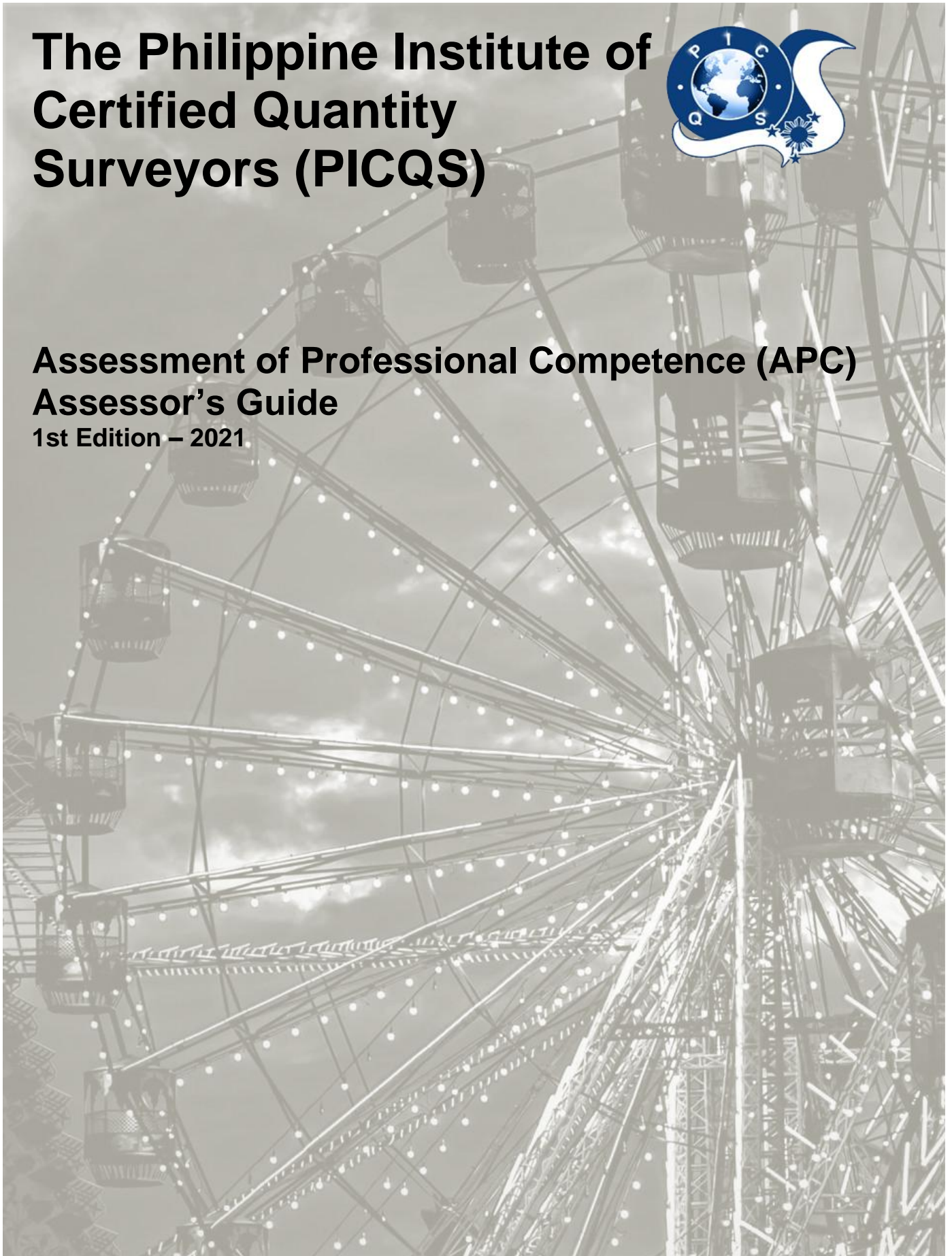


The Philippine Institute of Certified Quantity Surveyors (PICQS)



Assessment of Professional Competence (APC) Assessor's Guide 1st Edition – 2021



Assessment of Professional Competence (APC) | Assessor's Guide
1st Edition – 2021

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1. Introduction

- 1.1 The PICQS Assessment of Professional Competence (APC) is the process to attain the “Certified Quantity Surveyor (QS)” qualification in the Philippines and become a Corporate Member of the PICQS (MPICQS).
- 1.2 The APC ensures that the Candidate becoming qualified can deliver quality services by achieving a set of technical competencies as well as interpersonal, business and management skills, and by upholding high professional and ethical standards.
- 1.3 This Guide has been written for all APC assessors who have completed PICQS assessor training and who have qualified by the Regulatory Board to assess the competence of APC Candidates prior of becoming a Certified Quantity Surveyor.

