



**THE SOUTH AFRICAN COUNCIL**  
for the  
**QUANTITY SURVEYING PROFESSION**  
**DIE SUID-AFRIKAANSE RAAD** vir die **BOUREKENAARSPROFESSIE**

Established in terms of the Quantity Surveying Profession Act 2000 (Act 49 of 2000)  
Ingestel ingevolge die Wet op die Bourekenaarsprofessie 2000 (Wet 49 van 2000)

**IDENTIFICATION OF WORK**

**TO BE PERFORMED BY PERSONS REGISTERED IN TERMS OF  
THE QUANTITY SURVEYING PROFESSION ACT 2000  
(ACT NO. 49 OF 2000)**

**Date: 19 August 2011**

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## 1.0 INTRODUCTION

The following are detailed descriptions of standard activities and functions inherent in delivering professional **Quantity Surveying (QS)** services. In essence, this document defines the work set aside for persons registered as Quantity Surveyors in the specified categories of registration

The contents of this document describe standard services which are generic to most Built Environment projects.

There is often a lack of comprehension of the work performed by Quantity Surveyors. This is to the general detriment of the construction industry macro economy and the micro-economy of the individual projects in terms of profitability / feasibility, cost management and value for money derived by clients of the industry.

Identification of work for persons registered in terms of Section 18 of Act 49/2000

- optimises the application of scarce, highly-skilled human resources,
- minimises a client's financial risk,
- promotes best value for money spent,
- protects the Public

Section 26 of the Act requires SACQSP to make recommendations to the Council for the Built Environment (CBE), regarding the work identified in terms of subsection (2) and prohibits a person not registered in terms of this Act to perform any kind of work identified for any category of professional registered in terms of this Act.

## 2.0 DEFINITIONS

**"Built Environment"** refers to the functional field in which registered persons practice. The Built Environment includes all structures that are planned and/or erected above or underground, as well as the land utilised for the defined purposes and the provision of supporting infrastructure.

**"Quantity surveying"** is the provision of expert, professional services and advice on construction procurement, contracting and costs. Quantity surveyors are trained, experienced specialists who have acquired comprehensive knowledge of construction procurement and contracting methods, finance and economics. They advise, collaborate and co-operate with members of other Built Environment Professions.

To protect their clients' interests, Quantity surveyors:

- advise on construction procurement methods and evaluation of tenders, contracting strategies and conditions of contract
- advise on and provision of construction cost planning, cost analysis and cost control of projects
- advise and undertake value engineering and life cycle costing exercises and estimation of replacement cost for insurance purposes
- undertake financial feasibility ( viability / profitability) studies to predict possible rates of return on commercial investment projects
- prepare and compile procurement documentation including tender, pricing and contract data, bills of quantities / activity schedules / schedules of rates and other tender documents including main-, sub-contract and specialist services agreements
- evaluate tenders and make recommendations on suitability and pricing of tenders and report findings accordingly
- manage all the financial aspects of construction projects including the preparation of valuations for payment certificates in order to ensure that projects are constructed within approved budgets
- prepare valuation of variations to the scope of work including negotiation of rates and prices and the preparation and conclusion of financial final accounts with main- and subcontractors
- advise on contractual matters including resolution of contractual claims and disputes
- act as principal agents in terms of construction contracts

**"Quantity Surveyor"** is a person who is registered as such in terms of the Quantity Surveying Profession Act, 2000 (Act No. 49 of 2000, as amended)

**"Works"** means all work executed or intended to be executed in accordance with a construction contract.

**“Principal Agent”** means a person or entity appointed by a client, and who has full authority and obligation to act on behalf of that client in terms of a construction contract.

**“Principal Consultant”** means a person or entity appointed by a client to manage and administer the services of all other consultants appointed to provide professional services on a specific project.

**“Contractor”** means any person or legal entity entering into a contract with a client for the execution of the **works** or part thereof of a specific project.

