



THE HONG KONG INSTITUTE OF  
**SURVEYORS**

香港測量師學會

**ASSESSMENT OF TECHNICAL COMPETENCE  
IN PURSUANCE OF THE TECHNICAL QUALIFICATION IN  
BUILDING SURVEYING**

**建築測量技能評核試**

**GUIDANCE NOTES for ASSESSORS**

**評核員指引**

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## **Guidance Notes for Assessors of candidates pursuing the technical qualification AMHKIS**

*These notes refer to and should be read in conjunction with the Rules and Guide to the Assessment of Technical Competence in pursuance of the technical qualification in Building Surveying, issued in February 2019, to be effective on 1 March 2019.*

### **Background**

1. The BS APC 2012 was an overhauled regime of training and assessment for candidates pursuing either professional or technical qualifications. The BS ATC 2019 has extracted relevant provisions with specific reference to candidates pursuing technical membership (AMHKIS) of the Institute. It also provides for the transfer of professional candidates to the technical regime.
2. BS ATC Assessors must be corporate members with at least 5 years post qualification standing. They should familiarize themselves fully and carefully with the Rules and Guide, with unmistakable understanding of the different stipulations. Any queries should be raised with the BS Divisional Education Committee. Ideally, if Assessors could also act as Counsellors, they would appreciate the reality of training and can more effectively conduct the assessments.

### ***Assessors Accepting Responsibilities***

3. When Assessors accept the invitation of the Institute to so act, truly the onus is now squarely on Assessors to guard the fort and qualify only those candidates who are up to professional standard.
4. It is of paramount importance that Assessors act honestly and objectively in the course of assessment. When Assessors are invited to sit on assessment panels, they should identify and report any possible conflict of interest with the candidates being assessed. Conflict of interest normally refers to personal knowledge of the candidate, personal and work relationship with the candidate, and other similar relationship with the candidate that might give rise to bias, favouritism, pre-determination, etc. In uncertain situations, Assessors should seek clarification well before the assessment sessions are conducted.
5. The Institute highly appreciates the dedication of Assessors who are senior members of the profession to help maintain standards of qualifications, and to produce competent new blood to meet future challenges and opportunities. Assessors

should therefore also keep themselves updated with relevant technological innovations and social changes and advancements, just as they would expect the candidates to do so. Assessors are also encouraged to continually improve themselves in the art and technique of conducting interviews and assessments, which is, after all, not the basic skills of Building Surveyors.

## **ATC Training**

6. Candidates with a cognate sub-degree or diploma will pursue a minimum training period of 2 years under the ATC. Those having a cognate graduate degree may otherwise need only one year training under the ATC. During the course of training, they will select which route to meander for their desired career pursuit.
7. When candidates come forward for assessment, Assessors must receive them at par for their chosen main stream practice, either in Building Control, Projects & Development, or Maintenance & Rehabilitation. The different courses or lengths of training should not mitigate the depth of assessment.

## **Assessments**

8. The assessments leading to the qualifications of AMHKIS comprise the Practical Task and the Final Assessment.

### ***Practical Task***

9. The Practical Task is normally conducted in November every year. Assessors should be alert of the relevant dates and be prepared to fully participate in the exercises.
10. The Practical Task is an authentic project requiring substantive building surveying input for a “site” in respect of which the “problem” is set. Normally on day 1, candidates will be allowed to visit the “site” in the morning, while Assessors may visit the “site” in the afternoon. Assessors are encouraged to make every effort to familiarize themselves with the actual site conditions vis-à-vis the “problem” (which will also be disseminated to the Assessors early in day 1) in order that they may realistically assess the desk top exercise undertaken by the candidates in the morning of day 2 at the “centre”.
11. It is expected candidates will assume the role of technical assistants in working out the solutions to the assignment which should be completed and handed in within 2 or 3 hours depending on the assignment, which may differ from year to year.

