

# End-point assessment plan for Chartered Surveyor non- integrated degree apprenticeship standard

Apprenticeship standard number	Level of this end point assessment (EPA)	Integrated
ST0331	6	Non-integrated degree apprenticeship

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## Introduction and overview

This document sets out the requirements for end-point assessment (EPA) for the Chartered Surveyor apprenticeship standard. It is for use by the end-point assessment organisation. The EPAO can only be the Royal Institution of Chartered Surveyors (RICS). It will also be of interest to Chartered Surveyor apprentices, their employers and training providers.

Successful completion of the EPA demonstrates that the apprentice satisfies the occupational and professional requirements for Chartered membership of RICS and has the knowledge, skills and behaviours to work competently as a Chartered Surveyor.

Full time apprentices will typically spend 60 months on-programme (before the gateway) working towards the occupational standard, with a minimum of 20% off-the-job training. All apprentices will spend a minimum of 12 months on-programme.

The apprenticeship standard is made up of three distinct pathways. Apprentices will complete a common 'core' element and pursue one of the following three options:

- Building Surveying
- Property
- Quantity Surveying and Project Management

The EPA period should only start, and the EPA be arranged, once the employer is satisfied that the apprentice is deemed to consistently be working at or above the level set out in the occupational standard, all of the pre-requisite gateway requirements for EPA have been met and that they can be evidenced to an EPAO.

All pre-requisites for EPA assessment methods must also be complete and available for the assessor as necessary.

As a gateway requirement and prior to taking the EPA, apprentices must complete a RICS accredited degree. Apprentices without English and mathematics at level 2 must achieve level 2 prior to taking their EPA.

The EPA must be completed within an EPA period typically lasting a maximum of 12 months, beginning when the apprentice has passed the EPA gateway.

The EPA consists of 3 discrete assessment methods.

The individual assessment methods will each have pass or fail grades. Performance in the EPA will determine the overall apprenticeship standard and grade of:

- Pass
- Fail

## EPA summary table

<b>On-programme</b> (typically 60 months)	Training to develop the occupation standard's knowledge, skills and behaviours and study on an RICS accredited degree.
<b>End-point Assessment Gateway</b>	<ul style="list-style-type: none"> <li>• Employer is satisfied the apprentice is consistently working at, or above, the level of the occupational standard.</li> </ul> <p>Apprentices must have:</p> <ul style="list-style-type: none"> <li>• achieved English/mathematics Level 2</li> <li>• completed a RICS accredited degree (as mandated in the Apprenticeship Standard)</li> <li>• completed a Summary of Experience Portfolio</li> </ul>
<b>End Point Assessment</b> (which would typically take 8 months)	<p>Assessment Method 1: Online test</p> <p>With the following grades:</p> <ul style="list-style-type: none"> <li>· Pass</li> <li>· Fail</li> </ul> <p>Assessment Method 2: Case Study including report, presentation and questioning</p> <p>With the following grades:</p> <ul style="list-style-type: none"> <li>· Pass</li> <li>· Fail</li> </ul> <p>Assessment Method 3: Interview (underpinned by a Summary of Experience Portfolio)</p> <p>With the following grades:</p> <ul style="list-style-type: none"> <li>· Pass</li> <li>· Fail</li> </ul>
<b>Professional recognition</b>	Aligns with recognition by the Royal Institution of Chartered Surveyors (RICS) for Chartered membership.

## Length of end-point assessment period:

The EPA must be completed within an EPA period typically lasting a maximum of 8 month(s), beginning when the apprentice has passed the EPA gateway.

Any supporting material required for the EPA should be submitted at the Gateway.

If an EPA assessment method is failed, it should be resat/retaken within the EPA period and in-line with the requirements set out in this assessment plan.

## Order of assessment methods

The assessment methods can be delivered in any order.

### Gateway

The EPA period should only start once the employer is satisfied that the apprentice is consistently working at or above the level set out in the occupational standard, that is to say they are deemed to have achieved occupational competence. In making this decision, the employer may take advice from the apprentice's training provider(s), but the decision must ultimately be made solely by the employer.

In addition to the employer's confirmation that the apprentice is working at or above the level in the occupational standard, the apprentice must have achieved English/mathematics Level 2 and completed an RICS accredited degree (as mandated in the Apprenticeship Standard).

