

**BOARD NOTICE 81 OF 2009**

**SOUTH AFRICAN COUNCIL FOR THE QUANTITY SURVEYING PROFESSION  
POLICY:  
REGISTRATION AND ASSESSMENT OF PROFESSIONAL COMPETENCE**

**1. APPLICATION FOR REGISTRATION IN TERMS OF THE QUANTITY SURVEYING PROFESSION ACT 2000 (ACT NO 49 OF 2000)**

Applicants are required to complete the APPLICATION FOR REGISTRATION which facilitates application for registration as a Candidate Quantity Surveyor

**2. CANDIDATE QUANTITY SURVEYOR**

**2.1 Application for registration as a Candidate (section 18.(1) (b)) of Act 49/2000**

Applicants are required to submit the following information:

- (i) Completed application form
- (ii) Certified copy of qualification awarded
- (iii) Certified copy of Identity Document or Passport
- (iv) Completed and signed declaration: Candidate
- (v) Completed and signed declaration / undertaking:
- (vi) Proof of payment: enrolment fee

**2.2 Administration: application for registration as a Candidate**

- (i) Verification of receipt of enrolment fee
- (ii) Scrutiny of information stated on application form
- (iii) Verification of supervisor's status:
- (iv) Assessment of areas of supervised, professional experience to be gained by the Candidate, stated in Employer's signed undertaking. Applicants are informed in writing, by the Registrar's office of any requirements arising from the assessment and a copy of the correspondence is sent to the Employer (as an explanation to assist the Employer)
- (v) An Applicant's in-training period commences *post-qualification*, on the date on which Candidacy is confirmed, provided that the Applicant is currently employed
- (vi) Anticipated dates by which the Registrar is to receive the following submissions:
  - Interim (18 months after confirmed date of Candidate's registration)
  - Final (33 months after confirmed date of Candidate's registration)
- (vii) When foregoing processes (i) to (vi) have been finalised, an invoice is raised for the annual registration fee which is due and payable to the Council by the Applicant before any further information is conveyed
- (viii) When proof of payment of the annual registration fee is received, an IT (in-training) Registration Number is allocated and a Registration Certificate printed for enclosure in a letter to the Applicant (whose status changes to that of Candidate) and copied to the Employer, conveying all the information arising from foregoing points (i) to (vii), and in addition, copies of the following documents are provided:
  - (a) The Quantity Surveying Profession Act 2000 (Act No 49 / 2000)
  - (b) SACQSP Code of Conduct
  - (c) SACQSP Rules
  - (d) Guide to the Assessment of Technical / Professional Competence
  - (e) Specimen sheets: reports



- (f) Specimen daily diary sheets
- (g) Guidelines: report writing
- (ix) If the information contained in the original application is *not* in order, a letter is addressed to the Applicant and copied to the Employer, requesting additional / correct information, which will be re-processed in terms of foregoing points (i) to (vii)
- (x) When the registration process is completed, all the newly-registered Candidate's details are entered in the register of persons in-training, maintained by the Council in terms of section 11.(c) of Act 49 / 2000

### **3 SUPERVISED / DIARISED / RECORDED / LOGGED / CERTIFIED PROFESSIONAL EXPERIENCE TO BE GAINED BY CANDIDATE QUANTITY SURVEYORS**

Candidates must demonstrate that they have gained appropriate, supervised, mentored professional experience in either the building or the engineering construction industry

Experience in the building industry includes building-related engineering services

For the purpose of an Assessment of Professional Competence (APC), engineering construction incorporates both civil engineering and mechanical/electrical engineering associated with engineering construction

Broad definitions of different engineering disciplines are the following:

:

#### **(i) Civil engineering**

- o Major earthworks
- o Roads and bridges
- o Railways
- o Tunnelling and shaft-sinking
- o Major sewerage and water treatment facilities
- o Dams
- o Harbours
- o Treatment of industrial effluent
- o Major civil construction works associated with power generation, other processing plants and similar works

#### **(ii) Mechanical engineering**

- o Process and manufacturing plants including but not limited to pipework, ductwork, insulation, heavy lifting gear and fire protection systems
- o Production platforms and the like for the oil and gas industry
- o Pipelines for fluid and gas transmission
- o Material-handling installations
- o Ductwork, plate work and associated plant for use in the chemical and mining industries
- o Large scale heating, ventilation and air-conditioning installations
- o Structural steelwork



