



# **THE HONG KONG INSTITUTE OF SURVEYORS**

**Guidance Notes for**

**MANDATORY**

**CONTINUING PROFESSIONAL DEVELOPMENT**

**June 2007**

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## PREFACE

Part VII of the Bye-Laws stipulates that “All Corporate Members and Technical Associates of the Institute shall maintain a high level of competence in professional practice and technical performance and are obligatory to undertake continuing professional development (CPD) and lifelong learning (LLL) to enhance their professional and technical competence.” It also provides that “The General Council may from time to time issue regulations and guidance notes on mandatory continuing professional development administered by the Board of Professional Development.”

Professional surveyors and Technical Associates are expected to not only excel in their own specialties, but also keep up with the latest developments in all related areas and in various forms, including community and social service. This will not only enhance the self-esteem and capabilities of members, but also project a better image to the public. The surveying profession will thus develop as members take more time and effort to improve their skills, serve the community and enhance professional development.

持續進修    提昇專業水平    鞏固基礎    發揮專長  
終生學習    發展全人理想    擴張領域    啟發潛能



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## 1. Introduction to Mandatory Continuing Professional Development

1.1 This document explains the administrative framework for mandatory continuing professional development (CPD). To record the undertaking of CPD, the Institute will issue to every member in the professional and technical grades a CPD Log Sheet. CPD Log Sheets will be sent to new members upon admission and additional copies are available upon request. New and updated CPD Log Sheets will be sent to members from time to time. Members should maintain the CPD Log Sheet and keep it safe as it will be needed for scrutiny not only by the Institute for CPD monitoring and admission to fellowship, but also possibly in the following circumstances:

- Insurance premium renewals
- Demonstration of competence to undertake specific work
- Job or promotion interviews
- Performance appraisals
- Client request and marketing
- ISO 9000 Accreditations
- Arbitration or dispute cases

1.2 All queries should be directed to the Education Department of the HKIS Secretariat at tel.: 2526 3679 or email <edudept@hkis-sec.org.hk>.

## 2. Requirements to undertake CPD

### 2.1 Definition

CPD is both a personal and business opportunity. It is “the systematic maintenance, improvement and broadening of knowledge and skill and the development of personal qualities necessary for the execution of professional and technical duties throughout the practitioner’s working life.” All corporate and technical members are required to complete a minimum requirement of **60 hours over a three-year period**, of which at least 15 hours must be in the form of formal events, as described in 2.2. The annual requirement of 20 hours is a minimum guideline only. Members are encouraged to undertake and report more CPD activities if available.



## 2.2 What Counts

The following table provides a quick reference to the variety of activities that qualify for CPD. The list serves as examples and is not exhaustive. The choice of activity should be carefully matched to the skill level the individual member expects or would like to exhibit, and it must provide certain added knowledge.

| Types Of CPD   | Examples   |
|--|--|
| 1. Formal events (attending or presenting) ( <b>15-hour minimum</b> required within any three-year period)                       | <ul style="list-style-type: none"><li>- Courses, seminars, conferences</li><li>- Workshops &amp; Briefing sessions</li><li>- Lecturing on careers/the profession</li></ul>   |
| 2. Structured learning and programmes (subject to a <i>maximum</i> claim of <b>15 hours</b> in any three-year period)            | <ul style="list-style-type: none"><li>- Full/part-time study</li><li>- Open/distance learning</li><li>- Research for publications</li><li>- Staff training</li><li>- Developing skills (e.g. IT, business/financial skills)</li></ul>  |
| 3. Community, institutional, and social services (subject to a <i>maximum</i> claim of <b>15 hours</b> in any three-year period) | <ul style="list-style-type: none"><li>- Divisional council and Board attendance</li><li>- Special working groups</li><li>- APC assessor preparation and assessment</li><li>- External examiner</li><li>- Professional interviews</li><li>- Delivering ideas to public meetings</li><li>- Voluntary works for the community</li></ul> |
| 4. Private study (subject to a <i>maximum</i> claim of <b>15 hours</b> in any three-year period)                                 | <ul style="list-style-type: none"><li>- Use of audio, video, or multi-media resources &amp; HKIS library services.</li></ul>   |



### 2.3 HKIS Committee Meetings

Attendance at official HKIS committee meetings may be counted for up to one hour of CPD for each meeting or part thereof attended, up to a maximum of five hours in any CPD year. Qualifying meetings include General Council, Executive Committee, Divisional Councils, Standing Committees, Boards, Panels, and working groups that meet on a regular basis.