For those with an education, health and care plan or a legacy statement, the apprenticeship's English and mathematics minimum requirement is Entry Level 3 and British Sign Language qualification are an alternative to English qualifications for whom this is their primary language.

There are no specific gateway requirements for the online test or for the case study including a report, presentation and questioning

For the interview, the apprentice will be required to submit a Summary of Experience Portfolio for which the requirements are as follows:

- The format and structure of the portfolio must be agreed between the employer and apprentice and will be presented electronically and submitted to the EPAO at the gateway
- Reflective accounts and self-evaluation cannot be included as evidence
- The portfolio should contain written accounts of activities that have been completed and referenced against the knowledge, skills and behaviours
- The portfolio should typically cover at least 24 months (and at least 400 days of work experience) and the summary should be typically 5500 words long
- The portfolio should include a CPD record of a typical minimum of 48 hours of CPD activity in each of the last two years of the apprenticeship (typical minimum of 96 in total)
- The content must be sufficient to evidence the apprentice can apply the knowledge, skills and behaviours required as mapped to assessment method 3 (Interview)
- The evidence provided must be valid and attributable to the apprentice; the portfolio must contain a statement from the employer (typically a chartered surveyor) confirming this. Where the employer is not a chartered surveyor, a statement must also be made by a chartered surveyor
- The Summary of Experience Portfolio is not directly assessed. It underpins the interview and therefore should not be marked by the EPAO for the purpose of EPA . EPAOs should review the portfolio of evidence in preparation for the interview but are not required to provide feedback after this review.

# Assessment methods

## Assessment Method 1: Online test

### Overview

The rationale for this assessment method is:

This method allows the testing of a range of different scenarios and ethical dilemmas the scope of which would not be adequately assessed by other methods.

### Test Format

The test is computer based and consists of 20 closed response (multiple choice) questions.

### Test administration

Apprentices must have 60 minutes to complete the test.

The test is open book which means that the apprentice can refer to reference books or materials.

Apprentices must take the test in a suitably controlled environment that is a quiet space, free of distractions and influence, in the presence of an invigilator. The invigilator will be approved by the EPAO. The EPAO is required to have an invigilation policy that will set out how the test/examination is to be carried out. This will include specifying the most appropriate ratio of apprentices to invigilators to best take into account the setting and security required in administering the test/examination.

The EPAO is responsible for ensuring the security of testing they administer to ensure the test remains valid and reliable (this includes any arrangements made using online tools). The EPAO is responsible for verifying the validity of the identity of the person taking the test.

The test must be undertaken either at an assessment centre approved by the EPAO or at the apprentice's place of work, with formal approval of the EPAO. Such approval must include arrangements for invigilation. These arrangements must be in place before the test takes place. All tests must be invigilated and the identity of apprentices must be checked and confirmed prior to commencement of the test. The invigilator must provide a report to the EPAO confirming the arrangements that were used for the invigilation. This must be signed by both the invigilator and the apprentice. The invigilator must not have had any prior involvement with the apprentice.

### Marking

Tests will be provided by the EPAO and computer marked. Marks will be out of 40. Each question is assigned 2 marks. 5 answer choices will be provided. Two of the five questions are correct but one is better than the other. Selection of the best answer will achieve a mark of 2, selection of the next best answer will achieve a mark of 1. Other selections or no selection will be assigned 0 marks.

### Question and resources development

Questions are written and provided by the EPAO and will be relevant to the occupation and employer settings. The EPAO will provide a 'test specification' and 'question banks' of sufficient size to prevent predictability and review them regularly (at least once every three years) to ensure the test specification and the questions they contain, are fit for purpose.

### Required supporting material

As a minimum the EPAO will produce the following material to support this method:

- test specification
- sample tests and mark schemes
- live tests and mark schemes

- analysis reports which show areas of weakness for completed tests/exams and an invigilation policy.

## Assessment Method 2: Case Study including a Report, Presentation and questioning

The rationale for this assessment method is:

The case study including report, presentation and questioning is designed to demonstrate the application of knowledge and skill as it would in the occupation. It collates findings, demonstrates critical analysis and evaluation and produces recommendations for a client or business to consider. The report is a significant and complex undertaking in itself and thoroughly tests knowledge and skills. Chartered Surveyors need to write reports and give presentations to clients and others in order to provide information, data and advice.

