



香港測量師學會
**THE HONG KONG
INSTITUTE OF
SURVEYORS**

專業評核試
**ASSESSMENT OF
PROFESSIONAL
COMPETENCE**

物業設施管理組

**PROPERTY & FACILITY
MANAGEMENT**
僱主、督導員及顧問指引
**NOTES FOR GUIDANCE OF
EMPLOYERS
SUPERVISORS
AND COUNSELLORS**

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**ASSESSMENT OF PROFESSIONAL COMPETENCE
PROPERTY & FACILITY MANAGEMENT
NOTES FOR GUIDANCE OF
EMPLOYERS, SUPERVISORS AND COUNSELLORS**

(Effective September 2005)

This booklet should be shown to employers, supervisors and counsellors. Extra copies may be obtained upon request.

I. Introduction and Objectives

1. To qualify as professional Property and Facility Management (PFM) surveyors, in addition to having acquired a relevant academic qualification recognized by the Hong Kong Institute of Surveyors (the Institute), the candidates must undergo an approved period of professional training and pass the Assessment of Professional Competence (APC) in Property and Facility Management before they are eligible for election to corporate membership of the Institute.
2. Candidates entering the APC must be suitably employed in an establishment principally engaged in Property and Facility Management or in an organization providing related services in the Property and Facility Management industry.
3. The purpose of the APC is to satisfy the Institute that only those candidates considered competent to carry out the work of a professional Property and Facility Management surveyor on behalf of clients or employers are admitted to corporate membership.
4. Through the APC, the Institute will ensure that the candidates:
 - (a) have learned to apply their theoretical knowledge through professional training and experience to attain practical PFM skills;
 - (b) have achieved a satisfactory level of understanding and application of the skills that form an essential part of the knowledge base of the chosen core and non-core competences;
 - (c) are aware of the need to pay particular attention to accuracy and essential detail to safeguard the interests of employers and clients;
 - (d) can communicate effectively, orally, graphically and in writing, and can prepare reports which are correct in grammar and in spelling, well structured and well presented; and
 - (e) are aware of and intend to act in accordance with the Institute's Rules of Conduct, possess the highest level of professional integrity and

objectivity, and recognize their ethical duties to clients, employers and the community.

5. These notes explain the roles of employers and their experienced staff, which are essential to assist their trainees to fulfil the requirements of the APC.
6. Although it is not formally written into the detailed content of the APC, the Institute places considerable importance on the need to instill in candidates a sense of professional ethics and conduct. Candidates may not have had any such experience during their period of academic training, and it is most important that they should develop a thorough appreciation of these concepts during their period of approved professional training prior to becoming a qualified professional PFM surveyor.

II. The Assessment of Professional Competence

1. The APC consists of a minimum period of two years comprising not less than 400 working days **approved professional training** in accordance with Appendix I. Candidates are required to maintain a diary of their training and to summarize the entries in a log book, both of which are to be submitted for assessment. The object is to demonstrate that their training is of adequate breadth, depth and well balanced in their respective core and non-core competences as listed in Appendix I.
2. During the period of approved professional training, candidates are required to undertake a minimum aggregate of 40 hours of **qualified structured learning** which may be in the form of short courses organized by academic or professional institutions, or employers, to complement the practical experience of the candidates and to enhance their professional development.
3. Before final assessment of their professional training, candidates are required to submit a **critical analysis** of three cases illustrating different aspects of PFM that they have been personally involved.
4. Candidates are also required to undertake a **practical task**, which will be an authentic professional problem, and they are expected to come up with a solution under normal office conditions within the given time. This is to give candidates the opportunity to demonstrate their ability to adopt a professional approach to the work of the PFM Surveyor and to exercise competent professional judgement.
5. Upon completion of the period of professional training, candidates are required to attend a **professional interview** to test on their competence before a panel of assessors when their professional training, their structured learning and general aspects of professional PFM practice will be discussed.

6. The assessment is carried out by a panel of assessors who are senior members of the profession and candidates must satisfy the assessors in all the elements and at the professional interview, otherwise they may be referred in any one or all elements. If so, they must apply for re-assessment as appropriate.

