

Technician and associate routes to professional membership - an opportunity for FIG?

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SUMMARY

This paper looks at the role and place for technician and associate training within the Surveying profession. Models from various professional institutions are explained. The paper then reviews recent developments from the RICS in developing an associate route for membership. These developments are then put into context for FIG and the specific opportunities for FIG Young Surveyors are analysed.

1. INTRODUCTION

This paper explains the development of surveying across the UK from a historical perspective. It continues by reviewing the change within the Royal Institution of Chartered Surveyors (RICS) and its move towards its present role as a global organization. The method of training surveyors is discussed within the RICS and then related to its provision for young trainee surveyors. This paper looks at the role and place for associate/technician training within the Surveying profession. Models from two other professional institutions are explained. The paper then reviews recent developments from the RICS in developing an Associate route for membership. These developments are then put into context for FIG and the specific opportunities are analysed.

2. HISTORY OF SURVEYING IN THE UNITED KINGDOM

The history of surveying in Britain goes back thousands of years; the creation of a Domesday Book, where a major national audit was taken on behalf of the state, of land holdings in the 11th Century and was perhaps the first example of a major Surveyors report. Enclosure legislation, making agriculture more efficient, where small land holdings were amalgamated to provide more efficient usage in the Seventeenth Century further reinforced the role of Surveyors. The Victorian era saw a major industrial revolution with rapid expansion of cities and the development of a transport infrastructure including canal building. This led to the creation of the profession of Surveying in the UK (RICS) in the mid Victorian era culminating in the RICS Agenda for change in 2000 that created a global professional brand.

The Royal Institution of Chartered Surveyors (Royal Institution of Chartered Surveyors [RICS], 2010a) with around 100,000 qualified members and over 50,000 students and trainees in some 140 countries, regards itself as the world's leading professional qualification in land, property, construction and their associated environmental issues.

The evolution of the RICS has created a very broad based property profession. This development is partly reflected in the nature of the UK which is a diverse and densely populated country. In other countries such as the USA the development of surveying has followed a very different pattern with appraisal being separate from land surveying which in turn is a separate discipline to Real Estate management. The need to measure vast areas of territory in relatively recent history has created some very different 'surveying' professional bodies with backgrounds varying from pioneering land surveying to land administration.

3. EDUCATION

The 19th Century saw a massive change in education as there was a need to provide highly educated people for an expanding country and growing empire. Many of the professional organisations in the UK today owe their origins to the Victorian era. Stapleton's Real Estate management provides a useful guide to the background behind estate management in the UK (Banfield, 2005, 3-7). In 1834 a Land Surveyors Club was formed to promote the profession. This was in the same year that the Architects formed RIBA - Royal Institution of British Architects (Royal Institution of British Architects [RIBA], 2010). In 1868, 20 surveyors met in London at 12 Great George Street in Parliament Square. These surveyors had a strong railway works connection. Perhaps the 'Grand Father' of surveying in the UK was John Clutton who oversaw large landholdings on behalf of the Church. Following many successful years these surveyors gained a Royal Charter (a quality stamp and an agreement to conduct business in a professional way) was granted in 1881.

The development of education for Surveyors has been through many stages. The gold standard is attainment of Chartered status by the individual and use the designation MRICS (Member) or FRICS (Fellow). There are two main ways of studying firstly through a correspondence course, and secondly through attendance at higher education establishments. The 1970's saw the creation of the Polytechnics and a growth of full and part time courses where many surveying courses were developed. These polytechnics were changed into Universities in 1992 and the provision of surveying courses then moved across into the 'old' university sector. These courses, as they led to a route to professional membership, were always regarded as high status with elite universities such as Cambridge University having a long term interest in Land Economy. (Cambridge University, 2010) A property recession in 1990 led to major changes in surveying education - difficulties in finding employment for property students in fierce competition with Law and Business Studies students meant that the RICS had to rethink its strategy. This came to a head in the RICS policy of Agenda for Change which coincided with the Millennium.