2. APC explained

- 2.1 The APC ensures that the Candidate becoming qualified can deliver quality services by achieving a set of technical competencies as well as interpersonal, business and management skills, and by upholding high professional and ethical standards.
- 2.2 The Candidate must demonstrate the required level for each competency during the APC interview, with the levels defined as follows:
- 2.2.1 Level 1 – underpinning knowledge and relevant understanding
 - i. This level of competency must contain how knowledge was acquired (e.g. through attending P3T, attending post-graduate studies, etc.).
 - 2.2.2 Level 2 – practical application of knowledge in a professional environment
 - i. This level of competency must contain how knowledge at Level 1 has been applied in Candidate's professional practice.
 - 2.2.3 Level 3 – ability to provide reasoned advice, and demonstrate depth of technical knowledge and implementation
 - i. The demonstration of Candidate's achievements is an acceptable approach to satisfy the Level 3 competency.
- 2.3 The competencies are grouped into three categories:
- 2.3.1 Ethical Standards
 - 2.3.2 Basic Professional – personal, interpersonal, business skills
 - 2.3.3 Core Technical – primary practical and specialist skills of the Quantity Surveyor

3. Eligibility requirements

- 3.1 The APC requirements shall be accomplished in accordance to Section 2 and Section 8 of the APC Candidate's Guide. The compliance of each requirement shall be read in conjunction with the Routes to Membership where the Candidate has the following qualifications:
- 3.1.1 Route 1 - Candidates with Accredited Degree / Formal Education in Quantity Surveying
 - 3.1.2 Route 2 - Candidates with Bachelor's Degree in Engineering
 - 3.1.3 Route 3 - Candidates with Other Educational Qualification
 - 3.1.4 Route 4 - Senior Management Role / Academic Experience
 - 3.1.5 Route 5 – Non-Filipino Members of QS Professional Bodies having MRA with PICQS

4. Standard of assessment

- 4.1 The purpose of the PICQS APC is to ensure that knowledge and understanding, gained through a combination of qualifications, experience and training, are applied in practice and measured consistently internationally. This demonstrates to all stakeholders that only those with the agreed level of competence become certified quantity surveyor (MPICQS).

5. Candidate submission

5.1 Candidate submission should comprise the APC requirements indicated in the route the Candidate is taking (Refer to Section 3 Eligibility requirements) and in conjunction with Section 8 (APC submission/requirements) of the APC Candidate’s Guide and outlines as follows:

- 5.1.1 Curriculum Vitae (CV)
- 5.1.2 Statement of Experience (SOE)
- 5.1.3 Case Study
- 5.1.4 PICQS Structured Training Certificates
- 5.1.5 Continuing Professional Development (CPD)

6. Interview guidance

6.1 One of the requirements to be a qualified certified quantity surveyor or to be a PICQS corporate Member is through the APC. The assessment standard, technical and professional requirements and structure of the interview remain the same. You must interview all Candidates following the same procedure assessing against the same standard of competence and professionalism, to ensure a fair and consistent assessment for all.

6.2 When chairing the APC final interview, the chairperson must follow the outline stated in ‘Panel of Assessor’s Interview Structure’, enclosed as Appendix A.

7. Procedure

7.1 The interview shall be conducted by a panel of Assessors comprising of three (3) Certified Quantity Surveyors, trained and selected for this role.

7.2 Role of the chairperson:

7.2.1 The chairperson is responsible for supervising the final assessment process, which include:

- 7.2.1.1 To initiate pre-interview discussions
- 7.2.1.2 Agreeing the structure of the interview and assign who shall question each competency
- 7.2.1.3 Manage the questioning
- 7.2.1.4 Control the timing
- 7.2.1.5 Initiating the decision-making process after the interview
- 7.2.1.6 Ensure all assessors adhere to the assessment policies
- 7.2.1.7 Writing the referral report with the involvement of the assessors.

8. Conflict of interest

8.1 All PICQS members are bound by their professional ethic to ensure the credibility of the final assessment process. It is important that potential conflicts of interest between assessors and Candidates are properly identified and managed.

8.2 PICQS uses all reasonable endeavours to identify and avoid any obvious conflicts of interest, when selecting panel of assessors, prior to the interview going ahead.

8.3 Once approval of the Preliminary Assessment is received from PMLA, the APC Committee shall contact the APC Assessors to check conflict of interest, prior to the distribution of 'APC Final Assessment Submission' to chairpersons and assessors.

8.4 The following are example which could give rise to conflict:

- 8.4.1 Friend, neighbor, acquaintance or friends in common
- 8.4.2 Family relationship
- 8.4.3 Colleague past or present
- 8.4.4 Client or competitor
- 8.4.5 Does business with you or your firm.

8.5 In case there is a conflict of interest, it should be declared to APC Committee, who shall set the schedule of final interview and arrange the respective Candidate for each panel of assessors. The APC Committee shall send the list of potential Candidates to APC Assessors in advance. If you think a conflict of interest might exist you should declare this immediately and in advance of the interview.

9. Pre-interview preparation

9.1 On receipt of the ‘APC Final Assessment Submission’ approved by the APC Committee, each panel should check that the documents comply with the requirements. Key areas to check are:

- 9.1.1 The correct number and level of Basic Professional and Core Technical
- 9.1.2 Written submissions are complete
- 9.1.3 Appropriate amount and type of professional development is recorded

9.2 The panel should commit time to prepare for each interview to ensure:

- 9.2.1 Had read the Candidate’s submission
- 9.2.2 Understand the Candidate’s background and experience
- 9.2.3 Familiarize with the Candidate’s declared competencies
- 9.2.4 Understand the assessment process ensuring the delivery of a professional and competent assessment

9.3 The chairperson shall contact each assessor prior to the final assessment day to arrange a time to discuss the Candidate as a panel. It is significant that the chairperson is well-briefed about the outline when chairing the interview as listed in Appendix A – ‘Panel of Assessor’s Interview Structure’.

