

Society of Chartered Surveyors

Assessment of Professional Competence
Guide for supervisors,
counsellors and employers

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Introduction

Commitment is the key

The business world we live in is changing and management best practice is now focusing very heavily on training as an investment for the future. The Society of Chartered Surveyors' Assessment of Professional Competence (APC) is a part of that investment.

This Guide will help you prepare for the commitment and responsibility that goes with training an APC candidate. The commitment does not start on day one; indeed it is a state of mind, with is ongoing with organisations who are committed to best practice.

This guide provides background information to help you get started. It then gives guidance on the competency achievement planner and Pre-Qualification Structured Learning (PQSL). Finally, in chronological order, it looks at your involvement in the various stages and reviews that need to be carried out over the course of the training period.

Samples of review templates are included with the guide, Templates 1-7 are for the candidate to complete and can be found in the APC Candidates guide.

Overview of the APC

What is the APC?

Think of the APC as a period of practical training and experience which, when added to the academic study and learning the candidate received at university, leads to their membership of the Society.

It is the process by which the Society ensures the candidate is competent to practice as a Chartered Surveyor. To prove this competence, candidates undergo at least two years rigorous and demanding training, which includes a minimum of 400 days of relevant experience.

The APC has two components:

1. A period of structured training – during which the candidate keeps a record of experience gained.
2. The final assessment interview- a panel of three practitioners (assessors) interview the candidate and, based on this and the written submissions, form a judgement and “assess” whether they are competent to practice as a member of the Society. **(Note: the candidate cannot take the final assessment until you certify they have reached the required level of competence.)**

The APC is, first and foremost, a period of training and practical experience. If you put this aspect of the process correctly in place at the outset and meet the standards set out by the Society the candidate's final assessment should be a formality.

Key elements of the APC

Competent to practice: the APC aims to assess that the candidate is competent to carry out the work of a qualified surveyor. To be competent is to have the skill or ability to perform a task or function.

A competency: a statement of the skills or abilities needed to perform the specific task or function. It is based upon attitudes and behaviours as well as skills and knowledge. The requirements for each surveying division and specialism (APC routes) are set out in the APC requirements and competencies guide.

Structured Training: a formal, structured approach to the delivery of training over any given period.

Note: There is no minimum requirement of the number of training days under each competency other than a minimum of 400 days within 24 calendar months of structured training.

Diary: the candidate's day- to- day record of how their training and experience is progressing.

Logbook: summarises the candidate's diary showing the training, in number of days, grouped under the competency headings.

Record of progress: charts the progress against the competency levels of the chosen APC route. It is made up of a series of report certified by the supervisor and counsellor:

- The three monthly supervisor's reports
- The six monthly supervisor's **and** counsellor's report.
- The interim and final assessment records.

Pre-Qualification Structured Learning (PQSL): candidates must undertake a minimum of 96 hours of PQSL over the structured training period. It helps them gain knowledge and skills that might not be available in the day-to-day training and experience. They can use it to complement and inform the mandatory competencies.

For the candidate the PQSL is an introduction to the Continuing Professional Development (CPD) commitments required upon qualification.

The role of the supervisor and counsellor

The supervisor and counsellor have a dual role of advising and supporting the candidate in their development, as well as assessing their competence. It is also their responsibility to ensure the candidate gains the range and depth of experience and training needed.

The APC supervisor should be the person who has day-to-day responsibility for the candidate and knows their work well. The role of counsellor is more strategic, being responsible for planning the training programme and monitoring the progress of the candidate. Preferably, both should be Chartered Surveyors and come from the specialist route the candidate is about to take. The two need to liaise regularly to discuss the candidate's progress.

Outline of the supervisor's role

- Give the candidate guidance, support and encouragement
- Assess the candidate against the competencies every three months, completing their record of progress and the supervisor's three monthly progress report
- Give guidance on how to keep a diary up to date, reviewing it to see whether the competency references are correct. Are they claiming too many or not enough?
- Help the candidate interpret the competencies to ensure that they receive credit for all activities carried out
- Ensure the logbook is complete and accurate
- After 12 months, agree with counsellor and the candidate on the candidate's progress and complete interim summary of progress
- Together with the counsellor, assess whether the candidate has achieved the competency requirements of their division/specialism and has all the relevant evidence for the pre-assessment submissions
- Give support and guidance to the candidate on their critical analysis, which forms part of the final assessment submissions
- Prior to final assessment discuss with the counsellor the candidate's progress and readiness
- Together with the counsellor complete the final summary of progress report.
- If the candidate has been referred, discuss with the counsellor the candidate's progress and readiness for re-assessment.

