



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

ASSESSMENT OF PROFESSIONAL COMPETENCE  
PROPERTY & FACILITY MANAGEMENT

Form APC3/PFM (2018)

LOG BOOK

Name of Candidate	HKIS No.
Communication Address	
Date of Submission	
<i>for Interim Assessment</i>	<i>for Final Assessment</i>

## NOTES

1. The Log Book (APC3/PFM) comprising Analysis of Diary Sheets is to enable a candidate to present an analysis of his/her professional training in a chronological order based on entries in his/her Diary, which will assist the Assessors to evaluate the adequacy and proper balance of his/her training. It will also provide an easy reference to any particular aspect of training as set out in the Diary.
2. The Log Book should be kept in safe custody. It is important to note that if the Log Book is lost, the failure to produce an analysis of the candidate's training may prejudice the subsequent assessment.
3. Entries in the Analysis of Diary Sheets should be abstracted from the Diary at the end of each month. The training received in the month must be entered in whole days or half-days under the area and month headings of the Sheets. At the end of every three months, the Log Book must be signed by the candidate and endorsed by his/her counsellor.
4. After completion of an aggregate of 12 months' training, the Log Book should be submitted to the counsellor together with the relevant sections of the Diary for interim assessment. On submission, the time spent on each training area must be sub-totalled vertically on the Analysis of Diary Sheets, and also horizontally where appropriate.
5. On completion of the full approved period of professional training, the total time spent on each training area should be added up both vertically and horizontally on the Analysis of Diary Sheets. The grand total should also be computed. The Log Book must be submitted together with the Diary for final assessment.



**ANALYSIS OF DIARY SHEET (Areas 1 - 6) (Months 1-12)**

Area of Professional Training		Month	1	2	3	4	5	6	7	8	9	10	11	12	Sub-total
Date of Commencement of Month 1:															
<b>Section 1 <u>Mandatory Competences (Level One)</u></b>															
<b>1.1 Core Skills (Choose all)</b>															
1.1.1	Ethics, knowledge of HKIS structure, rules and regulations	(1)													
1.1.2	Basic business & communication skills, self management, customer care	(2)													
1.1.3	Information technology, analysis of information and data	(3)													
1.1.4	Law, dispute resolution and conflict avoidance	(4)													
1.1.5	Health, Safety and Environment Awareness	(5)													
<b>1.2 Other Skills (Choose all)</b>															
1.2.1	Business management, organisational leadership, negotiation skills	(6)													
1.2.2	Management of people and resources, recruitment and selection	(7)													
1.2.3	Accounting principles and procedures	(8)													
		Sub-total													
<b>Section 2 <u>Core Competences (Level Three; Choose 2 out of 5)</u></b>															
<b>2.0 Property Asset Management</b>															
2.1	Advice, negotiation and management of leases, deeds, agreements and rent reviews	(1)													
2.2	Advice on asset investment and strategy	(2)													
2.3	Valuation of premises for asset management purposes	(3)													
2.4	Legal advice and preparation of evidence and negotiation	(4)													
2.5	Sales, marketing, advertising and agency matters	(5)													
2.6	Sales and letting of premises	(6)													
2.7	Management of acquisition and disposal of property assets	(7)													
2.8	Administration of property assets	(8)													
		Sub-total													
<b>3.0 Corporate Real Estate</b>															
3.1	Strategic space planning, advice on re-location	(1)													
3.2	Acquisition of space and premises; valuation and agreement on terms	(2)													
3.3	Research and business relocation planning	(3)													
3.4	Setting of space standard and guides	(4)													
3.5	Space audit and establishment of space inventory and asset register	(5)													
3.6	Post occupancy evaluation of user needs	(6)													
3.7	Interior design and fit-out planning, procurement, churn management	(7)													
3.8	Support of Business Operations	(8)													
3.9	Inspection and assessment of licensed premises	(9)													
		Sub-total													

