



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 COUNSELLORS

輔導顧問指引

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Guidance Notes for Counsellors 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 of 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 Counsellors 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. Preferably, Counsellors should also act as Assessors so that they can properly guide their candidates through the different stages of assessment.

Counsellors Accepting Responsibilities

3. When Counsellors accept the invitation of candidates to so act, truly the onus is now squarely placed on Counsellors to properly guide and prepare their candidates in their acquisition of technical competences. On the other hand, Counsellors are the guards of the profession to ensure only the well prepared candidates are presented for assessment. If Counsellors are not satisfied with the progress of training, they can refuse to endorse the candidates' applications for subsequent components of the ATC. When endorsing such applications, viz., to undertake the Practical Task (Form ATC4/BS), or for Final Assessment (Form ATC5/BS), Counsellors should ensure that all pre-requisites have been satisfactorily submitted and responded.
4. If for any reason a Counsellor cannot continue to so act during his candidate's ATC programme, he should signify (on Form ATC1S/BS) his ceasing to act and help the candidate to invite a new Counsellor to take over. This is particularly valid when candidates change employment and it is always more desirable, if practicable, for Counsellors to be invited from within the organization.

5. The Institute relies heavily on Counsellors who are mature members of the profession to nurture the next generation technical surveyors to face both future challenges and future opportunities. It is therefore important that Counsellors are also keeping themselves updated with relevant technological innovations and social changes and advancements, just as they would expect their candidates to do so. Counsellors should maintain their alert and outlook to cultivate a better building surveying profession for both the local market and beyond.

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. It is very much a personal development process on the candidates' own initiatives by acquisition of the relevant skills and knowledge through practical involvements in surveying practices under the guidance of competent persons. ATC candidates must invite professional BS to act as their Counsellors who will mentor their pursuit of professional qualifications and monitor the progress of their training accomplishments. ATC trainees may be receiving coaching from different supervisors at different stages in different work environments. It is really the opportunities for the trainees to learn rather than the duty of the supervisors to teach.
8. It is desirable if Counsellors are operating in a supervisory capacity within the candidates' employs, that they may maintain close contacts with their candidates and provide direct and immediate coaching. External Counsellors in the remote control and hands-off training capacity should therefore make an effort to regularly review with their candidates their training progress. In any event, it is paramount that Counsellors act proactively with full understanding of their candidates' training environment and provide appropriate guidance on how they can reap essential and fundamental expertise and experience both in breadth and in depth. It goes without emphasis that Counsellors are indeed role models for their candidates, not only in practical performances, but more importantly, in their attitude and ethical approach to professionalism.
9. Counsellors must be aware that candidates have invariably different exposures during their practical training. In order to supplement any deficiency in knowledge and complement any insufficiency in training, candidates are required to undertake pre-qualification structured learning (PQSL) of not less than 20 hours per year.

Counsellors are encouraged to monitor their candidates' progress of PQSL, preferably at the occasions of regular mentoring sessions on their Self Assessment Reports, and vet their Synopses of Structured Learning prior to their applications for Final Assessment.

10. 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 surveying 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. Counsellors should therefore ensure that their candidates have fully acquired the technical expertise set out in Appendix I of the Rules and Guide.
11. Depending on the training opportunities the candidates may have from time to time, it is inevitable that they may change their main stream practice during the course of training. When such situation arises, Counsellors should consider whether to stay put with their candidates or transfer them to new Counsellors for more appropriate training and monitoring.
12. Candidates undergoing ATC training may be pursuing other courses of personal development at the same time, e.g., studying for a graduate degree, getting married, starting a family with babies. Some of them, unfortunately, may be facing different kinds of difficulties and problems, with their health or families. Any of such instances may invariably affect their training progress. Counsellors are encouraged to be understanding and supportive, and extend to those needy the care and concern of the big surveying family.