### Overview

Apprentices must produce a case study report during the EPA period, which will be the basis of a presentation to a panel of three independent assessors with follow up questioning immediately after the presentation.

The case study report is compiled after the apprentice has gone through the Gateway. The apprentice will undertake their report and submit it to the EPAO typically within 21 week(s) of the Gateway.

The employer will ensure the apprentice has sufficient time and the necessary resources, within this period, to plan and undertake the report. Apprentices will typically have 7 weeks to complete the case study report within the 21 weeks permitted.

The apprentice must produce their report to guidelines and in a template produced by the EPAO.

The case study report must be based on a real work-based surveying activity carried out in the employer's workplace as part of the apprentice's day to day activities. The case study report should be designed to ensure that the apprentice's work meets the needs of the business, is relevant to their role and allows the relevant KSBs to be demonstrated for the EPA. The employer will ensure it has a real business application and will confirm with the EPAO that the title and scope of the case study has the range to meet the relevant KSBs for this method

Typical case study subjects could be:

- Cost reduction
- Ensuring best value
- Meeting client requirements
- Efficiency improvements
- Process improvements

The case study report content must cover the following:

- A summary of the case study and an overview of the apprentice's role and level of responsibility
- Client or stakeholder requirements
- The options considered, solutions identified and reasons why some options were not feasible
- What the apprentice achieved and how this was achieved
- Discussion of challenges and actions taken
- Lessons learnt and best practices

The report will have a word count of 3,000 words and must not include any self-reflective evidence.

A tolerance of minus 10% is allowed.

Appendices, references, diagrams etc. will not be included in this total. Appendices will typically include:

- Plans
- Calculations
- Photographs
- Extracts from documents
- A mapping of how the report evidences the relevant KSBs for this method

The report must map, in an appendix, how it evidences the relevant KSBs for this assessment method.

When the report is submitted, the employer and the apprentice should verify the submitted work is that of the apprentice. Assessors will have a minimum of one working week to review the report once submitted.

The presentation will be based on the case study report and will cover the following:

- A summary of the case study report
- Decisions made
- Rationale for decisions
- Recommendations
- Critical evaluation of the case study

Following the presentation, the assessors will ask questions relating to the case study presentation. These questions will be used to explore areas of knowledge and skills for this method not fully covered by the presentation and to satisfy the assessors that these have been achieved and the apprentice really understands the decisions made in the project.

The presentation will be presented to an independent assessor face-to-face.

The apprentice will have a minimum of 20 days to prepare and complete the presentation after submitting their report.

The assessors must holistically assess the report, presentation and questioning against the KSBs for this method.

## Delivery

The presentation and questioning will take place with a panel of three independent assessors, one of whom will take the role of Chair. The presentation will last for 10 minutes and the questioning for a further 10 minutes.

The independent assessors will ask a minimum of 5 assessor generated questions at the end of the presentation. These will be competency based questions based on the KSBs assigned to this method. The total number of questions asked should be balanced between the two non Chair assessors. The Chair may ask further follow up questions where necessary to clarify answers given by apprentices.

To deliver the presentation, the apprentice will be able to use:

- PowerPoint
- flip chart
- computer

The Chair will make the final grading decision, if the other two assessors cannot agree. This will be based on the two other assessors' feedback and comments

## Venue

EPAOs must ensure that the presentation and questioning elements are conducted in a suitable controlled environment at a suitable venue selected by the EPAO.

The venue should be a quiet room, free from distraction and external influence.

Video conferencing can be used to conduct the presentation and questioning but the EPAO must have processes in place to verify the identity of the apprentice and ensure the apprentice is not being aided in any way, e.g. the use of a 360 degree camera to allow the assessor to look around the room during the presentation.

## Other relevant information

A three-member panel will assess the presentation. This ensures the panel has the experience across the range of KSBs for this method and ensures fair and unbiased assessment. It is also important as Chartered Surveyors will normally present to groups of individuals. The role of the Chair is to manage the session.

