

Institution of Surveyors of Kenya

Professional Examination Syllabus

1.0 INTRODUCTION

The Institution of Surveyors of Kenya (ISK) Diploma Syllabus for the Chapters of Valuation and Estate Management Surveyors, Land Management Surveyors and Building Surveyors.

2.0 OBJECTIVES OF THE DIPLOMA

The diploma aims to assess the candidate's competence to carry out the work of a Full Member of the Institution of Surveyors of Kenya. The diploma requires that one is competent to perform related tasks or functions, in both technical and soft skills.

3.0 COURSE DELIVERY, ASSESSMENT AND GRADING STRUCTURE

3.1 Lecture Delivery

The teaching methods include;

- i) Lectures which will be largely participatory and interactive
- ii) e-learning mode where possible
- iii) or combination of both (i) and (ii)

3.2 Course Assessment and Grading

The courses are assessed through formal written examinations, technical papers and project paper. Formal written examinations are administered as per the prescribed Institution of Surveyors of Kenya examination regulations.

COURSE OUTLINE

CODE	COURSE
ISK 301	Professional Practice and Procedure (Common Paper)
ISK 302	Basic Accounts and Book keeping (Common Paper)
ISK 303	Planning Regulation and Property Laws (Common Paper)
ISK 304	Project Management (Common Paper)
ISK 305	Land Information Management(Common Paper)
ISK 306	Project Papers (Common Paper)
ISK 307	Orals Examination (Common Paper)

ISK 308	Property Valuations (Statutory & Non Statutory Valuations) (VEMS)
ISK 309	Property and Facilities Management (Common Paper)
ISK 310	Property Agency and Marketing (Common Paper)
ISK 311	Land Management and Administration (LMS)
ISK 312	Building Maintenance (BS)
ISK 313	Technical Papers (VEMS & BS)

Each course unit that is examined as a written examination shall comprise 12 lecture hours.

4.0 EXAMINATION AND REGULATIONS

- 4.1 A candidate shall be allowed to sit for professional examinations only when he/she has met the prescribed professional examinations requirements by the ISK Board;
- 4.2 Examinations shall be conducted at the set time as approved and announced by the ISK Board;
- 4.3 Each written examination shall be in the form of a three-hour written examination paper.
- 4.4 Written examinations, technical papers and oral examinations will be marked out of 100 %;
- 4.5 The pass mark for each paper shall be fifty percent (50%);
- 4.6 Compensation shall be allowed for **two** (2) papers only, within any professional examination year, for marks between **46- 49%**. These are normally referred to as border - cases. For every one (1) compensation mark, two (2) marks shall be taken from the compensating paper. Compensating papers shall, therefore, have adequate marks to allow for the deductions to be made; preferably **58%** and **above**. It is advisable that marks for compensation for the two papers is done from two different papers.
- 4.7 A candidate who fails to obtain the pass mark in no more than two papers may be allowed to sit for supplementary examinations before the start of the next professional year examinations, on the recommendations of the Education Board of Examiners and approved by the ISK Board; to be held at a time to be determined by the Education Board of Examiners and approved by the ISK Board; and provided that the candidate pays the prescribed fees for the respective paper(s).
- 4.8 A Candidate who fails in the supplementary examination shall be required to repeat the failed papers in the next professional examination.

- 4.9 A pass obtained by a candidate after sitting for supplementary examination(s) shall constitute only a pass of 50% in that particular paper.
- 4.10 A candidate who fails to obtain the pass mark in the technical project(s) may on the recommendation of the Education Board of Examiners and approved by the ISK Board be allowed to resubmit the technical project(s) in the next professional examination; once only.
- 4.11 A candidate who, for good cause (supported with authentic documentary evidence) fails to sit or submit technical paper(s) may be allowed to sit for the written paper(s) and submit the project and technical paper(s) concerned when the professional examination is next scheduled, without paying additional fees. The Examination Board will exercise the discretionary powers. The decision by the board will not be questioned.
- 4.12 Any candidate who attends any examination drunk or under the influence of any banned substance or behaves in a manner that is disorderly shall be disqualified from that examination.
- 4.13 Mobile telephones will not be allowed in the examination room.
- 4.14 Candidates in the VEMS Chapter, Building Surveyors Chapter and the Land Management Chapter will be required to keep a log book for the mandatory two years. This rule will be applied two years from the publishing of the revised syllabus. ISK office will avail the template.

