- Knowledge of quarry or mine development engineering and design, environmental control systems, and aftercare and restoration measures
- Carrying out monitoring and compliance with planning, legal or environmental controls of a minerals site.

#### Level 3

Design, give advice on, and/or manage minerals exploitation schemes, their implementation and/or property interests therein.

Examples of activities and knowledge comprised within this level are:

- Assuming full responsibility for the initiation of the works in accordance with the approved project specific and standard survey procedures, customer requirements and technical specifications
- Preparing tender documents and being responsible for financial control of projects
- Liaising and advising clients regarding contract execution and having overall responsibility for the successful performance of the technical team
- Evaluating and presenting survey results and advising clients with respect to survey findings
- Assisting clients with their further requirements and helping develop future potential
- Advising clients on national/ international policy and legislation and its influence on survey activities.

For more details download the [Land and Resources](#) pathway guide from [rics.org/pathways](#)

## Chartered Minerals Surveyor

### Option 2

You must demonstrate the waste management competency to level 3.

### Waste management

This competency deals with the practical aspects of waste management including the regulatory framework, compliance issues, an appreciation of economic viability, technical design, planning and Pollution Prevention & Control (PPC) permitting, estates and project management.

### Examples of likely knowledge, skills and experience at each level

#### Level 1

Demonstrate a broad appreciation of practical aspects of waste management and regulatory regime. Undertake inspections of waste management facilities.

Examples of activities and knowledge comprised within this level are:

- Current and emerging legislation including Landfill Directive, Waste Strategy, Groundwater Protection Act, Landfill Tax and similar legislation
- The various waste management technologies dealing with collection, recycling, treatment and disposal together with trends in the industry
- Estates and planning management functions
- Inspection of facilities to assess property issues including ownership boundaries, rights of way, easements, discharge consents, regulatory compliance.

#### Level 2

Demonstrate an appreciation of the economic and technical viability and/or management application of the practical requirements and monitoring of waste facilities.

Examples of activities and knowledge comprised within this level are:

- Advising on legal agreements, royalties, rents, rating and compliance issues
- Carrying out evaluation of facilities to assess economic and technical viability
- Knowledge of landfill engineering and design, gas utilisation, environmental control systems and aftercare measures or similar aspects relating to another waste treatment technology
- Carrying out environmental monitoring of a waste management facility.

#### Level 3

Design, advise on, and/or manage waste management schemes, their implementation and/or property interests therein.

Examples of activities and knowledge comprised within this level are:

- Carrying out detailed valuations/ financial appraisals and preparing reports to clients in support of development opportunities
- Designing and/or project managing planning and/or PPC permit application or waste treatment/disposal tenders
- Managing property interests including purchase and sale of waste assets
- Identifying and evaluating related business opportunities including new technologies.

For more details download the [Land and Resources](#) pathway guide from [rics.org/pathways](#)

## Chartered Planning and Development Surveyor

### Option 1

You must demonstrate the planning development and management competency to level 3.

### Planning development and management

Planning appraisal is one of the crucial starting points in the development or refurbishment process. Such appraisals draw together all of the relevant policies, site history and local context pertaining to a site and the potential to secure planning consent. Development management covers the process of managing or obtaining the grant of planning consents working for either the local authority or client-side perspective. The competency also covers the appeals process and the criteria by which cases will be considered by inspectors.

### Examples of likely knowledge, skills and experience at each level

#### Level 1

Demonstrate knowledge and understanding of the key principles and processes used to determine both the need for planning consent and the procedures involved in obtaining appropriate planning permission.

Examples of activities and knowledge comprised within this level are:

- The purpose of the development management system and process
- The stages of the development application and appeals process
- The consultation process and stakeholder management
- The decision making process and role of key stakeholders
- The need for supporting information and basis for determining what is required
- Familiarity with appropriate planning policy and procedures relevant to the locality/region of working
- Site/building surveys and details e.g. site planning history, flood risk, biodiversity, archaeology, architectural character, conservation, accessibility, highways, services and utilities
- Analysis of environmental features and issues
- Urban design principles and characteristics and their implications for development appraisals
- The role of supplementary planning documents, design guides and codes in guiding planning applications and their consideration.

#### Level 2

Apply your knowledge to identify, select, assemble and analyse information relevant to the preparation or determination of appropriate planning applications.

Examples of activities and knowledge comprised within this level are:

- Support the making of planning applications and/or appeal documentation
- Selecting, researching and analysing information and data and writing reports in support of or in response to planning applications
- Identify and implement appropriate consultation procedures and respond to issues identified
- Identify and help ensure compliance with planning policies and guidance.

#### Level 3

Apply information and reasoned advice in the preparation, presentation and/or negotiation of planning applications and/or appeals documentation.

