



專業評核試

**ASSESSMENT OF  
PROFESSIONAL  
COMPETENCE**

物業設施管理組  
**PROPERTY & FACILITY  
MANAGEMENT**

規則及指引

**RULES  
AND  
GUIDE**

**May 2018**

**RULES and GUIDE to the  
ASSESSMENT of PROFESSIONAL COMPETENCE IN  
PROPERTY & FACILITY MANAGEMENT  
(Effective May 2018)**

**I. General Introduction and Objectives**

1. The Assessment of Professional Competence (APC) of Hong Kong Institute of Surveyors (the Institute) is a scheme of professional training and assessment to enable the Institute to satisfy itself that only those candidates considered competent to carry out the work of a professional surveyor, on behalf of clients or employers, are admitted to corporate membership of the Institute. Probationer members attached to the Property and Facility Management Division (PFMD) of the Institute are required to satisfy all requirements of the APC in Property and Facility Management before they are eligible for election to corporate membership of the Institute.
2. In deciding whether or not the candidates meet the requirements for corporate membership, the Institute seeks, through the APC, to establish that the candidates:
  - (a) has learned to apply his/her theoretical knowledge through professional training and experience to attain practical Property and Facility Management skills;
  - (b) has 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) is 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) is aware of and intends to act in accordance with the Institute's Rules of Conduct, possesses the highest level of professional integrity and objectivity, and recognizes his/her ethical duties to clients, employers and the community.
3. In addition, candidates are expected to demonstrate, through the various elements of the APC, that they:
  - (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 experience 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.
4. Candidates shall not be eligible to undertake the Final Assessment of the APC until they have completed at least two years of appropriate professional training for recognized cognate degree holders; and at least three years of appropriate professional training for recognized non-cognate but relevant degree holders OR other degree holders OR AMHKIS holders; all in accordance with the Institute's latest Constitutions and approvals. The time required by different candidates may vary according to circumstances. The candidates should therefore ensure, in consultation with their counsellors, that the training they receive is of sufficient breadth and depth before presenting themselves for assessment.

## II. The Principal Parties

1. To achieve these objectives, and to satisfy the Institute that the candidate has accomplished professional competence, involves a partnership between the Institute and several essential parties, namely, the candidate, the employer, the supervisor, the counsellor, and the assessors.
2. The **Candidate** needs to enter the APC with enthusiasm and commitment and to follow the procedures prescribed in this document diligently and by the deadlines.
3. The **Employer** is expected to provide the candidate with opportunities to acquire the appropriate training under proper supervision, suitable encouragement and necessary facilities and time, and to timely endorse the appropriate forms for the candidate when being requested.
4. The **Supervisor** who must be a competent person in PFM, working in the same organization, is the candidate's immediate superior having the responsibility of supervising the day-to-day work of the candidate. The supervisor is expected to provide guidance on practical training and to timely endorse the candidate's diary when being requested.
5. The **Counsellor** who must be a professional PFM surveyor and a corporate member of the Institute of at least five years standing, is responsible to provide professional advice on the candidate's training and to timely check the appropriate forms for the candidate when being requested. In addition, the counsellor is also responsible to monitor the candidate's training progress, to conduct the interim assessment of the candidate's training, and to ensure that the candidate is suitably prepared before he/she is presented for final assessment.

6. The **Assessors** who are professional PFM Surveyors and corporate members of the Institute of at least five years standing will conduct assessment of the Practical Tasks and the Written Submissions, and conduct Professional Interviews.
7. The **PFM Division** will provide opportunities for pre-qualification structured learning. The **PFM Divisional Education Committee** administers the APC and answers technical inquiries while the **Administration Office** of the Institute provides the necessary administrative backups and assists in answering general inquiries.

### **III. The Assessment of Professional Competence**

1. The APC for PFM probationer (*for recognized cognate degree holders, non-cognate but relevant degree holders or other degree holders*) at Part I consists of:
  - (a) AMHKIS is not sought in the interim
    - (i) A minimum period of one year comprising not less than 200 working days approved training in specified areas listed in Appendix I to be documented in a diary and log book;
    - (ii) A minimum aggregate of 20 hours of qualified structured learning complementary to the training or for professional development; and
    - (iii) A written test.