III. The Role of Employers

1. It is appreciated that employers may not be principally carrying on PFM practices and may not be able to provide structured training to prepare their employees for their professional pursuit. When the work assignments will be attributable to the candidates' professional and technical experience, it is expected that employers make available such opportunities under the supervision of competent persons and, if available, also under suitable mentoring of counsellors.
2. Counsellors should normally be professional PFM surveyors working in the same organization and they should provide mentoring to not more than three candidates at any one time. Where there is no PFM surveyor within the organization, or where there is not enough PFM surveyors in-house to take care of all the trainees, practising PFM surveyors from other organizations may be invited to act as external counsellors.
3. It is acknowledged that the training obtained by candidates will be in an assistant capacity and that the degree of individual responsibility and discretion given to candidates may not be high, particularly in the early part of their training. Nonetheless employers are expected to allow candidates as much professional involvement as may be possible.
4. It is appreciated that by the nature of their work, which may be highly specialized or centered on only certain aspects of the professional discipline concerned, some employers may not be able to provide the full spectrum of training required by the APC. In such circumstances it is essential that candidates are appropriately warned, and it is suggested that employers explore the possibility of seconding the candidates to other offices for a short period for the missing links, perhaps taking candidates from those offices in exchange.
5. When candidates apply to enter the APC, they are required to complete Form APC1/ PFM. They are required to state the nature of their employment and the areas of training available. Employers are requested to endorse the form to certify the candidate's employment.
6. If candidates change employment, a supplementary application on Form APC1S/PFM is required and former employers are requested to confirm the termination of employment.
7. During the course of the candidates' training, PFM employers are expected to provide training seminars or to allow the candidates to attend training courses as may be available, during office hours as may be necessary.

8. The practical task will normally be conducted in November every year and for that purpose, it is requested that candidates be released of their office duties for one day. On the morning of that day, candidates will receive the instructions and the problem, and they are required to present their solutions after 4 hours, on the same day. No text books or other reference materials are permitted.

IV. The Role of Supervisors

1. During their period of training, candidates are expected to work under the direct instruction and supervision of immediate superiors who are competent in their respective professions. Such superiors may be PFM surveyors, surveyors of other disciplines, architects, engineers of various specialization, or other allied professionals or sub-professionals.
2. The candidates' supervisors, i.e. their immediate superiors in a workplace, are expected to provide within their respective expertise proper guidance to the candidates that they may acquire in adequate depth relevant technical knowledge and practical skill in the various areas of training.
3. For control purposes, candidates are required to keep a diary of their daily tasks and supervisors are requested to check the entries and certify their correctness by signing the diaries every week.

V. The Role of Counsellors

1. Counsellors should be professional PFM surveyors who are corporate members of the Institute of not less than five years standing.
2. Counsellors are responsible to ensure that the candidates under their guidance acquire the necessary training in breadth and in depth. Each counsellor should normally be responsible for not more than three candidates at any one time so that adequate personal attention can be provided.
3. It is appreciated that candidates may be transferred from section to section within a large organization or seconded to other offices for supplementary training and they may not always be under the direct supervision of their counsellors. Nonetheless it remains the counsellors' responsibility to provide coordinated and consistent guidance throughout their candidates' professional training.
4. Counsellors should therefore review periodically what tasks their candidates have performed and what knowledge they have acquired. To assist counsellors in their control function, all candidates are required to maintain diaries and log books, which should be checked by the counsellors regularly to monitor progress. The diaries and the log books should be countersigned by the counsellors every three months.

5. After 12 months of the approved period of professional training, counsellors are required to conduct an Interim Assessment of the candidates' training. The purpose of the Interim Assessment is to provide an opportunity for the counsellors to critically review the training progress of their candidates and to give objective advice so that the candidates may adequately and suitably prepare themselves for the Final Assessment in the remaining period of training.
6. To assist the counsellors in conducting the Interim Assessment, candidates are required to prepare an Interim Summary of Experience in not more than 1,000 words summarizing and describing the professional training so far received and a self-assessment of their own training progress. They are also required to submit their diaries and log books together with the Interim Assessment Report on Form APC4/PFM to their counsellors.
7. When the submission for Interim Assessment is received, the counsellor should evaluate in quantitative terms if the training so far received by the candidate is adequate and balanced. If shortfalls are identified, suitable advice and comments should be given on the Interim Assessment Report.
8. In assessing the adequacy of the professional training, counsellors should consider both the breadth and the depth of the training. However counsellors must bear in mind that the training has been gained in an assistant capacity and that the degree of individual responsibility and discretion given to candidates would not be high, particularly in the early part of their training.
9. It is inevitable that some candidates may be receiving a broad span of training in a general PFM practice while some candidates in specialist institutions may be receiving concentrated training in specific areas in sequence. Counsellors should therefore bear this in mind when they are identifying any shortfalls.
10. Counsellors should not only look at the Log Books in numerical terms but also check through the diaries to determine whether the works undertaken are relevant and appropriate.
11. If a candidate's training is clearly of restricted scope or grossly inappropriate in the professional sense, the effort the candidate has spent would have been rendered abortive and the counsellor should signal appropriate warning so that the candidate may consider changing his course of training before it is too late.
12. After the desktop assessment, the counsellor should interview his/her candidate and discuss with him/her how he/she should make up any shortfall and suitably conduct himself/herself in pursuance of professional qualification. The interview should be recorded in the Interim Assessment Report in duplicate countersigned by both the counsellor and the candidate. All documents for Interim Assessment may then be returned to the candidate who is required to file in one copy of the Interim Assessment Report and his Interim Summary of Experience to the Institute