5.0 APPEALS

Details of how and when to lodge an appeal will be sent to any candidate on request.

When an appeal is made it must be:

- in writing and accompanied by an administration fee (as prescribed by the Institution of Surveyors of Kenya)
- made by the candidate and not a third party
- clear in stating the grounds upon which the appeal is being made
- supported by appropriate evidence
- received by the Institution of Surveyors of Kenya not later than 14 days after your result was posted.

The decision made by the Education Board of Examiners and the Institution of Surveyors of Kenya Council will be final.

6.0 COURSE UNITS

ISK 301: Professional Practice and Procedure

This course examines general information on Professional practice and Professional Institutions (in terms of definitions, institutional structure, policy guidelines, and scale of fees). It describes the rights, duties inherent in the relationship with a client and prepares the valuer/estate manager/building surveyor for the complicated

ethical issues he confronts on a daily basis. The knowledge and skills required by the professional in practice and the contents of a code of ethics, business ethics and the social audit. Professional ethics; Professional Practice, Ethics and Morality (ethical vs unethical practices, professional vs client vs society, disciplinary issues, corruption and corporate governance, etc).

Know the history of The Institution of Surveyors of Kenya (ISK), Structure (Chapters), Membership, Affiliation, Constitution and By-laws, The Council & Standing Council Committees, Rules on Professional Practice etc. Know the Statutes/Acts Governing Property Professional Practices in Kenya.

The rules of conduct for members of other international bodies (for example; the rules of conduct for members of Royal Institution of Chartered Surveyors (RICS);. Corporate social responsibility, the social contract, changing values toward social responsibility, the business - Government interface, the model of ethics;

ISK 302: Basic Accounting and Book Keeping

The objectives of the course is to acquaint the candidate with an overview of financial records and records management accounting principles and standards as an aid to professional practice and to underscore the business nature of real estate professional services and investment; to also highlight common business motivations and regulations in real estate. Topics covered include; The goals of a business, record keeping, financial records and book keeping and accounting, international accounting standards, international financial standards and international public sector accounting standards and its relationship to international valuation standards, financial statement, income statement, cash flow statement, budget estimates, the liquid assets and liabilities, shareholder's equity, and maintenance of accounts by professionals; business planning. Taxation and making returns.

The Practical Aspect of the Course

At the end of the unit the candidate should be able to do the following:

Demonstrate knowledge and understanding of accounting concepts and the format and preparation of management and company accounts, including profit and loss statements, cash flow statements and balance sheets. Should be able to provide evidence of interpretation of company accounts and balance sheets in your area of practice and application of appropriate accounting and regulatory standards and finally be able to provide evidence of reasoned advice given to clients with regard to profit and loss statements and balance sheets. The candidates should submit a business plan before the written examination.

ISK 303: Property Laws and Planning Regulations

Property Law

What is property law, Basic terminologies, Types of property law, property taxation laws, land policy and land Use policy etc. Institutions dealing with land e.g. The National Land Commission (composition and functions) Selected Acts of parliament related to property laws e.g the Land Act, the Land Registration Act. Legal issues affecting land in Kenya. Land laws and how they affect property markets. Land

rights as defined in the Constitution and related legislation. All other legislation that gives instructions in how to value property (The Valuation for Rating Act, the Rent Restriction Act) Law relating to the management of property (The Rent Acts, Sectional Properties Act and the Land Act). Laws relating to conveyancing e.g. The Land act, the Land Registration Act and the Sectional Properties Act) and legal responsibilities of running a company Others include general knowledge and understating of the various old and new regulations that govern the property industry. These include, Contract Laws, Residential and Commercial tenancy/lease regulations, Auctioneering Act, Planning laws, Public Procurement regulations, Safety and Health Regulations, building regulations, fire regulations and security. Provisions of WIBA, Environmental laws, Emerging trends in property management, international treaties, laws relating to building maintenance, Vision 2030.