- o Building and civil engineering work in connection with the foregoing

**(iii) Electrical engineering**

- o Transmission cabling and supports
- o Installations in connection with engineering construction
- o Switchgear and transformers
- o High voltage power transmission
- o Medium and low-voltage power transmission
- o Lighting and power installations
- o Instrumentation
- o Space heating
- o Fire detection
- o Communication installations within building and civil engineering work in connection with the foregoing

Section 4 presents skills competencies which are fundamental to quantity surveying, in which Candidates are required to demonstrate their competence

Section 4 (v) covers specialised activities, some of which may not be undertaken by all firms or Employer organisations, and while Candidates may be exposed to certain aspects of specialised services, they will not be expected to have achieved competence in all the listed activities

Experience recorded in a Candidate's diaries should be referenced in terms of the SACQSP Logbook skills categories. Some activities may be recorded under more than one heading and should reflect a balanced distribution of practical experience

If Candidates are unable to obtain sufficient experience in a particular skills category, simulation offers an acceptable alternative. They should undertake assignments based on previously-completed tasks performed within their offices and submit their completed assignments for evaluation by their supervisors / mentors. Alternatively, they should be permitted to observe / assist their supervisors / mentors in the latter's performance of such tasks

Candidates must obtain the Council's approval of any quantity surveying experience which does not fall within the areas specified in section 4

Candidates who change their

- place of employment or the type of industry in which they are employed (building to engineering or *vice versa*)
- supervisor / mentor

must submit full details of such changes to the Council for approval

**4 SUPERVISED / MENTORED PROFESSIONAL EXPERIENCE TO BE GAINED BY A CANDIDATE UNDER THE GUIDANCE OF A REGISTERED MENTOR, APPOINTED IN TERMS OF THE DECLARATION OF THE CANDIDATE'S EMPLOYER**

**(i) Cost advice and cost planning**

- o Preparing and using cost data



- Preparing estimates
  - Undertaking financial feasibility and comparative studies
  - Preparing and using detailed budgets and cost plans, cost checking during design development; compiling and using cost limits
  - Preparing and applying cost-in-use studies; life cycle costing
  - Preparing and interpreting turnover/cash flow projections and profit/loss forecasts
  - Cost control and reporting during pre-contract period
- (ii) Contract documentation**
- Preparing bills of quantities for principal or sub-contracts of supply including the measurement and description of work, drafting of preliminaries, preambles and contract conditions
  - Preparing bills of measurement for final accounts if measured from drawings
  - Preparing specifications and/or schedules of rates
  - Contractual correspondence
- (iii) Tendering and contractual arrangements**
- Formulating or implementing procedures on tendering and contractual arrangements for principal or sub-contracts or contracts of supply
  - Advising on selection of tenders; evaluation of and reporting on tenders
  - Preparing tenders including compilation of rates for work and preliminaries
- (iv) Contract services**
- The following are applicable to principal contracts or sub-contracts:
- Advising on cost during progress of the works, estimating final costs and reporting on the financial aspects
  - Monitoring of proposed construction methods or sequences and reporting on actual requirements; preparing cost benefit reports on alternative construction methods
  - Cost control during progress of the works
  - Preparing valuations for interim certificates
  - Analysing contract price relative to cost recording methods
  - Preparing and agreeing final accounts and contra charges
  - Reporting on, evaluating and negotiating contractual and extra-contractual issues; contract correspondence; attending site meetings
  - Preparing or interpreting cost/value and other reconciliation statements for management purposes
  - Surveying, measuring and recording site information
- (v) Specialisations**
- Taxation allowances and grants
  - Planning or programming of contract works
  - Resource determination, scheduling and purchasing
  - Procurement of plant and materials
  - Production cost/quality control, time standards and operational methods
  - Productivity methods and evaluation
  - Project planning and project management
  - Insurance
  - Litigation and arbitration
  - Insolvency and liquidation
  - Planned preventative maintenance



- o Schedules of dilapidation
- o Technical audits
- o Office management including resource allocation, fees and budgets
- o Maintenance of buildings
- o Research and development

Details of any other specialisations that Candidates may wish to include must be submitted to the Council for prior approval

