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**The Institution of Surveyors of Uganda**

**P. O. Box 2122 Kampala**

**Candidate’s Practical Experience Log Book**

**and Guidance Notes – VS 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 VS 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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**2.5 EMPLOYER 5:**

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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 Inspection**

This competency is about property and asset inspection, fundamental to providing accurate advice on machinery and business assets or property. It is important that candidates are able to demonstrate knowledge and understanding of the core requirements of property and asset inspection. Assessors will be seeking confirmation that all candidates have good knowledge of building construction, location analysis and defects.

**Level 1** *(Demonstrate knowledge and understanding of the different requirements for inspection, together with the required information and factors affecting the approach to an inspection.)*

**Level 2** *(Undertake inspections and apply the information gained to prepare reports, schedules and/or registers of equipment, presenting appropriate information gained from the inspection.)*

**Level 3** *(Provide evidence of reasoned advice and recommendations arising from inspections.)*

* Understanding the requirements and reasons for a property/ asset inspection
* Understand safety issues when undertaking an inspection
* Implications of location and situation
* Identify access arrangements
* Environmental issues
* Basic knowledge of building construction and specification
* General awareness of the legal requirements that impact upon the occupation/ ownership of buildings/ assets
* Awareness of any statutory requirements which govern the particular inspection being undertaken
* Accurate recording of building/ asset and site characteristics
* Understanding potential defects of buildings/ assets (both structural and environmental) and related implications
* Assessing quality of location, design and specification

**3.3.2 Valuation**

This competency is about the preparation of property valuation advice, made in accordance with the appropriate valuation standards, to enable clients to make informed decisions.

**Level 1** *(Demonstrate knowledge and understanding of the purposes for which valuations are undertaken; the relevant valuation methods and techniques; the appropriate standards and guidance; and any relevant statutory or mandatory requirements for valuation work.)*

**Level 2** *(Demonstrate practical competence in undertaking both capital and rental valuations and detailed involvement with the preparation and presentation of client reports. Demonstrate your ability to use valuation methods and techniques appropriate to your area of practice. Show how the relevant valuation standards and guidance have been applied to your valuation experience.)*

**Level 3** *(Demonstrate practical competence in undertaking valuations, either of a range of property/ asset types or for a range of purposes. Demonstrate the application of a wide range of valuation methods and techniques. Be responsible for the preparation of formal valuation reports under proper supervision and provide reasoned advice. Demonstrate a thorough knowledge of the appropriate valuation standards and guidance and how they are applied in practice.)*

* A general appreciation of the main drivers that have an impact on value
* The principles and application of the International Valuation Standards or other relevant valuation standards
* The principles of professional practice, liability and indemnity insurance
* The underlying principles of property law, planning and other relevant regulations or controls and their impact on property/asset values
* The different purposes for which valuations may be required (including, bank lending, taxation, performance management, etc.)
* The principles of the various methodologies needed to provide both capital and rental valuation advice
* An understanding of the importance of independence and objectivity
* The underlying principles of machinery and business assets law, planning and other relevant regulations or controls and their impact on property/ asset values
* The role and function of Automated Valuation Models (AVMs)

**3.3.3 Measurement of Land and Property**

This competency is relevant to all data capture and measurement of land, property and assets.

**Level 1** *(Demonstrate knowledge and understanding of the principles and limitations of measurement relevant to your area of practice.)*

**Level 2** *(Apply your knowledge to undertake measurement. Use basic and/or advanced instruments to collect data. Present appropriate information gained from measurement and drawings.)*

* Relevant data capture techniques including the use of lasers and tapes
* The limitations of different methods of measurement
* Checking procedures for the instruments used and the calculations undertaken
* Potential sources of error from use of the instruments
* Understanding the basis on which measurements should be undertaken i.e. the core definition of measurement and their application
* Awareness of the appropriate standards and guidance relating to measurement with particular reference to the International Property Measurement Standards
* The degree of accuracy that is required for different types of assets and the use to which the measurements will be put
* The use and limitations of plans and drawings

**3.4 OPTIONAL COMPETENCIES**

Three competencies to Level 3 and one competency to Level 2, from the list below:

**3.4.1 Access and Rights over Land:**

This competency is about access and easements for power, water and communications infrastructure including way-leaves and the differing methods of acquisition and compensation negotiations, including fees.

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

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

**Level 3** *(Give reasoned advice)*

* The processes involved in the acquisition of land for the purposes of establishing access agreements, way-leaves and easements for the provision of power, water, pipelines or communications infrastructure
* Compensation procedures associated with such acquisitions, including any temporary accommodation and other works required for the construction and maintenance of infrastructure on the land acquired
* Negotiating with occupiers and companies regarding the routes, accommodation works, temporary works, and reinstatement and compensation
* Agreeing heads of terms and final documentation
* Providing strategic advice on complex elements of the subject including dispute resolution
* Preparing and providing strategic advice on unusual or challenging cases

**3.4.2 Accounting Principles and Procedures\***

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

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

**Level 3** *(Give reasoned advice)*

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

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

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

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

**Level 3** *(Give reasoned advice)*

* 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

**3.4.5 Sustainability**

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

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

**Level 3** *(Give reasoned advice)*

* 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

**3.4.6 Auctioneering\***

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

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

**Level 3** *(Give reasoned advice)*

**3.4.7 Building Pathology**

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

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

**Level 3** *(Give reasoned advice)*

**3.4.8 Capital Taxation\***

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

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

**Level 3** *(Give reasoned advice)*

**3.4.9 Compulsory Purchase and Compensation\***

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

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

**Level 3** *(Give reasoned advice)*

**3.4.10 Corporate Real Estate Management**

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

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

**Level 3** *(Give reasoned advice)*

**3.4.11 Corporate Recovery and Insolvency\***

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

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

**Level 3** *(Give reasoned advice)*

**3.4.12 Development Appraisals**

This competency is about the role of development appraisals in residential and commercial development. Development appraisals also have a role in residual valuations of development sites but it should be remembered that the two are different activities.