Agenda for change saw the development of Partnership agreements with the University/Higher Education sector. Minimum threshold agreements were set for educational establishments if they were to achieve Partnership status. These included minimum school leaving standards, departmental research targets and employment targets. The logic of this was to raise standards in the profession so that the RICS could compete in the global market place. It also saw the expansion of post graduate entry into the profession.

With this push to set standards for higher education the role of the non graduate/technician was perhaps overlooked. To redress this balance the RICS has recently launched a grade of membership called RICS Associate (AssocRICS), (RICS, 2010b). This is an entry level grade with a strong bias toward work based learning and competence.

4. ROUTE to PROFESSIONAL MEMBERSHIP

The starting point for professional membership for most people is to attend an RICS accredited course at a Partnership Institution (see Appendix). Following this a two year period of professional engagement takes place. During this period the person is supported by a mentor and a supervisor who assist with company training plans. These plans are checked and supported by an RICS training adviser. The candidate then presents themselves to the RICS for an Assessment of Professional Competence (APC). If successful the candidate will be awarded Professional Chartered Status and will be able to use the letters MRICS after their name. Following further experience with clear evidence of a contribution to the profession Fellowship can be applied for allowing the letters FRICS to be used after their name. (RICS, 2010c)

Raising academic standards and creating barriers to entry to the profession through Agenda for Change has created a skills gap at the technical level and the RICS is now developing a new associate membership with clear training progression which will also allow a bridge to professional membership. The development of this mainly non graduate side of the profession sets many exciting challenges. Perhaps the greatest is that graduates by the very nature of their educational 'training' are exposed to some very sophisticated networking opportunities where the non graduate may find plugging into these professional networks harder. This is an area where FIG and the RICS could work together for mutual benefit particularly in the developing countries.

The Chartered Surveyor belongs to one nominated Faculty recently renamed as a Professional Group (normally the one that he/she qualified in). However the Chartered Surveyor can join four of these groupings as part of membership. The RICS sees itself a learned institution. With learning in mid post qualification the surveyor is expected to undertake Life Long Learning (LLL) also known as Continuing Professional Development (CPD). The surveyor sets learning objectives and must keep a learning log which may be audited at random. A major events programme run by the RICS and its regions supports this learning. This is another area where FIG and the RICS could develop more synergy as both organisations are 'learned societies'.

The RICS has always promoted regional identity to encourage its members to share best practice for the benefit of both members and clients. Improvements in communications and the move towards a global branding have moved regions into a series of tiers within the global community at International, International and National level. These regions can be highly proactive a good example being the RICS South Eastern Region (RICS South East, 2010) which produces a variety of services for surveyors. This part of England is economically very advanced, if it were a country it

would be the same size as Denmark and it would be classified as the 22nd largest economy in the world. (South East England Development Agency [SEEDA], 2010). As the RICS brand has expanded globally the RICS has had to restructure to provide services both to its original home catchment area and its new responsibilities globally. This has created a climate of almost continuous positive change over the last ten years. The RICS now operates in 140 countries in the following global regions Africa, Americas, Asia-Pacific, Oceania, Middle East and Europe. This regionalisation does not represent a form of professional commercialism but a genuine desire to improve services to both clients and RICS members both of who are becoming more global following the digital revolution of the last ten years.

5. RICS Associate Route

The development of the Associate route offer huge opportunities to the RICS as it moves away from the accredited degree system to a mix of learning opportunities that includes work based learning. It also offers the ability to provide a stepping stone to full Chartered Status. There are no minimum requirements to embark on this route as work based learning can be considered.

There are five candidate profiles:

- No vocational/academic qualifications
- Relevant NVQ 3, Relevant HND/HNC, Dip HE/FD
- Relevant degree
- RICS approved professional membership
- RICS approved NVQ 4.

This is followed by work experience that varies according to the candidate profile, an assessment again varying in need according to profile, an ethics module and the final award of AssocRICS.

Currently candidates might be working in:

- Quantity Surveying and Construction
- Facilities Management
- Project Management
- Residential Estate Agency
- Residential Surveying and Valuation.

