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# **CANDIDATE QUANTITY SURVEYORS APC GUIDELINES**

## Table of Contents

<b>1. INTRODUCTION</b> .....	2
<b>2. CANDIDATE QS DAILY DIARY</b> .....	2
<b>3. LOG BOOK</b> .....	4
<b>4. RESPONSIBILITIES</b> .....	4
<b>5. APPLICATION FOR BACKDATING</b> .....	6
<b>Backdating Eligibility</b> .....	<b>6</b>
<b>6. QUANTITY SURVEYING COMPETENCIES</b> .....	6
<b>6.1. MANDATORY COMPETENCIES</b> .....	<b>6</b>
a) Professional Ethics.....	6
b) Laws related to QS Practise & Management.....	6
c) Communication Skills .....	7
d) Tariff of Professional Fees for Quantity Surveying Services.....	7
<b>6.2. CORE COMPETENCIES</b> .....	<b>7</b>
I. Estimating, Cost Planning, Cost Risk Assessment.....	7
Ii. Measurement & Quantifying .....	8
Iii. Procurement & Tendering.....	8
Iv. Contract Administration .....	9
V. Quantification Of Work Progress .....	10
Vi. Financial Management & Reporting.....	11
<b>ANNEXURE A – DAILY DIARY</b> .....	13
<b>ANNEXURE B – LOG BOOK</b> .....	14
<b>ANNEXURE C – ROUTE TO REGISTRATION</b> .....	15

## 1. INTRODUCTION

A Candidate quantity surveyor (CanQS) is a Quantity Surveyor in training and can only work under a Professional Quantity Surveyor (PrQS).

All Candidate Quantity Surveyors must have a Supervisor/mentor, who will review their Logbook on a monthly basis. They must also review their daily diary records leading up to the Assessment of Professional Competency (APC) to enable them to register as Professional Quantity Surveyors. The signed off Logbook must be submitted to the QSRC annually together with the daily diary sheets. These must cover a 12 months period.

At the end of the duration of the candidacy as stated in the registration approval letter, the CanQS must submit the following:

- Signed Logbook
- Signed Daily Diary Sheets
- A report of Post Graduate Experience Report (as per the Guidelines for Post Graduate Report)

These must be submitted within 3 months from the completion date. The Registration Committee will make an assessment of the CanQS final submission, and the CanQS will be called for an APC Test and/or Interview. Following which, the Registration Committee will make a recommendation to the Council. In case of not attaining the required competencies, or inadequacy in the submitted reports, the candidacy can be extended for a further period.

If the Council is happy with the Candidate's final submission, the Candidate will be registered as a PrQS and will be required to submit a completed Application for a Practising Certificate form upon payment of the PrQS registration fee of P2 500.00.

Renewal of the Candidate's QS letter of registration will only be done after submission of the logbook.

## 2. CANDIDATE QS DAILY DIARY

The Daily Diary must be as per Annexure A attached. This must be signed off by the Supervisor every month. The Candidate QS will have 1 sheet per month. The Diary sheet must be completed every day. If the CanQS was on leave, please indicate the date and state under the Description Column that you were on leave. The Diary must be completed from beginning of each month, and a new sheet completed for each month.

DATE	PROJECT	Description of Professional Work Carried out	Degree of responsibility	Hours spent	Competency Reference
			Select degree of responsibility		
			Select degree of responsibility		
			Being Exposed		
			Assisting		
			Participating		
			Contributing		
			Performing		
			Select degree of responsibility		

- The “**date**” column is the date when the task was performed. Any gaps during the month must also be indicated as stated above with regards to leave. Tasks not completed in a day must be recorded again the following day, or whenever the task is continued.
- Input the name of the project you are working on under the “**Project**” column. If it is not a Project, state so.
- In the “**Description of Work**”, you should give a more detailed description of what tasks you are doing specifically so that your mentor/supervisor can monitor your progress with full knowledge of what you have done, e.g. **Measurement of Partitioning work to Block 1 from drawing BWG 5510 Rev 1 as per Architect Instruction No.10**. This is an excellent tool to record what you have done for tracking work completed. You must also state if the task was completed or transferred to someone else to complete.
- Under the “**Degree of responsibility**” column, please select from the drop down your level of involvement in each task captured here. This is clearly explained in the table below:

<b>Degree of Responsibility</b>	<b>Nature of task: the candidate</b>	<b>Extent of Supervisor/ Mentor Support</b>
<b>1: Being Exposed</b>	Undergoes induction, observes processes and work of competent Practitioners	Supervisor explains and forms of solutions; and makes sure the Candidate is exposed to relevant information/tasks
<b>2: Assisting</b>	Performs specific processes/tasks under close supervision	Supervisor/Mentor coaches, offers feedback
<b>3: Participating</b>	Performs specific processes/tasks as directed with limited supervision	Supervisor progressively reduces support, but monitors outputs
<b>4: Contributing</b>	Performs specific work with detailed approval of work outputs	Candidates articulates own reasoning and compares it with those of supervisor
<b>5: Performing</b>	Works without supervision or with minimum supervision, recommends work outputs, responsible, but is not accountable	Candidate takes on tasks without support, at most limited to accountability towards the PrQS Mentor who is accountable overall

- **Hours** – Time taken in each task must be stated under the “Hours” column.
- **Competency reference** – This refers to the competency numbering in the Logbook. This will help you to ensure that you have covered all the Six Core Competencies. For example, if you are doing measurements and taking off from the drawings, the competency reference will be 2.3.

### 3. LOG BOOK

The Logbook must be as per Annexure B attached, and must be completed every month to demonstrate which competencies have been captured, this must relate to the Daily Diary Sheets. In essence, the Logbook shows an overall summary of the work undertaken by the Candidate, which means you cannot have an entry in the Log Book not captured in the Daily Sheets. This will make it easier for the Registration Committee to make an assessment of the Candidate’s work since it will be detailed in the Diary sheets. When submitting the Logbook to the QSRC, all the Diary sheets must be attached in a chronological order. Both the CanQS and mentor must add their comments to the logbook and daily diary, including signing of the documents.

The Candidate must complete the month column to show which month is month 1, and also indicate the year. Though the Daily Diary is captured in hours, the logbook summarises the Daily Diary in days. The CanQS must indicate the number of days spent per element under each competency per month over a 12 month period. The total number of days spent under each element per annum must also be shown in the last column before the comments column.

Details must be provided to make it easier for the Supervisor to understand where you are lagging behind, and which competencies have not been covered so that they are able to assist. Also, the details must demonstrate a level of understanding the Candidate is at.

### 4. RESPONSIBILITIES

#### 4.1. Candidate’s Responsibility

- ✚ Candidates are required to maintain a diary recorded in hours of their day-to-day experience with reference to the Competencies as detailed in the Logbook.
- ✚ Diarised daily experience is to be summarised in the Logbook. Daily diary sheets and the logbook are to be updated in the format provided by the Council.
- ✚ The candidate is responsible to ensure that they attain the full spectrum of workplace skill/experience required and highlight any deficiencies with their supervisor/mentor.
- ✚ Interim and final word-processed reports must demonstrate not only the candidate’s experience, but also their ability to express themselves formally.
- ✚ Interim submissions will be evaluated by QSRC Registration Committee and candidates will be informed of any shortcomings in their practical, professional experience or report-writing skills that require to be remedied.
- ✚ Candidates must ensure compliance with the requirements and that processes of Assessment of Professional Competence are not undermined.
- ✚ Candidates are required to complete the Route to Registration within the

prescribed period as detailed in the Route to Registration (Annexure C) and in their letter of registration.

- ✚ If the candidate changes employment or if the supervisor/mentor is changed, the Registrar of the Council must be notified in writing immediately.
- ✚ Verify the PrQSs mentorship by signing their CPD form.