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

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

**Level 3** *(Give reasoned advice)*

**3.4.13 Indirect Investment Vehicles**

This competency is about developing an understanding of indirect investment vehicles (Investment Trusts, REITS, LPs, etc.) and debt structures. It requires an awareness of existing vehicles and trends in the market and an ability to advise clients on optimal indirect investment solutions.

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

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

**Level 3** *(Give reasoned advice)*

**3.4.14 Insurance\***

In this context many candidates will be involved with insurance in relation to re-instatement and owner/tenant liability in the context of property/ assets. The candidate should demonstrate a thorough working knowledge of how insurance in relation to your area of practice is dealt with, and likely costs in the market place.

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

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

**Level 3** *(Give reasoned advice)*

* 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

**3.4.15 Investment Management (including fund and portfolio management)\***

Be conversant with the key principles of investment management theory and practice. Acquire and develop detailed asset management expertise and knowledge across a broad range of sectors and be able to apply these in a strategic context.

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

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

**Level 3** *(Give reasoned advice)*

**3.4.16 Landlord and Tenant (including Rent Reviews and Lease Renewals)**

This competency is about the management of the landlord and tenant relationship. It has a broad scope covering all aspects of lease negotiations arising between landlord and tenant. The candidate will be expected to understand the issues and how they affect both parties.

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

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

**Level 3** *(Give reasoned advice)*

**3.4.17 Leasing/Letting\***

This competency is specifically in relation to the market for leasehold property/ assets and includes assignments. Candidates should be able to demonstrate an understanding and experience (if appropriate) of working for both lessee and lessor. The candidate should have knowledge of the whole transactional market for property/assets.

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

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

**Level 3** *(Give reasoned advice)*

**3.4.18 Local Taxation and Assessment\***

Valuation and negotiation of rating appeals which may include attendance at Valuation Tribunals. Inspection, measurement and analysis of comparables. Application of evidence when dealing with appeals to include an understanding of the use of comparable rental evidence. Application of statute and casework.

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

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

**Level 3** *(Give reasoned advice)*

**3.4.19 Planning**

The planning system plays a vital role in the opportunities available for any potential development scheme. This means it is important for developers to have good working knowledge and experience of the processes involved to ensure successful development outcomes.

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

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

**Level 3** *(Give reasoned advice)*

**3.4.20 Property Finance Funding**

This competency focusses on the candidates’ understanding of the range of finance available, their understanding of how this is sourced and how this may be used to assist with property/ asset investment and development scenarios. Candidates will be expected to apply this knowledge in order to provide advice to clients on their financing options and the impact of this on their returns.

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

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

**Level 3** *(Give reasoned advice)*

**3.4.21 Property Management**

This competency covers all aspects of day to day functions associated with property management, covering all matters arising between the client and agent in the management of the property. It includes issues relating to works, health and safety, landlord and tenant relationships, and service charges. In general, any matter associated with the smooth running of property. Property managers have a growing number of statutory requirements that they must comply with. Candidates must demonstrate appreciation and experience of dealing with these issues.

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

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

**Level 3** *(Give reasoned advice)*

**3.4.22 Property Management Accounting**

This competency is about all accounting aspects of property management whether this is in the commercial/ residential or agricultural fields. The candidate would be expected to have knowledge of all the statutory requirements and be able to report to clients as well as residents associations regarding the accounting results.

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

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

**Level 3** *(Give reasoned advice)*

**3.4.23 Property Records and Information Systems**

This competency deals with the use, management and development of property information systems (including automated valuation models) and systems for registering land and property rights. Property records and information systems are increasingly sophisticated and are used widely in the public sector (e.g. for tax assessment or property/ land title registration) and the private sector (e.g. for residential valuation, property management, etc.).

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

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

**Level 3** *(Give reasoned advice)*

**3.4.24 Purchase and Sale\***

This competency relates to the purchase and sale of property/ assets on a freehold and leasehold basis. Candidates should have regard to all property/ asset markets and alternative uses and values. Similarly, the candidate should have awareness of other forms of disposal.

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

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

**Level 3** *(Give reasoned advice)*

**3.4.25 Strategic Real Estate Consultancy**

This competency is about the provision of strategic consultancy advice to clients on real estate issues influencing the business.

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

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

**Level 3** *(Give reasoned advice)*

**3.4.26 Valuation of Businesses and Intangible Assets**

This competency is about the preparation and provision of properly researched advice, made in accordance with the appropriate valuation standards, to enable clients make informed decisions regarding businesses and intangible assets.

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

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

**Level 3** *(Give reasoned advice)*

**Special Notes:**

1. Candidates who plan to specialise in **Machinery and Business Assets** (as part of their optional competencies) must ensure they choose two competencies with **\*** next to it, to **Level 3.**
2. Candidates planning to specialise in **Residential Survey and Valuation** must complete **Building Pathology** to **Level 3.**
3. Candidates are advised against choosing **Strategic Real Estate Consultancy** and **Corporate Real Estate Management** together as optional competencies.

**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: | **VALUATION SURVEYING** | |
| MONTH & PERIOD: | **e.g. Month 1, June 2016** | |
| **COMPETENCY** | **BRIEF DESCRIPTION OF TOPIC** | **DURATION** |
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| **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.

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