Examples of activities and knowledge comprised within this level are:

- Liaising with and negotiating with planning officers, clients, fellow professionals and third-party stakeholders in relation to a development project
- Preparing planning appraisals of land, buildings and concepts and area wide planning parameter studies
- Making a planning application and/or submitting an appeal and appearing at an informal or public inquiry
- Formulating and negotiating a planning or highways agreements.
- Creativity, problem solving and dispute mediation in scheme development.

For more details download the [Land and Resources](https://www.rics.org/pathways) pathway guide from [rics.org/pathways](https://www.rics.org/pathways)

## Chartered Planning and Development Surveyor

### Option 2

You must demonstrate the spatial planning policy and infrastructure competency to level 3.

### Spatial planning policy and infrastructure

National, regional and local spatial planning policies seek to influence the strategic direction, scale and location of development and associated infrastructure delivery. Planning and development surveyors need to understand the key drivers that shape decisions and, where appropriate, influence spatial policy and infrastructure planning taking account of commercial market trends.

### Examples of likely knowledge, skills and experience at each level

Level 1	Level 2	Level 3
Demonstrate knowledge of national (as appropriate to a candidate's location) spatial planning and infrastructure systems, their legislative basis and key national policies and programmes.	Apply your knowledge to identify, select, assemble and analyse information relevant to the preparation and review of land use planning policies and plans as well as infrastructure planning and provision including transportation, energy, waste, IT and local community infrastructure related provision.	Use information and skills in the preparation and presentation of reports that interpret land use and/or infrastructure planning, in order to give reasoned advice, as regards investment, valuation and/or development decision making and implementation.
<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> <li>The aims and objectives of national planning laws and policies and its underlying political basis</li> <li>The preparation and adoption process for Local Plans, core strategies and supporting planning documents; neighbourhood plans and community infrastructure needs</li> <li>Conservation and listed buildings policies, ecology, habitat management and planning policies to support and enhance biodiversity</li> <li>Environmental assessment policies and processes</li> <li>Understanding the geographic and demographic characteristics of areas (at e.g. regional and local scale) and the impacts of spatial planning proposals and infrastructure development</li> <li>Consultation processes and stakeholder perspectives</li> <li>Infrastructure provision and delivery at the local and national level</li> <li>Community Infrastructure Levy (CIL) and other local taxation initiatives and their rationale and efficacy.</li> </ul>	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> <li>Contributing to a consultation process on a local plan, supplementary planning documents and their review</li> <li>Identify appropriate planning strategy to help promote and/or manage proposed development allocations and/or strategic and community infrastructure requirements</li> <li>Critiquing, reporting and explaining to clients, stakeholders and the public: land use allocations, housing need assessments, regeneration strategies, infrastructure or economic development plans</li> <li>Contributing to the settlement or review of local CIL policies and implementation or review in the context of wider spatial planning policy.</li> </ul>	<p>Examples of activities and knowledge comprised within this level are:</p> <ul style="list-style-type: none"> <li>Taking a key role in contributing to a spatial planning policy and/or its related implementation or monitoring. This could include e.g. Local Plans, Strategic Development Plans, Neighbourhood Plans, regeneration masterplans, conservation areas</li> <li>Producing an opportunities/ risk evaluation and associated options report based on plans and policy based documentation</li> <li>Take a key role in the preparation, implementation or monitoring of related infrastructure planning policy instruments.</li> <li>Acting on behalf of stakeholder interests in relation to spatial planning or infrastructure matters</li> <li>Evaluating spatial planning and infrastructure policies, programmes and delivery in relation to individual sites, buildings and wider development or restraint areas.</li> </ul>

For more details download the [Land and Resources](https://www.rics.org/pathways) pathway guide from [rics.org/pathways](https://www.rics.org/pathways)

## Chartered Project Management Surveyor

You must demonstrate the following core and optional competencies..

### Core competencies

#### Level 3

- Contract practice
- Development/project briefs
- Leading projects, people and teams
- Managing projects
- Programming and planning

#### Level 2

- Construction technology and environmental services
- Procurement and tendering
- Project finance

### Optional competencies

#### One to Level 2

- Accounting principles and procedures **or** Communication and negotiation (must be taken to Level 3) **or** Conflict avoidance, management and dispute resolution procedures **or** Sustainability
- BIM management
- Commercial management
- Consultancy Services
- Contract administration
- Development appraisals
- Legal/regulatory compliance
- Maintenance management
- Performance management
- Purchase and sale
- Stakeholder management
- Supplier management
- Works progress and quality management

Plus, **one to Level 2** from the full list of technical competencies, including any not already chosen from the optional list.

## Chartered Quantity Surveyor

You must demonstrate the following core and optional competencies.