Outline of counsellor's role

- Assess the candidate against the competencies every six months and review overall progress as a second opinion to the supervisor
- At the six monthly review complete the record of progress and counsellor's progress report
- Discuss with the candidate and supervisor whether the candidate needs additional experience or training and agree who will organise it
- Support and guide the candidate
- At the 12 month review liaise with the supervisor and the candidate, agreeing progress and focus for the coming months and complete the interim summary of progress
- Judge when all the competencies have been achieved and the candidate is ready for final assessment
- Liaise with the supervisor and make sure that all the relevant documentation is included in the pre-assessment submissions. This should include the final summary of progress report
- Work with Supervisor to give advice and guidance to the candidate preparing for the final assessment presentation and interview
- If the candidate has been referred discuss with the supervisor the candidate's progress and readiness for re-assessment.

Requirement for counsellors

Throughout the book you will become aware of the importance of the counsellor's role in the APC process. In order to ensure that counsellors are fully appraised of their responsibilities, it is a requirement that all counsellors attend one of the APC information briefing sessions which will be held on a regular basis in central locations through out the country.

No candidate will be permitted to enter for final assessment unless his/her counsellor has attended a briefing session at least one year prior to their final submission.

Competency achievement planner

The competency achievement planner sets out the plan agreed with the candidate for their training.

Note: Some of the competencies, for example self management, will not have a start and end date as it will continue through out their career.

Complement the competency achievement planner with the monitoring table, which extends and expands upon the planner;

- **A monitoring table:** set out training completed and training planned for each competency.

Using the monitoring table allows you to focus on a single competency, providing space to review and progress the candidate's training and development. The format of this table also ties in with the interim and final assessment format.

An example of a competency achievement planner as well as the monitoring table are located at the back of this book.

Pre-Qualification Structured Learning (PQSL)

It is the candidate's responsibility to plan and acquire PQSL. For each of the 12 months of completed practical training, they must also undertake 48 hours of PQSL. PQSL helps the candidate to gain extra skills and knowledge, which are not always possible for you as an employer to provide within a week-to-week business of practice.

It is important to plan and structure professional development but to remain flexible. It needs to complement and support the candidate's various competencies. They can achieve this from formal training courses, distance learning programmes, informal structured reading and secondments. It is important that the supervisor and counsellor take an active interest and help with the evaluation. The APC candidate's guide provide more support.

It is recommended that the PQSL hours be divided as follows:

PQSL plan

A typical annual plan could look like this:

Technical skills development: linked to core/optional competencies
- normally 16 hours

Skills development: linked to common competencies
- normally 16 hours

Professional practice skills development: linked to ethics, professional identity and accountability
- a further 16 hours

If the candidate needs to vary the number of hours allocated you must explain this in:

- The interim summary of progress as part of the interim assessment
- The final summary of progress as part of the final assessment submissions

On a practical note, make sure that your candidate's PQSL complements the structured training plan. Ensure that at the interim and final assessment your candidate can provide evidence of a planned and systematic approach. They must clearly define the relationship between the topics selected and the competencies.

The candidate's application

The Society will provide the prospective candidate with the following enrolment documents:

- The APC candidate's Guide
- The APC guide for supervisors, counsellors and employers
- The APC requirements and competencies guide
- An application form and details of payment

The application should be accompanied by the competency achievement planner, which summarises the structured training.

Once the application and enrolment is accepted, the Society will confirm the application. The Society will also provide the candidate with a start date for recording their experience and the earliest date for final assessment. This is only the earliest expected date and it is important not to put candidates forward for final assessment before they are ready- remember, having completed the required 400 days experience within 24 calendar months does not necessarily mean that the candidate is ready for their final assessment.

Change of employer

If your company employs a candidate who has previously enrolled onto the APC the notification of change of employer form should be completed and the candidate should return this to the Society.

Although trained APC assessors will carry out the final assessment, supervisors and counsellors make important judgements on the competence of candidates. They continually check and certify that the candidate meets the standards set by the Society.

The responsibility is with you to ensure that the candidate is competent in all the required areas and at the required levels before applying for the final assessment. Remember the 400 days/24 calendar months is a minimum training period and it is very important that candidates are not sent for final assessment too early and are then referred. This is not only disappointing for them but it is also very time consuming for everyone involved.