OR

  - (b) AMHKIS is sought in the interim
    - (i) A minimum period of one year comprising not less than 200 working days approved training in specified areas listed in Appendix I to be documented in a diary and log book;
    - (ii) A minimum aggregate of 20 hours of qualified structured learning complementary to the training or for professional development;
    - (iii) A written test; and
    - (iv) An interview.
2. The APC for PFM probationer (*for recognized cognate sub-degree holders*) at Part I consists of:
  - (i) A minimum period of two years comprising not less than 400 working days approved training in specified areas listed in Appendix I to be documented in a diary and log book;
  - (ii) A minimum aggregate of 20 hours of qualified structured learning complementary to the training or for professional development;
  - (iii) A written test; and
  - (v) An interview.

3. The APC for eligible PFM probationer at Part II consists of:
  - (a) A minimum period of two years comprising not less than 400 working days **approved professional training** in specified areas listed in Appendix I to be documented in a diary and log book for recognized cognate degree holders; and a minimum period of three years comprising not less than 600 working days **approved professional training** in specified areas listed in Appendix I to be documented in a diary and log book for recognized non-cognate but relevant degree holders OR other degree holders OR AMHKIS holders OR a minimum period of five years comprising not less than 1000 working days **approved professional training** in specified areas listed in Appendix I to be documented in a diary and log book for *recognized cognate sub-degree holders*; all in accordance with the Institute's latest Constitutions and approvals;
  - (b) For a two-year training as specified, a minimum aggregate of 40 hours of **qualified structured learning** complementary to the professional training or for professional development; for a three-year training as specified, a minimum aggregate of 60 hours of **qualified structured learning** complementary to the professional training or for professional development; and for a five-year training as specified, a minimum aggregate of 100 hours of **qualified structured learning** complementary to the professional training or for professional development;
  - (c) A **practical task** on an authentic professional problem with which the candidate may demonstrate his/her competence in his/her professional pursuit; and
  - (d) A **professional interview** when the candidate will be tested on his/her professional competence as a PFM Surveyor.

#### IV. Eligibility

1. Candidates entering the APC must be validly registered probationer of the Institute
2. In order that a probationer may be allowed to enter the APC, he/she must hold a relevant academic qualification recognized by the Institute. For a degree to be considered for recognition, at least half of the prescribed degree programme should have been successfully completed by that applicant.
3. Candidates must be suitably employed in an establishment principally engaged in PFM or in an organization providing related services in the PFM industry. It is also important that their employers and supervisors are able and willing to provide appropriate professional training.

## **V. Entry to the Assessment of Professional Competence**

1. Candidates who wish to enter the APC should submit their applications as soon as they begin their professional career so that the available areas of training may be confirmed and their approved period of professional training may be determined. Training obtained prior to the submission and approval of application is not recognized.
2. Applications for subsequent stages of the APC must be submitted in accordance with the timetable set out in this booklet. Delayed applications will prolong the assessment process.

## **VI. Arrangements for Professional Training**

1. Candidates must familiarize themselves with the areas of professional training set out in this booklet. They should ascertain if their employment would provide sufficient opportunity for them to acquire the necessary training with adequate coverage.
2. Private practices offering professional PFM services and public bodies engaged in PFM are suitable grounds for acquiring practical experience. Other organizations providing professional services in the PFM industry may also provide opportunities in specialized areas. Candidates should take initiatives to seek professional knowledge from their supervisors and counsellors and to acquire experience upon hands-on involvement in their assignments.
3. Candidates should ensure that they have sufficient exposure to the required training areas. If the engagement in a particular employment provides only a limited scope of training, the candidates may have to consider if they need to make alternative arrangements, such as secondment to another office or change of employment, to make up for the inadequacy.
4. When candidates change their employment or counsellor, they must seek the approval of the Institute on their altered training arrangements by making a supplementary application as soon as they change employment or counsellor.
5. If in doubt, candidates may write to the Institute for preliminary opinion on the suitability of their proposed employment and training arrangements, which will be responded within six weeks.