**“Nominated Sub-contractors”** are specialist- and other sub-contractors who are nominated by a Principal Consultant to execute work or supply and fix any goods in terms of a specific contract.

**“Selected Sub-contractors”** are specialists and other sub-contractors who are selected by a contractor in consultation with a Principal Consultant to execute work or supply and fix any goods in terms of a specific contract.

**“Domestic Sub-contractors”** are specialists and other sub-contractors who are selected and appointed by a contractor to execute work or supply and fix any goods in terms of a specific contract.

**“Direct Contractors”** are contractors appointed by a client to execute work other than the works related to a specific contract.

**“Suppliers”** are persons or entities appointed by a client to supply goods and products for incorporation into the works related to a specific contract.

**“Construction Programme”** is an appropriately detailed programme for the works related to a specific contract, which

- is used for monitoring the progress of those works and
- indicates the logical sequence and duration of all activities to be completed by the contractors, sub-contractors and suppliers.

**“Contract programme”** is a construction programme for the works related to a specific contract, agreed between the contractor and the Principal Agent.

**“The South African Council for the Quantity Surveying Profession”** means the South African Council for the Quantity Surveying Profession established as a juristic person by section 2 of the Quantity Surveying Profession Act, 2000 (Act No. 49 of 2000, as amended), and **“SACQSP”** has the same meaning.

**“Quantity Surveying Profession Act”** means the Quantity Surveying Profession Act, 2000 (Act No. 49 of 2000, as amended).

**“Quantity Surveying Work”** means the work identified under section 4 of this *Identification of Work for Quantity Surveyors* document.

**“Improper Conduct”** contemplated in section 27(3) of the Quantity Surveying Profession Act, 2000, as amended), means failure to comply with the code of conduct for registered persons.

**“Public”** means any person or group of persons who is, or whose environment is either directly or indirectly affected by any quantity surveying activity, or by an outcome or influence of a quantity surveying activity, or by a service provided in terms of quantity surveying activity, which may impact on the health, safety and interest of such person or group of persons

**“Substantially Practise”** means

- regularly and consistently executing or performing quantity surveying work identified in section 4 of this *Identification of Work for Quantity Surveyors* document,
- charging professional fees for such work and
- accruing professional responsibility to a client or an employer for the performance of such work and related functions.

**“The Council for the Built Environment”** means the juristic person established by section 2 of the Council for the Built Environment Act, 2000 (Act No 43 of 2000)

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Section 26 of the Act requires SACQSP to make recommendations to the Council for the Built Environment (CBE), regarding the work identified in terms of subsection (2) and prohibits a person not registered in terms of this Act to perform any kind of work identified for any category of professional registered in terms of this Act.

### **3.0 GOALS AND OBJECTIVES**

The goal of this document is to make recommendations to the CBE regarding the work that is to be identified for the quantity surveying profession.

The objective of identifying this work is to verify competence of registered quantity surveyors to achieve the following requirements of the Quantity Surveying Professions Act to:

- comply with legislative requirements,
- protect the public by defining the work that each registration category of the quantity surveying professionals can undertake,
- protect the environment and promote effective environmental management,
- promote the sustainability of the developments,
- provide a framework for the identification of work and the demarcation of identified work between professionals,
- provide an effective and efficient mechanism for addressing and recognising overlaps and duplication between work identified by different professions,
- ensure that where work is to be carried out by different categories of professionals, there are clear and transparent ways of determining the category of professional to carry out the work, and
- promote the transparency and accountability of the identification of work process

## **4.0 GENERAL INFORMATION: WORK TO BE PERFORMED BY PERSONS REGISTERED IN TERMS OF ACT 49/2000**

### **4.1 Description of the Quantity Surveying Profession**

Quantity Surveying comprises a variety of services performed by professional consultant Quantity Surveyors appointed by clients who wish to invest in property developments or undertake built environment construction projects.