#### **4.2. Employer's Responsibility**

- ✚ It is the employer's responsibility to ensure that the candidate acquires the necessary experience and professional independence.
- ✚ The candidate must be given guidance, advice and encouragement to fulfil the requirements of the Assessment of Professional Competence (APC).
- ✚ The candidate is required to obtain the minimum of the prescribed workplace professional training and experience as detailed in the Route to Registration (Annexure C) based on the candidate's formal education.
- ✚ The candidate and employer must satisfy the Council that the candidate has received reasonably balanced professional training and experience as listed in the issued logbook.
  - Work in certain sub-areas may not normally be carried out by the candidate unaided.
  - Some employers will not be able to provide the full breadth of experience as prescribed. If this is the case, the candidate is required to take initiative by obtaining necessary further experience, and the employer is recommended to enter into a secondment agreement where the candidate temporarily works for a period of time in another PrQS office/employer, perhaps taking a substitute candidate from that office in exchange, for the required period.

#### **4.3. Supervisors / Mentors Responsibility**

- ✚ The employer must appoint a supervisor/mentor for every candidate.
- ✚ The supervisor/mentor is responsible to the employer and to the candidate for ensuring that the candidate receives appropriate training, the promised experience (or a suitable alternative), opportunities for development of professional confidence and independent performance of tasks.
- ✚ The supervisor/mentor must oversee the candidate's day-to-day work and countersign the candidate's diary sheets and logbook and certify the interim report, which must be submitted to the Council on an annual basis.
- ✚ The candidate should discuss any problems with the supervisor/mentor prior to the candidate's final submission.
- ✚ It is recommended that the maximum number of candidates to be assigned for supervision/mentorship to one supervisor/mentor is 5 (five).
- ✚ The supervisor/mentor must be a Registered Professional Quantity Surveyor and may not necessarily be the employer.
  - A supervisor is defined as a registered PrQS, who is an employer or employee
  - A direct relative (parent, grandparent, spouse or sibling) may not be appointed as the supervisor/mentor of the candidate.
- ✚ The supervisor/mentor is also responsible for
  - countersigning the candidate's work skills diary and the logbook every month,
  - certifying the interim and final reports
  - The supervisor/mentor must certify that the candidate has achieved the

required period of training together with the necessary breadth and quality of experience in all areas.

- The supervisor may append a performance report and make recommendation to the Registrar of the readiness of the candidate for consideration by the Registration Committee.

## 5. APPLICATION FOR BACKDATING

Backdating is the assessment and approval of prior workplace experience achieved under the supervision of a registered PrQS from the date of formal Candidate registration with the QSRC. Backdating of workplace skills training is not a right but a concession of the Registration Committee.

### Backdating Eligibility

- ❖ Application for backdating will only be considered after completion of registration as a Candidate QS.
- ❖ Any decision by the Registration Committee in respect to the granting of backdating is totally discretionary and not subject to any appeal.
- ❖ Candidate QS may only apply for backdating of their professional, practical experience gained from the date of registration stated in the Candidate's Registration Letter.
- ❖ Only the applicant's workplace experience under the direct supervision of a PrQS in good standing will be considered, that is, the Candidate QS should have been working under a PrQS.
- ❖ Backdating applications will only be considered within 12-month of initial registration with QSRC.

## 6. QUANTITY SURVEYING COMPETENCIES

The Candidate QS must complete the Mandatory Competencies including the Six Professional Core competencies as follows:

### 6.1. MANDATORY COMPETENCIES

- a) Professional Ethics
  - Understanding and compliance to the Code of Ethics & Professional Conduct Standards for Quantity Surveyors
  - Demonstrate practical application, and being able to justify actions at all times and demonstrate personal commitment to the Code of Ethics & Professional Conduct Standards for Quantity Surveyors
  - Demonstrate that you have applied these in the context of advising clients.
- b) Laws related to QS Practise & Management
  - Have an understanding of Contract Law and Construction Law
  - including the general principles of law and the legal system

c) **Communication Skills**

- Must be able to communicate effectively
- Demonstrate knowledge and understanding of effective oral, written, graphic and presentation skills including the methods and techniques that are appropriate to specific situations.
- Demonstrate practical application of these skills in a variety of situations, specifically including where negotiation is involved.

d) **Tariff of Professional Fees for Quantity Surveying Services**

- Demonstrate knowledge of how fees for QS services are calculated and application of the tariff of fees as detailed in the Tariff of fees Guidelines.