13. It is important that counsellors conduct the Interim Assessment as soon as it is submitted, as any delay in filing in the Interim Assessment Report will prejudice the candidate's Final Assessment.
14. When candidates prepare their critical analysis, counsellors are required to certify that the submissions are the work of the candidates.
15. When candidates apply to undertake the practical task and/or final assessment, before endorsing their applications, counsellors should satisfy themselves that the candidates are in all respect ready to attempt the task and/or final assessment meaningfully. It should be noted that a bad failure could be damaging to the candidates' pursuit of professional qualification, let alone the waste of the effort of the assessors.
16. It is incumbent upon the counsellors, being members of the Institute, to ensure that their candidates are appropriately and adequately prepared to qualify as professional PFM surveyors. The counsellors should also ensure that apart from the technical knowledge and skills the candidates have acquired in their training, they have also developed a sense of professional ethics and conduct.
17. The Institute counts very much on counsellors to assist in the bringing up of young PFM surveyors who:
 - (a) are good ambassadors for the profession, the Institute and their employers;
 - (b) are aware of the professional and commercial implications of their work;
 - (c) understand their clients' and employers' thinking and objectives;
 - (d) have an up-to-date, developed and all rounded knowledge relevant to the work of PFM surveyors in Hong Kong;
 - (e) are able to play a role in a team and build up experiences in client contact;
 - (f) are aware of the operation of general economic principles;
 - (g) have the confidence to work independently and unsupervised; and
 - (h) are able to demonstrate motivation, initiative, administrative ability and leadership potential.

VI. Conclusion

1. It is only with the unflinching support of employers and supervisors, and the dedication of counsellors, that the production of adequately qualified professional PFM surveyors can be guaranteed. The Institute hopes that the APC will not cause

too much disruption and inconvenience to the employers and their supervisory staff and that they recognize the importance of the APC and give every assistance to the candidates in their offices.

2. The Institute will be pleased to answer any queries on these notes which should be addressed to the Chairman, Property and Facility Management Divisional Education Committee, The Hong Kong Institute of Surveyors, Suite 801, Jardine House, 1 Connaught Place, Central, Hong Kong, or via e-mail to <edudept@hkis.org.hk>.

Appendix I

Training and Professional Experience Requirements

1. We are looking to ensue a balanced and fully competent Property and Facility Management Surveyor. You must obtain a thorough understanding and knowledge of your chosen areas at competent level.
2. You are required to obtain and record a minimum of 400 working days of approved professional training and experience within a minimum period of 24 months from the date of registering for the Assessment of Professional Competence Scheme.

The training and experience MUST include the following:

- (a) Obtain a proper knowledge and understanding of the skill sets required in Section One, and be able to show this at interview. Be able to apply and give advice i.e. the more important skills with in-depth knowledge.
- (b) A minimum of 100 working days in each of the two selected core competences out of the four described in Section Two. You must show that you are competent in these areas; and have an in-depth knowledge and understanding of each.
- (c) A minimum of 100 working days in two or more of the five non-core competences in Section Three. You must show a good understanding and knowledge of these areas.

The sub-areas shown under each heading are main areas of work which are considered to be most relevant to the main heading. It is not, however, intended to exclude other work, which may be recorded under “other relevant professional experience”. It is accepted that work in certain sub-areas may not normally be carried out by yourself unaided.

The Log Book analysis is intended to show how you have achieved the required balance. The Log Book will have a separate space for you to record the Pre-qualification Structured Learning you have undertaken.