## **VII. Supervision and Counselling**

1. A candidate undergoing professional training should be guided and instructed by a supervisor with the relevant expertise. In addition a candidate must be properly advised by a counsellor who is a professional PFM Surveyor and a corporate member of the Institute of at least five years standing. Normally, a counsellor should have under his/her guidance not more than three candidates undertaking the APC at any one time.

2. It is preferable for the counsellor to be appointed by the employer from within the organization. If for any reason an employer is unable to provide an in-house counsellor, he/she must enlist the assistance of a professional PFM Surveyor of another organization to act as external counsellor.
3. Candidates should frequently discuss their training progress with their counsellors in order that they may be properly guided.
4. *The Notes for Guidance of Employers, Supervisors and Counsellors* provide further explanation of the roles of supervisors and counsellors.

### **VIII. Area of Professional Training**

1. The minimum approved period of documented professional training for is two years comprising not less than 400 working days, as listed in Appendix I for recognized cognate degree holders; and three years comprising not less than 600 working days, as listed in Appendix I for recognized non-cognate but relevant degree holders OR other degree holders OR AMHKIS holders OR a minimum period of five years comprising not less than 1000 working days **approved professional training** in specified areas listed in Appendix I for *recognized cognate sub-degree holders*; all in accordance with the Institute's latest Constitutions and approvals. The candidates should endeavour to cover the areas of training required within the approved period, or within such extended period as may be necessary.
2. It is appreciated that candidates may not have identified their preference for core competences and/or non-core competences at the commencement of their training and are often influenced by the employment they initially secured. Nevertheless, during the course of training, candidates should develop their aptitude and specialization and identify these competences for final assessment.
3. Candidates should acquire under proper supervision, sufficient in-depth practical experience in at least the chosen core competencies and non-core competences, and reasonably balanced working knowledge in all the other areas.

### **IX. Diaries**

1. Candidates are required to maintain a Diary throughout their approved period of professional training and any extended period of training that may be required.
2. Entries in the Diary should be clear and concise as candidates are required to analyze the work carried out every month for summary in their Log Books. Entries for the work carried out in any one week should appear only on the page relating to that week.
3. Where a candidate changes employment, the Diary should be continued in the usual way, but a clear indication of the change (with details of the new employment and date) must be given on the relevant page. It is, of course, necessary for candidates

to seek the approval of the Institute in respect of their new employment by submitting a supplementary application.

4. The Diary must be signed by the candidate and his/her supervisor at the end of every week certifying correctness of entries, and by his/her counsellor at the end of every three months. This is an opportunity for the counsellor to review the progress and to ensure the adequacy and relevance of the candidate's training.
5. The Diary provides important evidence of the candidate's professional training and should therefore be kept in safe custody. It is also advisable that a copy is made before the original is submitted for interim assessment.

#### **X. Log Books**

1. Candidates are required to keep a Log Book which is an analytical account of their professional training in chronological order based on entries in the Diary, to enable the evaluation of the adequacy and balance of their professional training. It will also provide easy references to any particular aspect of training set out in the Diary.
2. The details required should be drawn from the Diary. The training received in each month must be analyzed and entered in whole days or half-days under the area and month headings of the relevant Analysis of Diary Sheet. At the end of every 3 months it must be signed by the candidate and his/her counsellor.
3. Like the Diary, the Log Book provides important evidence of the candidate's professional training and should therefore be kept in safe custody. It is also advisable that a copy is made before the original is submitted for interim assessment.
4. Before the Log Book is submitted, the time spent on each area of training must be totalled both vertically and horizontally on the Analysis of Diary Sheets.