## **6.2. CORE COMPETENCIES**

### **I. ESTIMATING, COST PLANNING, COST RISK ASSESSMENT**

This competency covers advising the Client on costs, the impact of design and other factors on cost throughout the life of the building including the control of cost during the pre-contract stage. It covers the candidate's understanding of and involvement with the techniques used to estimate, manage and control costs during the design development phase of a project.

The Candidate is expected to:

- Demonstrate knowledge and understanding of the main factors that affect design economics over the whole life of a building.
- Demonstrate knowledge and understanding of how cost planning assists in the financial control of projects during the design development stage.
- Apply your knowledge to the cost management of design development on a project from feasibility to design completion.
- Prepare cost data for in-house use.

#### **Knowledge**

- Details of the Project Brief and factors affecting design economics over the life of a building
- How cost planning assists in the financial control of projects
- The various stages of cost planning
- Source/s of cost data
- Adjustments to cost data for factors including location, specification, time and market forces.
- Preliminaries, overheads and profit

#### **Activities**

- Producing project briefs



- Attending project initiation meetings and documenting learnings
- Producing estimates and cost plans
- Applying value engineering processes
- Preparing cost data for use
- Assessment of risk associated with the project

## II. MEASUREMENT & QUANTIFYING

This competency covers the measurement (taking off) and description of construction works in order to produce Bills of Quantities. It covers the candidate's understanding and involvement with the various methods of measurement used in the construction industry.

The Candidate is expected to:

- Apply your knowledge to the use of appropriate standard methods of measurement and forms of cost analysis.
- Demonstrate an understanding of the various products/material descriptions being used in the industry
- Demonstrate knowledge of the use of various basic and specialist Quantity Surveying software, including the use of Information Technology in general to enhance efficiency.

### Knowledge

- The various standard methods of measurement
- The products being used in the construction industry
- The measurement of buildings and structures to agreed standards.
- The various measurement tools available in the market including Quantity Surveying software.
- Documentation programme for the project

### Activities

- Producing pricing documents such as bills of quantities, bills of material, schedules of activities/works, schedules of rates and Preliminaries and General provisions
- The use of measurement tools including Quantity Surveying softwares.

## III. PROCUREMENT & TENDERING

This competency covers the way a project is structured and delivered in terms of risk allocation and contractual relationships, and how tendering processes are used to establish a contract price. Candidates should have a clear understanding of the different types of procurement methods and tendering commonly used and the advantages and disadvantages of each to the parties involved. They should also have a detailed working knowledge of the procurement routes and tendering procedures used on their projects. The Candidate must be aware of the different

forms of contract for use in construction, including the differences between the contract forms, and their application/suitability.

The Candidate is expected to:

- Demonstrate knowledge and understanding of the main types of procurement.
- Apply knowledge of the various forms of contract
- Demonstrate knowledge and understanding of the Procurement Policy within your place of work, and negotiation processes involved in procurement.
- Apply your knowledge to the implementation of the procurement routes selected for your projects and to carrying out tendering and negotiation processes relevant to them.
- Apply knowledge in adjudication of tenders and formats of the tender adjudication reports.

### **Knowledge**

- The main types of procurement used in both the public and private sectors
- The different forms of contract, and the differences between them
- Tendering and negotiation processes involved in procurement
- Ancillary processes such as partnering and framework agreements
- Codes of practice and procedures commonly used.

### **Activities**

- Implementing procurement routes such as traditional, design and build, management forms, term and serial contracting and other types
- Producing and compiling tender documentation such as letter of invitation, form of tender, health and safety documentation, design documentation and contractual details
- Advising on the different forms of construction contracts available for projects (JBCC, FIDIC, NEC, BIDP, etc.)
- Carrying out of the tendering and negotiation processes such as single and two stage tendering, the use of codes of practice and electronic tendering.
- Adjudication of tenders and contract sum analyses.

## **IV. CONTRACT ADMINISTRATION**

This competency covers the commercial management of construction works, and the role of a QS when administering a construction contract. Candidates should have an awareness of the financial processes used to achieve cost savings, as well as how these integrate with the overall delivery of the project. They should

have a detailed understanding of the contractual provisions relating to the forms of contract that they have administered.