Quantity surveyors offer professional advice to clients, architects, engineers and other service providers on all financial and contractual matters arising from built environment construction projects from inception to close out. Quantity Surveyors have a full understanding of various systems and methods of construction, specialised services and installations, construction materials, plant (machinery) and labour as well as the many forms of contract and sub-contract agreements available for use in the construction industry.

Quantity surveyors are also competent to advise their clients and other consultants regarding alternative procurement and contracting strategies, methods of construction, material, life cycle costs, value engineering alternatives and valuations of structures for insurance or other purposes

Professional quantity surveying work is undertaken by specialist, formally educated professionals with specific training and experience that provides a special range of skills that are applied to a wide range of problem-solving situations, predominantly related to project costs and construction contracts

### **4.2 Nature and Types of Projects**

The nature and types of projects to be implemented in terms of the *Identification of Work for Quantity Surveyors* registered in terms of the Quantity Surveying Profession Act 2000 (Act No 49 of 2000) shall be all construction work within the Built Environment.

### **4.3 Application of the Provisions of this Document**

The provisions of this document shall be applicable in respect of :-

1. Any quantity surveying work performed within the borders of the Republic of South Africa (RSA), whether or not the intended outcome of such work is to be executed outside the RSA
2. Any person who is not ordinarily resident in the Republic of South Africa, but who performs quantity surveying work within the RSA

### **4.4 Project Work Stages**

Typical construction projects comprise the following Project Work stages:

- 4.4.1. Inception:  
Project initiation and briefing: establishing the client's requirements and preferences, assessing user needs and options, appointments of consultants, establishing the project brief including project objectives, priorities, constraints, assumptions, aspirations and strategies
- 4.4.2. Concept and Viability:  
Preparing and finalising the project concept in accordance with the brief including the scope, scale, character, form, function and preliminary programme and viability of the project
- 4.4.3. Design Development:  
Developing the approved concept to finalise the design, outline specifications, cost plan, financial viability and programme for the project

- 4.4.4. Documentation and Procurement  
Preparing the construction and procurement documentation, confirm and implement the procurement strategies and procedures for effective and timeous procurement of necessary resources for the execution of the project
- 4.4.5. Construction  
Preparation and co-ordination of the procedures and documentation to facilitate practical completion of the works; managing, administering and monitoring the contracts and processes, including the preparation and co-ordination of the procedures and documentation to facilitate practical completion of the works
- 4.4.6. Close Out  
Fulfilling and completing the project close-out including the preparation of the necessary documentation to facilitate effective completion, handover and operation of the project

The generic scope of Work that a professional quantity surveyor may undertake in each of the above Stages is identified in Annexure B. and the competencies required to carry out such work is outlined in Annexure A and C.

#### **4.5 General Notes**

- 4.5.1. As these stages might overlap, the Standard Services stated in section 4 of this *Identification Of Work for Quantity Surveyors* document, may be required to be undertaken during any one Of the Project Work Stages.
- 4.5.2 The order of the Standard Services does not necessarily reflect the actual sequence of implementation.



**5 QUANTITY SURVEYING WORK**

**IDENTIFICATION OF WORK TO BE PERFORMED BY QUANTITY SURVEYORS  
I.E.  
PERSONS REGISTERED IN TERMS OF  
THE QUANTITY SURVEYING PROFESSION ACT, 2000 (ACT NO 49 OF 2000)**

