



# RICS Rating Diploma

Details of the post-qualification  
study course



## RICS Rating Diploma Study Course

The RICS Rating Diploma has long been recognised as the gold standard in terms of measuring the capability of rating surveyors. The diploma was first awarded in 1922 and surveyors with the diploma are entitled to the additional designatory letters *Dip. Rating*. Since its inception the diploma has involved a course of study followed by traditional style examinations. The format of the Diploma has been reviewed and has moved away from a formal examination to that of continuous learning with written assignments.

A series of nine self-directed learning modules has been devised, aiming at developing the rating surveyor's knowledge to a very high standard. They involve an in-depth study by the candidate of the subject matter of the module, using the learning resources provided and other material. A series of one or two day seminars are organised for candidates throughout the study course, one for each module, and each candidate will be allocated a mentor. Ultimately, though, the candidate requires a high level of self-motivation and personal research to successfully complete the course.

The new style diploma was launched in autumn 2012 and the first study course commenced in January 2013. From September 2013 study courses commence in September of each year. Interested rating surveyors meeting the qualification criteria are invited to apply. There are nine modules that will be assessed over a two-year period.

The nine modules are:

1. Principles of rating law
2. Rental valuations
3. Receipts and Expenditure valuations and leisure property
4. Cost basis valuations including mineral valuations
5. Plant and machinery
6. Compiling, maintaining and challenging rating lists/rolls
7. Domestic/ non-domestic borderline and the Council Tax
8. Collection of rates, exemptions, reliefs and unoccupied property rating
9. International property taxation systems and alternative taxation

Inevitably there will be some overlap between modules (for example all modules are subject to the Principles of Rating Law, Module 1).

On successful completion of the modular assessment candidates will be required to undergo a practical test and then invited to an interview with a view to being awarded the RICS Diploma in Rating. The interview will comprise a series of questions to confirm the candidate's knowledge of rating law, valuation, procedures and practice.

### Aim of study

The RICS Rating Diploma study course involves an in-depth study of rating valuation practice equipping the rating surveyor with a full understanding of this specialised discipline. At the completion of each module the surveyor is expected to have a high level of understanding of the topic, to have an extensive knowledge of the relevant case law and to have studied widely around the subject.

Achieving the diploma indicates a surveyor who does not merely undertake rating valuations but has the in depth knowledge of the expert and is able to demonstrate and use this knowledge in preparing valuations, negotiating with other surveyors, appearing in tribunal and acting in an advisory or policy making role/capacity.

### Approach to study

This is primarily a self-directed study course following a detailed syllabus supported by extensive guidance notes on the Rating Diploma's own Moodle web site. Surveyors are recommended to take notes and retain copies of research material building on the guidance notes provided and prepare a binder/electronic file of their studies for use in their day to day work.

Study will be by systematically working through each module in order. The guidance notes, which will be provided online, contain an extensive resource of books, articles and case law references that should be read or referred to.

There will be an assignment at the end of each module which is designed to encourage research into the more detailed areas of the module and as a means of assessment.

## **Diary**

Candidates are required to complete and maintain a study diary for the period of the course detailing the reading and research undertaken and the learning outcomes. This will also act as a record of the total time spent studying the various modules as well as providing a basis for questions at the final viva voce interview. The diary should be updated and submitted with every assignment and its proper completion is regarded as mandatory to progress through the course.

## **Commitment**

Typically university courses at this level indicate up to 1,800 hours of study time are needed. The Rating Diploma course, though, is for experienced surveyors who will already have a knowledge, both theoretical and practical, of the various topics covered in the modules and therefore have already invested study time in many of the topics. The amount of time necessary will vary between candidates depending on their existing knowledge and experience with perhaps anything between 50 and 100 hours per module being required.

## **Time frame**

The study course commences in September each year. Candidates are expected to complete the modules over a two-year period but in exceptional circumstances will be allowed longer to complete the course. Requests for extension or deferment should be made to the project manager.

The practical test and interviews will be held once a year in October. The aim is to award diplomas at the annual luncheon which is usually held at the end of November every year.

## **Guidance notes**

Whilst a full distance learning package is not available, detailed guidance notes have been prepared. These set out a suggested programme of study, provide a comprehensive list of sources and case law, including study materials, together with papers on topics and suggestions for further investigation. These can be accessed on the rating diploma study course website [www.diprating.co.uk](http://www.diprating.co.uk) which is supported by the Moodle learning application.