The Candidate is expected to:

- Demonstrate knowledge and understanding of the principles of management of construction project.
- Apply your knowledge to the financial management of construction projects, including regular monitoring and reporting on cashflow and expenditure.
- Demonstrate knowledge and understanding of the contractual legislative and statutory requirements,
- Demonstrate knowledge and understanding of the principles and responsibilities imposed by law, codes of practice and other regulations
- Demonstrate practical application of health and safety issues and the requirements for compliance.

### **Knowledge**

- Identifying and understanding the components that make up the cost of the project to the contractor
- Understanding of the effect that the design and construction processes have on the cost
- Awareness of the techniques used to reconcile the cost against cashflow
- Awareness of the techniques to financially manage subcontractors and suppliers
- Understanding the use of cash flows.
- The requirements of performance bond guarantee, relevant insurances and other guarantees/sureties.

### **Activities**

- Preparing contract documentation for signing
- Preparing and collecting of data for reports
- Carrying out cost to completion exercises
- Preparing cash flows
- Applying value engineering processes
- Preparing and submitting cost data for use in relation to areas such as cost of preliminaries, comparative cost of different construction techniques and taxation allowances.

## **V. QUANTIFICATION OF WORK PROGRESS**

This competency covers the measurement and definition of construction works in order to value and control costs. It covers the candidate's understanding and involvement with the various methods of quantifying and pricing construction

works used throughout a project. This also includes the valuation of progress of work and the preparation of interim payment certificates.

The Candidate is expected to:

- Demonstrate knowledge and understanding of the principles of quantification and costing of construction works as a basis for the financial management of contracts.
- Apply your knowledge to the quantification and costing of construction works, including the use of appropriate standard methods of measurement and forms of cost analysis.
- Carry out re-measurement and costing of works at all stages of the construction process.
- Attend progress meetings

### **Knowledge**

- The quantification of construction works (including both measurement and definition)
- The costing of construction works

### **Activities**

- Quantifying construction works at the various stages of a project to produce valuations of work, interim payment certificates, etc.
- Carry out re-measurements and costing of works at all stages of the construction process.
- Carrying out the costing of construction works by methods such as tendered rates, quotations or day-works.
- Attendance of progress meetings and documenting learnings.

## **VI. FINANCIAL MANAGEMENT & REPORTING**

This competency covers the effective cost control of construction projects during the construction phase. Candidates should be aware of the principles of controlling and reporting costs on any construction project. They should have an understanding of the control and reporting processes used on their projects; including the preparation of final accounts and close-out reports.

The Candidate is expected to:

- Demonstrate knowledge and understanding of the effective control of costs during a project.
- Demonstrate understanding of the legal and contractual constraints and the effect of time and quality on the cost of a project.
- Apply your knowledge to the management of project costs. This should include the preparation and presentation of financial reports on the performance of a project at appropriate intervals to provide effective forecasting of costs, risks and their financial implications.
- Manage and assess contractual claims including variations

- Apply your knowledge of preparation of final accounts

### **Knowledge**

- The effective control of costs during the construction phase of a project
- The legal and contractual constraints on the cost of a project such as changes in building legislation and design risk allocation
- The reporting and forecasting of costs during the construction phase
- The principles of contingencies/risk allowances.

### **Activities**

- Managing project costs during the construction phase
- Adjudication and resolving claims by the contractor, subcontractors and/or suppliers including Extension of Time claims
- Preparing cost reports such as liability statements, cost to complete and cost value reconciliations
- Managing risk allowances such as provisional sums and contingency amounts.
- Preparation of the final account
- Preparation of the Close out report

**ANNEXURE A – DAILY DIARY**

**CANDIDATE NAME:**

**REGISTRATION NO. :**

<b>DATE</b>	<b>PROJECT</b>	<b>Description of Professional Work Carried out</b>	<b>Degree of responsibility</b>	<b>Hours spent</b>	<b>Competency Reference</b>
			Select degree of responsibility		
			Select degree of responsibility		
			Select degree of responsibility		
			Select degree of responsibility		
			Select degree of responsibility		
			Select degree of responsibility		
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			Select degree of responsibility		
			Select degree of responsibility		
			Select degree of responsibility		

**ANNEXURE B – LOG BOOK**

**See attached**

## ANNEXURE C – ROUTE TO REGISTRATION

