HONG KONG INSTITUTE OF SURVEYORS
BUILDING SURVEYING DIVISION
Assessment of Professional Competence 2012
Guidance Notes for Counsellors and Assessors

These notes refer to and should be read with the Rules and Guide to the Assessment of Professional Competence (Building Surveying) 2012.

Background

1. The BS APC 2012 is a new regime of training and assessment for candidates pursuing either professional membership (MHKIS) or technical membership (AMHKIS) of the Institute. The unified system applies to both categories of candidates although they are pursuing different paths in the trunk road to qualifications. Candidates with different levels of pre-requisite academic qualifications can make their individual ways to the relevant finish lines. It provides for continuous advancement of AMHKIS to corporate membership of the HKIS. It also allows MHKIS candidates to migrate to the lower exit as AMHKIS if they so wish.

2. Counsellors and Assessors of BS APC candidates (who must be corporate members with at least 5 years post qualification standing) should familiarize themselves fully and carefully with the Rules and Guide, with unmistaken understanding of the different paths and stipulations. Any queries should be raised with the BS Divisional Education Committee. Preferably, all Counsellors should act also as Assessors so that when they know how their candidates are to be assessed, they can properly guide them. Vice versa, all Assessors should also act as Counsellors so that when they appreciate the reality of training, they can more effectively conduct the assessments.

Training

3. Based on the level of academic achievement, candidates entering the profession will select which route to meander for their desired career pursuit and the period of training will differ accordingly (clause 2.1 Table 1).

4. 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 (clause 1.1). APC Candidates must invite professional BS to act as their Counsellors who will mentor their pursuit of technical or professional qualifications and monitor the progress of their training accomplishments (clause 2.2). APC trainees may be receiving coaching from many 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.

5. 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 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.

6. Counsellors must be aware that candidates have different academic backgrounds and 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 (clause 2.4.2 and Appendix II). Counsellors are encouraged to monitor their candidates’ progress of PQSL, preferably at the occasions of SAR, and vet their Synopses of Structured Learning prior to their applications for Final Assessment.

Self Assessment Report

7. To assist both the candidates in mapping their own learning and accomplishments and the Counsellors in monitoring their training progress, a series of Self Assessment Reports (SAR) are stipulated (clause 2.4.3). Candidate must demonstrate their competence for every 9 months of training. This is also a check for every stage and continuity of the APC. Counsellors are responsible to make sure that their candidates pursue the APC with due diligence and make timely submissions according to the stipulated schedule,
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 APC, and delayed submission of the SAR will inevitably prolong the APC period (clause 3.3).

8. Upon receipt of the Self Assessment Reports (Form APC3/BS), 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 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.

9. 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 be at ease in providing tutorials and coaching.

10. 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.

**Counsellors Accepting Responsibilities**

11. When Counsellors accept the invitation of candidates to so act, truly the onus is now squared placed on Counsellors to properly guide and prepare their candidates in their acquisition of professional competence. 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 APC (clause 3.3 Table 2). When endorsing such applications, viz., to undertake the Practical Task (Form APC4/BS), or for Final Assessment (Form APC5/BS), Counsellors should ensure that the pre-requisite SAR have all been satisfactorily submitted and responded.
12. If for any reason a Counsellor cannot continue to so act during his candidate’s APC programme, he should signify his ceasing to act and help the candidate to invite a new Counsellor to take over (Form APC1S/BS). 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.

13. The Institute relies heavily on Counsellors, senior members of the profession, to nurture the next generation professionals 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 both locally and beyond.

**Assessments**

14. The assessments leading to the qualifications of AMHKIS or MHKIS both comprise the Practical Task (clause VII.4) and the Final Assessment (clause 2.4.5).

**Practical Task**

15. The Practical Task is conducted once in a year, normally in November. It contains 2 parts: the technical assignment and the professional assignment. Candidates pursuing AMHKIS need only attempt the technical assignment, while candidates pursuing MHKIS must attempt the professional assignment which includes the technical assignment.

16. Applications to undertake the Practical Task are only accepted during the month of August. In early September, the full list of candidates eligible to undertake the Practical Task later in the year will be circulated to all Assessors, who should identify and report any possible conflict of interest. Conflict of interest normally refers to personal knowledge of the candidate, personal and work relationship with the candidate, and other similar relationship that might give rise to favouritism, bias, pre-determination, etc.

17. 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 conduct the assessment interview in
day 4.

18. In order that the interviews may all be conducted and completed on day 4, very
often as many Assessors as the number of candidates undertaking the Practical
Task will be required. Assessors are sincerely requested to set aside the whole
day for this exercise every year. The interview panel will normally consist of a
panel chairman and 3 assessors. The panel chairman conducts and controls
the interview sessions while the assessors will take turn to evaluate the
performance of the candidate normally in pre-set areas of knowledge and
practices.

19. In order to maintain consistency in approach and emphases, notes on the
“problem” will normally be handed out to panel chairmen and assessors, or a
briefing session will be conducted immediately before the start of the interviews.
Assessors must therefore be punctual and arrive at the “examination centre” on
time. As a guide, a relevant marking scheme for the task of the year will be
provided.

20. Failed candidates could only undertake the Practical Task in the following year.
It is important that these candidates are advised of their weaknesses so that they
may improve their competences for the next attempt. For this purpose,
Assessors should record their observations and findings and provide relevant
advice on the marking sheets. All comments will be conveyed to the
candidates when results are announced.

Final Assessment

21. 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 (clause
2.4.5). The remaining copies of the Self Assessment Reports will also be
included. These additional documents are presented as evidence and
illustrations. They are not meant to be assessed. The assessment is solely
via the viva voce interview. The interview panel will normally consist of a panel chairman and 3 assessors. The panel chairman conducts and controls the interview sessions while the assessors will take turn to evaluate the performance of the candidate.

22. 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. Assessors should aim at finding out how much the candidates know and can do particularly in their chosen mainstream practice, rather than how much the candidates do not know and cannot do in a much wider building surveying context.

23. The Assessors need only be satisfied that the candidates have the basic knowledge and expertise to perform as building surveying technicians or to embark on a career as professional building surveyors. It will be unrealistic that only seasoned candidates and all-rounders are qualified and admitted to membership, as seasoned technicians and expert surveyors 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.

24. If candidates are found to be short of the desired standard for qualification, they should 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 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. 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.

25. The Institute highly appreciates the dedication of Assessors in helping maintain standards of qualifications. Assessors are 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.
Conclusions

26. These notes aim at providing general guidance to Counsellors and Assessors in pursuance of the APC so that the Institute may nurture and qualify more 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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