**5 SUBMISSION OF INTERIM OR FINAL REPORTS: THE DATES STATED IN THE LETTER TO A CANDIDATE, WILL CORRESPOND WITH CLOSING DATES FOR RECEIPT OF SUBMISSIONS INDICATED IN THE CURRENT SACQSP YEAR PLANNER**

- (i) Candidates and their Employers / Supervisors must complete the application form for Inspection of Reports (*Interim / Final*), and enclose the following documents for delivery to the Registrar's office
  - (a) certified General Report
  - (b) certified Project Report
  - (c) certified Diary Sheets
  - (d) certified Logbook
- (ii) Faxed or e-mailed submissions will not be accepted
- (iii) The Registrar's office provides written acknowledgement of receipt of all submissions
- (iv) Submissions are delivered to Assessors appointed by the Council, who evaluate the content, scope and quality of the supervised / mentored technical or professional experience gained by a Candidate, and the standard of presentation of the certified documents
- (v) Assessors are required by the Council to provide written reports arising from their evaluation of Candidates' submissions. These reports are considered by the Registration Committee prior to transmission to Candidates and their Employers
- (vi) Assessors' reports on INTERIM submissions are *advisory* and intended to specifically state whether the
  - scope and standard of the supervised / mentored technical or professional experience gained during the *first phase* of the in-training period is satisfactory,
  - content, format and standard of presentation of the certified documents is acceptable in terms of a similar approach to be applied when FINAL submissions are drafted
  - A Candidate's
    - ↓ supervised / mentored technical or professional experience should be enhanced / improved,
    - ↓ content / format / standard of presentation of the certified documents should be improved
- (vii) An Assessor's recommendation to the Registration Committee, based on evaluation of a FINAL submission, is the determining factor on which the Committee will approve a Candidate's
  - admission to an Assessment of Technical Competence (ATC) or Assessment of Professional Competence (APC) interview
  - deferment until the Candidate re-submits certified reports to the Registrar indicating that mentored experience has been enhanced and/or the quality of final submissions has been improved



- (viii) If an Assessor recommends that a Candidate's admission to an ATC or APC interview is to be deferred, a detailed, written motivation is to be provided for approval by the Registration Committee
- (ix) Resubmitted, certified reports will be delivered to the Assessor who evaluated the original (previously rejected) submissions, for re-evaluation, comment and provision of a recommendation to the Registration Committee,
- (x) Candidates receive written confirmation by the Registrar's office of their
  - admission to an ATC or APC interview and proposed arrangements, or
  - deferment (with reasons stated)

**6 APPLICATION BY A REGISTERED CANDIDATE QUANTITY SURVEYOR FOR BACKDATING OF EXPERIENCE (RECOGNITION OF PRIOR LEARNING)**

- (i) Only Registered Candidates may apply for backdating of technical or professional, practical experience gained prior to the date of registration stated in the letter to the Applicant described in foregoing 2.2 (viii)
- (ii) Two alternative types of submissions are available to Candidates who apply for backdating of their technical or professional experience

**Recognition of Prior Learning: Alternative No 1**

The following information should be submitted for consideration by the Registration Committee:

- A letter from the Candidate, requesting backdating of practical experience
- A tabulated Project Report, certified by the Candidate's (previous and current) / Supervisors (PrQS or PrEng), which presents a résumé of the projects on which the Candidate had been employed, the Candidate's applied quantity surveying skills / detailed personal roles and functions referenced in terms of the SACQSP skills competencies related to work to be performed, for example:

**RÉSUMÉ TO SUPPORT APPLICATION FOR BACKDATING OF TECHNICAL / PROFESSIONAL EXPERIENCE**

Project No, date and contract period	Project title, client, project scope, value	SACQSP skills categories / Candidate's personal roles and functions	Name of Employer's firm / supervisor's name & registration no. (printed) signature (for certification) and date
eg No 1: 1999: 6 months	eg <ul style="list-style-type: none"> <li>• XYZ Golf Estate and Conference Facilities;</li> <li>• John Smith</li> <li>• Conference Centre, clubhouse, residential units, golf course and landscaping</li> <li>• R1.5bn</li> </ul>	eg 2.1.1 Preparing and using cost data 2.1.2 Preparing estimates 2.2.3 Preparing schedules of rates 2.4.3 Cost control during progress of the works 2.4.6 Preparing & agreeing final accounts & contract charges	eg ABC Construction (Pty) Ltd  Peter Brown, PrEng Reg No 456  <i>Peter Brown</i> 24 January 2008