Further routes are being developed with the aim of eventually aim of covering the complete portfolio of expertise covered by the RICS.

Candidate Guide - The associate scheme from a candidate's point of view is divided into three stages – Registration, Assembling Evidence, and Associate Assessment. Working with the candidate will be an Associate Supporter helping, verifying evidence, providing guidance and an Associate Proposer who must be an experienced Associate or Member/Fellow. The assessment is provided by two assessors: An Associate Assessor (Associate, Member or Fellow) who assess the evidence on the managed learning Environment and a Lead Associate Assessor who has the additional responsibility of providing written feedback and managing any decision between the two assessors.

Candidate work load - The RICS will judge the candidate for Assoc RICS against a set of competences. To illustrate this, the competences and assessment requirements for the Quantity Surveying and Construction pathway are laid out below:

Six technical competencies

- Construction technology and environmental services
- Contract practice
- Procurement and tendering
- Project financial control and reporting
- Quantification and costing of construction works
- Either** Commercial Management of construction **or** design economics and cost planning.

Eight mandatory competencies

- Softer skills that all practitioners need
- Client care
- Communication and management
- Conduct rules, ethics and professional practice
- Conflict avoidance, management and dispute resolution procedures
- Data management
- Health and safety
- Sustainability
- Teamwork

Assessment - To demonstrate that these competences are being achieved the candidate will have to:

- Provide written evidence of 24 pieces of work from everyday role
- Commentary – a 300 word explanation for each piece of written evidence
- Structured development record
- Completion of an ethics module

At the heart of this system is a Managed Learning Environment that provides a warehouse for evidence, a teaching platform and a vehicle for assessment.

6. Civil Engineering and Architecture

The RICS is not alone in developing an Associate route although every professional Institution has a different philosophy as can be seen from the review of the provision of the Institute of Civil Engineering (ICE), the Chartered Institution of Civil Engineering Surveyors (CEIS), the Royal Institution of British Architects (RIBA) and the Chartered Institute of Architectural Technologists (CIAT) below:

6.1 Civil Engineering

The Associate Membership of Civil Engineers (Institution of Civil Engineers [ICE], 2010) is open to people who are engaged in a profession that supports or is allied to the work of the Civil Engineer. There are two routes provided by ICE one directly to Associate Membership the other leading towards Chartered Environmentalist registration.

Associate membership - Three stages are involved in qualifying as an Associate member (applicants can apply for Associate status and Chartered Environmentalist status separately or together):

Stage 1 Educational base

A Bachelors degree in any subject, compensation can be awarded if the qualification does not meet the Engineering Council benchmark

Stage 2 Initial Professional Development

Completion of an ICE Approved Training Scheme or Self Managed Training/Experience (Career Appraisal). Applicants for Chartered Environmentalist are required to complete the Environmental Professional Development Objectives.

Stage 3 Professional Review

Application for Review.

Technician Membership - This can be awarded to a wide range of engineers and can lead to recognition by the Engineering Council. Three stages are involved in qualifying as an Associate member:

Stage 1 Educational base

BTEC National Award (Certificate and Diplomas) in Construction Pathways or ICE approved NVQ level 3

Stage 2 Initial Professional Development

This can be completed by: Completion of an ICE Approved Training Scheme, or an ICE approved NVQ or Self Managed Training and Experience

Stage 3 Professional Review

Application for Professional Review.

There are also non standard routes such as the Technical Report Route and the European Directive Route.

Civil Engineering Surveyors in the UK (Chartered Institution of Civil Engineering Surveyors [CIES], 2010) are represented by the Chartered Institution of Civil Engineering Surveyors who are active members of FIG. They currently have an affiliate route and a technician route but not an associate route in the same sense as the RICS.

6.2 Architecture

Training in Architecture in Britain is complex as there are two institutions involved the Architects Registration Board and the Royal Institution of British Architects (RIBA) (RIBA, 2010). It is a seven year programme five years of this are full time study (Parts 1 and 11) two years professional practice and then a professional practice examination. There are also 'office' based routes.

