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**The Institution of Surveyors of Uganda**

**P. O. Box 2122 Kampala**

**Candidate’s Practical Experience Log Book**

**with Guidance Notes – QS CHAPTER**

**Candidate’s Name: …………………………………………………………………………..**

**Membership No:** ………………………………………………………………………………

**Discipline of Surveying:** ……………………………………………………………………

**Date Issued:** ……………………………………………………………………………………

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**Appendix A – DIARY ENTRY TEMPLATE**

1. **NOTES FOR THE LOG BOOK & DIARY**

**1.1** All graduates are required to keep a Log Book. A Log Book is to enable candidates present an analysis of their professional experience in a chronological order based on the entries in the book. It will help the assessors determine if the experience presented by the candidates is adequate and properly balanced. It will also provide an easy reference to any particular aspect of training if need arises.Log Books are to be submitted to supervisors for interim inspection at 6 month intervals, and should accompany the final assessment documents.

**1.2** Candidates should also keep their own records in the form of a training diary on a week-to-week basis. These entries should then be summarised at the end of the month and entered into the Log Book.

**1.3** The experience received during each month of training shall be entered in the Log Book in the form of days or half days under the area and monthly heading of the analysis sheet.

**1.4** The Log Book, complete with all entries should be submitted with other final assessment documents at the time of applying for Professional Associate membership.

**1.5** The Log Book will be the only source of information on the candidate’s depth of knowledge. Candidates should therefore give accurate and detailed information, and take the filling of this Log Book seriously.

**1.6** 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 professional competencies.

**1.7** The Supervisor must be a registered Professional QS with the ISU or any other external, internationally recognised body (MRICS, FRICS), and may not necessarily be the Employer. He/she has the role of advising and supporting the candidate in their development, as well as assessing their competence. The training periods set out are minimum periods. Candidates **MUST NOT** come forward for final assessment too early (i.e. before achieving the minimum level of competencies).

**1.8 Progression throughout the training period**

During development from the Graduate to meeting the competency requirements, the candidate progresses through levels of work capability until the required level of competency is attained. These are illustrated in the table below.

**Table 1: Progression throughout the training period (Ref. SACQSP & RICS)**

|  |  |  |  |
| --- | --- | --- | --- |
| **Level of Competency** | **Nature of work for the Candidate** | **Responsibility of Candidate to Supervisor** | **Extent of Supervisor Support** |
| Level 1: Being Exposed; Knowledge & Understanding | Undergoes induction, observes processes and the work of competent practitioners | No responsibility | Supervisor explains challenges and forms of solutions |
| Level 2: Assisting & Participating; Application of Knowledge & Understanding | Performs specific processes under close supervision;  Performs specific processes as directed with limited supervision | Limited and full responsibility for supervised work | Supervisor coaches, continually offers feedback and support;  Supervisor progressively reduces support, but monitors outputs |
| Level 3: Contributing & Performing; Reasoned advice and depth of technical knowledge | Works in team without supervision;  Recommends work outputs;  Responsible but not accountable | Level of responsibility to supervisor is appropriate to a registered person; Supervisor still accountable for candidate’s decisions | Candidate takes on problem solving with limited support |

**1.9 “**Over time, the emphasis on **training**, that is, the learning through inputs of others, gives way to learning by doing work and reflecting on observations and achievements, that is **experience**.” (The South African Council for the Quantity Surveying Profession - SACQS)

**2. DETAILS OF EMPLOYERS (CURRENT & FORMER)**

**2.1 EMPLOYER 1:**

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**2.2 EMPLOYER 2:**

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**2.3 EMPLOYER 3:**

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**3. COMPETENCIES/ STUDY CHECKLIST**

**3.1** In this section, the competencies are broken down into a list of topics to help candidates make sure they have covered the competencies appropriately. The list is not exhaustive and the candidate may not necessarily cover every topic, but it is a good starting point.