9.4 The ‘Competency Allocation Matrix’, enclosed as Appendix B can be used by the chairperson to reflect Candidate’s declared competency prior to distribution to his/her co-assessors.

10. Interview structure

10.5 The duration of interview is approximately one hour. The main objective of the final assessment interview (APC Final Interview) is to assess whether the Candidate can qualify as a competent Quantity Surveyor who shall be able to give reasoned advice to Clients.

10.6 The Panel of assessors is consisting of three (3) approved Corporate Member of the PICQS (MPICQS).

10.7 The APC final interview is structured below:

Chairperson’s opening and introduction	3-4 minutes
APC Candidate’s presentation about their case study	5 minutes
Questions on the presentation	10 minutes
Discussion on overall experience including CPD, core technical competencies, specific competencies (if applicable), basic professional practice, Rules of Conduct and Ethical standards	30 minutes
Chairperson’s areas of questioning may include basic professional practice, CPD, Rules of Conduct and Ethical standards; current issues in the profession	10 minutes
Chairperson to close	1-2 minutes
Total	60 minutes

11. Interview

11.1 The interview shall be conducted by a panel of Assessors comprising of three (3) Certified Quantity Surveyors, trained and selected for this role.

11.2 The Candidate be asked questions on the case study and the presentation; the final assessment submissions including the SoE and CPD log; PICQS ethical and professional standards; current issues in the profession; and other broader aspects of the Candidate’s experience and knowledge.

- 11.3 The chairperson shall welcome the Candidate, introduce the panel, explain the interview structure, ask opening questions, manage the time throughout the interview and close the interview. The chairperson’s questioning may include basic professional practice, CPD, Rules of Conduct and ethical standards; current issues in the profession.
- 11.4 The assessors shall be looking for evidence all throughout the interview of the Candidate’s achievement of the required level of competence of the competencies chosen by the Candidate in his/her route to membership. The Candidate is expected to provide advice to the client that would ensure sustainable outcome and shall not be detrimental to the project which could eventually result to dispute/arbitration. They shall take a holistic view of your training, submissions, presentation and interview and assessed whether you have attained the minimum level required to qualify as a Certified Quantity Surveyor. They may refer to your submission and their notes taken during your presentation and interview to guide them in their decision-making.
- 11.5 PICQS is looking for the Candidate to be technically competent, highly professional in dealings with the Client, management team, peers, and/or subordinates. The Candidate is expected to have a deep understanding of its role and the impact of its works in the project and in the construction industry. The Candidate must know its clients’ objectives and values and can confidently deliver quality services to them unsupervised. The Candidate must have an up-to-date knowledge of rules and regulations affecting the clients, the profession and the construction industry. The Candidate shall be an excellent ambassador for Filipino quantity surveyors and quantity surveying in the Philippines once qualified as a Certified Quantity Surveyor.
- 11.6 Each assessor shall bring the ‘Assessment Notes Sheet’, enclosed as Appendix C at the time of interview for note taking purposes.

12. Post interview assessment

- 12.1 After the Candidate has left the interview session, the panel shall take a few minutes to reflect on the interview and shall comment on the ‘Assessment Notes Sheet’. As such, these notes can be used as a reference when preparing their respective grading sheet (i.e. Appendix D - ‘Chairperson’s Grading Sheet’ and Appendix E - ‘Assessors’ Grading Sheet’) and completing the ‘Assessment Result Form’, enclosed as Appendix F.
- 12.2 The chairperson shall lead a discussion seeking each assessor’s views. It should cover all aspects of assessment but with particular reference to the competencies. Consensus decision must be made.
- 12.3 Subsequent to the final interview, the result shall be provided within 14 days from the date of final interview.
- 12.4 **Pass Result** - If the Candidate receives a pass result, he/she shall be awarded the Certified Quantity Surveyor qualification. He/she can use a post nominal, MPICQS.
- 12.5 **Referral Result** - If the Candidate gets referred, he/she shall be provided with a referral report within 28 days from the date of final interview stating the reasons of such decision. To be eligible for re-assessment the Candidate shall complete the following requirements:
- 12.5.1 gain further professional experience relevant to his/her area of deficiency
 - 12.5.2 continue taking CPDs as required in Section 2
 - 12.5.3 updated written submissions as per the assessor’s feedback in the referral report as well as to record further experience gained
 - 12.5.4 Secure sign-off APC Submissions from PMLA Committee
- 12.6 Once the above-mentioned requirements are complete, the Candidate shall re-submit at the next available assessment for re-interview. The Candidate shall be reassessed on all the requirements of the APC including Basic, Ethics and Core Technical competencies.

12.7 In case of appeal, the Candidate has 14 days from the date of referral result to fill-out the appeal form and to submit to the APC Regulatory Board.

13. Referred Candidates

13.1 In case the Candidate did not meet the level of competency, the chairperson in coordination with co-assessors shall prepare a referral report focusing on the Candidate’s competency deficiency. The panel should provide constructive comments clearly stating the deficiencies and how to rectify them. The panel can use the ‘Referral Report Guidance’, appended as Appendix H this Guide.