## **Support**

Each candidate will be allocated a rating diploma holder as mentor who will oversee progress and be available for discussion, support and general advice.

Candidates will be encouraged to exchange information and help each other in their studies. This will include using the on-line rating diploma discussion forum that has been set up.

## **Courses**

An introductory advisory meeting will be arranged in the month following the start of the course to allow candidates to find out more about the study course and discuss the requirements, format of study etc.

The Rating Diploma holders' section arranges a series of one or, occasionally, two day courses during the year for candidates to attend covering the topics being studied at that point of the study cycle. The section also holds an annual conference which candidates are encouraged to attend. A reduced conference fee will be available.

## Modules

The course is highly structured and will commence with the Law module followed by modules 2 to 5 in the first year and then the remaining modules in year two.

Modules are designed to give a meaningful division of local taxation into broad headings and are therefore not all of a uniform size. Modules will be released at prearranged times throughout the study period. The time required for each module will vary slightly depending on the particular module being studied and the candidates pre-existing knowledge.

## Assessment

Assessment is by written assignment. The object of the assignment is to encourage the candidate into studying the topic in depth, embed learning and demonstrate understanding. Assignments need to be successfully completed to progress through the course.

Candidates will set out a summary the research/reading undertaken on the module when submitting assignments. In the preparation of assignments regard should be had to matters that are contentious or in the course of change. Footnotes, bibliography and sources are to be included.

Assignments for modules may comprise essay type questions, shorter problem solving type questions, multiple choice exercises and/or an actual valuation. This will vary depending on the module's topic. For example Module 3 on Receipts and Expenditure Valuation will include a valuation to be prepared on the receipts and expenditure basis.

Completed assignments are posted on the Moodle site. Assignments will be assessed to see if they meet the required standard. If they do not the assessor will provide feedback on the areas needing more work and the candidate will be asked to resubmit a revised assignment. If this should still prove to be inadequate a different assignment will be set and the same process followed. Feedback will be provided on all assignments.

## Practical test

On successful completion of the nine modules candidates will be required to submit a practical example of a survey and valuation of substantial hereditament they have surveyed and valued, to demonstrate their practical appreciation of the knowledge gained. An interview on the practical test will be held to explore issues that have emerged. The interview will be conducted by two Rating Diploma assessors and will last 45 minutes.

## Interview

Assuming candidates have demonstrated an acceptable understanding of rating principles and practice by successfully completing the set assignments for modules 1 to 9, have passed the practical test, and submitted a completed diary, they will be invited to a viva voce interview with a view to being awarded the RICS Diploma in Rating. The interview will comprise a series of questions to confirm candidates' in depth knowledge and understanding of rating law, valuation and procedures and practice and will:

- have regard to the experience of the candidate but will not necessarily be competency based. The questions will be wide and searching, but are not intended to test the ability of the candidate to absorb facts.

- demonstrate an ability to 'think on your feet' and respond to questioning under the stress of interview conditions, not simply the production of the 'right answer' to the question.
- last for no more than 60 minutes.
- be conducted by a panel of three Rating Diploma interviewers.
- result in a simple pass or refer.

Feedback will be provided in the case of a failure and an early opportunity given to re sit.

## **Syllabi**

The study programme is open to surveyors wishing to study under the English/Welsh, Scottish and Northern Irish local property taxation systems.

## **Qualification Criteria**

Candidates must be Fellows or Members of the Royal Institution of Chartered Surveyors and should have an adequate length and weight of practical experience in rating before attempting the study course. Candidates should have obtained not less than five years practical experience in valuing a wide range of property for rating purposes including three years post qualification experience. If there are any queries regarding this requirement please contact the project manager (details below).

## **Fees**

Course fees are payable as follows:

Per module and practical test: £250

Viva voce: included in above fee

Fees payable at the start of each year, for the year, so £1,250 for year 1 and £1,250 for year 2.

## **Application**

If you are interested in commencing the Rating Diploma study course please complete and return the application form by 30 June for a September start in any particular year. Please be aware that there are only a limited number of applicants that can be accommodated in any year of the new study course so if the course proves popular, it may be that some applicants will have to be deferred until the following September start date.

If you would like any further background information please contact Duncan McLaren, the course project manager as follows:

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