Architectural Technicians and Technologists - these can have very different roles and experience. Some are educated to degree level and others join the profession straight from school. There are a large number of qualifications available to support this area and another Institute that supports them the British Institute of Architectural Technologist (BIAT) that became the Chartered Institute of Architectural Technologists (CIAT) in 2005. There are no compulsory national registration

requirements but the CIAT does maintain a comprehensive accreditation scheme. Rather like the RICS it has developed a tiered membership scheme for its 9,500+ membership:

- Chartered
- Technician
- Associate
- Profile Candidate
- Student.

Associate members have been educated to NVQ/HNC/HND/Foundation Degree/Degree level. Architectural Technicians must complete an Architectural Technician Professional and Occupational Performance Record under the guidance of an approved supervisor. The grade of Architectural Technician therefore might be regarded as a progression from associate membership although there are direct routes in. It can be seen that the provision of an Associate/Technical route is not dissimilar to the provision within the RICS.

7. FIG

The International Federation of Surveyors represents the interests of surveyors worldwide. At the heart of FIG is a work plan that guides FIG to responding to social, economic, technological and environmental change. FIG recognises that the role and market for surveyors is constantly changing. To respond to this change it has established ten Commissions to implement the work-plan, facilitate working groups, seminars and newsletters (International Federation of Surveyors [FIG], 2010).

Although at first sight it might appear that there is conflict between FIG and organisations such as the RICS in reality they do separate things. FIG is a very sophisticated networking group that is developing a knowledge exchange and promoting good practice, the RICS is developing and monitoring professional standards to provide a better service to members/clients. There are also many other organisations doing similar things. The thing that they perhaps have most in common is the need to engage with young surveyors and by default associate surveyors for the long term sustainability of both organisations. The development of services by FIG offers some interesting possibilities for providing support to its member organisations in the area of associate membership.

8. FIG YOUNG SURVEYORS AND RICS MATRICS (YOUNG SURVEYORS)

In terms of specific 'networking' support for Associate Surveyors both the RICS and FIG support young surveyors and this would include the associate grade. To support the young surveyor the RICS operates a networking group to provide a platform for younger surveyors to engage with the RICS and develop their skills further. This network is designed for chartered surveyors under the age of 35. This network is absolutely vital to the young surveyor who is starting their career. It provides an opportunity to network with other people who are also in the training stage of their career working towards passing an assessment of professional competence (APC). As part of this test they have to keep a reflective diary and set learning objectives. Meeting other people who are doing the same thing allows for an exchange of ideas

and as a result a collective continuing professional development. These groupings also have a strong social side which helps to develop a professional network for the future (RICS, 2010d). FIG has an active young surveyor's network. Neither organisation seem to offer specific support for the associate grade of surveyor – this may be an opportunity for FIG.

9. FIG – Associate Routes and the implications

The emerging Associate route in professional institutions may transform the nature of these institutions if it is successful. The assumption in the past when training surveyors was that they would in the main be young surveyors. Both the RICS and FIG have young surveyor's routes and in the case of FIG this seems to be developing a considerable momentum through the young surveyor's task group. Within the RICS there is considerable opportunity to recreate its successful RICS matrices model on a global scale.

For both organisations the role of the associate could be reconsidered. Because of the direct entry and work based learning routes they may not be young surveyors with ambitions to become chartered but technical people who are quite satisfied with giving a technical service. This technical service should be highly valued as it underpins the whole profession. In developing countries with developing professionalism the nurture of these associates and technicians might be very important as graduate surveyors through the nature of their 'University', based training are well networked. An Associate/Technical surveyor that has built experience and learning through the 'University of Life' may value the networking and learning opportunities that FIG and the RICS networks might provide.

10. CONCLUSION

Further research needs to be conducted into the relationship between Associate Surveyors, their home professional Institution and FIG. FIG Commission 2 could consider perhaps developing a workshop to look at the role of the Associate Surveyor, its place within FIG and the opportunities that this may provide.

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BIOGRAPHICAL NOTES

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