**3.2 MANDATORY COMPETENCIES**

**3.2.1 Accounting Principles and Procedures**

**Level 1** *(Demonstrate knowledge and understanding)*

* Balance sheets/ profit and loss account
* Taxation
* Revenue and capital expenditure
* Cash flows
* Auditing
* Ratio analysis
* Credit control
* Profitability
* Insolvency
* Legislation

**3.2.2 Business Planning**

**Level 1** *(Demonstrate knowledge and understanding)*

* Legislation
* Short/ long term strategies
* Market analysis
* Five year plans
* Business support services – administration, secretarial, HR, IT, etc.
* Staffing levels – recruitment/ turnover

**3.2.3 Client Care**

**Level 2** *(Apply knowledge/ Practical application)*

* Understanding client objectives
* Establishing client’s brief
* Appointment documents
* Fees
* Complaints procedures
* Key Performance Indicators
* Establishing communications with client teams
* Involvement of stakeholders

**3.2.4 Communication and Negotiation**

**Level 2** *(Apply knowledge/ Practical application)*

**Oral Communication:**

* Phone calls
* Reporting at meetings
* Facilitating/ chairing meetings
* Client and bid presentations
* Staff presentations
* Contractor/ consultant interviews
* Public speaking at seminars etc.
* Listening skills

**Written/ graphical communication:**

* Letters, memos and e-mails
* Report writing
* Programming
* Using drawn information – checking scales and revisions
* Using CAD documents

**Negotiation:**

* Establishing objectives
* Setting strategy
* Collecting and presenting evidence

**3.2.5 Conduct Rules, Ethics and Professional Practice**

**Level 3** *(Show how knowledge and experience gained has been applied to give reasoned advice)*

* Rules of Professional Conduct
* Conduct befitting a Professional Member
* Registration of Firms
* Complaints Procedure
* Conflicts of interest
* Gifts
* Professional Indemnity Insurance
* Client accounts
* Regulation
* Disciplinary procedures
* Lifelong learning – CPD

**3.2.6 Data management**

**Level 1** *(Demonstrate knowledge and understanding)*

* BIM
* Elemental analyses
* Data base use generally & ERP systems
* In-house data storage and filing systems
* Scheduling
* Libraries

**3.2.7 Health and safety**

**Level 2** *(Apply knowledge/ Practical application)*

* Personal health and safety at work (office and construction sites)
* Health and safety Legislation
* Health and Safety Management Systems

**3.2.8 Team Working**

**Level 1** *(Demonstrate knowledge and understanding)*

* Understanding the role of team members
* Appointing the project team
* Relationships with other team members
* Communicating with other team members
* Partnering and collaborative working

**3.3 CORE COMPETENCIES**

**3.3.1 Commercial Management of Construction**

**Level 3** *(Show how knowledge and experience gained has been applied to give reasoned advice)*

* Estimating
* Establishing budgets
* Cash flows
* Reporting financial progress against budget
* Procurement of labour
* Procurement of plant and materials
* Procurement of sub-contracts
* Financial management of supply chains
* Financial management of multiple projects

**3.3.2 Contract Practice**

**Level 3** *(Show how knowledge and experience gained has been applied to give reasoned advice)*

* Principles of contract law
* Legislation
* Current case law (look out for cases reported in journals)
* Standard forms of main and sub contract
* Roles and responsibilities of parties – Client, Contract Administrator/ Employer’s Agent/ Project manager/ Engineer, Contractor, Sub-contractors, Quantity Surveyor
* Assignment/ Novation
* Third party rights – Legislation/ Collateral Warranties
* Letters of intent – Comfort letters/ Consent to spend/ Recognition of contract
* Performance security – Bonds/ Parent Company Guarantees
* Insurances
* Advance payments
* Interim valuations and payment provisions
* Materials on/ off site