Planning Regulations

The aim of the course is to have the candidate understand why Planning Regulations are crucial in the operations of ISK professionals both in the built and natural environment. The course will include definition of key terms, for example: planning, development control, legal and technical instruments in planning, planning regulations, etc. Rationale / Why look at planning regulations; Major Planning and Development Control Actors / Institutions and their relevance in the planning process and regulations; Planning and Development Control Instruments, relevant Planning Acts and Regulations: e.g. Kenya Constitution 2010, Physical Planning Act (PPA), Environmental Management and Coordination Act (EMCA), Local Government Act (LGA), etc, Relevant Planning Standards: e.g. zoning, plot size / coverage, plot ratio, building lines and setbacks, buffer zones, riparian reserves, etc, By-Laws, The Physical planning handbook and other Guidelines etc; The Application of Planning Regulations in practice: e.g. during valuations, subdivisions, change of use, extension of use/lease, amalgamation, environmental social assessments reports and studies, etc; Challenges faced by ISK Professionals in relation to Planning Regulations; Strategies and/Recommendations to address some of the highlighted challenges.

ISK 304: Project Management

Project Management Framework:

Introduction to project management, understanding project management and defining the project. . Project sequence, developing a project life cycle. Project, program and portfolio management. Project Implementation framework. Project selection models.

Management various aspects of a project: integration, scope management, procurement management, time management, quality management, team management, risk management, success and failure management, communication management, and cost management. Project planning and control. Project organization structures.

Practical Aspects of Project Management:

The role of project manager and his team. Influence of organisational structures and external environmental factors on Projects. Estimating and Planning the

activities. Interacting network diagrams. Determining the critical path in a project. GANTT diagrams and work breakdown structure. Preparing a project plan, controlling, scheduling, budgeting and scope.

Determining the Program evaluation review technique. Project completion, evaluation and review. Knowledge management in Project Management. Use of Project Management software applications. Typical challenges and symptoms in project management.

ISK 305: Land Information Management

Each candidate should have a basic understanding of the role of Information Management Systems in the management and administration of land resources. principles of land information systems; legal and institutional frameworks for land registration (land registration under the Land Registration Act of 2012), management and administration; nature, types and benefits of land information and land information management systems; The candidate must know how to use the different land information systems (Spatial and non-spatial) must be able to interpret plan and map data; the legal language in relation to data, must understand the software applications in land management e.g. Geographic Information Systems; ensure security of data, The importance of a LIMS in Security of Tenure and Resource's Governance, LIMS in e-Business, e-Government, e-Learning and Knowledge Management; how an integrated LIMS can in promote local economic development. Evolutionary Land Tenure Information System

ISK 306: Project Papers

Each candidate will be expected to undertake an investigation in an area which relates directly to real estate problems under the supervision of an approved examiner. The project will be presented as per detailed guideline provide by the examination board. A final copy of the technical and the projects papers will be submitted by the candidate, once corrections are certified by the examiners, to the Institution of Surveyors of Kenya for the library.

ISK 307 Orals Examination Format

The orals examinations are based on:

- The subject and content of the project paper
- The technical papers presented
- Experience and knowledge related to the discipline including Ethics and the general rules governing the institution and Knowledge of current issues of concern to the profession.

Assessment Checks

At any time the ISK may undertake a random check, asking the candidate to provide evidence to support the information they have provided on the technical papers or in the oral examination. If a random check finds any irregularities, or a complaint is made against the candidate the candidate may need to provide further information, and/or attend another oral examination. The principal may also be required to provide more information to support the candidates work and when cases of integrity are suspected. This may result in the candidate's technical papers being cancelled and their case being referred for further disciplinary investigation.

ISK 308 Property Valuations

Fundamentals of Valuation, The Nature of Value, Foundations of Valuation, The Valuation Process and methods of valuation, Real Property Ownership and Interests, Real Estate Markets, Money Markets, and Capital Markets, Introduction to the different methods of valuation, Data Collection and Analysis, Market Areas, Neighborhoods, and Districts, Land or Site Analysis, Improvement Analysis, Market Analysis, Highest and Best Use Analysis; Reconciliation and Reporting, Reconciling Value Indications, The Valuation Report; International Valuation Standards & ISK, Professional Practice and Law, Financial Formulas. Types of Valuations –Market Based, Profit based e.g. Petrol Stations Hotels etc , Insurance Valuation, Valuation for Financial Reporting.