13.2 The report must have:

13.2.1 reason for the referral

13.2.2 information to support the referral,

13.2.3 recommend further experience of study that the Candidate should be able to identify and achieve.

13.3 The chairperson shall adopt the ‘Referral Report Template’, enclosed as Appendix G when completing the referral report to be provided to the Candidate within 28 days from the date of final interview.

APPENDIX A – Panel of Assessor’s Interview Structure

Panel of Assessors’ Interview Structure

Below outlines the structure the APC Chairperson must follow when chairing an APC Interview.

Time frame	Interview structure
3-4 mins	Chairperson’s opening and introduction
	<ul style="list-style-type: none"> • Explain interview process to Candidate: <ul style="list-style-type: none"> - Presentation – 5 minutes - Questions on presentation – 10 minutes - Discussion on overall experience including CPD, Core Technical Competencies, Basic Professional Practice, Rules of Conduct and Ethical Standards – 30 minutes - Chairperson’s area of questioning which may include CPD, Core Technical Competencies, Basic Professional Practice, Rules of Conduct and Ethical Standards, current issues in profession – 10 minutes - Close interview (giving Candidate last word) - 1-2 minutes • Check that the Candidate is fit and well and able to proceed. (MAKE SURE THE CANDIDATE RESPONDS)
10 mins	Candidate presentation
	<ul style="list-style-type: none"> • Ask Candidate to start presentation when they are ready • Ensure the presentation is only 5 minutes
10 mins	Questions on Presentation
	<ul style="list-style-type: none"> • Thank the Candidate for their presentation • Move onto questioning on Presentation • You may wish to ask the first question (This helps the flow of the interview) • Other assessors to follow • Cover any questions you feel assessors may have missed • Watch the time and close

APPENDIX A – Chairperson’s Interview Structure (Cont’d)

25 mins	Discussion on overall experience including CPD, Core Technical Competencies, Basic Professional Practice, Rules of Conduct and Ethical Standards
	<p>Move unto questioning on overall experience including Core Technical Competencies, Basic Professional Practice, Rules of Conduct and Ethical Standards</p> <ul style="list-style-type: none"> • You may wish to ask the first question (This helps the flow of the interview) • Other assessors to follow • Cover any questions you feel assessors may have missed • Watch the time and close
10 mins	Chairperson’s areas of questioning may include Basic Professional practice, CPD, Rules of Conduct and Ethical standards; current issues in the profession
	<ul style="list-style-type: none"> • Move unto questioning on Professional practice, CPD • Rules of Conduct and Ethical Standards (relevance to experience if possible) • Client Care and Business Principles • General (PICQS business / industry hot topics) • Watch the time • Draw the interview to a close
1-2 mins	Close interview
	<ul style="list-style-type: none"> • Thank you • Pick up any questions passed over during interview • Give Candidate last word • Any questions Candidate wishes to come back on • Advise Candidate PICQS will inform them of the result by e-mail within 14 days

APPENDIX B – Competency Allocation Matrix

Competency Allocation Matrix

Note: This template needs to be updated by the chairperson to reflect the Candidate’s declared competency and to be sent to co-assessors as soon as the Final APC Submission is received from the APC Committee

Chairperson	Assessor 1	Assessor 2
Candidate	Panel	Assessment date / time

Competency	Level	To be covered by.....			Evidence	Pass	Refer
		Chair	Assessor 1	Assessor 2			
Basic Professional Competencies [Remember to ask at least 6 on Basic Professional Competencies questions, always focusing on Candidate experience]							
E07 Conduct Rules, Ethics and Professional Practice	3	X					
B01 Sustainability and Green Environment	2		X				
B02 Health, Safety and Welfare in Construction	2		X				
B03 Conflict Avoidance and Alternative Dispute Resolution	1		X				
B04 Client Care and Business Principles	2	X					
B05 Financial Accounting and Management Principles	1			X			
B06 Teamworking, Communication and Inclusivity/Diversity	2			X			

APPENDIX B – Competency Allocation Matrix (Cont’d)

Competency	Level	To be covered by.....			Evidence	Pass	Refer
Core [Remember to ask experiential based questions from Critical Analysis, declared competencies and documented experience. If evidence is not documented or presented by the Candidate, ask the Candidate what they have done to achieve the competency]		Chair	Assessor 1	Assessor 2			
C01* Economics for Construction and Estimating	3			X			
C02 Measurement, Tendering and Procurement	3			X			
C03** Commercial Management in Construction	3		X				
C04 Cost Reporting	3			X			
C05 Contractual Procedures, Law and Contract	3			X			
C06 Construction Technology, Methods and Maintenance of Buildings	3		X				
C07 Value Management and Risk Management	2		X				

*Core Technical Competency for Consulting Quantity Surveyor
 **Core Technical Competency for Contracting Quantity Surveyor

APPENDIX B – Competency Allocation Matrix (Cont'd)

Notes for Panel of Assessors

1. PICQS requires all assessors to ensure all questioning is based upon the Candidate's experience and declared competencies.
2. Assessors are asked to refrain from using 'stock' questions unless the question has any relevance to the Candidate's experience and declared competencies.
3. Assessors are required to fully appreciate the Candidate's declared competencies and generate a list of questions specific to each individual Candidate's experience and declared competencies.
4. Assessors are required to, as best they can in the timescale provided (60mins), cover the breadth and depth of the Candidate's declared competencies and experience and use the breadth and depth of questioning as the foundation for the assessment outcome.
5. If a Candidate is unable to demonstrate a competency, do not dwell on it, move on. Generally, time will not be on your side.
6. This matrix is a tool provided to chairperson to best manage the breadth and depth of questioning. It is only an example and can be amended.
7. This matrix is a tool to assist chairperson and assessors in the creation of a referral report or appeal report should they be required. With this in mind, please complete the evidence column as best you can (probably drawing on additional notes given the space limitation) if the competency marked as referred.
8. Please keep this competency matrix and all assessment notes for a period of **3 months** after the assessment date to ensure the results and appeals period has passed. After this period of time this matrix and all notes should be confidentially shredded.