### **Recognition of Prior Learning: Alternative No 2**

The following information should be submitted for consideration by the Registration Committee:

- a comprehensive business / project CV which lists all the projects on which the Candidate has worked during the past 3 years and which provides explicit details of the Candidate's personal quantity surveying roles and functions on each of those projects, with
    - each role / function, on each project referenced to the SACQSP skills competencies
    - the contents of the business / project CV / personal QS roles and functions verified by the Candidate's previous and current Employers / Supervisors if any changes in employment have occurred during the past 3 years
  - signed letters of commendation, presented on their original letterheads, from clients and registered consultants with whom the Candidate has worked on the projects listed in the business / project CV. Commendation must be referenced to specific SACQSP skills competencies. Each client and registered professional consultant should be given a copy of the SACQSP Skills competencies to be used for defining references in attesting to the Candidate's quantity surveying competence
- (iii) When received by the Registrar's office, the foregoing information will be submitted to the Registration Committee for adjudication and a recommendation that the Candidate
- (a) acquires a prescribed (enhanced) scope of quantity surveying skills and / or experience, presented in a certified report for evaluation by the Committee prior to be admitted to an APC interview; or
  - (b) is permitted a shortened supervised / mentored in-training period, but that all other conditions stated in the letter to the Candidate described in foregoing 2.2 (vii) will still apply; or
  - (c) is to be admitted to an APC interview without further practical in-training requirements; or
  - (d) is to acquire a prescribed (enhanced) scope of quantity surveying skills and / or experience, presented in a certified report for evaluation by the Committee, and is to pass the Council Examinations prior to submitting an application for admission to an ATC or APC interview.

### **7 MEMBERS OF THE ROYAL INSTITUTION OF CHARTERED SURVEYORS AND/OR OTHER ORGANISATIONS ALLIED TO THE QUANTITY SURVEYING PROFESSION**

- The terms of the Memorandum of Understanding between the SACQSP and the RICS will apply
- Persons holding quantity surveying qualifications accredited or recognised by the SACQSP, with at least one year's (current) relevant professional experience gained in South Africa and on submission of a résumé of this practical experience, may be admitted to a professional interview and subsequently registered as a 'Professional Quantity Surveyor' (PrQS) by the SACQSP.



## 8 EMPLOYER'S RESPONSIBILITY

- It is the Employer's responsibility to ensure that the Candidate acquires the necessary technical / professional experience. The Candidate must be given guidance, advice and encouragement to fulfill the requirements of the APC.
- When a Candidate applies to enter the APC process, the Employer (usually a principal, partner or person responsible for training) must prepare a programme and sign a declaration that the appropriate experience and supervision will be provided.
- Candidates are required to obtain a minimum of **600 working days of technical / professional training and experience, within a minimum period of 33 months**, by meeting the requirements detailed in this Policy.
- The Candidate and the Employer must satisfy the Council that the Candidate has received reasonably balanced technical / professional training and experience. Some Employers' will not be able to provide the full breadth of experience required by the APC process, and Candidates must be warned if this is the case, Employers could temporarily second their Candidates (for an agreed period) to another office where the prerequisite technical or professional experience *will* be gained, and the Employer may consider taking a substitute Candidate from the secondment office in exchange.
- Work in certain specialised may not normally be carried out (unaided) by Candidates
- Candidates are required to maintain comprehensive Diaries of their day-to-day experience with reference to the SACQSP skills competencies. Day work is to be summarised in the Logbook. Diary sheets and the Logbook are provided by the Council
- Interim word processed reports are designed to demonstrate not only Candidates' experience, but also their ability to express themselves formally. Interim submissions will be evaluated by SACQSP-appointed assessors and Candidates will be informed of any shortcomings in experience or in report-writing skills.
- s must ensure compliance with the Rules and that the purpose of an ATC or APC is not undermined.