**3.3.2 Contract Practice - continued**

**Level 3** *(Show how knowledge and experience gained has been applied to give reasoned advice)*

* Fluctuations
* Retention – retention bonds
* Change procedures
* Valuing change – variations/ compensation events
* Extensions of time
* Claims/ Loss and Expense
* Dispute avoidance and resolution
* Named/ Nominated subcontractors
* Sectional Completion/ Partial Possession
* Design Portions/ Performance specified works
* Determination
* Final Accounts
* Completion
* Liquidated damages
* Defects rectification period

**3.3.3 Construction Technology and Environmental Services**

**Level 3** *(Show how knowledge and experience gained has been applied to give reasoned advice)*

**Construction Technology:**

* Substructures – basements, types of piling, etc.
* Superstructure
* Comparison of concrete/ steel frames
* Floor structures
* External walls, windows and doors
* Cladding/ glazing
* Roof structures and coverings
* Partitioning systems and doors
* Finishes and fixtures
* Hard and soft landscaping

**Engineering Structures:**

* Bridges
* Tunnels
* Roads
* Railways
* Waterways
* Sea defences
* Earthworks
* Sewage treatment plants
* Processing plant

**Services Technology:**

* Air conditioning/ mechanical ventilation systems
* Fire safety systems
* Security systems
* Environmental systems and controls
* Data systems

**3.3.3 Construction Technology and Environmental Services - Continued**

**Level 3** *(Show how knowledge and experience gained has been applied to give reasoned advice)*

* Building types and other structures
* Building regulations and codes
* Planning legislation and procedures
* Party wall issues/ rights
* Dangerous/ banned substances – asbestos, etc.
* Pre-fabrication
* Disability legislation

**3.3.4 Design Economics and Cost Planning**

**Level 3** *(Show how knowledge and experience gained has been applied to give reasoned advice)*

* Economics of design – site density, wall/floor ratio, storey heights, room sizes, letable/ non- letable
* Sources of cost data
* Inflation (tender/ construction)
* Location factors, regional variations
* Currency fluctuations
* Estimating
* Cost Plans
* Cost Planning
* Life Cycle Costing – capital/ running costs/ replacement
* Value Engineering
* Value Management
* Risk Management and Analysis (contingency)
* State of the construction market
* State of the economy generally – locally and globally
* Interest rates

**3.3.5 Procurement and Tendering**

**Level 3** *(Show how knowledge and experience gained has been applied to give reasoned advice)*

**Types of procurement**

* Traditional
* Design and Build
* Management Contracting
* Construction Management
* Measured Term
* Serial Contracting

**Financial basis**

* Lump sum
* Re-measured
* Reimbursable
* Target cost
* Guaranteed or Agreed Maximum Price

**Tendering**

* Standard rules of tendering – codes of practice, practice notes
* Single/ two-stage tendering – competitive/ negotiated
* Compilation of tender lists – pre-qualifying contractors
* Compilation of tender documents
* Tender analysis
* Tender reports
* Partnering – project and strategic
* Private Finance Initiative – PFI
* Public Private Partnership – PPP
* Prime contracting
* Best Value
* Whole life costing
* Supply Chain Management
* Lean Construction
* Key Performance Indicators – KPI

**3.3.6 Project Financial Control and Reporting**

**Level 3** *(Show how knowledge and experience gained has been applied to give reasoned advice)*

* Post contract cost control
* Change control procedures
* Change control forms
* Cost reporting
* Final accounts
* Loss and expense
* Risk management
* Cash flows
* Value engineering
* Benchmarking/ Best value

**3.3.7 Quantification and Costing of Construction Works**

**Level 3** *(Show how knowledge and experience gained has been applied to give reasoned advice)*

**Methods of Measurement**

* Standard Method of Measurement for Building Works (SMM)
* Civil Engineering Method of Measurement (CESMM)
* General Specifications for Road and Bridge Works (Series 1000 – 7000)
* New Rules of Measurement (NRM)
* Principles of Measurement (International) POMI
* AAQS Standard Method of Measuring Building Works for Africa