Sign at the end of every 3 months	Candidate														
	Counsellor														

Area of Professional Training		Month	1	2	3	4	5	6	7	8	9	10	11	12	Sub-total
Date of Commencement of Month 1:															
<b>4.</b>	<b><u>Project Management</u></b>														
4.1	Advice on architectural design services, construction technology and engineering, including research	(1)													
4.2	Management of submissions to Planning and Building Authority	(2)													
4.3	Drafting of specification, drawings and taking on-site measurement	(3)													
4.4	Construction and finishing material selection and procurement	(4)													
4.5	Procurement and contract management	(5)													
4.6	Project management of construction, fit out and major renovation projects	(6)													
4.7	On-site supervision to comply with statutory requirements	(7)													
	Sub-total														
<b>5.0</b>	<b><u>Repair and Maintenance</u></b>														
5.1	Assessment of repair and replacement for insurance	(1)													
5.2	Planned maintenance program, renovation	(2)													
5.3	Building fabric and finishes maintenance and condition monitoring	(3)													
5.4	Building services maintenance and performance monitoring	(4)													
5.5	Building adaptation, alterations, additions and renovation improvement	(5)													
5.6	Condition and structural survey, and preparation of survey report	(6)													
5.7	Advice on statutory and licence compliances to owners or occupiers	(7)													
5.8	Slope safety monitoring	(8)													
<b>6.0</b>	<b><u>Property Management</u></b>														
6.1	Security management including tendering	(1)													
6.2	Environmental hygiene management including tendering	(2)													
6.3	Management of staff and contractors	(3)													
6.4	Drafting and administration of deed of mutual covenants	(4)													
6.5	Taking enforcement actions under House Rules and lease agreements; and following up on any court judgements	(5)													
6.6	Management of accommodation, car parking, amenities and residents club house	(6)													
6.7	Landscaping management	(7)													
6.8	Contingency planning and handling of crisis / emergencies	(8)													
6.9	Community events, general management matters	(9)													
	Sub-total														
Sign at the end of every 3 months		Candidate													
		Counsellor													

**ANALYSIS OF DIARY SHEET (Areas 7-11) (Months 1-12)**

Area of Professional Training		Month	1	2	3	4	5	6	7	8	9	10	11	12	Sub-total
Date of Commencement of Month 1:															
<b>Section 3 <u>Non-Core Competences (Level Two; Choose 2 out of 5)</u></b>															
<b>7.0 <u>Finance Management</u></b>															
7.1	Advice on property investment and financial arrangements	(1)													
7.2	Preparation and control of asset investment and development budgets	(2)													
7.3	Preparation and control of management and maintenance budgets	(3)													
7.4	Finance planning and forecasting, and resources allocation	(4)													
7.5	Economic and market analysis	(5)													
7.6	Scrutiny and approval of finance statements	(6)													
7.7	Negotiation and arrangement of insurance coverage	(7)													
7.8	Consideration and implementation of outsourcing arrangement	(8)													
7.9	Major tendering exercises and evaluation	(9)													
	Sub-total														
<b>8.0 <u>Human Resources and Organisation Management</u></b>															
8.1	Managing people and resources	(1)													
8.2	Staff catering and club house management	(2)													
8.3	Office and workplace housekeeping management	(3)													
8.4	Human resource planning and management	(4)													
8.5	Organisational administration management	(5)													
8.6	Car fleet and transportation management	(6)													
8.7	Staff training and development	(7)													
	Sub-total														
<b>9.0 <u>Information Technology and Communication Management</u></b>															
9.1	Computer-aided facilities management and maintenance	(1)													
9.2	Voice, data and telecommunication planning and management	(2)													
9.3	Computer application, research and preparation of specification for development of valuation system	(3)													
9.4	Help desk and tenancy service centre management	(4)													
9.5	System disaster recovery and management	(5)													
	Sub-total														
Sign at the end of every 3 months		Candidate													
		Counsellor													

Area of Professional Training		Month	1	2	3	4	5	6	7	8	9	10	11	12	Sub-total
Date of Commencement of Month 1:															
<b>10.0</b>	<b><u>Quality and Performance Management and Benchmarking</u></b>														
10.1	Customer service management	(1)													
10.2	Quality system implementation and management	(2)													
10.3	Environmental management	(3)													
10.4	Occupational health and safety system implementation and management	(4)													
10.5	Energy audit and management	(5)													
10.6	Indoor air quality control and monitoring	(6)													
10.7	Research and benchmarking market best practice and performance	(7)													
10.8	Public relation and corporate communication management	(8)													
	Sub-total														
<b>11.0</b>	<b><u>Major Research</u></b>														
11.1	Property asset management research	(1)													
11.2	Corporate real estate research	(2)													
11.3	Real estate design research	(3)													
11.4	Project management research	(4)													
11.5	Operation and maintenance research	(5)													
11.6	Finance management research	(6)													
11.7	Human resources and organisation management research	(7)													
11.8	Information technology and communication management research	(8)													
11.9	Quality & performance management and benchmarking research	(9)													
11.10	Facility management research	(10)													
11.11	Investment strategy research	(11)													
	Sub-total														
Sign at the end of every 3 months		Candidate													
		Counsellor													

