



香港測量師學會

**ASSESSMENT OF PROFESSIONAL COMPETENCE  
IN PURSUANCE OF THE PROFESSIONAL QUALIFICATION IN  
BUILDING SURVEYING**

**建築測量師專業評核試**

**GUIDANCE NOTES for COUNSELLORS**

**輔導顧問指引**

二零二四年五月修訂  
Revised May 2024

## **Guidance Notes for Counsellors of candidates pursuing the professional qualification MHKIS**

*These notes refer to and should be read in conjunction with the Rules and Guide to the Assessment of Professional Competence in pursuance of the professional qualification in Building Surveying, which was overhauled in 2012, and amended in January 2019, July 2020, December 2021, and revised in May 2024, to be effective on 1 June 2024.*

### **Background**

1. The BS APC 2012 is an overhauled regime of training and assessment of candidates pursuing professional membership of the Institute. The 2024 revision has updated the eligibility for admission as well as fine-tuned the assessment requirements.
2. BS APC Counsellors must be corporate members with at least 5 years post qualification standing. They should familiarize themselves fully and carefully with the Rules and Guide, with unmistakable understanding of the different stipulations. Any queries should be raised with the BS Divisional Education Committee. Preferably, Counsellors should also act as Assessors so that they can properly guide their candidates through the different stages of assessment.

### ***Counsellors Accepting Responsibilities***

3. When Counsellors accept the invitation of candidates to so act, truly the onus is now squarely placed on Counsellors to properly guide and prepare their candidates in their acquisition of professional competences. On the other hand, Counsellors are the guards of the profession to ensure only the well-prepared candidates are presented for assessment. If Counsellors are not satisfied with the progress of training, they can refuse to endorse the candidates' applications for subsequent components of the APC. When endorsing such applications, viz., to undertake the Practical Task (Form APC4/BS), or for Final Assessment (Form APC5/BS), Counsellors should ensure that all pre-requisites have been satisfactorily submitted and responded.
4. If for any reason a Counsellor cannot continue to so act during his candidate's APC programme, he should signify (on Form APC1S/BS) his ceasing to act and help the candidate to invite a new Counsellor to take over. This is particularly valid when candidates change employment and it is always more desirable, if practicable, for Counsellors to be invited from within the employing organization.

5. The Institute relies heavily on Counsellors who are mature 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 advancements and changes, just as they would expect their candidates to do so. Counsellors should maintain their alert and outlook to cultivate a better building surveying profession for both the local market and beyond.

## **APC Training**

6. Based on the different natures of academic achievement, candidates entering the profession will undergo the corresponding period of practical training. During the course of training, they will select which route to meander for their desired career pursuit.
7. It is very much a personal development process on the candidates' own initiatives by acquisition of the relevant skills and knowledge through practical involvements in surveying practices under the guidance of competent persons. APC candidates must invite professional BS to act as their Counsellors who will mentor their pursuit of professional qualifications and monitor the progress of their training accomplishments. APC trainees may be receiving coaching from different supervisors at different stages in different works environments. It is really the opportunities for the trainees to learn rather than the duty of the supervisors to teach.
8. It is desirable that Counsellors are invited from within the candidates' employs. In-house Counsellors operating as the candidates' works supervisors should be able to provide direct coaching to the candidates' training and to monitor their performance. Even if in-house Counsellors may not be operating as direct supervisors throughout the candidates' training, hopefully they will be able to maintain full awareness of their candidates' performance in the same organization.
9. Where professional BS are invited to act as External Counsellors, they are not in the same employs as their candidates and can only operate in a remote and hands-off capacity. External Counsellors who may not be seeing their candidates very often should therefore make extra efforts to regularly review with their candidates their training progress.
10. 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 also more importantly, in their attitude and ethical approach to professionalism.