#### **XI. Interim Assessment**

1. For a two-year training as specified, after 12 months comprising not less than 200 working days of the approved period of professional training, the Log Book and the completed sections of the Diary, together with the Interim Assessment Report and an Interim Summary of Experience, should be submitted to the counsellor for interim assessment. For a three-year training as specified, after 18 months comprising not less than 300 working days of the approved period of professional training, the Log Book and the completed sections of the Diary, together with the Interim Assessment Report and an Interim Summary of Experience, should be submitted to the counsellor for interim assessment. For a five-year training as specified, after 30 months comprising not less than 500 working days of the approved period of professional training, the Log Book and the completed sections of the Diary, together with the Interim Assessment Report and an Interim Summary of Experience, should be submitted to the counsellor for interim assessment. In the Interim Summary of Experience which should not exceed 1,000 words, the

candidate should summarize and describe the professional training so far received and a self-assessment of his/her own training progress.

2. The counsellor must assess the breadth and depth of the training so far received by the candidate, and provide advice if there appears to be any deficiency in his/her training and how this might be corrected. The candidate should observe the guidance given, as failure to do so before final assessment may result in deferment for further training.
3. The counsellor should convey his/her advice to the candidate in an interview. The counsellor should record the interim assessment and the interview on the Interim Assessment Report in duplicate, which are to be countersigned by the candidate. After the interview, all the submitted documentation will be returned to the candidate.
4. After the interim assessment, the candidate is required to file in one copy of the Interim Assessment Report and the Interim Summary of Experience to the Institute while the other copy of the Interim Assessment report should be attached to the application for final assessment.

## **XII. Pre-Qualification Structured Learning**

1. During the approved period of professional training, candidates are required to undertake on their own initiatives a minimum aggregate of 40 or 60 or 100 hours of structured learning as specified.
2. Structured learning may be in the form of short courses, organized by academic or professional institutions, or employers. All such learning courses should have been certified by the PFM Divisional Education Committee before the attendance is accepted as Structured Learning. Credit shall not be granted to the attendant unless he/she has passed a post learning test in each course.
3. Structured learning must relate to the training areas and should preferably be complementary to the practical experience that the candidates are acquiring. Study courses that will enhance professional knowledge or professional development will be suitable. Structured self-learning courses may be recognized up to an aggregate of 10 hours. Unstructured self-learning is not recognized.
4. Upon application for final assessment, candidates are required to declare the structured learning they have undertaken and they will be expected to testify their added knowledge at the professional interview. In case of queries, candidates may be required to produce evidence of their structured learning.

### **XIII. Practical Task**

1. The Practical Task is designed to give candidates an opportunity to demonstrate their ability to adopt a professional approach to the work of the PFM Surveyor and to exercise competent professional judgement.
2. The Practical Task, which normally lasts for four hours, is conducted once a year, normally in November; and will take place at a centre to be arranged. The candidate will be required to answer a specific number of questions on specific professional area. No text books or other reference materials are permitted.
3. Prior to the commencement of the assessment, candidates will assemble at the centre or an appointed location, and will be briefed on the practical problem for the task. Each candidate will be given a package containing relevant material and information relating to the problem.
4. On the following four hours, candidates will stay at the centre or the appointed location, to work out a solution to the problem as in a real life situation. It is important that candidates treat this exercise seriously and honestly.
5. All candidates will present their solutions to the Assessors by means of a written report and a presentation, to answer the queries from the assessors. The presentation may include drawings, diagrams, written materials and spoken words.
6. Assessment of the practical task will generally be based on the following aspects but variations may be made depending on the nature of the task:
  - (a) General presentation, organization, clarity of expression, use of diagram and quality of drawings. (10%)
  - (b) Ability and fluency to communicate and ability to react to questioning with logical answers. (10%)
  - (c) Ability to demonstrate all rounded knowledge at competent level. (20%)
  - (d) Ability and approach to problem solving. (20%)
  - (e) Technical contents of answers, relevance and correctness. (20%)
  - (f) Conclusion and recommendations, soundness and practicality. (20%)