All assessors will agree the KSBs that each will cover prior to the presentation and questions. The Chair will:

- Ensure the assessment process is unbiased
- Ensure assessments are inclusive
- provide feedback on assessor performance
- Check the candidate's submissions for any potential conflicts of interest prior to the assessment
- Agree which KSBs each assessor will cover
- Manage the session
- Welcome the apprentice
- Ensure the apprentice is fit, well and ready to proceed
- Confirm the structure of the assessment to the apprentice
- Confirm key points about the assessment ie timing, no interruptions during the presentation
- Manage time
- Ask follow up questions where necessary to clarify answers made by apprentices
- Give assessors time to reflect and complete their mark sheets
- Keep notes



- Make the final grading decision if the other two assessors cannot agree based on the two other assessors' feedback and comments

### Support material

EPAOs will produce the following material to support this assessment method:

- Outline of the assessment method's requirements
- Case study requirements
- Information on how to make submissions for the EPA
- Marking materials

## Assessment Method 3: Interview (underpinned by a Summary of Experience Portfolio )

The rationale for this assessment method is:

This will allow the assessment of KSBs that would take too long to be assessed in the workplace. It also allows the assessors to probe the level of knowledge, skills and behaviours of the apprentice.

### Overview

For the interview, the apprentice will be required to submit a Summary of Experience Portfolio. The portfolio should not include any reflective accounts or self-evaluations and must be submitted at the Gateway in a format approved by the EPAO.

The employer must confirm the validity of the Summary of Experience Portfolio and that this is the apprentice's own work.

This assessment will take the form of an interview, which must be appropriately structured to draw out the best of the apprentice's competence and excellence and cover the KSBs assigned to this assessment method with the Summary of Experience Portfolio used to support the apprentice's responses.

### Delivery

A panel of three independent assessors will conduct and assess the interview one of whom will act as Chair.

The interview must last for 40 minutes. Further time may be granted for apprentices with appropriate needs, in-line with the EPAO's Reasonable Adjustments policy.

During this method, the independent assessors must generate their own questions and will ask a minimum of 15 questions. The total number of questions asked should be balanced between the two non-Chair assessors. The Chair may ask further follow up questions where necessary to clarify answers given by apprentices.

The interview will be based on the submitted Summary of Experience Portfolio. The employer must confirm the validity of these documents and that these are the apprentice's own work. Questioning should

be used to authenticate evidence, experience and competence and to explore the apprentice's ability to deal with KSBs in different circumstances.

The independent assessors must use the assessment tools and procedures that are set by the EPAO to record the interview.

The Chair will make the final grading decision based on the feedback and assessment by the other assessors.

Apprentices must receive appropriate notice of their interview date and time. There should be a minimum of 10 working days' notice of the time, date and venue.

## Venue

The interview will take place in a suitable venue selected by the EPAO and will be in a quiet room, free from distractions and influence.

Video conferencing can be used to conduct the presentation and questioning but the EPAO must have processes in place to verify the identity of the apprentice and ensure the apprentice is not being aided in any way, e.g. the use of a 360 degree camera to allow the assessor to look around the room during the presentation.

## Other relevant information

EPAOs must ensure that apprentices have a different set of questions in the case of re-sits/re-takes.

Independent assessors must be developed and trained by the EPAO in the conduct of interview and reaching consistent judgement.

A three-member panel will undertake the interview. This ensures the panel has the experience across the range of KSBs for this method and ensures fair and unbiased assessment. It is also important as Chartered Surveyors will normally present to groups of individuals. The role of the Chair is to manage the session.

All assessors will agree the KSBs that each will cover prior to the interview. The Chair will:

- Ensure the assessment process is unbiased
- Ensure assessments are inclusive
- To provide feedback on assessor performance
- Check candidate's submissions for any potential conflicts of interest prior to the assessment
- Agree which KSBs each assessor will cover
- Manage the interview
- Welcome the apprentice
- Ensure the apprentice is fit, well and ready to proceed
- Confirm the structure of the assessment to the apprentice
- Confirm key points about the assessment ie timing
- Ask a simple opening question
- Manage time
- Ask follow up questions where necessary to clarify answers made by apprentices
- Give assessors time to reflect and complete their mark sheets
- Keep notes

- Make the final grading decision if the other two assessors cannot agree based on the two other assessor's feedback and comments

EPAOs will produce the following material to support this assessment method:

- Outline of the assessment requirements
- Format for the summary of experience portfolio
- Marking guides
- Marking and feedback templates

## Weighting of assessment methods

All assessment methods are weighted equally in their contribution to the overall EPA grade.