<p><b>Honours Degree in Quantity Surveying (minimum 360 credits plus minimum: 120 credits)</b></p>	<p><b>Professional Quantity Surveyor</b></p>	<p><b>Provision of advanced quantity surveying expertise within the following core activities and delivery of the full scope of professional services</b></p> <p><b>Note: Persons registered as Professional Quantity Surveyors are permitted to open their own firms and practice for their own accounts</b></p>	<p><b>Associated Competencies (Unit Standard Numbers)</b></p>
<p>Interacting with relevant stakeholders in the construction industry</p>		<p>14415</p>	
<p>Interpreting construction drawings and specifications</p>		<p>14426</p>	
<p>Basic setting-out of construction works, using appropriate survey equipment</p>		<p>14428</p>	
<p>Compilation of price determination documents and utilising the information in project administration applications</p>		<p>Undertake elementary descriptive quantification</p>	
<p>Taking off quantities and preparing price determination documents for small / simple load bearing structures</p>		<p>Undertake basic descriptive quantification</p>	
<p>Taking off quantities, preparing and pricing price determination documents for both load bearing and framed structures</p>		<p>Undertake intermediate descriptive quantification</p>	
<p>Implementing appropriate budgetary processes related to Built Environment projects, cash flow forecasting and management, and preparing financial reports</p>		<p>Undertake budgetary reporting</p>	
<p>Preparing cost estimates for Built Environment projects, including advising on design-cost alternatives, undertaking project cost norm analyses, and preparing replacement cost valuations</p>		<p>Prepare cost estimates for Built Environment projects</p>	
<p>Undertaking the cost planning and cost control of Built Environment projects</p>		<p>Prepare for and implement cost planning and cost monitoring processes related to Built Environment projects</p>	
<p>Providing procurement advice for Built Environment projects, including matching clients' strategic objectives with procurement system characteristics</p>		<p>Provide procurement advice for Built Environment projects</p>	
<p>Managing payment processes during Built Environment project construction</p>		<p>Managing payment processes during Built Environment project construction</p>	

Identifying and managing the effects of scope-change on Built Environment projects	Manage the effect of change in the nature and scope of Built Environment projects
Determining the resources required by Built Environment project production processes	Determine resource requirements for Built Environment projects
Undertaking the contractual management of Built Environment projects	Apply legal principles to the contractual management of Built Environment projects
Undertaking the strategic planning of Built Environment projects, including contributing to brief development, cost / benefit analyses and economic and financial analyses	Strategic planning of Built Environment projects
Providing advice on appropriate types of contract documents and price determination methods	Providing advice on contract documents and price determination methods for Built Environment projects
Managing the production / preparation of price determination and cost management documents for Built Environment projects	Manage production processes of price determination documents for Built Environment projects
Resolving claims, preparing the final account and applying close-out procedures	Resolve claims, settle disputes and apply close-out procedures on Built Environment projects
Developing and implementing project service quality assurance procedures	Implement project service quality assurance on Built Environment projects
Undertaking financial feasibility studies for Built Environment projects, including market need, risk and return analyses	Undertake financial feasibility studies for Built Environment projects
Planning and managing environmental initiatives for construction projects	114656
Managing and administering construction projects on site	115119 and 115449
Managing construction organisational assets	115444
Designing, compiling and utilising project cost information databases for the financial management of Built Environment projects eg elemental cost analyses	Compile a project cost information database for Built Environment projects
Managing the price determination, awarding and evaluation processes associated with Built Environment projects eg tender process management	Manage price determination processes for Built Environment projects
Managing risk on Built Environment projects by identifying, analysing and responding to risk events	Manage risk on Built Environment projects
Undertaking whole life appraisal of Built Environment projects	Undertake whole life appraisal of Built Environment projects
Contributing to the sustainability assessment of Built Environment projects	Understand the principles of sustainability assessment for Built Environment projects

Undertaking value management exercises for Built Environment projects	Understand value management processes on Built Environment projects
Designing and implementing specialised service quality assurance procedures	Design and implement specialised quality assurance procedures
Conducting tax assessments on Built Environment projects, including tax depreciation, and Value Added Tax (VAT) and Capital Gains Tax (CGT) assessments	Conduct tax assessments on Built Environment projects
Conducting land and related tax assessments of Built Environment projects	Conduct land and related tax assessments of Built Environment projects
Conducting premises-, energy-, maintenance- and asset register audits	Conduct specialised audits of Built Environment projects
Taking off quantities, preparing and pricing price determination documents for specialised elements of complex buildings	Undertake advanced descriptive quantification
Undertaking professional practice management in a quantity surveying enterprise, including structuring the enterprise, negotiating quantity surveyor-client agreements, and applying relevant fee scales	Understand professional practice management procedures in a quantity surveying enterprise