### **XIV. Final Assessment**

1. After completion of the full approved period of professional training or such extended period that may be required and satisfactory completion of all the prescribed assessments such as Interim Assessment, Practical Task etc., the candidate may apply for Final Assessment

2. When applying for Final Assessment, the candidate should also submit his/her Diary covering the full (and any extended) training period, his/her Log Book, a copy of his/her Interim Assessment Report, a Summary of Experience and a Synopsis of Structured Learning.
3. In the Summary of Experience, which should not exceed 2,000 words, the candidate should summarize and describe the professional training he/she has undertaken during the full period of professional training. It should give an account of his/her personal involvement in his/her engagements and an evaluation of the experience he/she has acquired. The candidate should also illustrate and assess his/her own aptitude for specialization in his professional career.
4. As a guide, the Summary of Experience should comprise the following elements:
  - (a) a chronological account of employment and job descriptions.
  - (b) a chronological account of postings and nature of work.
  - (c) a summary/analysis of on-job training and personal involvement.
  - (d) an appraisal of guidance given by employers, supervisors and counsellors.
  - (e) an evaluation of professional practice and experience so acquired.
  - (f) an assessment of personal aptitude towards his/her chosen specialization in PFM practice.
5. In the Synopsis of Structured Learning, which should not exceed 2,000 words, the candidate is required to submit the certificates indicating that he/she has successfully completed and passed the required courses.
6. The Summary of Experience and the Synopsis of Structured Learning will enable the assessors to evaluate the adequacy and coverage of the candidate's professional training, and the sufficiency and relevance of the candidate's structured learning.
7. As the final stage of assessment, the candidates will be tested on their professional knowledge and experience as PFM Surveyors. They are expected to answer questions on their professional training, their structured learning, general PFM practice and professional ethics including the Institute's Rules of Conduct.

8. The Final Assessment will be conducted by a panel of assessors who will be looking for the following attributes:
  - (a) Adequacy in breadth and in depth, and in balance, of the candidate's professional training. (20%)
  - (b) Adequacy and relevance of the candidate's structured learning. (20%)
  - (c) General knowledge of professional PFM practices. (25%)
  - (d) Professional ethics and legal liabilities of PFM Surveyors. (25%)
  - (e) General presentation. (10%)

#### **XV. Notification of Results**

1. Individual marks awarded will not be disclosed.
2. Results of the Practical Task and Final Assessment will be released normally within one month.
3. All results are final and are not subject to appeal.

#### **XVI. Arrangement for Unsuccessful Candidates**

1. Unsuccessful candidates are encouraged to seek advice from their counsellors.
2. Candidates who fail in their Practical Task or Final Assessment may apply to re-take in the next occasion
3. Candidates whose professional training is considered deficient in coverage or depth may be required to undertake an extended period of training before re-assessment. Such further period of training may relate to specific areas of deficiency and will normally be from 6 to 12 months. The candidates will need to maintain a Diary and Log Book for such extended period and apply for re-assessment after the period of deferral with a submission of the summary of experience covering that period.
4. Candidates whose structured learning is considered insufficient may be required to undertake structured learning of such duration as the panel of assessors may specify, within 6 to 12 months, and submit a synopsis of the supplementary structured learning.
5. After the period of deferral, the candidate can apply for a Final Assessment as the case may be.

## XVII. Submission of Applications

1. Applications in pursuance of the APC should be made on the relevant forms, fully and correctly completed, duly endorsed by the employer, supervisor or counsellor where required, and submitted with the prescribed fees where appropriate.
2. The following table lists out the content and requirements of the various forms.