Self Assessment Report

13. To assist both the candidates in mapping their accomplishments and learning, and the Counsellors in monitoring their training progress, a series of Self Assessment Reports (SAR) are stipulated. Candidate must demonstrate their acquired competences for every 9 months of the approved period of training. This is also a check for every stage and continuity of the ATC. Counsellors are responsible to make sure that their candidates pursue the ATC with due diligence and make timely submissions according to the schedule stipulated in the Rules and Guide, and Counsellors should also make early responses to such SAR submissions. This must be taken seriously as non-submission of the SAR will automatically suffocate the ATC, and delayed submission of the SAR will inevitably prolong the ATC period.

14. Upon receipt of the Self Assessment Reports (Form APC3/BS) from their candidates, Counsellors should assess the submissions together with the candidates' log books (Form APC2/BS) both quantitatively and qualitatively. Counsellors should check that a full account of the experience acquired in the relevant period is presented. The relevant period for each SAR is 9 months in duration, or such longer period as may be prolonged by intermittent suspension of the approved period of training, or the delay in the SAR submission. In addition to the training contents and the competences acquired, Counsellors should also evaluate and provide advice on the candidates' presentation skills, use of English and trade jargons, and report writing, as such will be essential elements in their future practices.
15. In assessing the SAR, Counsellors must make sure that their candidates do not put in case analyses, sometimes with case documents and details that are, more than often, privileged documents, which in any event should not be included in private reports. It is more important to assure what the candidates have learned through active participation in the identified projects, rather than how the projects were conducted and performed by their masters.
16. If a Self Assessment Report is not up to standard, Counsellors have the discretion to require amendments, corrections, substantiations, or anything that can help improve its content and presentation. This could be the only learning opportunity for the candidates, and Counsellors should at least be providing tutorials and coaching.
17. Having assessed the Self Assessment Report, the Counsellor should record his finding and comments on the Report forms in duplicate, so that the candidate may file in one copy to the Institute while retaining the other copy for submission with his Application for Final Assessment.

Assessments

18. The assessments leading to the qualifications of MHKIS comprise the Practical Task and the Final Assessment.

Practical Task

19. The Practical Task is normally conducted in November every year. Applications to undertake the Practical Task are only accepted during the specified period normally in August. Counsellors should be satisfied that their candidates are adequately prepared for the task before endorsing their applications.

20. 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, and then return to their workplace to tidy up their field notes. They will then attend the “centre” in the morning of day 2 to work out a desk top exercise based on their field notes.
21. Assessors’ comments on the candidates’ exercises will normally be conveyed to the candidates. Successful candidates may proceed to Final Assessment while failed candidates will have to undertake the Practical Task again in future exercises. Counsellors should make sure that such candidates continue to substantiate their competences and make up any identified deficiencies.

Final Assessment

22. Final Assessments are conducted throughout the year as soon as applications are received. In their applications for Final Assessment, candidates will include their Summary of Experience and their 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 to help assessors realize the training history of the candidates, including their emphases and specialties. The assessment is solely via the viva voce interview where the assessors will evaluate the overall technical competences of the candidate.
23. 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. Counsellors should help verify the comprehensiveness of the Summary.
24. The Synopsis of Structured Learning is an account of the candidate’s voluntary self-learning. Counsellors should help ascertain the sufficiency of time spent and the relevance of such learning activities in complementing the candidates’ core competences.
25. The copies of the Form APC3/BS will reflect the Counsellors’ monitoring of the candidate’s training and the advice given to them throughout the candidate’s ATC programme.
26. Successful candidates are deemed to be qualified and may apply for technical membership of the Institute for designation as AMHKIS.

27. Unsuccessful candidates will normally be deferred for 9 months to substantiate their expertise and experience. The purpose of the standard deferral is for candidates to prepare one more Self Assessment Report through which they may have an updated opportunity for seeking guidance from their Counsellors, to improve their strengths and resolve their weaknesses. Hopefully with aided enhancement on their competences, the candidates may return with an expectation of success.

Conclusions

28. These notes aim at providing general guidance to Counsellors in pursuance of the ATC so that the Institute may nurture and qualify competent technical 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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