A key role of the supervisor is the day-to-day assessment of progress against the various competencies of the candidates chosen APC route. It therefore follows that a key aspect to the successful management of the training period is your in-depth knowledge and understanding of the competencies for each relevant division or surveying specialism.

Continuous assessment

Traditional qualifications tested what people knew. The competency- based approach, while still assessing what people know, also assesses what they can do. You have to ensure that candidates not only have the knowledge and understanding to carry out their work but they can also put it into practice.

If you are the candidate's supervisor you will already be doing much of what is required to assess them. It requires similar skills to those used for appraising staff:

- Being aware of how they are performing in day-to-day activities, assessing some of the competencies such as working in a team, problem solving and working to deadlines.
- Looking at work they have produced, learning more about their technical and professional knowledge, as well as their understanding
- Asking them questions about why they chose a particular approach, exploring their knowledge and understanding
- Asking them about wider implications of their work, testing their understanding of the whole environment.

From this you can begin to form a judgement of how well they are doing. The point at which they are competent is without supervision, such as giving advice or taking appropriate action, to a standard that is acceptable to you.

The competencies

It is important that you understand competency based training and competency-based interviewing in the context of the APC.

The APC requirements and competencies guide sets out what skills and abilities need to be achieved. It includes:

- Each APC route's specific competencies with guidelines for the number of competencies to be covered
- The required depth and level of attainment
- The "full list" of competencies in alphabetical order with their reference number.

The competencies cover a wide range of technical, professional, business, personal and inter-personal skills. They form three levels, which are mainly progressive in terms of skills and abilities:

Level 1 – Knowledge and understanding

Level 2 – Practical application of knowledge/ understanding

Level 3 – Reasoned advice and/ or depth of technical knowledge, the required limit of knowledge and ability at this stage in the candidate's career.

Before you sign off a candidate at any level, carefully study the wording of the particular competency.

You must be satisfied that the candidate has been given the appropriate experience and will be able to answer questions on the competency at final assessment.

The candidate must satisfy three types of competency for each APC route:

- **Mandatory competencies** – personal, inter-personal and business skills common to all routes
- **Core competencies** – primary skills of the chosen route
- **Optional competencies** – selected by the candidate together with the supervisor and counsellor

Discuss with your candidate and decide at which point they reached the right level of skills and abilities for each of the competencies. There is no minimum number of days. The number of days taken to reach the appropriate level will depend upon a combination of the following:

- The starting point – has there been any previous experience?
- The candidate's aptitude and speed of learning in the competency
- The quality of the training and experience provided
- The particular competency - some competencies may be more difficult than others.

The supervisor and counsellor make a judgement before signing off the candidate in the appropriate column in the record of progress. It is particularly important that this

judgement upholds the rigorous standards of the Society

How to choose competencies

Each route to qualification defines the mandatory, core and optional competencies that make up the minimum requirements defined by the chosen division.

Candidates must fulfil the competencies that are specified in their chosen route to qualification. For most divisional routes you will find that there is an element of free choice for the optional competencies. In other words, candidates may choose any competency that is included in the full alphabetical list of competencies.

It is important that you give careful thought to the candidate's choice and combination of competencies and to the combination of competencies that you will be able to provide. The philosophy of giving the candidate the widest possible choice in most cases is to reflect the diversity of work undertaken by surveyors. It is therefore appropriate that you and your candidate take a pragmatic approach to the combination of competencies that are chosen (where there is a choice).

The combination must reflect not only the work of the candidate in their day to day environment (driven by the needs of clients / employer) but also what is appropriate to the chosen division. It is important to understand that when the candidate reaches the end of their training they must have experience that is appropriate to their chosen area of practice.

It is impossible to give specific guidance for each route to qualification but you must be aware that the choice and combination of competencies that the candidate achieves will be a reflection of their judgement. At the final assessment, the assessors will take these choices into account and will also assess the candidate on the appropriateness of their choices.

You must ensure that their choice is a competency that is normally undertaken by surveyors practising in their chosen division or specialism. At final assessment the assessors will expect the candidate to present a sensible and realistic choice that reflects the technical and, where appropriate, business skills needed to fulfil the role of a surveyor in their chosen field of practice.