Statutory Valuations- the candidate should have an overview of the different types of statutory valuations (Stamp Duty, Estate Duty/Public Trustee Administration Valuation, Compulsory Valuation, Rating Valuations, Rent Restriction, Lease Extension, Alienation, subdivision, Change of User, Conversion of Leasehold to Freehold, Wayleaves and Easement Valuations; the statutory valuation practice and methodologies. Relate statutory valuation practice to current developments in technology and standards e.g. GIS and Mass appraisals etc.

ISK 309 Property Management and Facilities Management

Property Management

The candidate should show evidence of understanding of property management and the role of the manager in maximizing returns, consultancy etc; managing outgoings and all other functions and various management styles as applied to different properties. Other duties undertaken by the property manager besides the main and traditional roles. Key factors determining the landlord and tenant relationship, lease terms and their implication in property management, service charge and disputes. Leases Management, Maintenance Contracts, Management Accounts; Repair and renovation process; Staffing Issues (Hiring and Firing, Managing employees; customer Relations Candidates should be able to demonstrate effective management of relationships with customers and other parties through an understanding to build rapport, confidence and trust with others; Communication - effective use of information and communication links; An appreciation of the respective roles of The

Environment and Land Court and Tribunals, and other dispute resolution mechanisms identifying the various risks associated with Property management and the various mitigation factors. Evidence will be required of how records should be kept so that appropriate auditing and audit trails exist including the legal obligations. Provide evidence of reasoned advice including preparation of Management Reports; provide final accounts and tax returns and report on property management accounts and service charge accounts, prepare clients VAT returns.

Facilities Management

Definition of facilities management, the functions, how facility managers assist business to execute essential property decision, from day to day matters to strategy planning; best space utilization, space allocation, suitable technology solutions, human resources and safe surroundings, waste disposal facilities, cleaning services, furniture and equipment post occupancy evaluation; corporate real estate management, the strategic management of occupational property – the space a business or public body needs in order to operate – taking an overall strategic view about its suitability for that business operation and the financial implications of continued occupation whilst ensuring that the facility is managed on a day to day basis in a cost effective and high quality manner to maximise occupational productivity.

ISK 310: Property Agency and Marketing

Definition and scope of estate agency; estate agency mandates; estate agents' authority; estate agents duties; The role of the dual/buyer's agent, leasing and selling of property; verifying property, company and personal details of sellers and purchasers, landlords and tenants; marketing real estate products and services, International property marketing, international markets and their analysis; the practice of estate agency in Kenya; registration of estate agents under the Estate Agents Act, Cap 533 and as per the ISK handbook; estate agents remuneration (applicable transaction costs e.g agency fees, statutory levies, legal fees and valuation fees etc.) developing and managing contracts, and other services defined by the Act; disciplinary procedures under Estate Agency Rules, 1987; applicable regulations to an estate agent's work e.g the Land Act of 2012, the Land Registration Act of 2012, law of agency; definition; practice; duties; The principle law governing the Auctioneers Act, of 1996; sale by auction.

ISK 311: Land Management and Administration

This course unit will introduce students to land management and administration. Topics covered will include Role of land management and administration in economic development; Institutional (existing and as given in the land policy) and legislative frameworks of land administration in Kenya; the processes of land administration e.g. Adjudication, Allocation, Planning, Valuation, Survey, Titling (Approaches to land registration, Importance of land registration, Challenges to land registration); Land development applications and their procedures; Land Policy and land use policy and their importance; Governance in land administration and management (Corruption (Types of corruption) and land administration, Causes of poor governance,

Implications of poor governance, Measures to improve governance, Role of land management surveyors in land sector governance).

ISK 312: Building Maintenance

Definition and types/categories of maintenance, Maintenance planning, Maintenance cycle, Emerging trends in maintenance, Culture and its impact on maintenance, Maintenance policy, Maintenance procurement Maintenance records and documentation. Typical building defects, causes of failure, remedial action/preventive works, preparation of schedules of dilapidations; building condition survey checklist for inspection and remedial advice; The definition of the building surveying practice; opportunities and challenges for the building surveyor, legal issues in building surveying, regulation and ethics; best practices in building surveying, emerging/contemporary issues in building surveying and building development e.g. sustainable building development, green buildings etc.