**Preparation of Pricing Documents**

* Tender documents generally
* Bills of Quantities
* Schedule of Works
* Schedule of rates
* Provisional Sums/ Prime Cost Sums

**Analysis of Price**

* Tender returns
* Guaranteed/ Agreed maximum Price
* Target cost – Pain/ Gain mechanisms
* Loss and expense
* Preliminaries
* Dayworks

**Valuation of Works**

* Interim valuations
* Valuing change
* Loss and expense
* Final account
* Reporting on cost
* Tender report
* Correcting errors in tenders
* Post contract financial reporting

**3.4 OPTIONAL COMPETENCIES**

**3.4.1 Analysis of client requirements**

This competency is about the establishment and agreement of a client brief, but primarily deals with the inception stage of a building project. This requires sound understanding of the law applying to building projects, the preparation of outline design proposals in various formats, the preparation of budget costs, project programmes, and advising on various procurement options. It also requires an understanding of matters concerning energy efficiency, sustainability and alternative energies.

**3.4.2 Building Information Modelling (BIM) Management**

**Level 2** *(Apply knowledge/ Practical application)*

* Information modelling
* BIM Strategies
* BIM Software
* BIM Management process
* International Standards
* Cost estimating
* Cost planning

**3.4.3 Capital Allowances**

**Level 2** *(Apply knowledge/ Practical application)*

* Current legislation
* Capital revenue expenditure
* Taxation
* Capital Allowances legislation
* Claiming capital allowances
* Plant and machinery
* Research and development

**3.4.4 Commercial Management of Construction**

**Level 2** *(Apply knowledge/ Practical application)*

*(If not selected as a Core Competency)*

* Estimating
* Establishing budgets
* Cash flows
* Reporting financial progress against budget
* Procurement of labour
* Procurement of plant and materials
* Procurement of sub-contracts
* Financial management of supply chains
* Financial management of multiple projects

**3.4.5 Conflict Avoidance, Management and Dispute Resolution Procedures**

**Level 2** *(Apply knowledge/ Practical application)*

* How standard forms of contract deal with conflict avoidance and dispute resolution
* Conflict avoidance
* Partnering
* Negotiation
* Mediation
* Conciliation
* Adjudication
* Arbitration
* Pre-action Protocol
* Expert Witness
* Independent Expert Determination

**3.4.6 Design Economics and Cost Planning**

**Level 2** *(Apply knowledge/ Practical application)*

*(If not selected as a Core Competency)*

* Economics of design – site density, wall/floor ratio, storey heights, room sizes, letable/ non- letable
* Sources of cost data
* Inflation (tender/ construction)
* Location factors, regional variations
* Currency fluctuations
* Estimating
* Cost Plans
* Cost Planning
* Life Cycle Costing – capital/ running costs/ replacement
* Value Engineering
* Value Management
* Risk Management and Analysis (contingency)
* State of the construction market
* State of the economy generally – locally and globally
* Interest rates

**3.4.7 Due Diligence**

**Level 2** *(Apply knowledge/ Practical application)*

* Project monitoring on management style contracts
* Fund monitoring
* Feasibility study
* Planning and building regulatory control
* Suitability of teams
* Suitability of procurement route
* Tendering
* Contractual arrangements
* Third party rights
* Suitability of programme
* Cash flows
* Interim payments
* Draw-down
* Final accounts
* Risk

**3.4.8 Insurance**

**Level 2** *(Apply knowledge/ Practical application)*

* Professional Indemnity Insurance
* Indemnifying the Employer
* Third Party Liability – Persons and Property
* Insurance of the Works – Joint names
* Subrogation
* Non-negligence insurance
* Setting level of cover
* In the aggregate/ each and every event
* Excess
* Net Contribution Clause
* Performance Bonds
* Fire Insurance Valuations