APPENDIX D – Chairperson Grading Sheet

Chairperson Grading Sheet

Notes for Chairperson

The information below has been compiled to assist the APC chairperson with the final assessment process. Your main responsibility is to ensure that the final assessment process is followed correctly for both Candidates and assessors. Please ensure you follow the recommended procedure and guideline set out below.

1. Check the Candidate submissions to ensure they meet the requirements. You must also check for any potential conflicts of interest. If you do not believe the submissions meet the requirements or you identify potential conflicts of interest, you must contact APC Committee immediately.
2. Contact your assessment panel at least two weeks before the assessment day. This may be done by email, telephone or in person. Ensure there are no conflicts of interest. Discuss the competency areas each panel member is most comfortable covering before allocating questioning areas.
3. The APC competency questioning matrix is a tool provided to assessors to best manage the breadth and depth of questioning. It is only a guide and can be amended as you feel appropriate.
4. The APC competency allocation matrix is also tool to assist the chairperson and assessors with interview questioning and the creation of a referral report or appeal report should they be required. With this in mind, please complete the evidence column with constructive feedback if the competency is marked as not met. (Please make additional notes on the Assessment Notes Sheet template as space is limited)
5. PICQS requires all assessors to ensure all questions are based upon the Candidate's experience and declared competencies.
6. Assessors are asked to refrain from using 'stock' questions unless the question has any relevance to the Candidate's experience and declared competencies.
7. It is the chairperson's responsibility to ensure assessors are familiar with the Candidate's declared competencies and able to generate a list of questions specific to each individual Candidate's experience and declared competencies.
8. Assessors are required to, as best they can in the timescale provided (60mins), cover the breadth and depth of the Candidate's declared competencies and experience and use the breadth and depth of questioning as the foundation for the assessment outcome. As the Chairperson it is your responsibility to ensure this happens by controlling the interview and time keeping.
9. If a Candidate is unable to demonstrate a competency, do not dwell on it, move on.
10. As the chairperson you must lead and control the interview, you have the overall responsibility for:
 - Structure of the interview was properly considered
 - Questioning areas and levels are appropriate
 - Good timing of the process
 - Post-assessment outcome discussed and agreed
 - APC Referral Report completed with structured feedback (if applicable)

Please refer to the Appendix A – Panel of Assessors' Interview Structure of the Assessor's Guide.

11. The decision to pass or refer the Candidate should not be made until after the interview has been completed and a full discussion has taken place within the assessment panel.

APPENDIX D – Chairperson Grading Sheet (Cont’d)

12. Produce referral reports within 28 days from the date of final interview stating the reasons of such decision. Take away your notes so you can fully consider the guidance you are giving. Always e-mail the report to your fellow panel members for their comments before sending the report to APC Committee. Make sure you use the provided template. Please return the completed referral report to APC Committee electronically in a Word format.
13. Please make sure you have advised APC Committee of the outcome of all of your interviews on the same day of the Candidate’s final interview using ‘Assessment Result Form’, enclosed as Appendix F of the Assessor’s Guide.
14. APC competency allocation matrix and all assessment notes should be kept for a period of 3 months from the assessment date to ensure all results and appeals process has been completed. After this period of time the matrix and all notes should be confidentially destroyed, in accordance to the PICQS Data Protection Regulation, (which both PICQS and you are subject to comply).

Case study

Case study title:	
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Case study	Notes
Suitable project(s) / process selected for the case study. (Within 36 months)	
Introduction - summary of the project and the role/ involvement of the Candidate	
Approach - One or two key issues / challenges encountered in the project	
Options - considered to resolve the issue(s)	
Critical analysis of these options leading to the Candidate’s recommended solution	
Outcome of the recommended solution	
Conclusion - Reflective analysis of the outcome and the lessons learnt.	
A good display of professional and technical knowledge and problem solving abilities.	
Overall standard of: <ul style="list-style-type: none"> • written presentation • layout • spelling • grammar • graphics 	

APPENDIX D – Chairperson Grading Sheet (Cont’d)**Continuing Professional Development (CPD)**

Competency Requirements	Notes
No. of hours of formal CPD as per Section 8.5 of APC Candidate’s Guide.	
No. of hours of informal CPD as per Section 8.5 of APC Candidate’s Guide.	