## Grading

### Assessment method 1: Online test

KSBs	Fail	Pass
	<p>Each question can be awarded 0, 1 or 2 marks depending upon the answer chosen.</p> <p>A mark of 0 will be given where the chosen answer is incorrect, no understanding is shown.</p> <p>A mark of 1 will be given where the chosen answer demonstrates partial understanding</p> <p>A mark of 2 will be given where the chosen answer demonstrates a full understanding.</p>	
<b>K8 (part)</b> <b>K9</b>	Does not meet the pass criteria and achieves a score of 29 marks or less	A score of 30 marks or more

### Assessment method 2: Case Study Presentation (underpinned by a case study report)

KSBs	Fail	Pass (all criteria common to core and the criteria for the chosen option must be met to achieve a pass)
<b>K1 K2</b> <b>K3 K4</b> <b>K5 K6</b> <b>K8 (part)</b> <b>K9</b>  <b>S1 S2 S4</b> <b>S5</b>	Does not meet the pass criteria	<p>The apprentice can:</p> <p>Collect, analyse and make appropriate use of data and information; provide advice to clients based on data and information collected (K2, S1)</p> <p>Recommend solutions to clients relating to land, property or construction to ensure safe and secure working environments (K4, S2)</p> <p>Undertake negotiations and agree appropriate terms for relevant property- or construction-related contract (K1, S4)</p> <p>Agree terms of engagement with clients and manage client instructions from engagement to completion. Demonstrate how sustainability is achieved and clients' behavior influenced (K6, K9, S5)</p>

		<p>Explain the importance of diversity, ethical requirements including inclusive environments and the role and governance of RICS (K5, K8 part)</p> <p>Explain how to manage accounting procedures and methods for obtaining and managing finance (K3)</p>
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### Assessment method 3: Interview (underpinned by a Summary of Experience and a record of Continuing Professional Development (CPD))

KSBs	Fail	Pass (all criteria common to core and the criteria for the chosen option must be met to achieve a pass)
<p><b>B1 B2 B3 B4 B5 K7 S3</b></p> <p><b>K10 K11 K12 S6 S7 S8 (Building Surveying option only)</b></p> <p><b>K16 K17 K18 S12 S13 S14 (Property option only)</b></p> <p><b>K13 K14 K15 S9 S10 S11 (Quantity Surveying option only)</b></p>	Does not meet the pass criteria	<p>The apprentice can demonstrate the behaviours and knowledge required of the surveying profession using examples to show how they:</p> <p>Provide the best possible advice and support for clients adhering to the terms of engagement that have been agreed (B1)</p> <p>Act with integrity and in a way that promotes trust in the surveying profession, treating others with respect and showing a respect for confidential information, avoiding bias or conflicts of interest, acting in the public interest when making decisions or providing advice (B2, B3, B4)</p> <p>Take responsibility for their own work and deal with any complaint in an appropriate professional manner (B5)</p> <p>Understand and provide advice on the construction technology of complex buildings including materials (K7, S3)</p> <p>Additionally, depending on the chosen option, the apprentice can:</p> <p><u>Building Surveying</u></p> <ul style="list-style-type: none"> <li>• Explain the pathology of buildings, evaluate defects in buildings and the causes of defects and appropriate remedies (K10)</li> <li>• Undertake building surveys and inspections and provide advice and recommendations relating to these (S6)</li> </ul>

		<ul style="list-style-type: none"> <li>Describe and implement the stages of the design preparation process including legal requirements and regulations and structural implications of design and prepare designs and specifications (K11, S7)</li> <li>Administer contracts from instruction to completion (K12, S8)</li> </ul> <p><u>Property</u></p> <ul style="list-style-type: none"> <li>Explain and use comparative and investment methods of valuation to undertake capital and rental valuations and appraisals of land and property and prepare valuation reports for clients (K16, S12)</li> <li>Evaluate how land law, landlord and tenant law and planning law affects the occupation, management and use of land and property (K17)</li> <li>Negotiate solutions to issues affecting the ownership and occupation of land and buildings (S13)</li> <li>Inspect and measure land and property (K18, S14)</li> </ul> <p><u>Quantity Surveying and Project Management</u></p> <ul style="list-style-type: none"> <li>Advise on appropriate forms of procurement and tendering, manage tendering processes (K13, S9)</li> <li>Quantify and cost construction works and undertake cost planning of construction works (K14, S10)</li> <li>Explain how to manage a construction contract (K15)</li> <li>Manage efficiency of construction contracts including life cycle costing and value engineering (S11)</li> </ul>
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### Overall EPA grading

Apprentices must pass all three methods for the EPA to be passed overall.