A Level 1 mandatory competency may also be chosen as an optional competency. Candidates are advised to take the greatest care when making such decisions so as to ensure that such choices are wisely made in the context of guidance given.

The Mandatory Competencies

All candidates, on all routes must achieve the defined level of the mandatory competencies. The APC competencies are a mix of technical and professional practice, interpersonal, business and management skills. The Society considers them to be common to, and necessary for, all Chartered Surveyors.

They are structured in levels and candidates must achieve the minimum standards as follows:

- Ethics, professional identity and accountability-to Level 3 (see the ethics section on page 5 for more on this)
- Collection, retrieval and analysis of information and data – to Level 1
- Conflict avoidance, management and dispute resolution procedures-to Level 1
- Customer care-to Level 2
- Environment awareness – to Level 1
- Health and safety – to Level 1
- Information Technology – to Level 1
- Law – to Level 1
- Self management – to Level 3
- Team working – to Level 1
- Verbal communication – to Level 2
- Written/graphic communication – to Level 2

Plus:

APC candidates must also achieve two further business, management and interpersonal related competencies to Level 1 from the list shown below. All of these competencies are defined in the alphabetical list of competencies.

- Accounting principles and procedures – to Level 1
- Business management – to Level 1
- Corporate and public communications – to Level 1
- Leadership – to Level 1
- Managing people – to Level 1
- Managing resources – to Level 1
- Negotiating skills – to Level 1
- Recruitment and selection – to Level 1

Experienced Route

If an APC candidate is following the expert route to membership, they must achieve two further business, management and interpersonal related competencies to Level 1 from the list below:

- Accounting principles and procedures – to Level 1
- Business management – to Level 1
- Corporate and public communications – to Level 1
- Negotiating skills- to Level 1
- Recruitment and selection – to Level 1

In addition, they must also achieve the following competencies:

- Leadership – to Level 2
- Managing people – to Level 2
- Managing resources – to Level 2

For all candidates: the mandatory competencies are in addition to the core and optional competencies for each route. These minimum standards are set by the Society but may also be included at a higher level if appropriate to the route of the division/ specialism. If a division has included a mandatory competency to a higher level it will appear again in the core competency list for that route to the higher level.

Please also see “how to choose you competencies” for further guidance on the use of these competencies as optional competencies.

Preparing your candidate for the final assessment

The final assessment interview is a competency- based interview for which your candidate will need some very specific skills. It is extremely important that you plan this within the candidates training. Ensure that they have a good working and well rounded knowledge of the particular faculty or specialism, as well as detailed experience in the core and selected optional competencies.

Judging the evidence

Think about the type of evidence that would demonstrate the candidate's competence e.g. reports, valuations, letters. Base your decisions on actual evidence of work produced rather than their ability to talk about what they do. Competence-based assessment is about the candidate being able to work under normal work pressures, such as interruptions and tight deadlines. It is also about having interpersonal skills and being part of a team. The best way to judge this is to observe them naturally in their normal day.

Be objective in your assessments, avoid what is known as the “ halo and horns effect”. The halo effect is where you get on well with someone, who is often a conscientious type, and assume they are capable of doing something they cannot. It is also easy to over look something, which they do not do all that well, but prefer not to mention.

The “horns” can occur when you do not get on particularly well with someone, or perhaps they have made a few mistakes in the past. There can be a tendency to see much of what they do with a critical eye and find that they cannot do anything right.

These are the extremes, but avoid falling into this trap by acting impartially in your assessments. Be fair at all times and give the candidates reasoned and objective advice.

The main ways to assess the candidates are:

- Observation in the natural course of your work and theirs
- Examination of their work
- Asking the candidate questions
- Speaking to other people who know their work for confirmation of their abilities

When looking at the work produced by the candidate find out what work they did themselves and which aspects were done by teamwork. The best way to find this out is to talk to the candidate.

Your role: a chronology

Among the questions to ask yourself when considering whether people have achieved competence are:

- Is the work they have produced relevant to the competencies they are claiming?
- Is it sufficient? Are you sure the candidate could do this again in similar circumstances or was this a one-off? It is usually best to see a person's work over a period of time to make sure they are competent.
- Is the evidence current? If a candidate is taking a long time to gain experience can the candidate still do it? Will they be out of touch or out of date?

The candidate must be competent in all the required competencies at the required levels **before** going for final assessment. If you use a variety of assessment methods and get to know the candidate's work over a period of time you will be able to make a sound judgement. The candidate cannot apply for final assessment until you have certified that, in your opinion, they have reached a level of proficiency that justifies attending the final assessment.