## **6 PROVISIONS FOR REGISTRATION CATEGORIES IN TERMS OF THE QUANTITY SURVEYING PROFESSION ACT NO 49 OF 2000**

### **6.1 Compliance with the Quantity Surveying Profession Act, 2000**

- 6.1.1. Section 18(2) states that a person may not practise in any of the registration categories unless he or she is registered in that category. Two categories are currently recognised viz. Professional Quantity Surveyor (PrQS) and Candidate Quantity Surveyor (CaQS). See Annexures A and C.
- 6.1.2. Section 18(3) states that a person who is registered in the category of candidate must perform work in the quantity surveying profession only under the supervision and control of a professional of a category as prescribed. Refer 'Annexure A' for Assessment of Professional Competence which clearly illustrates the aspects that differentiates the competencies between Professional Quantity Surveyor (PrQS) and Candidate Quantity Surveyor (CaQS).
- 6.1.3. Section 26(3)(a) states that a person who is not registered in terms of this Act, may not perform any kind of work identified for any category of registered persons. However section 26(4) states clearly that this may not be construed as prohibiting any person from performing work identified in terms of section 26, if such work is performed in the service of or by order of and under the direction, control, supervision of or in association with a registered person entitled to perform the work identified and who must assume responsibility for any work so performed.

### **6.2 Improper Conduct**

Section 27(3) states that all registered persons must comply with the code of conduct and failure to do so constitutes improper conduct.

**7 OVERLAPS: WORK WHICH PERSONS REGISTERED IN TERMS OF OTHER LEGISLATION WISH TO PERFORM IN CONTRAVENTION OF THAT WORK BEING RESERVED FOR PERFORMANCE BY PERSONS REGISTERED IN TERMS OF THE QUANTITY SURVEYING PROFESSION ACT 2000 (ACT NO 49 OF 2000)**

Section 26(1) of the Quantity Surveying Profession Act states that the identification of the type of quantity surveying work which may be performed by persons registered in any of the categories referred to in section 18, should include work which may fall within the scope of any other profession regulated by the professions' Act referred to in the Council for the Built Environment Act, 2000. It therefore pre-supposes that there may be overlaps amongst the professions registered under the various Built Environment Councils.

The CBE Policy Framework on Identification of Work recognises these potential overlaps and suggests that the issue of overlaps be resolved by the professions. Any person who substantially practices quantity surveying work should register with the SACQSP

The following overlaps have been agreed in association with the other relevant Councils. (note: SACQSP still needs to discuss the content of the table with other councils) :

SACPCMP	SACAP	SACLAP	ECSA
<b>Stage 1: Inception</b>			
1.1 Principal Consultancy and Principal Agency service as set out in Annexure B Additional requirements	1.1 Advise on procurement policy for building projects without bills of quantities	1.1 Advise on procurement policy for landscaping projects	1.1 Advise on procurement policy for civil, electrical or mechanical projects
1.2 Principal Consultancy and Principal Agency service as set out in Annexure B Additional requirements	1.2 Advise on other consultants and services required	1.2 Advise on other consultants and services required	1.2 Advise on other consultants and services required
		1.3 Advise on economic factors affecting the landscaping project	1.3 Advise on economic factors affecting the civil, electrical or mechanical project
	1.3 Advise on appropriate financial design criteria for building projects without bills of quantities	1.4 Advise on appropriate financial design criteria for landscaping projects	1.4 Advise on appropriate financial design criteria for civil, electrical or mechanical projects
<b>Stage 2: Concept and viability</b>			
2.1 Principal Consultancy and Principal Agency services as set out in Annexure B Additional requirements		2.1 Prepare cost estimates for landscaping project	2.1 Prepare cost estimates for civil, electrical or mechanical projects