Post Interview

- Reflect on the last hour, has the Candidate sufficiently demonstrated their knowledge, practice and advisory level on the selected competencies (2 – 5 minutes of quiet time)
- Add additional notes to ‘Assessment Notes Sheet’ and agree on outcome
- Consider the competencies and the Candidate’s responses
- Consider the Candidate’s overall performance
- Agree a decision from the panel – **as the Chairperson you must lead discussion**
- Indicate the result on Appendix F - ‘Assessment Result Form’ of the Assessor’s Guide
- If the Candidate is referred ensure your panel have added additional comments/feedback to referral section to assist you when writing the referral report and to help the Candidate to improve their performance in the future
- All grading sheets should be retained by the panel of assessor for reference in referrals
- APC Committee shall confirm the result of the assessment using the Appendix F - ‘Assessment Result Form’ of the Assessor’s Guide
- As the chairperson you **must** complete the ‘Referral Report Template’, enclosed as Appendix G of the Assessor’s Guide if the Candidate is referred

Candidate Name:
PICQS Membership No.

APPENDIX D – Chairperson Grading Sheet (Cont’d)

Presentation (**outcome to be completed by each panel member after the interview**)

Chairperson Name: _____

Presentation – 5 minutes	Reasoning/Why	Outcome	
Oral communication		<input type="checkbox"/> Met	<input type="checkbox"/> Not Met
Clarity of thought and structure		<input type="checkbox"/> Met	<input type="checkbox"/> Not Met
Presentation skills: <ul style="list-style-type: none"> • Eye contact • Body language • Voice projection • Visual aids (if any) 		<input type="checkbox"/> Met	<input type="checkbox"/> Not Met

Interview / Competency (outcome to be completed by each panel member after the interview)

Competency Requirements	Reasoning/Why	Outcome	
Basic Professional		<input type="checkbox"/> Met	<input type="checkbox"/> Not Met
Core Technical		<input type="checkbox"/> Met	<input type="checkbox"/> Not Met

Ethics

(If this has not been met to a satisfactory standard the Candidate **must** be referred)

Competency Requirements	Reasoning/Why	Outcome	
Ethics		<input type="checkbox"/> Met	<input type="checkbox"/> Not Met

APPENDIX D – Chairperson Grading Sheet (Cont’d)

Continuing Professional Development (CPD)

Competency Requirements	Reasoning/Why	Outcome	
No. of hours of formal CPD as per Section 8.5 of APC Candidate’s Guide.		<input type="checkbox"/> Met	<input type="checkbox"/> Not Met
No. of hours of informal CPD as per Section 8.5 of APC Candidate’s Guide.		<input type="checkbox"/> Met	<input type="checkbox"/> Not Met

Further Notes (Comments to inform referral report)

Overall Assessment Outcome

Please indicate the overall outcome on the separate **Assessment Result Form**. This document must be signed by the panel of assessors.

Please retain this grading sheet for your reference for referred Candidates.

APPENDIX E – Assessors Grading Sheet

Assessors Grading Sheet

Notes for APC Assessors

1. PICQS requires all assessors to ensure all questioning is based upon the Candidate's experience and declared competencies.
2. Assessors are asked to refrain from using 'stock' questions unless the question has any relevance to the Candidate's experience and declared competencies.
3. Assessors are required to fully appreciate the Candidate's declared competencies and generate a list of questions specific to each individual Candidate's experience and declared competencies.
4. Assessors are required to, as best they can in the timescale provided (60mins), cover the breadth and depth of the Candidate's declared competencies and experience and use the breadth and depth of questioning as the foundation for the assessment outcome.
5. If a Candidate is unable to demonstrate a competency, do not dwell on it, move on. Generally, time will not be on your side. Refer to the APC Interview Structure for timings.
6. The APC competency questioning matrix is a tool provided to assessors by the panel chairperson to best manage the breadth and depth of questioning. It is only an example and can be amended.
7. The APC competency questioning matrix is also tool to assist the chairperson and assessors in the creation of a referral report or appeal report should they be required. With this in mind, please complete the evidence column as best you can (probably drawing on additional notes given the space limitation) if the competency marked as referred.
8. APC competency questioning matrix and all assessment notes should be kept for a period of 3 months from the assessment date to ensure all results and appeals process has been completed. After this period of time the matrix and all notes should be confidentially shredded in accordance to the PICQS Data Protection Regulation, (which both PICQS and you are subject to comply).
9. Do not make a decision to pass or refer the Candidate until after the interview has been completed.

APPENDIX E – Assessors Grading Sheet (Cont’d)

Case study

Case study title:	
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Case study	Notes
Suitable project(s) / process selected for the case study. (Within 36 months)	
Introduction - summary of the project and the role/ involvement of the Candidate	
Approach - One or two key issues / challenges encountered in the project	
Options - considered to resolve the issue(s)	
Critical analysis of these options leading to the Candidate’s recommended solution	
Outcome of the recommended solution	
Conclusion - Reflective analysis of the outcome and the lessons learnt.	
A good display of professional and technical knowledge and problem solving abilities.	
Overall standard of: <ul style="list-style-type: none"> • written presentation • layout • spelling • grammar • graphics 	

APPENDIX E – Assessors Grading Sheet (Cont’d)**Continuing Professional Development (CPD)**

Competency Requirements	Notes
No. of hours of formal CPD as per Section 8.5 of APC Candidate’s Guide.	
No. of hours of informal CPD as per Section 8.5 of APC Candidate’s Guide.	