Remember when you are signing off a candidate as competent, you are saying that not only can the candidate do the task in your organisation, but allowing for minor differences, could also do the same thing in another organisation. More importantly you are saying that you consider this candidate to be suitable to become a professional member of the Society of Chartered Surveyors.

Guidance and support

Candidates need guidance and support to get the most out of their training programme. This is particularly important where you have reviewed their progress and have decided they are not competent. This needs handling with tact and sensitivity to give the candidate clear guidance on where they need to develop, and should be done in a way that motivates them.

If there is an area where a candidate could improve let them know. The candidate may not realise there is a problem and end up missing out on a learning opportunity. These issues can easily be dealt with at the three monthly reviews.

Giving feedback

An important part of your role is giving constructive feedback that is helpful to the candidate. It is too easy to focus on what went wrong, resulting in the person feeling that they cannot do anything right. Point out areas that they have done well before going on to areas that need to be improved or done differently next time. You need to leave the candidate motivated, feeling that they could tackle the task again and could do it better, rather than they never want to do it again.

Most people appreciate being able to point out for themselves what went wrong, rather than have it pointed out to them. So whenever you are reviewing a candidate's work as them how they thought it went first:

- Start by discussing what should have happened – what was the plan, original intentions and objectives
- Consider what actually happened by focusing on the highlights and strengths
- Consider the shortcomings or areas of weakness by comparing the differences between the proposed plan and what actually happened.
- Identify improvement areas
- End on a positive note by summarising the good points and overall achievement.

Providing additional support

Sometimes the candidate needs a little extra help. Work out with the candidate the best way of meeting this need and reviewing progress. You may want to review progress more frequently than every three months.

The candidate can meet that extra training and development by:

- Being able to tackle a similar activity, having learnt from a previous occasion with constructive feedback
- Attending a training course or seminar
- Speaking to a more experienced person, perhaps in another department
- Shadowing or working alongside an experienced colleague
- Taking open and / or distance learning programmes
- Reading professional journals
- Going on site visits where appropriate

Once you agree a development activity, set clear measurable objectives of what must be achieved and by when you and the candidate need to review them to assess progress.

Key aspects before training starts

- Make your intention and commitment clear from the outset
- Help the candidate with the various application forms
- Discuss and agree competency achievement planner
- Plan the PQSL
- Put dates in diaries for 3, 6 and 12 monthly reviews
- Make sure that you sign all the appropriate documents at the appropriate time.

Daily and weekly

The supervisor and the counsellor must maintain regular contact with the candidate. Most importantly the supervisor must:

- Ensure the candidate's day-to-day work broadly covers their competencies
- Discuss before and evaluate after any planned training or PQSL events
- Help the candidate to keep their diary in a format that will encourage meaningful discussions at the formal quarterly reviews of progress against the competencies
- Involve the candidate in work-based activities. Also ensure that other staff are aware of the candidate's training needs and are prepared to assist when interesting opportunities arise
- Record examples of their performance at regular intervals – something to refresh your memory at quarterly reviews.

At the end of three months

The supervisor using Template 8 from the APC candidate's guide, needs to:

- Set aside a time and a place where you will be undisturbed
- Prepare by reviewing the competency planner
- Take a look at the candidate's diary and logbook
- Review progress against the competencies as shown on the record of progress
- Review your personal notes on the candidate's performance

- Ask the candidate for their views and feeling on their progress – and ask them to prepare a few notes to bring to the meeting
- In this discussion always use as a reference point the competency statements in the APC requirements and competencies guide
- At the end of the meeting and from your notes, complete the part of the template headed "observations on training to date". Try to include one or two action points for the coming quarter. This will emphasise to the candidate that it is an active partnership
- Ask the candidate for a completed copy of the "candidate's comments".

Repeat this process in months 9, 15, 21

At the end of six months

At this point the counsellor becomes involved following the process outlined for the supervisor at the end of the first three months.

The counsellor provides a strategic overview of the candidate's progress against the competencies. They may also act as a third party, assisting with areas of uncertainty and adding another point of view to things.

From a practical viewpoint, there is no need for the candidate to have a separate meeting with the counsellor unless there are specific reasons for doing so, all three can meet together.

Template 9- "counsellor's progress report" can simply agree with the supervisors observations or add some more thoughts or views.