## 9 SUPERVISORS

- The Employer must appoint a supervisor for every Candidate.
- The supervisor is responsible to the Employer and to the Candidate for ensuring that the Candidate receives appropriate training and the promised experience (or a suitable alternative) and that the Candidate develops professional confidence to perform tasks independently. The supervisor must countersign the Candidate's Diary sheets and Logbook and certify the interim report, which must be submitted to the Council. The Candidate should discuss any problems with the supervisor.
- Prior to the Candidate's application for admission to an ATC or APC interview, the supervisor must certify that the Candidate has achieved the required period of training together with the necessary breadth and quality of experience in all areas.
- Supervisors must be Registered Professionals but not necessarily the Employer or a senior person within the Employer's own organisation
- The supervisor is also responsible for overseeing the Candidate's day-to-day work. The supervisor must countersign the Candidate's Diary each week and the Logbook every three months, and certify the interim and final reports.
- If the Candidate changes employment or if the supervisor is changed, the Council must be notified immediately.
- The supervisor is responsible for ensuring that, as part of the Candidate's training and experience, the Candidate is given the opportunity to attend at least 20 hours of



appropriate Continuing Professional Development during the training period. This is in addition to the minimum requirement of 600 working days.

- No relative (family member) may certify a Candidate's diaries, reports or other submissions related to an Assessment of Professional Competence



**EMPLOYER'S UNDERTAKING: CANDIDATE QUANTITY SURVEYOR**

*NOTE: This declaration is to be signed by a Principal/Head of Department in the firm or organisation where the Candidate is employed. Where the Candidate is employed in the public service, the signature of the Head (or authorised deputy) of the Department is required. Only Registered Professional persons may be appointed as supervisors to Candidates registered in terms of the Quantity Surveying Profession Act 2000 (Act No 49 of 2000)*

This Undertaking on behalf of (NAME AND FULL ADDRESS OF FIRM, ORAGNISATION OR DEPARTMENT: Please print)

is to be signed by a Candidate's Employer and / or supervisor in terms of this SACQSP Policy, and is to be submitted to the Registrar

I hereby certify that (CANDIDATE'S FULL NAME AND ID NUMBER)

is currently employed in my firm / organisation / department and will be afforded full opportunity - supervised by a Registered Professional member of my staff, or by me - to gain appropriate practical experience in preparation for admission to the prescribed Assessment of Technical or Professional Competence interview required prior to statutory registration in terms of the Quantity Surveying Profession Act 2000 (Act No 49 of 2000)

I declare that I have read the "Employer's Responsibility" as set out in the "Guide and Rules to the Assessment of Professional Competence"

I confirm that (CANDIDATE'S NAME) ..... will be given experience in the following SACQSP skills competencies

SKILLS REFERENCE NUMBERS: .....  
.....

I shall ensure that the practical, technical / professional experience to be gained by

(CANDIDATE'S NAME) ..... is properly supervised and that all Diary Sheets and Logbook entries to be submitted to the Council are certified

I have nominated (SUPERVISOR'S NAME & REGISTRATION NUMBER).....

.....as supervisor while

(CANDIDATE'S NAME).....

gains the technical / professional experience I have hereby undertaken to provide

**CANDIDATE'S NAME (Please Print).....**

**SIGNATURE AND DATE.....**



### CANDIDATE'S DECLARATION

I, the undersigned, have read the "SACQSP Policy: Registration and Assessment of Professional Competence" and declare that I am entitled to registration under section 18(1)(b) of the Quantity Surveying Profession Act 2000 (Act No 49 of 2000).

In order to commence my supervised, mentored period of practical, technical / professional training, I hereby apply for inclusion in the Register maintained by the South African Council for the Quantity Surveying Profession in terms of Section 11 of Act No 49 of 2000, and submit the following:

- Application for registration
- Employer's Undertaking  
Note: If I should change my place of employment during my Candidacy period, I shall
  - (i) ensure that my new Employer/s complete and sign a new "Employer's Undertaking"
  - (ii) submit the newly-signed "Employer's Undertaking" to the Registrar
- Certified copies of my qualification/s and/or certificate/s
- Certified copy of my Identity Document or Passport
- Proof of remittance of the \*\*registration fee (R.....)

If my application is successful, I will pay the \*\*annual fee applicable to the current financial year on receipt of the SACQSP invoice.

.....  
**Signature**

.....  
**Date**

.....  
**Name (printed)**

\*\*Fees are published on the website <http://www.sacqsp.org.za>

End. Glr 20.08.2008