Assessment Method 1: Online Test	Assessment Method 2: Case Study including Report, Presentation and Questioning	Assessment Method 3: Interview	Overall Grading
Fail any assessment method			Fail

Pass	Pass	Pass	Pass
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## Roles and responsibilities

Role	Responsibility
Apprentice	<ul style="list-style-type: none"> <li>• participate in development opportunities to improve their knowledge, skills and behaviours as outlined in the standard</li> <li>• meet all gateway requirements when advised by the employer</li> <li>• understand the purpose and importance of EPA and undertake EPA</li> </ul>
Employer	<ul style="list-style-type: none"> <li>• support the apprentice to achieve the KSBs outlined in the standard to their best ability</li> <li>• determines when the apprentice is working at or above the level outlined in the standard and is ready for EPA</li> <li>• select the EPAO</li> <li>• confirm all EPA gateway requirements have been met</li> <li>• confirm arrangements with the EPAO for the EPA (who, when, where) in a timely manner</li> <li>• ensure apprentice is well prepared for the EPA</li> </ul>
EPAO	<p>As a minimum EPAOs should:</p> <ul style="list-style-type: none"> <li>• appoint administrators to administer the EPA</li> <li>• approve assessment centres for online tests</li> <li>• provide training and CPD for the independent assessors who will undertake the EPA</li> <li>• provide adequate information, advice and guidance documentation to enable apprentices, employers and providers to prepare for the EPA</li> <li>• deliver the end-point assessment outlined in this EPA plan in a timely manner</li> <li>• prepare and provide all required material and resources required for delivery of the EPA in-line with best practices</li> <li>• use appropriate assessment recording documentation to ensure a clear and auditable mechanism for providing assessment decision feedback to the apprentice</li> <li>• maintain systems and procedures to ensure there is no conflict of interest</li> <li>• maintain robust internal quality assurance (IQA) procedures and processes, and conducts these on a regular basis</li> <li>• conform to the requirements of the nominated external quality assurance body</li> <li>• organise and conduct moderation of independent assessors' marking in accordance with this plan</li> </ul>

	<ul style="list-style-type: none"> <li>• have, and operate, an appeals process</li> </ul>
Independent assessor	<p>As a minimum an Independent assessor should:</p> <ul style="list-style-type: none"> <li>• have 1 year post professional qualification experience and be currently working in a relevant occupation</li> <li>• be a chartered professional of RICS</li> <li>• have evidence of up to date CPD (as required by the relevant professional body)</li> <li>• have experience of assessing learners or willingness to undertake training</li> <li>• understand the standard and assessment plan</li> <li>• deliver the end-point assessment in-line with the EPA plan</li> <li>• comply to the IQA requirements of the EPAO</li> <li>• be independent of the apprentice, their employer and training provider(s) i.e. there must be no conflict of interest</li> <li>• satisfy the criteria outlined in this EPA plan</li> <li>• have the capability to assess the apprentice at this level</li> <li>• attend the required number of EPAO training events (as defined in the IQA section)</li> </ul>
Training provider	<p>As a minimum the training provider should:</p> <ul style="list-style-type: none"> <li>• work with the employer to ensure that the apprentice is given the opportunities to develop the KSBs outlined in the standard and monitor their progress during the on-programme period</li> <li>• advise the employer, upon request, on the apprentice's readiness for EPA prior to the gateway</li> <li>• Plays no part in the EPA itself</li> </ul>



## Internal Quality Assurance (IQA)

Internal quality assurance refers to the requirements that the EPAO must have in place to ensure consistent (reliable) and accurate (valid) assessment decisions. The EPAO must:

- appoint independent assessors who have recent relevant experience of the occupation/sector at least the same level as the apprentice gained in the last year or significant experience of the occupation/sector.
- appoint independent assessors who are chartered professionals of the RICS (chartered surveyors)
- appoint independent assessors who are competent to deliver the end-point assessment and who have a minimum of 1 year post professional qualification experience and are working in relevant employment together with evidence of up to date CPD (as required by RICS)
- provide training for independent assessors in terms of good assessment practice, operating the assessment tools and grading
- have robust quality assurance systems and procedures that support fair, reliable and consistent assessment across the organisation and over time.
- operate induction training and standardisation events for independent assessors when they begin working for the EPAO on this standard and before they deliver an updated assessment method for the first time

## Re-sits and re-takes

Apprentices who fail one or more assessment method will be offered the opportunity to re-sit or re-take. A re-sit does not require further learning, whereas a re-take does.

Apprentices should have a supportive action plan to prepare for the re-sit or a re-take. The apprentice's employer will need to agree that either a re-sit or re-take is an appropriate course of action.

An apprentice who fails the online test will be required to re-sit or re-take this assessment method before progressing to the other methods. Apprentices who fail assessment method 2 or 3 will be required to re-sit or re-take both methods.

The timescales for a resit/retake are agreed between the employer and EPAO. A resit is typically taken within 6 months of the EPA outcome notification. The timescale for a retake is dependent on how much re-training is required and is typically also taken within 6 months of the EPA outcome notification.

## Affordability

Affordability of the EPA will be aided by using at least some of the following practice:

- online assessment
- using an employer's premises
- assessing multiple apprentices simultaneously (Assessment method 1, Online Test)

## Professional body recognition

This apprenticeship is designed to prepare successful apprentices to meet the requirements for qualification as a Chartered Surveyor with the Royal Institution of Chartered Surveyors

## Reasonable adjustments

The EPAO must have in place clear and fair arrangements for making reasonable adjustments for this apprenticeship standard. This should include how an apprentice qualifies for reasonable adjustment and what reasonable adjustments will be made. The adjustments must maintain the validity, reliability and integrity of the assessment methods outlined in this assessment plan.

# Mapping of knowledge, skills and behaviours (KSBs)

## Assessment method 1: Online test

Knowledge
<b>K8 (part)</b> Ethics and professionalism - Global and professional ethical standards and Rules of Conduct and how to deal with ethical dilemmas.
<b>K9</b> Client relationships - How to manage client/customer relationships.

## Assessment method 2: Case Study Presentation (underpinned by a case study report)

Knowledge
<b>K1</b> Law - The law and the role of legal advisers relating to either acquisition/disposal of property, standard forms of building contracts or other property related contracts.
<b>K2</b> Information management - The methods and techniques for providing information, data and advice to clients.
<b>K3</b> Finance - Accounting procedures and methods for obtaining and managing finance.
<b>K4</b> Health and safety - How to ensure safe and secure working environments for self and others.
<b>K5</b> Diversity and inclusion - The importance and recognition of diversity. Legal, regulatory and ethical requirements including inclusive environments.
<b>K6</b> Sustainability - How to embed sustainability into projects and how to influence client behaviour.
<b>K8 (part)</b> Ethics and professionalism - The role, governance and regulatory framework of the RICS.
<b>K9</b> Client relationships - How to manage client/customer relationships.

Skills
<b>S1</b> Information management - Provide data, information and advice for clients relevant to the surveying discipline.
<b>S2</b> Health and safety - Recommend solutions to ensure safe and secure working environments.
<b>S4</b> Law - Negotiate and agree terms for acquisition/disposal of property, standard forms of building contracts or other property related contracts and liaise with legal advisers.
<b>S5</b> Consultancy - Manage instructions from engagement to completion.