ISK 313: Technical Papers

Valuation Surveyor

In technical papers, candidates shall present five different types of Valuation Reports from any of the following groups:

- i) Open Market Valuation for sale, purchase, stamp duty, book purposes, etc.
- ii) Valuation for Mortgage or Forced Sale/Auction purposes
- iii) Capital Valuation for Insurance purposes
- iv) Capital Valuation for Owner Occupier House Allowance purposes
- v) Rental Assessment for either buildings, and/or land, including site acquisitions
- vi) Open Market Valuation or Rental Assessment for plant and machinery, furniture and fittings, computer and equipment, motor vehicle etc

NB: Candidates from Public Service (Government Valuers) shall give a list of other statutory valuations done in their respective ministries. This will help the examiners to decide whether the projects fall within the above stated groups or if there is need to create new groups for this category of candidates.

- vii) In addition to submitting the five different reports, at least one valuation report shall be for:
 - a) A developed property with structures such as buildings with a built up area of at least 1000 sq. ft. (excluding site works)
 - b) An agricultural property in excess of 2 acres
 - c) Statutory purposes i.e. either stamp duty, insurance; and on this note, a candidate shall not:
 - submit more than two statutory valuation reports;
 - provide more than one valuations report for a vacant site
- viii) The following shall be attached to the valuation reports:

- a) Tenure documents and maps including sketch route maps, mutation forms, rates statements, rent demand notes, searches, copies of titles, Registry Index Maps, Part Development Plans, F/Rs, etc.
 - b) Coloured photographs of the property.
 - c) Relevant comparables citing title numbers
 - d) Workings and analysis showing how the final figures have been arrived at.
- ix) Other Requirements include:
- a) Valuation reports shall be on official letterheads and continuation paper
 - b) Valuation reports shall be signed by the candidate and the principal

Building Surveyors

The B.S candidate will be required to present at least three technical reports from any of the following areas that the candidate has undertaken.

- a) Measurements for repair/old works
- b) Leasing
- c) Condition survey report
- d) Project management cycle

7.0 CHAPTERS IN THE INSTITUTION OF SURVEYORS OF KENYA

1. Valuation and Estate Management Surveyors

Candidates seeking to be qualified as Valuers must sit the following papers:

ISK 301	Professional Practice and Procedure (Common Paper)
ISK 302	Basic Accounts and Book keeping (Common Paper)
ISK 303	Planning Regulation and Property Laws (Common Paper)
ISK 304	Project Management (Common Paper)
ISK 305	Land Information Management(Common Paper)
ISK 306	Project Papers (Common Paper)
ISK 307	Orals Examination (Common Paper)
ISK 308 (VEMS)	Property Valuations (Statutory & Non Statutory Valuations)
ISK 309	Property and Facilities Management (Common Paper)
ISK 310	Property Agency and Marketing (Common Paper)
ISK 313	Technical Papers (VEMS & BS)

2. Building Surveyors

Candidates seeking for certification as Building Surveyors must sit and pass the following paper:

ISK 301	Professional Practice and Procedure (Common Paper)
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ISK 302	Basic Accounts and Book keeping (Common Paper)
ISK 303	Planning Regulation and Property Laws (Common Paper)
ISK 304	Project Management (Common Paper)
ISK 305	Land Information Management(Common Paper)
ISK 306	Project Papers (Common Paper)
ISK 307	Orals Examination (Common Paper)
ISK 309	Property and Facilities Management (Common Paper)
ISK 310	Property Agency and Marketing (Common Paper)
ISK 312	Building Maintenance (BS)
ISK 313	Technical Papers (VEMS & BS)

3. Land Management Surveyors

Candidates seeking for certification as Land Management Surveyors must sit and pass the following papers:

ISK 301	Professional Practice and Procedure (Common Paper)
ISK 302	Basic Accounts and Book keeping (Common Paper)
ISK 303	Planning Regulation and Property Laws (Common Paper)
ISK 304	Project Management (Common Paper)
ISK 305	Land Information Management(Common Paper)
ISK 306	Project Papers (Common Paper)
ISK 307	Orals Examination (Common Paper)
ISK 309	Property and Facilities Management (Common Paper)
ISK 310	Property Agency and Marketing (Common Paper)
ISK 311	Land Management and Administration (LMS)