<b>Stage 3: Design development</b>			
3.1 Principal Consultancy and Principal Agency services as set out in Annexure B Additional requirements		3.1 Prepare detailed cost estimates for landscaping project	3.1 Prepare detailed cost estimates for civil, electrical or mechanical projects
<b>Stage 4: Documentation and procurement</b>			
4.1 Principal Consultancy and Principal Agency services as set out in Annexure B Additional requirements	4.1 Formulation of the procurement strategy for contractors, sub-contractors and suppliers for building projects without bills of quantities	4.1 Formulation of the procurement strategy for landscape contractors, sub-contractors and suppliers	4.1 Formulation of the procurement strategy for civil, electrical or mechanical contractors, subcontractors and suppliers
	4.2 Call for tenders and/or negotiate prices for building projects without bills of quantities	4.2 Call for tenders and/or negotiate prices for landscape projects	4.2 Call for tenders and/or negotiate prices for civil, electrical or mechanical projects
	4.3 Financial evaluation of tenders for building projects without bills of quantities	4.3 Financial evaluation of tenders for landscape projects	4.3 Financial evaluation of tenders for civil, electrical or mechanical projects
<b>Stage 5: Construction</b>			
5.1 Principal Consultancy and Principal Agency services as set out in Annexure B Additional requirements		5.1 Prepare schedule of predicted cash flow for landscape projects	5.1 Prepare schedule of predicted cash flow for civil, electrical or mechanical projects
		5.2 Prepare proactive estimates for proposed variations to landscape projects for client decision-making	5.2 Prepare proactive estimates for proposed variations to civil, electrical or mechanical projects for client decision-making
		5.3 Adjudicate and resolve financial claims by the landscape contractor	5.3 Adjudicate and resolve financial claims by the civil, electrical or mechanical contractor
		5.4 Resolution of contractual claims by landscape contractor	5.4 Resolution of contractual claims by civil, electrical or mechanical contractor
		5.5 Establish and maintain a financial control system for landscape projects	5.5 Establish and maintain a financial control system for civil, electrical or

		5.5 Establish and maintain a financial control system for landscape projects	5.5 Establish and maintain a financial control system for civil, electrical or mechanical projects
		5.6 Prepare valuations for payment certificates for landscape projects to be issued by the principal agent	5.6 Prepare valuations for payment certificates for civil, electrical and mechanical projects to be issued by the principal agent
		5.7 Prepare final account(s) for the landscape works on a progressive basis	5.7 Prepare final account(s) for the civil, electrical or mechanical works on a progressive basis
<b>Stage 6: Close-out</b>			
6.1 Principal Consultancy and Principal Agency services as set out in Annexure B Additional requirements		6.1 Prepare valuations for payment certificates for landscape projects to be issued by the principal agent	6.1 Prepare valuations for payment certificates for civil, electrical and mechanical projects to be issued by the principal agent
		6.2 Conclude final account(s) for the landscape works	6.2 Conclude final account(s) for the civil, electrical or mechanical works

### **AGREEMENT WITH SACPVP**

1. Preparation of estimates of total building cost or project cost (for any purpose) is a core function of registered quantity surveyors, and this function ranges from estimates of the potential cost of:
  - i. restoration (existing structures)
  - ii. replacement (existing structures) or
  - iii. new buildings or projects
  
2. Preparation of market-related values of existing buildings (for any purpose) is a core function of registered property valuers

## ANNEXURE A

### SACQSP GUIDELINES: ASSESSMENT OF PROFESSIONAL COMPETENCE

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

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

Experience in the building industry includes building-related engineering services