<b><i>Form No.</i></b>	<b><i>Content and Requirement</i></b>
APC1/PFM	<b><i>Application to enter the APC</i></b> ✧ to be submitted by new candidates entering the APC ✧ must be endorsed by counsellor and employer ✧ must include full application fee
APC1S/PFM	<b><i>Supplementary Application to enter the APC</i></b> ✧ <i>to be submitted upon change of employment or counsellor</i> ✧ <i>must be endorsed by former employer, former counsellor, new employer and new counsellor</i>
APC2/PFM	<b><i>Diary</i></b> ✧ <i>to be maintained throughout the period of training</i> ✧ <i>must be endorsed by supervisor every week</i> ✧ <i>must be endorsed by counsellor every 3 months</i> ✧ <i>completed sections to be submitted for Interim Assessment</i> ✧ <i>all sections to be submitted for Final Assessment</i>
APC3/PFM	<b><i>Log Book</i></b> ✧ <i>to be maintained throughout the period of training</i> ✧ <i>must be endorsed by counsellor every 3 months</i> ✧ <i>completed sections to be submitted for Interim Assessment</i> ✧ <i>all sections to be submitted for Final Assessment</i>
APC4/PFM	<b><i>Interim Assessment Report</i></b> ✧ <i>to be submitted to counsellor upon completion of 12 or 18 or 30 months of training where applicable</i> ✧ <i>to be filed in after Interim Assessment</i>
APC5/PFM	<b><i>Application to undertake the Practical Task</i></b> ✧ <i>to be submitted after completion of the majority approved professional training</i> ✧ <i>accepted only in August each year</i> ✧ <i>must be endorsed by counsellor</i>

<b><i>Form No.</i></b>	<b><i>Content and Requirement</i></b>
APC5R/PFM	<p><b><i>Re-application to undertake the Practical Task</i></b></p> <ul style="list-style-type: none"> <li>✧ to be submitted after failing previous attempt</li> <li>✧ accepted only in August each year</li> <li>✧ must be endorsed by counsellor</li> <li>✧ must include fee for re-assessment</li> </ul>
APC6/PFM	<p><b><i>Application for Final Assessment</i></b></p> <ul style="list-style-type: none"> <li>✧ to be submitted after completion of full period of training</li> <li>✧ accepted only after satisfactory completion of all the prescribed assessments such as Interim Assessment, Practical Task etc. must be endorsed by counsellor</li> </ul>
APC6R/PFM	<p><b><i>Re-application for Final Assessment</i></b></p> <ul style="list-style-type: none"> <li>✧ to be submitted after the period of deferral (counting from the date of assessment)</li> <li>✧ must be endorsed by counsellor</li> <li>✧ must include fee for re-assessment</li> </ul>

3. All applications should be delivered to the Institute either personally or by post.
4. Candidates should check with the Institute if they do not receive any reply after one month of submission.
5. Late applications may result in delay in timely assessment that may unduly prolong the candidates' pursuit of professional qualification.

#### **XVIII. Fees**

1. An entry fee for the APC is payable in full at the time of application on Form APC1/PFM, which shall be non-refundable in the event the application is not approved.
2. A re-application fee, which is non-refundable in any event, is payable for every re-assessment of the Practical Task at the time of re-applications on Form APC5R/PFM. A re-application fee, which is non-refundable in any event, is payable for every re-assessment of the Final Assessment at the time of re-applications on Form APC6R/PFM.
3. The fee scale is subject to change from time to time and candidates are advised to check with the Institute before submitting their applications.

## **XIX. Time Scale**

1. The following time scale is a guide for candidates to plan their own APC programmes.

<i>Time of Training</i>	<i>Action to take</i>
Month 1	✧ Apply to enter the APC. ✧ Diary and Log Book will be issued upon approval.
Within 1 month of change of employment	✧ Apply for supplementary approval
Within 1 month of change of counsellor	✧ Apply for supplementary approval
Month 13 or 19 months or 31 months where applicable	✧ Submit Interim Assessment Report to Counsellor ✧ Counsellor conducts Interim Assessment ✧ File in Interim Assessment Report
Month 21 or 33 where or 57 months applicable (in August)	✧ Apply to undertake the Practical Task
Month 24 or 36 or 60 months where applicable (in November)	✧ Practical Task will be conducted.
Within 1 month of the Assessment	✧ Results of Practical Task will be released.
Within 1 month of Final Assessment	✧ Results of Final Assessment will be released.
Any time after the period of deferral of Final Assessment	✧ Re-apply for Final Assessment

2. Candidates who commence their approved period of professional training in or before October may normally be able to undertake the Practical Task and Final Assessment in or after November two or three years later as the case maybe.