11. In order that Counsellors may adequately monitor their candidates' training, Counsellors should encourage their candidates to maintain full records of their training in proper diaries as suggested in clause 2.4.2 of the Rules and Guide, or in any other suitable format, so that it may be analyzed and reviewed to ascertain sufficiency of their training. For this purpose, Counsellors should arrange regular mentoring meetings with their candidates, preferably once every 3 months, to ensure that their candidates are on the right track with their APC. It should be noted that the Log Book (Form APC2/BS) comprises 3-monthly Log Sheets. Counsellors should ensure that their candidates are diligently maintaining their Log Books so that Counsellors would have no problem checking the training progress of their candidates.
12. 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. Counsellors should also monitor their candidates' progress of PQSL, preferably at the occasions of regular mentoring sessions on their Self Assessment Reports, and vet their Synopses of Structured Learning prior to their applications for Final Assessment.
13. As required by the Rules and Guide, professional candidates must have a sound knowledge base of the anatomy and physiology of buildings, and they must be conversant in their chosen mainstream practice with sufficient in-depth practical experience and expertise, and they should also have acquired reasonably balanced working experience in all the other non-mainstream areas of the core competences. In addition to the "what" and the "how", Building Surveyors must know the "why" of their core competences. Counsellors should therefore ensure that their candidates have fully acquired the professional expertise set out in Appendix I of the Rules and Guide.
14. Depending on the training opportunities the candidates may have from time to time, it is inevitable that they may change their main stream practice during the course of training. When such situation arises, Counsellors are encouraged to stay put with their candidates to maintain continuity, or for the sake of the candidates receiving more relevant training and direct monitoring, transfer them to new Counsellors from the candidates' new employs.

15. Candidates undergoing APC training may be pursuing other courses of personal development at the same time, e.g., studying for a post-graduate degree, getting married, starting a family with babies. Some of them, unfortunately, may be facing different kinds of difficulties and problems, with their health or families. Any of such instances may invariably affect their training progress. Counsellors are encouraged to be understanding and supportive, and extend to those needy the care and concern of the big surveying family.

### ***Self Assessment Report***

16. To assist both the candidates in mapping their learning and accomplishments, and the Counsellors in monitoring their training progress, a series of Self Assessment Reports (SAR) are stipulated. Candidate must demonstrate their acquired competences for every consecutive 9 months of the approved period 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 schedule stipulated in the Rules and Guide, and Counsellors should also make early responses to such SAR submissions. This must be taken seriously as non-submission of the SAR will automatically suffocate the APC, and delayed submission of the SAR will inevitably prolong the APC period.
17. Upon receipt of the Self Assessment Reports (Form APC3/BS) from their candidates, Counsellors should assess the submissions together with the candidates' Log Books (Form APC2/BS) both quantitatively and qualitatively. Counsellors should check that the Log Book entries are genuine summaries from the candidates' diaries or training records. It must be reiterated that any fabrication or falsification of Log Book entries may amount to fraudulent misrepresentation, and may result in the candidate's dismissal from the APC.
18. Counsellors should also check that a full account of the experience acquired in the relevant period is presented. The relevant period for each SAR is 9 months in duration, or such longer period as may be prolonged by intermittent suspension of the approved period of training, or the delay in the SAR submission. In addition to the training contents and the competences acquired, Counsellors should also evaluate and provide advice on the candidates' presentation skills, use of English and trade jargons, and report writing, as such will be essential elements in their future practices. It should be emphasized that tabulations in the report may be useful to a certain extent, but they can hardly demonstrate writing skills and the use of English.

19. In assessing the SAR, Counsellors must make sure that their candidates do not put in case analyses, sometimes with case documents and details that are, more than often, privileged documents, which in any event should not be included in private reports. It is more important to assure what the candidates have learned through active participation in the identified projects, rather than how the projects were conducted and performed by their masters or colleagues.
20. If a Self Assessment Report is not up to standard, Counsellors have the discretion to require amendments, corrections, substantiations, or anything that can help improve its content and presentation. This could be the only learning opportunity for the candidates, and Counsellors should at least be providing tutorials and coaching.
21. Having assessed the Self Assessment Report, the Counsellor should record his finding and comments on the Report forms in duplicate, so that the candidate may file in one copy to the Institute while retaining the other copy for submission with his Application for Final Assessment.