## Assessment method 3: Interview (underpinned by a Summary of Experience Portfolio)

Knowledge
<b>K7</b> Construction technology - The technology of complex buildings including materials.
<b>And either:</b>
<b>Building Surveying Option</b>
<b>K10</b> Building pathology - The detailed pathology of buildings and the related defects, causes and remedies. The methodology for completing a property inspection and inspection techniques.
<b>K11</b> Design and specification - The various stages of the design process, legal requirements and regulations including planning, Building Regulations and health and safety requirements and the structural implication of design.
<b>K12</b> The standard forms of building/construction contract and subcontract, contractual mechanisms and procedures applied at various stages of the contract. The role and responsibilities of the contract administrator and the duties of the parties to the contract.
<b>Or:</b>
<b>Quantity Surveying Option</b>
<b>K13</b> Procurement and contracts - Identifying when different forms of procurement and tendering are appropriate and the clauses of building/infrastructure contracts.
<b>K14</b> Costing and cost planning of construction works - The detailed quantification and costing of construction works and the methods of cost planning that can be applied.
<b>K15</b> Construction project control and reporting – Management of a construction project and the principles of contingencies and risk allowances. Life cycle costing and value engineering. Techniques to manage contractors, sub-contractors and/or suppliers. Reporting and forecasting.
<b>Or:</b>
<b>Property Option</b>
<b>K16</b> Applied valuation and appraisal - How to undertake complex capital and rental valuations of land and property and the requirements for valuation reporting.
<b>K17</b> Land, property and planning law - How land law, the law of landlord and tenant and planning law affects the occupation, management and use of buildings and land.
<b>K18</b> Inspection and measurement – The requirements and reasons for a property inspection. Safety issues when undertaking an inspection and identifying access arrangements. The basis on which measurement should be undertaken, data capture techniques and appropriate standards and guidance. Limitations and degrees of accuracy required for measurements
Skills
<b>S3</b> Construction technology - Provide advice relating to the construction technology of buildings and their materials.

<p><b>And either:</b></p> <p><b>Building Surveying Option</b></p>
<p><b>S6</b> Building surveys – Undertake inspections and surveys and provide advice and recommendations to clients relating to building surveys.</p>
<p><b>S7</b> Prepare designs and specifications – Carry out the preparation of the design and specification of building projects from outline proposals to completion of the design and specification process.</p>
<p><b>S8</b> Administer contracts – Implement administrative procedures for the running of a construction project. Issue instructions, deal with payment provisions, manage variation procedures and deal with completion and possession issues and the issuing of certificates.</p>
<p><b>Or:</b></p> <p><b>Quantity Surveying Option</b></p>
<p><b>S9</b> Tendering and procurement - Provide advice and recommendations as to appropriate procurement routes and manage the tendering processes relevant to them.</p>
<p><b>S10</b> Costing and cost planning of construction works - Undertake the detailed quantification, costing and cost planning of complex construction works.</p>
<p><b>S11</b> Manage efficiencies of construction contracts – Manage the construction phase of a construction project. Carry out life cycle costing and apply value engineering processes. Prepare data, reports and forecasts.</p>
<p><b>Or:</b></p> <p><b>Property Option</b></p>
<p><b>S12</b> Valuation and appraisal - Prepare capital and rental valuations of land and property for a range of formal and appraisal purposes and prepare client reports.</p>
<p><b>S13</b> Land, property and planning law - Negotiate solutions to issues affecting both owners and occupiers of land and property including at least two of management, sales, lettings, purchase and/or planning.</p>
<p><b>S14</b> Inspection and measurement – Undertake inspections of land and property and prepare related reports and advice. Use appropriate instrumentation to take measurements of commercial and/or rural land and property. Apply the appropriate guidance and use the appropriate basis to undertake measurements. Prepare and present measurements in an appropriate manner.</p>

Behaviours
<p><b>B1</b> Provide a high standard of service - Always ensure your client, or others to whom you have a professional responsibility, receive the best possible advice, support or performance of the terms of engagement you have agreed to and ensure you always give attention to detail.</p>
<p><b>B2</b> Act in a way that promotes trust in the surveying profession - Act in a manner, both in your professional life and private life, to promote you, your firm or the organisation you work for in a professional and positive way.</p>
<p><b>B3</b> Act with integrity - Always be trustworthy, open and transparent. Respect confidential information of your clients or potential clients and do not allow bias, conflict of interest or the undue influence of</p>

others to override your professional or business judgments or obligations. Always act consistently in the public interest when making decisions or providing advice.

**B4** Treat others with respect - Treat everyone with courtesy, politeness and respect and consider cultural sensitivities and business practices.

**B5** Take responsibility - Always act with skill, care and diligence and deal with any complaint in an appropriate professional manner.