Post Interview

- Reflect on the last hour, has the Candidate sufficiently demonstrated their knowledge, practice and advisory level on the selected competencies (2 – 5 minutes of quiet time)
- Add additional notes to ‘Assessment Notes Sheet’ and agree on outcome
- Consider the competencies and the Candidate’s responses
- Consider the Candidate’s overall performance
- Make a decision as a panel – chairperson to lead discussion
- Indicate the result on Appendix F - ‘Assessment Result Form’ of the Assessor’s Guide, sign the relevant box
- If the Candidate is referred ensure your panel have added additional comments/feedback to referral section to assist you when writing the referral report and to help the Candidate to improve their performance in the future
- All grading sheets should be retained by the panel of assessor for reference in referrals
- APC Committee shall confirm the result of the assessment using the Appendix F - ‘Assessment Result Form’ of the Assessor’s Guide
- The chairperson must complete the ‘Referral Report Template’, enclosed as Appendix G of the Assessor’s Guide if the Candidate is referred

Candidate Name:

PICQS Membership No.

APPENDIX E – Assessors Grading Sheet (Cont’d)

Presentation (outcome to be completed by each panel member after the interview)

Assessor Name: _____

Presentation – 5 minutes	Reasoning/Why	Outcome	
Oral communication		<input type="checkbox"/> Met	<input type="checkbox"/> Not Met
Clarity of thought and structure		<input type="checkbox"/> Met	<input type="checkbox"/> Not Met
Presentation skills: <ul style="list-style-type: none"> • Eye contact • Body language • Voice projection • Visual aids (if any) 		<input type="checkbox"/> Met	<input type="checkbox"/> Not Met

Interview / Competency (outcome to be completed by each panel member after the interview)

Competency Requirements	Reasoning/Why	Outcome	
Basic Professional		<input type="checkbox"/> Met	<input type="checkbox"/> Not Met
Core Technical		<input type="checkbox"/> Met	<input type="checkbox"/> Not Met

Ethics

(If this has not been met to a satisfactory standard the Candidate **must** be referred)

Competency Requirements	Reasoning/Why	Outcome	
Ethics		<input type="checkbox"/> Met	<input type="checkbox"/> Not Met

APPENDIX E – Assessors Grading Sheet (Cont’d)

Continuing Professional Development (CPD)

Competency Requirements	Reasoning/Why	Outcome	
No. of hours of formal CPD as per Section 8.5 of APC Candidate’s Guide.		<input type="checkbox"/> Met	<input type="checkbox"/> Not Met
No. of hours of informal CPD as per Section 8.5 of APC Candidate’s Guide.		<input type="checkbox"/> Met	<input type="checkbox"/> Not Met

Further Notes (Comments to inform referral report)

Overall Assessment Outcome

Please indicate the overall outcome on the separate **Assessment Result Form**. This document must be signed by the panel of assessors.

Please retain this grading sheet for your reference for referred Candidates.

APPENDIX F – Assessment Result Form

Assessment Result Form

Candidate details:

Name of Candidate:	
Membership number:	
Route to Membership:	
Assessment Date:	

For assessor use only: (to be completed after the final assessment interview)

Overall Assessment Outcome

Overall result: (delete as necessary)	PASS	REFER
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As the assessment panel, we confirm that we are all in agreement with the result.

Chairperson Name:		Signature:	
Assessor Name:		Signature:	
Assessor Name:		Signature:	

Reasons for referral (Please tick all that apply)

Ethics	<input type="checkbox"/>
Not technically competent for current pathway	<input type="checkbox"/>
Not fully prepared – gave poor interview	<input type="checkbox"/>
Not fully prepared – summary of experience submission was poor	<input type="checkbox"/>
Not fully prepared – case study submission was poor	<input type="checkbox"/>
Case study topic did not fully meet the competencies	<input type="checkbox"/>
Others (Please specify)	<input type="checkbox"/>

APPENDIX G – Referral Report Template

Referral Report

Name of Candidate:	
Membership number:	
Route to membership:	

The panel set out within the report guidance to assist you with a future re-submission for assessment.

The APC is a holistic assessment of your knowledge, practical experience, written submissions and communication skills.

Case study

Title	
<p>When you resubmit for assessment, your case study must continue to meet the criteria as set out in the Candidate’s guide. The case study must be on a project or projects that you have been personally involved with in three years prior to your final assessment submission date. This may mean you need to change the project, or element of the project, your existing case study is based on. Remember, a project may have started over two years ago but your case study should reference your involvement in the past two years.</p> <p>The following feedback is provided to support you with preparing a case study for your next submission.</p>	
Empty space for case study content	

APPENDIX G – Referral Report Template (Cont’d)

Presentation and Interview

Basic Professional

Competency name	Level declared	Level the assessment panel consider you have achieved	Evidence that the declared level was not achieved

APPENDIX G – Referral Report Template (Cont’d)

Core Technical

Competency name	Level declared	Level the assessment panel consider you have achieved	Evidence that the declared level was not achieved

Continuing professional development (CPD)

Please note: you should continue recording CPD until you come forward to sit final assessment again.

APPENDIX G – Referral Report Template (Cont'd)

Conduct Rules, Ethics and Professional Practice

Level the assessment panel consider you have achieved	Evidence that the declared level was not achieved

Conclusion

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APPENDIX G – Referral Report Template (Cont’d)

Next steps

Further support

At your next assessment, the deficient competencies outlined in this report, must be approved again by your mentor to show they consider that the deficiencies identified have been fully addressed.