## **Assessments**

22. The assessments leading to the professional qualification comprise the Practical Task and the Final Assessment. Applications for assessments must be treated as an important milestone during the candidates' training and Counsellors should ensure their preparedness. For unsuccessful candidates, Counsellors should ensure that they apply for re-assessment within 2 years of their last attempt, or otherwise their APC will be deemed to be terminated.

## **Practical Task**

23. The Practical Task is a 4-day exercise normally conducted annually but as we are having more candidates than we can cater for in one annual exercise, we have organized another exercise in mid-year.
24. Applications to undertake the Practical Task are only accepted during the specified period for application for each exercise, which will be announced hopefully at least a month before the confirmed dates of the exercises. Counsellors should be satisfied that their candidates are adequately prepared for the task before endorsing their applications.
25. The Practical Task is an authentic project requiring substantive building surveying input for a "site" in respect of which the "task paper" is set. Normally on day 1,

candidates will be briefed on the task problem before they disperse to work out the solution on their own, and then to present their findings and solutions on day 4 at the “centre”.

26. Candidates are expected to assume the role of consultants in the project, as in real life practices, and they may solicit advice from other consultants. When Counsellors are approached for the purpose, they may guide their candidates as in real life projects. But it is paramount that the candidates derive their own solutions instead of merely copying from the expert specialists. After all, it is the candidates who will face the challenges of presenting their findings to the panel of assessors acting as clients.
27. How candidates should present their responses to the task problem would normally be specified in the task paper. Prepared handouts for presentation may not be mandatory depending on the specific task exercise.
28. Information technology devices are permissible to be used for the candidates’ own aide-memoire but they are not to be used for any kind of presentation.
29. Assessors’ comments on the candidates’ performance will normally be conveyed to the candidates. Successful candidates may proceed to Final Assessment while failed candidates will have to undertake the Practical Task again in future exercises. Counsellors should make sure that such candidates continue to substantiate their competences and make up any identified deficiencies.

### ***Final Assessment***

30. Final Assessments are conducted throughout the year as soon as applications are received. To cater for the numerous applications and not to create excessive backlog, assessment weeks or assessment weekends will be arranged. In their applications for Final Assessment, candidates will include their Summary of Experience and their Synopsis of Structured Learning. The second copies of the Self Assessment Report submission forms (Form APC3/BS) will also be included. These additional documents are presented as evidence and illustrations. They are not meant to be assessed but to help assessors realize the training history of the candidates, including their emphases and specialties. The assessment is solely via the viva voce interview where the assessors will evaluate the overall professional competences of the candidate.
31. The Summary of Experience is the full record of the candidate’s training which should indicate his emphasis in building surveying experience and preparedness for his main

stream practice. Counsellors should help verify the comprehensiveness of the Summary.

32. The Synopsis of Structured Learning is an account of the candidate's voluntary self-learning. Counsellors should help ascertain the sufficiency of time spent and the relevance of such learning activities in complementing the candidates' core competences.
33. The copies of the Form APC3/BS will reflect the Counsellors' monitoring of the candidate's training and the advice given to them throughout the candidate's APC programme. This would also reflect how the candidate has progressed and improved in their pursuance of the APC.
34. Successful candidates are deemed to be professionally qualified and may apply for corporate membership of the Institute for the designation as MHKIS.
35. Unsuccessful candidates will normally be deferred for 9 months to substantiate their expertise and experience. The purpose of the standard deferral is for candidates to prepare one more Self Assessment Report through which they may have an updated opportunity for seeking guidance from their Counsellors, to improve their strengths and resolve their weaknesses. Hopefully with aided enhancement on their competences, the candidates may return with an expectation of success.

## **Conclusions**

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