### Core competencies

#### Level 3

- Commercial management (of construction works) **or** Design economics and cost planning\*
- Construction technology and environmental services
- Contract practice
- Procurement and tendering
- Project finance (control and reporting)
- Quantification and costing (of construction works)

### Optional competencies

#### Two to Level 2

- Capital allowances
- Commercial management (of construction works) **or** Design economics and cost planning (whichever is not selected as core competency)
- Conflict avoidance, management and dispute resolution procedures **or** Sustainability
- Contract administration
- Corporate recovery and insolvency
- Due diligence
- Insurance
- Programming and planning
- Project feasibility analysis
- Risk management

\* Candidates working in a **commercial or contracting environment** will likely choose **Commercial management to Level 3**.

Candidates working in a **consulting environment** within either the public or private sector will likely choose **Design economics and cost planning to Level 3**.

For more details download the [Quantity Surveying and Construction](https://www.rics.org/pathways) pathway guide from [rics.org/pathways](https://www.rics.org/pathways)

## Chartered Valuation Surveyor

You must demonstrate the following core and optional competencies.

### Core competencies

#### Level 3

- Inspection
- Valuation

#### Level 2

- Measurement

### Optional competencies

#### Three to Level 3 or two to Level 3 and two to Level 2\*

- Accounting principles and procedures **or** Conflict avoidance, management and dispute resolution procedures **or** Data management **or** Sustainability
- Auctioneering
- Building pathology
- Capital taxation
- Compulsory purchase and compensation
- Construction technology and environmental services
- Contaminated land
- Corporate recovery and insolvency
- Development appraisals
- Indirect investment vehicles
- Insurance
- Investment management (including fund and portfolio management)
- Landlord and tenant
- Leasing and letting
- Legal/regulatory compliance
- Loan security valuation
- Local taxation/assessment
- Planning and development management
- Property finance and funding
- Property management
- Purchase and sale
- Strategic real estate consultancy
- Valuation of businesses and intangible assets

Plus, **one to Level 2** from the full list of technical competencies, including any not already chosen from the optional list.

\* Candidates planning to specialise in **Residential survey and valuation** must choose Building pathology to Level 3 as part of their optional competency requirements.

Candidates planning to specialise in **Machinery and business assets** must choose **two to Level 3** from the following list as part of their optional competency requirements:

- Auctioneering
- Accounting principles and procedures **or** Conflict avoidance, management and dispute resolution procedures **or** Sustainability
- Capital taxation
- Compulsory purchase and compensation
- Corporate recovery and insolvency
- Insurance
- Investment management (including fund and portfolio management)
- Leasing and letting
- Legal/regulatory compliance
- Local taxation/assessment
- Purchase and sale

For more details download the [Valuation](https://www.rics.org/pathways) pathway guide from [rics.org/pathways](https://www.rics.org/pathways)

## Interview requirements

If the outcome of your application is a recommendation to complete a final assessment interview, you must prepare an additional submission.

The final assessment interview is used for all assessment routes that result in the MRICS qualification. As you already hold the MRICS qualification, the submissions and interview format have been adapted for the purposes of CAD applications.

### Submission

In addition to your original application, you must submit a case study and CPD record. You are required to provide evidence only for the required competencies of the CAD you are applying for.

Note: You do not need to provide evidence for the mandatory competencies as these were covered when you were originally assessed for the MRICS qualification.

### Case study

You must select and detail a project that focusses on the competencies required for the CAD you are applying for. You must reference your involvement in the project within the last three years.

Maximum word count: 1,500 words.

### CPD record

Provide a record of CPD for the last 12 months that is relevant to the required competencies of the CAD you are applying for. As a chartered surveyor you should be recording 20 hours of CPD each year. The number of hours you record relevant to the CAD should reflect the number and levels of the required competencies of the CAD.

## Interview

You will be assessed by a minimum of two (maximum three) trained assessors.

The interview will last for a maximum of 45 minutes and follow the structure below.

Chairperson's opening and introductions	3-4 minutes
Your presentation on case study, focussing on the experience you have gained in the required competencies/ linked pathway of the CAD.	10 minutes
Questions on the presentation.	10 minutes
Discussion on overall experience, focussed on technical competencies and CPD record.	20 minutes
Chairperson to close.	1-2 minutes

**Note:** Although you are not required to demonstrate evidence of the ethics, rules of conduct and professionalism competency (a mandatory competency to level 3), any issues relating to this competency that arise during the CAD assessment may be questioned by the assessors and, if appropriate, referred to RICS Regulation. This is the case for any RICS assessment candidate.

## Further guidance

For further guidance on completing the submission and preparing for the interview you should refer to the APC candidate guide available at [rics.org/apc](https://rics.org/apc)

Note: The APC candidate guide is designed for graduate trainees completing the APC to become MRICS-qualified so some content may not be applicable to you.

## 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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