Section One : Mandatory Competences

1.1 Core Skills (Level One*; Choose all)

- 1.1.1 Ethics, knowledge of HKIS structure, rules and regulations
- 1.1.2 Basic business & communication skills, self management, customer care
- 1.1.3 Information technology, analysis of information and data
- 1.1.4 Law, dispute resolution and conflict avoidance
- 1.1.5 Health, Safety and Environment Awareness

1.2 Optional Skills (Level One*; Choose 2 out of 3)

- 1.2.1 Business management, organizational leadership, negotiation skills
- 1.2.2 Management of people and resources, recruitment and selection
- 1.2.3 Accounting principles and procedures

Section Two: Core Competences (Level Three*; Choose 2 out of 4)

2.0 Property Asset Management

- 2.1 Advice, negotiation and management of leases, deeds, agreements and rent reviews
- 2.2 Advice on asset investment and strategy
- 2.3 Valuation of premises for asset management purposes
- 2.4 Legal advice and preparation of evidence and negotiation
- 2.5 Sales, marketing, advertising and agency matters
- 2.6 Sales and letting of premises
- 2.7 Management of acquisition and disposal of property assets
- 2.8 Administration of property assets

3.0 Corporate Real Estate

- 3.1 Strategic space planning, advice on re-location
- 3.2 Acquisition of space and premises; valuation and agreement on terms.
- 3.3 Research and business relocation planning
- 3.4 Setting of space standard and guides
- 3.5 Space audit and establishment of space inventory and asset register
- 3.6 Post occupancy evaluation of user needs
- 3.7 Interior design and fit-out planning, procurement, churn management
- 3.8 Support of Business Operations
- 3.9 Inspection and assessment of licensed premises

4.0 Project Management

- 4.1 Advice on architectural design services, construction technology and engineering, including research
- 4.2 Management of submissions to Planning and Building Authority
- 4.3 Drafting of specification, drawings and taking on-site measurement
- 4.4 Construction and finishing material selection and procurement
- 4.5 Procurement and contract management
- 4.6 Project management of construction, fit out and major renovation projects
- 4.7 On-site supervision to comply with statutory requirements

5.0 Property Management

- 5.1 Assessment of repair and replacement for insurance
- 5.2 Planned maintenance program, renovation
- 5.3 Building fabric and finishes maintenance and condition monitoring
- 5.4 Building services maintenance and performance monitoring
- 5.5 Building adaptation, alterations, additions and renovation improvement
- 5.6 Security management including tendering
- 5.7 Environmental hygiene management including tendering
- 5.8 Condition and structural survey, and preparation of survey report
- 5.9 Advice on statutory and license compliances to owners or occupiers

- 5.10 Management of staff and contractors
- 5.11 Drafting and administration of deed of mutual covenants
- 5.12 Taking enforcement actions under House Rules and lease agreements; and following up on any court judgements
- 5.13 Management of accommodation, car parking, amenities and residents club house
- 5.14 Landscaping management and slope safety monitoring
- 5.15 Contingency planning and handling of crisis/emergencies
- 5.16 Community events, general management matters

Section Three : Non-Core Competences (Level Two*; Choose 2 out of 5)

6.0 Finance Management

- 6.1 Advice on property investment and financial arrangements
- 6.2 Preparation and control of asset investment and development budgets
- 6.3 Preparation and control of management and maintenance budgets
- 6.4 Finance planning and forecasting, and resources allocation
- 6.5 Economic and market analysis
- 6.6 Scrutiny and approval of finance statements
- 6.7 Negotiation and arrangement of insurance coverage
- 6.8 Consideration and implementation of outsourcing arrangement
- 6.9 Major tendering exercises and evaluation

7.0 Human Resources and Organization Management

- 7.1 Managing people and resources
- 7.2 Staff catering and club house management
- 7.3 Office and workplace housekeeping management
- 7.4 Human resource planning and management
- 7.5 Organizational administration management
- 7.6 Car fleet and transportation management
- 7.7 Staff training and development

8.0 Information Technology and Communication Management

- 8.1 Computer-aided facilities management and maintenance
- 8.2 Voice, data and telecommunication planning and management
- 8.3 Computer application, research and preparation of specification for development of valuation system
- 8.4 Help desk and tenancy service centre management
- 8.5 System disaster recovery and management

9.0 Quality and Performance Management and Benchmarking

- 9.1 Customer service management
- 9.2 Quality system implementation and management
- 9.3 Environmental management
- 9.4 Occupational health and safety system implementation and management

- 9.5 Energy audit and management
- 9.6 Indoor air quality control and monitoring
- 9.7 Research and benchmarking market best practice and performance
- 9.8 Public relation and corporate communication management

10.0 Major Research

- 10.1 Property asset management research
- 10.2 Corporate real estate research
- 10.3 Real estate design research
- 10.4 Project management research
- 10.5 Operation and maintenance research
- 10.6 Finance management research
- 10.7 Human resources and organization management research
- 10.8 Information technology and communication management research
- 10.9 Quality & performance management and benchmarking research
- 10.10 Facility management research
- 10.11 Investment strategy research

Remarks

Level One- Knowledge and understanding.

Level Two- Knowledge application and analysis.

Level Three- Knowledge application and analysis; ability to give advice.

-END-

Prepared by K Chan, 9.2005