**3.4.9 Programming and Planning**

**Level 2** *(Apply knowledge/ Practical application)*

* Project programming
* Multi-project programming
* Flow diagrams
* Activity Schedules
* Gantt Charts
* Critical Path
* Key milestones
* Float
* Cash flows
* Progress monitoring
* Project Execution Plans – PEP
* Commissioning/ handover procedure
* Close-out reports

**3.4.10 Project Evaluation**

**Level 2** *(Apply knowledge/ Practical application)*

* Appraisal methods
* Residual value
* Value/ income
* Valuation of property/ rental values
* Costs
* Land acquisition
* Construction costs
* Fees
* Finance costs
* Taxation, grants, capital allowances
* Profitability
* Planning

**3.4.11 Risk Management**

**Level 2** *(Apply knowledge/ Practical application)*

* Workshops
* Identification
* Register
* Management Plan
* Mitigation
* QS contribution to risk management
* Risk analysis
* Profitability and impact
* Expected Monetary Value – EMV
* Monte Carlo Simulation
* Central Limit Theory – CLT
* Route Mean Square – RMS
* Contingency

**3.4.12 Sustainability**

**Level 2** *(Apply knowledge/ Practical application)*

* Sustainable development/ construction
* National and international regulations
* Environmental assessment methods – e.g. LEED, BREEAM, etc.
* Building Regulations and Codes
* Contaminated land
* Waste management
* Recyclable materials
* Sustainable materials
* Building environmental management systems
* Water conservation
* Energy generation
* Energy conservation

**4. DECLARATION FORM**



**The Institution of Surveyors of Uganda**

**P. O. Box 2122 Kampala**

**Declaration**

I, the undersigned, declare that the work submitted in the Log Book is a true representation of my efforts under the guidance of the following persons:

|  |  |  |
| --- | --- | --- |
| NAME | REGISTRATION NO. | SIGNATURE |
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|  |  |  |
|  |  |  |

CANDIDATE NAME:

MEMBERSHIP NUMBER:

SIGNATURE:………………………………………………………..

DATE:

**5. PRACTICAL EXPERIENCE LOG BOOK**

**5.1** The Practical Experience Log Book shall comprise the following fields:

* Log Sheet Number
* Candidate’s Name
* Membership Number
* Discipline of Surveying
* Month and Period of Practical Experience
* Area of Professional Competencies Covered in the Month
* Brief Description of Topic
* Duration in Days or Half-Days
* Supervisor Name, Stamp, Signature and Date
* Employer’s Name, Stamp, Signature and Date

**5.2** Where other relevant work carried out, but outside the identified scope of competencies, it should be described and attached on a separate sheet.

|  |  |  |
| --- | --- | --- |
| **PRACTICAL EXPERIENCE LOG BOOK** | **SHEET NO.** | |
| CANDIDATE NAME: |  | |
| MEMBERSHIP NO.: |  | |
| DISCIPLINE: | **QUANTITY SURVEYING** | |
| MONTH & PERIOD: | **e.g. Month 1, June 2016** | |
| **COMPETENCY** | **BRIEF DESCRIPTION OF TOPIC** | **DURATION** |
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| **SUPERVISOR:** | …………………………………………….. | **STAMP** |
| **SIGNATURE & DATE:** |
| **EMPLOYER:** | …………………………………….………. | **STAMP** |
| **SIGNATURE & DATE:** |

**Appendix A – Diary Entry Template**

Please note that candidates should keep their own records in the form of a training diary on a week to-week basis. These entries should then be summarised at the end of the month and entered into the Log Book. Diaries will not be part of the Submission Documents for the final assessment, but may be requested in order to clarify some issues presented in the Log Book.

The template below is therefore for illustration purposes only.

|  |  |  |  |
| --- | --- | --- | --- |
| **WEEK** |  | | |
| **DATE (dd/mm/yyyy)** | **NATURE OF PROFESSIONAL WORK CARRIED OUT** | **COMPETENCY REFERENCE** | **DURATION** |
| 16/05/2016 |  |  |  |
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