In most cases the candidate's comments will probably duplicate those made in the supervisor's templates.

Repeat this process at the end of 18 months.

At the end of 12 months - Interim Assessment

Within a month of recording 12 months of training from the date of enrolment the candidate, supervisor and counsellor complete the interim assessment of the training and experience. The date of the interim assessment is important because a further minimum of 12 months of training must be completed before the candidate can present themselves for final assessment.

This is a very significant point in the APC. It gives you the chance to sit with your candidate to review progress and forward plan the final 12 months.

You need to complete three forms:

Progress to date: this form is based on the monitoring table that is used with the competency achievement planner. The candidate writes, in approximately 1,800 words, an account of the first 12 months of training and experience. There is also a column that allows you to plan the rest of the candidate's training. This can include a note of competencies or levels where further experience is needed and will be expanded upon in the forward plan.

Forward plan: the candidate writes another 1,800 words on how they will gain the training and experience necessary. They should write this against the competency statements and levels.

Supervisor and counsellor's report: this form draws together the information contained in the supervisor's three monthly reports and the counsellor's six monthly reports. There is also room for candidate's comments. The form contains a section for all parties to declare the interim assessment has been completed and that the diary, logbook and record of progress have been correctly completed and maintained.

You need to include some information about the candidate's PQSL. This is a record of the main elements, together with a summary of the key learning gained from each element of the programme. At both the interim and final assessment the assessors will be looking for clearly defined links between your candidate's PQSL and the competencies. The candidate will need to show a planned and systematic approach to relevant PQSL.

From the supervisor and counsellor viewpoint, follow the same format as the first quarterly review but with these exceptions:

- Devote more time to the candidate's training during this review period
- Ask the candidate to complete **template 10 "progress to date"** ready for meeting
- Both the supervisor and counsellor review it and discuss the "gaps". These should be identified and recorded in **template 11 – "the forward plan"** comprising a summary of the candidate's training needs over the next 12 months
- The supervisor and counsellor complete their observations in **template 12 "interim supervisor's and counsellor's report"**. The candidate adds their comments and all parties sign the document. The panel of assessors consider this to be an important component of the final assessment.
- Ensure that the log sheet has been completed and is in line with the training plan. There needs to be a good balance in terms of the number of entries across the spread of competencies. It should show the candidate is on the way to fulfilling the requirements of their chosen APC route.

At the end of 21 months

With just three months to go to the final assessment your candidate will have to submit, in triplicate and ring bound in lever arch folders, the following documents to the Society:

- Logbook
- PQSL record
- Record of Progress
- Summary of Progress (Interim Assessment)
- Critical Analysis

With regard to the final summary of progress the candidate, supervisor and counsellor should complete **templates 13 – "summary of progress" and template 14 – "Supervisor's and counsellor's report"** in the APC candidate's guide. The format is the same as the interim assessment; the only difference being that there will not be a forward plan.

Between 21 and 24 months

It is very easy to lose sight of things over the three months that follow and you will need to show particular regard for the following:

- Ensure the candidate's diary is kept up-to-date, with any supplementary log sheets being ready to take to the assessment centre
- If the candidate has not completed required number of competencies or not reached the required levels, you will have to guarantee this will happen over the last three months. Alternatively defer the candidate's final assessment to the next available date
- Ensure that supplementary pages to the record of progress are taken by the candidate to the assessment centre
- Ensure that any shortfalls in PQSL are addressed over this time
- Consider training your candidate for final assessment. This includes training in interview and presentations skills.

Do not send your candidate to the assessment centre with any shortfalls in the logbook or record of progress.

Check list – What needs to be signed off by you:

- Logbook and PQSL
- Record of progress
- Supervisor and counsellor's report
- Interim Assessment reports
- Final Assessment reports
- Final Assessment declaration

After the final assessment

The assessment panel will make a decision on the interview day. The Society will inform the candidate of the outcome within one month. Should the candidate be unsuccessful the outcome is a referral, and the notice will include a referral report explaining why the panel reached the decision.

Counselling and guidance for referred candidates

Being unsuccessful will be a disappointing experience for the candidate and it is important that you are on hand to provide support and guidance. Ask them to write a few notes about their experience in relation to the contents of the referral report. When you meet to discuss the situation adopt a counselling style of interview.

Give the candidate the opportunity to understand the outcome of the assessment for themselves, allow them to talk through it with you listening.