You will need to record all your experience since your referral, concentrating on the areas highlighted. All elements of the APC and all competencies will be reassessed.

PICQS Training

There are a range of training courses available for Candidates to undertake. If there are recommendations that have been made in this referral report on gaining further knowledge and experience, there may be PAP2 training suitable to support you.

Online learning – an efficient way to develop your skills

There are other resources that are available online related to your course that provides convenient, flexible, online study options.

Preliminary Assessment

If you have been deemed ready to proceed to final assessment through the preliminary review and have been referred at final assessment, you are not required to complete the preliminary review again. However, a sign-off APC Final Assessment Submission is required from PMLA Committee prior to confirmation of your re-assessment.

Appeals process

If you believe your interview was not conducted according to our guidelines you can appeal. To do this you must complete the APC appeal form available and submit to the APC Regulatory Board within 14 days of your referral report being issued by the APC Committee. Appeals can be made about the manner in which the interview took place, but not in relation to a decision which you may disagree with.

APC Regulatory Board will appoint an independent appeal panel to consider the way the interview was conducted, based upon the appeal form and your referral report. The outcome will either be ‘approved for re-assessment’ or ‘declined’. The decision of the APC Regulatory Board relating to any appeal from the Candidate is final.

APPENDIX H – Referral Report Guidance

Referral Report– Guidance

*Please use this guide to assist with completing the referral report template for the Candidate. The referral report should **always** be addressed directly to the Candidate using ‘you’ and ‘your’.*

The Assessor 1 & Assessor 2 shall send their respective input on the referral report to their panel chairperson **within 5 working days** from the Candidate’s final interview. The chairperson is expected to consolidate and complete the ‘Referral Report Template’ and to submit to the APC Committee copy furnished both Assessor 1 and Assessor 2.

Please use this report to provide guidance to assist the Candidate with their future re-submission for assessment. PICQS will encourage the Candidate to discuss the contents of their referral report with their mentor through joining PMLA.

Case Study

In this section, please give specific advice on the contents of the project used, and not just the format and layout of the document. If the Candidate has exceeded the word count, this should be mentioned.

Please remove the statement that is not relevant for the Candidate, leaving only one option:

- Submit another 3,000-word case study on another project/s
- Re-submit the case study from this assessment suitably updated or amended.

Please note:

- If a Candidate produces a technically competent case study and adequately covers all elements of the competency questioning, it is not sufficient grounds to refer the Candidate on the case study alone.
- If the Candidate’s involvement is more than 24 months ago at the time of referral, they will be provided with one further session to use the same case study if the panel deem the case study as acceptable.

Presentation and Interview

Please note this section is for general comments on the presentation, interview techniques and quality of answers. It should not contain comments regarding the case study.

Basic Professional Competencies & Specific Competencies

In this section, please list any Basic Professional competencies that have not been adequately demonstrated. Provide examples from the interview and submission documents. Please indicate the level of competency required, and the level you believe they have reached. **(Ethics is to be addressed under a separate section).**

If during the interview you have found the Candidate to be satisfactory in this area, and have no comments to add, please insert the following standard statement:

“On this occasion, you have demonstrated the required level of basic competence in the context of your experience and area of practice. However, all basic professional competencies shall be fully tested again at your next interview. Therefore, ensure you remain up to date.”

Core Technical Competencies

In this section, please list any core competencies that have not been adequately demonstrated. Provide examples gained from the interview and submission documents. You should provide more than one example for each competency. Please indicate the level of competency required, and the level of competence that they have successfully demonstrated. **You should provide examples of questioning at each level that have not been adequately demonstrated by the Candidate:**

Level 1: knowledge and understanding

Level 2: application of knowledge and understanding

Level 3: reasoned advice and depth of knowledge

Examples of questioning must be provided at each level that the Candidate did not achieve.

Further advice should also be provided to the Candidate on how they can address this deficiency.

APPENDIX H – Referral Report Guidance (Cont’d)

Continuing Professional Development (CPD)

Please note that the CPD record might influence your overall decision. However, it should not be the sole reason for referral.

Ethics

Please note that Ethics should only be addressed in this section of the referral report and **not** under the basic/special competency section.

If during the interview you have found the Candidate to be satisfactory in this area, and have no comments to add, please insert this statement into the box.

“This is a basic competency that is tested at final assessment, and is an essential part of becoming a member of PICQS.

On this occasion, you have demonstrated the required level of competence in the context of your experience and area of practice. However, all basic competencies shall be fully tested again at your next interview. Therefore, ensure you remain up to date.”

Conclusion

You must provide a concluding statement of the outcomes, referring to the areas of improvement highlighted in the relevant sections, for the Candidate’s next assessment. Please also use this section to provide the Candidate with any positive feedback about their assessment.

Finally

If you believe this Candidate has been put forward for final assessment too early and clearly not ready, then please advise APC Committee.

References:

PICQS, 2011. *PICQS Bye-Laws*. Makati: s.n.

RICS, 2018. <https://www.rics.org>. [Online]

Available at: <https://www.rics.org/globalassets/rics-website/media/assessment/apc-candidate-guide/>
[Accessed 24 August 2020].