Remarks

Level One - Knowledge and understanding

Level Two - Knowledge application and analysis

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

**ANALYSIS OF DIARY SHEET (Areas 1 - 6) (Months 13-24)**

Area of Professional Training		Month	13	14	15	16	17	18	19	20	21	22	23	24	Sub-total
Date of Commencement of Month 13:															
<b>Section 1 <u>Mandatory Competences (Level One)</u></b>															
<b>1.1 Core Skills (Choose all)</b>															
1.1.1	Ethics, knowledge of HKIS structure, rules and regulations	(1)													
1.1.2	Basic business & communication skills, self management, customer care	(2)													
1.1.3	Information technology, analysis of information and data	(3)													
1.1.4	Law, dispute resolution and conflict avoidance	(4)													
1.1.5	Health, Safety and Environment Awareness	(5)													
<b>1.2 Other Skills (Choose all)</b>															
1.2.1	Business management, organisational leadership, negotiation skills	(6)													
1.2.2	Management of people and resources, recruitment and selection	(7)													
1.2.3	Accounting principles and procedures	(8)													
		Sub-total													
<b>Section 2 <u>Core Competences (Level Three; Choose 2 out of 5)</u></b>															
<b>2.0 Property Asset Management</b>															
2.1	Advice, negotiation and management of leases, deeds, agreements and rent reviews	(1)													
2.2	Advice on asset investment and strategy	(2)													
2.3	Valuation of premises for asset management purposes	(3)													
2.4	Legal advice and preparation of evidence and negotiation	(4)													
2.5	Sales, marketing, advertising and agency matters	(5)													
2.6	Sales and letting of premises	(6)													
2.7	Management of acquisition and disposal of property assets	(7)													
2.8	Administration of property assets	(8)													
		Sub-total													
<b>3.0 Corporate Real Estate</b>															
3.1	Strategic space planning, advice on re-location	(1)													
3.2	Acquisition of space and premises; valuation and agreement on terms	(2)													
3.3	Research and business relocation planning	(3)													
3.4	Setting of space standard and guides	(4)													
3.5	Space audit and establishment of space inventory and asset register	(5)													
3.6	Post occupancy evaluation of user needs	(6)													
3.7	Interior design and fit-out planning, procurement, churn management	(7)													
3.8	Support of Business Operations	(8)													
3.9	Inspection and assessment of licensed premises	(9)													
		Sub-total													
Sign at the end of every 3 months		Candidate													
		Counsellor													



Area of Professional Training		Month	13	14	15	16	17	18	19	20	21	22	23	24	Sub-total
Date of Commencement of Month 13:															
<b>4. <u>Project Management</u></b>															
4.1	Advice on architectural design services, construction technology and engineering, including research	(1)													
4.2	Management of submissions to Planning and Building Authority	(2)													
4.3	Drafting of specification, drawings and taking on-site measurement	(3)													
4.4	Construction and finishing material selection and procurement	(4)													
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Sub-total															
<b>5.0 <u>Repair and Maintenance</u></b>															
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6.8	Contingency planning and handling of crisis / emergencies	(8)													
6.9	Community events, general management matters	(9)													
Sub-total															
Sign at the end of every 3 months		Candidate													
		Counsellor													

**ANALYSIS OF DIARY SHEET (Areas 7-11) (Months 13-24)**

Area of Professional Training		Month	13	14	15	16	17	18	19	20	21	22	23	24	Sub-total
Date of Commencement of Month 13:															
<b>Section 3 <u>Non-Core Competences (Level Two; Choose 2 out of 5)</u></b>															
<b>7.0</b>	<b><u>Finance Management</u></b>														
7.1	Advice on property investment and financial arrangements	(1)													
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<b>9.0</b>	<b><u>Information Technology and Communication Management</u></b>														
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	Sub-total														
Sign at the end of every 3 months		Candidate													
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11.9	Quality & performance management and benchmarking research	(9)													
11.10	Facility management research	(10)													
11.11	Investment strategy research	(11)													
	Sub-total														
Sign at the end of every 3 months		Candidate													
		Counsellor													

Remarks

Level One - Knowledge and understanding

Level Two - Knowledge application and analysis

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