## **XX. Inquiries**

1. General inquiries and applications should be sent to the Institute at Room 1205, 12/F, Wing On Centre, 111 Connaught Road Central, Sheung Wan, Hong Kong.  
Telephone : 2526 3679; Facsimile : 2868 4612; E-mail : <edudept@hkis.org.hk>
2. Further queries may be directed to the Chairman of the Property and Facility Management Divisional Education Committee.

**XXI. Notes**

1. The Institute reserves the right to amend the Rules and Guide without prior notice.
2. All matters or disputes relating to the Rules and Guide is subject to the final decision of the Institute.
3. This is not a contractual publication.

## Appendix I

### Training and Professional Experience Requirements

1. We are looking to ensure a balanced, 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 or 600 or 1000 working days of approved professional training and experience within a minimum period of 24 or 36 or 60 months from the date of registering for the Assessment of Professional Competence Scheme, as specified.

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 Other Skills (Level One\*; Choose all)**

- 1.2.1 Business management, organisational 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 5)***

### **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 Repair and Maintenance**

- 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 Condition and structural survey, and preparation of survey report
- 5.7 Advice on statutory and licence compliances to owners or occupiers
- 5.8 Slope safety monitoring

## **6.0 Property Management**

- 6.1 Security management including tendering
- 6.2 Environmental hygiene management including tendering
- 6.3 Management of staff and contractors
- 6.4 Drafting and administration of deed of mutual covenants
- 6.5 Taking enforcement actions under House Rules and lease agreements; and following up on any court judgements
- 6.6 Management of accommodation, car parking, amenities and residents club house
- 6.7 Landscaping management
- 6.8 Contingency planning and handling of crisis/emergencies
- 6.9 Community events, general management matters

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

## **7.0 Finance Management**

- 7.1 Advice on property investment and financial arrangements
- 7.2 Preparation and control of asset investment and development budgets
- 7.3 Preparation and control of management and maintenance budgets
- 7.4 Finance planning and forecasting, and resources allocation
- 7.5 Economic and market analysis
- 7.6 Scrutiny and approval of finance statements
- 7.7 Negotiation and arrangement of insurance coverage
- 7.8 Consideration and implementation of outsourcing arrangement
- 7.9 Major tendering exercises and evaluation

## **8.0 Human Resources and Organisation Management**

- 8.1 Managing people and resources
- 8.2 Staff catering and club house management
- 8.3 Office and workplace housekeeping management
- 8.4 Human resource planning and management
- 8.5 Organisational administration management
- 8.6 Car fleet and transportation management
- 8.7 Staff training and development

## **9.0 Information Technology and Communication Management**

- 9.1 Computer-aided facilities management and maintenance
- 9.2 Voice, data and telecommunication planning and management
- 9.3 Computer application, research and preparation of specification for development of valuation system
- 9.4 Help desk and tenancy service centre management
- 9.5 System disaster recovery and management

## **10.0 Quality and Performance Management and Benchmarking**

- 10.1 Customer service management
- 10.2 Quality system implementation and management
- 10.3 Environmental management
- 10.4 Occupational health and safety system implementation and management
- 10.5 Energy audit and management
- 10.6 Indoor air quality control and monitoring
- 10.7 Research and benchmarking market best practice and performance
- 10.8 Public relation and corporate communication management

## **11.0 Major Research**

- 11.1 Property asset management research
- 11.2 Corporate real estate research
- 11.3 Real estate design research
- 11.4 Project management research
- 11.5 Operation and maintenance research
- 11.6 Finance management research
- 11.7 Human resources and organisation management research
- 11.8 Information technology and communication management research
- 11.9 Quality & performance management and benchmarking research
- 11.10 Facility management research
- 11.11 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-