## 3. Checking Compliance

- 3.1 Throughout the year, the Institute carries out CPD spot-checks on a percentage of the membership. When asked to submit CPD details, members should keep the original and submit a copy of the CPD Log Sheet for the period specified, normally the previous three years. Supporting documents such as receipts, tickets, and certificates are normally not required to be submitted, but should be retained in case more information on a particular item is requested.
- 3.2 All professional and technical members of the Institute are obliged to undertake self development and keep an account of their CPD until they retire fully. Members who are exempted from payment of the annual subscription are deemed to have retired. Non-resident and non-practising members are required to fulfill a pro rata 50% of the requirement during the period of non-residency or non-practice.
- 3.3 Members who are not able to provide adequate evidence to support the fulfillment of the required CPD hours shall be required to be reviewed in one year time. It is expected that the member will complete a minimum of 20 hours of CPD during that year, and continue to accumulate more CPD hours as other members do. Cases of continuing non-compliance of this requirement shall be dealt with individually by the Board of Professional Development and the General Council as appropriate.



#### **4. CPD Events organized by the Institute**

The CPD events that qualify for CPD hours are those organized in the following ways, whether held locally or outside Hong Kong:

- By individual Divisions and the Young Surveyors Group (YSG).
- By the HKIS jointly with other organizations.
- By individual Divisions and the YSG jointly with other organizations.
- By other organizations with the endorsement and support of the HKIS.

#### **5. CPD Events organized by other Organizations**

5.1 Any course, presentation, conference, or similar event organized by any organization, whether held locally or outside Hong Kong, may count towards CPD hours if they contribute to relevant added learning to HKIS members. Such events however need not be formally validated for CPD purposes, which is at the sole discretion of HKIS.

5.2 To qualify for CPD hours, events should generally satisfy the following requirements:

- They enhance the member's professional or technical knowledge
- They update the member's knowledge of wider issues affecting the surveying profession
- They enhance and broaden the member's business, managerial, legal, and related skills
- They introduce the member to practices in other countries, other professions, or other organisations allied to the surveying profession



## 6. Attendance Records

- 6.1 Attendance at events organized by HKIS will be recorded in the computerised CPD database in the HKIS office. This is an administrative record of attendance of events and is not a substitute for members' CPD records. Nonetheless, members may be allowed access to such database to verify their own records.
- 6.2 It is advisable to keep all receipts for attendance, tickets, and other evidence of attendance in case they are required for verification purposes.

## 7. Calculation of CPD Hours

- 7.1 To qualify for CPD, an event must last for a minimum of half an hour.
- 7.2 Hours counted should be net of travelling time to the event, and should exclude breaks of longer than half an hour unless another CPD activity takes place during the break (e.g. lunch time speaker during a conference).
- 7.3 CPD hours should be rounded up to the nearest half hour.
- 7.4 Individual events will only count for a maximum of **ten hours** unless specifically endorsed by the Institute.
- 7.5 In the event of a dispute over accountability, the number of hours to be counted, or attendance at a CPD event, the decision of the Institute shall be final.



## Annex – Sample CPD Log Sheet

|                      |                     |
|----------------------|---------------------|
| <b>CPD LOG SHEET</b> | <b>For the Year</b> |
|----------------------|---------------------|

|             |                 |              |                 |
|-------------|-----------------|--------------|-----------------|
| <b>NAME</b> | <b>DIVISION</b> | <b>GRADE</b> | <b>MEM. NO.</b> |
|-------------|-----------------|--------------|-----------------|

| Date | CPD Event |         | Organizer | Speaker | Hours | Cumulative Hours |
|------|-----------|---------|-----------|---------|-------|------------------|
|      | Code      | Details |           |         |       |                  |
|      |           |         |           |         |       |                  |
|      |           |         |           |         |       |                  |
|      |           |         |           |         |       |                  |
|      |           |         |           |         |       |                  |
|      |           |         |           |         |       |                  |
|      |           |         |           |         |       |                  |
|      |           |         |           |         |       |                  |
|      |           |         |           |         |       |                  |
|      |           |         |           |         |       |                  |
|      |           |         |           |         |       |                  |

| Code | Type of CPD Activity                          | Total |
|------|---|-------|
| 1    | Formal events                                 |       |
| 2    | Structured learning and programmes            |       |
| 3    | Community, institutional, and social services |       |
| 4    | Private study                                 |       |