12. The assessment is primarily on whether the candidates can perform their duties and work out accurate data and relevant input as may be required in major projects in real life.
13. The assessment panel will normally consist of a chairman and 3 assessors. The candidates' scripts will be marked separately by the assessors while the chairman will consolidate the assessments in a panel review to conclude the award.

### ***Final Assessment***

14. Final Assessments are conducted throughout the year as soon as applications are received. In their applications for Final Assessment, candidates will include the Summary of Experience and the Synopsis of Structured Learning. The second copies of the Self Assessment Report submission forms (Form APC3/BS) will also be included. These additional documents are presented as evidence and illustrations. They are not meant to be assessed but just to help assessors realize the training history of the candidates, including their emphases and specialties. The assessment is solely via the viva voce interview.
15. The Summary of Experience is the full record of the candidate's training which should indicate his emphasis in building surveying experience and preparedness for his main stream practice. Assessors may single out interesting episodes and ascertain the depth of the candidate's personal involvements in the projects.
16. The Synopsis of Structured Learning is an account of the candidate's voluntary self-learning. Assessors should ascertain the sufficiency of time spent and the relevance of such learning activities in complementing the core competences. Assessors may also single out interesting episodes and ascertain the nature of the candidate's learning.
17. The copies of the Form APC3/BS will reflect the monitoring of the candidate's training by his counsellor and his advice given throughout the candidate's ATC programme.
18. The interview panel will normally consist of a chairman and 3 assessors, preferably from different main stream practices and from different organizations. The panel chairman conducts and controls the interview sessions while the assessors will take turn to evaluate the professional competences of the candidate in all areas of building surveying practice and in ethics.

19. The Final Assessment is indeed the only opportunity for candidates to demonstrate their overall competences before they are admitted as technical surveyors. As required by the Rules and Guide, technical candidates must have a sound knowledge base of the anatomy and physiology of buildings, and they must have full familiarization of their chosen mainstream practice, even though they may only be operating in a supporting capacity. In addition to the “what” and the “how”, technical surveyors should preferably also understand the “why” of their core competences.
20. The requisite level of technical expertise in the various core competences have been set out in Appendix I of the Rules and Guide, which can be taken as the bench mark for the assessment of technical candidates.
21. Normally a Final Assessment interview should be conducted within an hour including the making of a decision. Before the interview, the Assessors should have a preliminary idea of the background of the candidates. Time should not be unduly wasted for the candidates to elaborate on their training, as the relevant information is already presented in their submitted supporting documents. The panel chairman should therefore ensure that the evaluation is evenly spread over the various competences and assessors should aim at finding out how much the candidates know and can perform particularly in their chosen mainstream practice, rather than how much the candidates do not understand and cannot do in a much wider building surveying context.
22. The assessors need be satisfied that the candidates have the basic knowledge, and expertise, to embark on a career as technical surveyors. It will be unrealistic that only seasoned candidates, or all-rounders, are admitted to membership, as capable assistants are not produced with just a few years of training. It is the duty of the panel of assessors to collectively adjudicate and strike a fair balance in their verdicts.
23. If candidates are found to be short of the desired standard for admission, they will be deferred a standard period of 9 months for substantiation of their expertise and experience. The purpose of the standard deferral is for candidates to improve their strengths and resolve their weaknesses under the guidance of their Counsellors. Any observation and advice for the candidates to make up their deficiencies should be recorded, and all comments will be conveyed to the candidates when results are announced.
24. When candidates return for re-assessment, it is more important to ascertain how much they have improved over their identified shortcomings during the period of deferment, rather than to explore their further weaknesses.

## **Conclusions**

25. These notes aim at providing general guidance to Assessors in pursuance of the APC so that the Institute may nurture and qualify competent professional Building Surveyors to meet market demands. These notes can never be exhaustive and readers are always welcome to present their views and insight for the continual improvement of the system. Comments including constructive criticism should be addressed to the BS Divisional Education Committee.

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