Assist if they feel they have been unfairly treated or have grounds for an appeal.

Appeals

The candidate will have 21 working days (from the date the result is posted by the Society) to make an appeal.

Broadly speaking appeals may be made for one of three reasons:

- Administrative or procedural matters
- Questioning and testing of competence that has concentrated too much outside of the main areas of training and experience
- Any form of discrimination

When an appeal is made it must:

- Be in writing, accompanied by an administrative fee of €50
- Be made by the candidate and not a third party
- Clearly state the grounds upon which the appeal is being made, supported by appropriate evidence

Re- assessment of referred candidates

In most instances the next step will be to steer the candidate through a further six months of training and make preparations for the next assessment. The candidate will need to satisfy some minimum requirements:

- Record a minimum of a further 100 days relevant professional experience. The assessors will give some guidance on this.
- Complete a minimum of a further 24 hours PQSL.
- Prepare a new critical analysis or if requested, re-submit the original, suitably amended with updates.
- Complete a summary forward plan to cover the further 100 days of training and experience and complete a summary of progress form. You will also need to complete another supervisor and counsellor's report.
- The candidate need to submit a copy of the record of progress giving details of the further 100 days of training and experience in relation to the competencies
- The candidate will then be re-interviewed in the normal manner

Your role during these six months is to provide daily and weekly support and guidance. First agree the further training needs with the candidate based on the referral report as these will form the detail of the forward plan-**template 15 – “summary of forward plan – in preparation for re-assessment”**. This should comprise around 500 words.

You need to do a review after three months and then at the end of six months. Both the supervisor and counsellor complete a summary and review ready for the next assessment. For this, complete **templates 16- “referred candidate summary of progress”** and **template 17- “referred candidate supervisor's and counsellor's report”**. This should also comprise around 500 words and should be written with reference to the appropriate competency statements and levels.

Where to find help

We hope you have had an overview of the APC and most importantly an insight into the importance of your role as a supervisor and / or counsellor. The role carries with it a lot of responsibility and commitment. However should you require further assistance or information please contact the Education Officer in the Society:

The Education Officer
Society of Chartered Surveyors
5 Wilton Place
Dublin 2

Phone: 01 6765500
Fax: 01 6761412

info@scs.ie
www.scs.ie

Template 10 - Interim Assessment record
(Summary of progress - months 1-12)

Signature..... Date.....			
COMPETENCE TITLE and REFERENCE	DATES	SUMMARY OF EXPERIENCE/TRAINING COMPLETED	TRAINING PLANNED
MANDATORY (max. 500 words)			
CORE (max. 500 words)			
OPTIONS (max. 500 words)			
PQSL (max. 300 words)			

Template 11 - Interim Assessment record
(Summary of forward plan - months 12-24)

COMPETENCE TITLE and REFERENCE	DATES	SUMMARY OF EXPERIENCE/TRAINING COMPLETED
MANDATORY (max. 500 words)		
CORE (max. 500 words)		
OPTIONS (max. 500 words)		
PQSL (max. 300 words)		

Template 12 - Interim Assessment record (Supervisors's and counsellor's report - months 1-12)

OBSERVATIONS ON TRAINING / PROGRESS TO DATE, EXPERIENCE GAINED AND FORWARD PLAN

Candidate's comments

SPECIMEN

Certification by supervisor/counsellor that:

- a) Training and Development has been reviewed after 12 months
- b) Candidate will receive a further minimum of 12 months training before final assessment
- c) Record of progress, diary, logbook and PQSL records are complete and up to date.

Signed:.....(Supervisor) Date:.....

Signed:.....(Counsellor) Date:.....

Signed:.....(Candidate) Date:.....

Template 13 - Final Assessment record (Summary of progress - months 12-24)

COMPETENCE TITLE and REFERENCE	DATES	SUMMARY OF EXPERIENCE/TRAINING COMPLETED	TRAINING PLANNED (BETWEEN APPLICATION DATE AND FINAL ASSESSMENT- IF APPLICABLE)
MANDATORY (max. 500 words)			
CORE (max. 500 words)			
OPTIONS (max. 500 words)			
PQSL (max. 300 words)			

SPECIMEN

Template 14 - Final Assessment record
(Supervisor's and counsellor's report - months 12-24)

OBSERVATIONS ON TRAINING / PROGRESS TO DATE AND EXPERIENCE GAINED

Candidate's comments

SPECIMEN

Certification by supervisor/counsellor that:

- a) Training and development has been reviewed in preparation for final assessment
- b) Record of progress, diary, logbook and PQSL records are complete and up to date.

Signed:.....(Supervisor) Date:.....

Signed:.....(Counsellor) Date:.....

Signed:.....(Candidate) Date:.....

Template 15 - Referred candidate record
(Summary of forward plan - in preparation for re-assessment)

COMPETENCE TITLE and REFERENCE	DATES	TRAINING PLANNED/DETAILS OF FURTHER ACTION WITH DATES AND TIMING
MANDATORY (max. 500 words)		
CORE (max. 500 words)		
OPTIONS (max. 500 words)		
PQSL (max. 300 words)		

SPECIMEN

Template 16 - Referred candidate record
(Summary of progress - additional training period)

Template 17 - Referred candidate record
(Supervisor's and counsellor's report on additional training period)

COMPETENCE TITLE and REFERENCE	DATES	SUMMARY OF EXPERIENCE/TRAINING COMPLETED	TRAINING PLANNED (BETWEEN APPLICATION DATE AND FINAL ASSESSMENT- IF APPLICABLE)
MANDATORY (max. 500 words)			
CORE (max. 500 words)			
OPTIONS (max. 500 words)			
PQSL (max. 300 words)			

OBSERVATIONS ON TRAINING / PROGRESS TO DATE AND EXPERIENCE GAINED

Candidate's comments

Certification by supervisor/counsellor that:

- a) Training and development has been reviewed in preparation for final assessment
- b) Record of progress, diary, logbook and PQSL records are complete and up to date.

Signed:.....(Supervisor) Date:.....

Signed:.....(Counsellor) Date:.....

Signed:.....(Candidate) Date:.....

Template 18 - Sample competency achievement planner

Competency achievement planner								
Name:								
Company name:								
Ref. No	Quarter 1	Quarter 2	Quarter 3	Quarter 4	Quarter 5	Quarter 6	Quarter 7	Quarter 8
Date:-								
Mandatory competencies								
037	Ethics, and Codes of Conduct	Level 1	Level 2	Level 2	Level 2	Level 2	Level 2	Level 3
011	Collection & retrieval of Data	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1
014	Conflict Avoidance, management & Dispute resolution procedures	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1
025	Customer care	Level 1	Level 1	Level 1	Level 2	Level 2	Level 2	Level 2
034	Environmental awareness	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1
042	Health & safety	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1
049	Information technology	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1
056	Law	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1
090	Self-management	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1
096	Team working etc.	Level 1	Level 1	Level 1	Level 2	Level 2	Level 2	Level 3
099	Verbal communication	Level 1	Level 1	Level 2	Level 2	Level 2	Level 2	Level 2
101	Written/ Graphic Communication	Level 1	Level 1	Level 1	Level 2	Level 2	Level 2	Level 2
Compulsory core competencies								
		Level 1	Level 1	Level 1	Level 2	Level 2	Level 2	Level 2
		Level 1	Level 1	Level 1	Level 2	Level 2	Level 2	Level 2
		Level 1	Level 1	Level 1	Level 2	Level 2	Level 2	Level 3
Optional competencies								
			Level 1	Level 1	Level 1	Level 2	Level 2	Level 2
Commentary								

Competency achievement planner								
Name:								
Company name:								
Ref. No	Quarter 1	Quarter 2	Quarter 3	Quarter 4	Quarter 5	Quarter 6	Quarter 7	Quarter 8
Date:-								
Mandatory competencies								
037	Ethics, and Codes of Conduct	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1	Level 3
011	Collection & retrieval of Data	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1
014	Conflict Avoidance, management & Dispute resolution procedures	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1
025	Customer care	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1
034	Environmental awareness	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1
042	Health & safety	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1
049	Information technology	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1
056	Law	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1
090	Self-management	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1
096	Team working etc.	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1
099	Verbal communication	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1
101	Written/ Graphic Communication	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1
Compulsory core competencies								
		Level 1	Level 1	Level 1	Level 1	Level 2	Level 2	Level 2
		Level 1	Level 1	Level 1	Level 1	Level 2	Level 2	Level 2
		Level 1	Level 1	Level 1	Level 2	Level 2	Level 2	Level 3
Optional competencies								
			Level 1	Level 1	Level 1	Level 1	Level 2	Level 2
Commentary								