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

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

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

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

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

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

Candidates who change their

- place of employment or the type of industry in which they are employed (building to engineering or *vice versa*)
- supervisor / mentor must submit full details of such changes to the Council for approval

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

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

- Preparing and using cost data
- Preparing estimates
- Undertaking financial feasibility and comparative studies
- Preparing and using detailed budgets and cost plans, cost checking during design development; compiling and using cost limits
- Preparing and applying cost-in-use studies; life cycle costing
- Preparing and interpreting turnover/cash flow projections and profit/loss forecasts
- Cost control and reporting during pre-contract period

##### (ii) Contract documentation

- Preparing bills of quantities for principal or sub-contracts of supply including the measurement and description of work, drafting of preliminaries, preambles and contract conditions
- Preparing bills of measurement for final accounts if measured from drawings
- Preparing specifications and/or schedules of rates
- Contractual correspondence

**(iii) Tendering and contractual arrangements**

- Formulating or implementing procedures on tendering and contractual arrangements for principal or sub-contracts or contracts of supply
- Advising on selection of tenders; evaluation of and reporting on tenders
- Preparing tenders including compilation of rates for work and preliminaries

**(iv) Contract services**

The following are applicable to principal contracts or sub-contracts:

- Advising on cost during progress of the works, estimating final costs and reporting on the financial aspects
- Monitoring of proposed construction methods or sequences and reporting on actual requirements; preparing cost benefit reports on alternative construction methods
- Cost control during progress of the works
- Preparing valuations for interim certificates
- Analysing contract price relative to cost recording methods
- Preparing and agreeing final accounts and contra charges
- Reporting on, evaluating and negotiating contractual and extra-contractual issues; contract correspondence; attending site meetings
- Preparing or interpreting cost/value and other reconciliation statements for management purposes
- Surveying, measuring and recording site information

**(v) Specialisations**

- Taxation allowances and grants
- Planning or programming of contract works
- Resource determination, scheduling and purchasing
- Procurement of plant and materials
- Production cost/quality control, time standards and operational methods
- Productivity methods and evaluation
- Project planning and project management
- Insurance
- Litigation and arbitration
- Insolvency and liquidation
- Planned preventative maintenance
- Schedules of dilapidation
- Technical audits
- Office management including resource allocation, fees and budgets
- Maintenance of buildings
- Research and development

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

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

Candidates and their Employers / Supervisors must complete the application form for Inspection of Reports (*Interim / Final*), and enclose the following documents for delivery to the Registrar's office

- (a) certified General Report
- (b) certified Project Report
- (c) certified Diary Sheets
- (d) certified Logbook

- (i) Faxed or e-mailed submissions will not be accepted
- (ii) The Registrar's office provides written acknowledgement of receipt of all submissions
- (iii) Submissions are delivered to Assessors appointed by the Council, who evaluate the content, scope and quality of the supervised / mentored technical or professional experience gained by a Candidate, and the standard of presentation of the certified documents
- (iv) Assessors are required by the Council to provide written reports arising from their evaluation of Candidates' submissions. These reports are considered by the Registration Committee prior to transmission to Candidates and their Employers



- (v) Assessors' reports on INTERIM submissions are advisory and intended to specifically state whether the
  - scope and standard of the supervised / mentored technical or professional experience gained during the first phase of the in-training period is satisfactory,
  - content, format and standard of presentation of the certified documents is acceptable in terms of a similar approach to be applied when FINAL submissions are drafted
  - A Candidate's
    - supervised / mentored technical or professional experience should be enhanced / improved,
    - content / format / standard of presentation of the certified documents should be improved
- (vi) An Assessor's recommendation to the Registration Committee, based on evaluation of a FINAL submission, is the determining factor on which the Committee will approve a Candidate's
  - admission to an Assessment of Technical Competence (ATC) or Assessment of Professional Competence (APC) interview
  - deferment until the Candidate re-submits certified reports to the Registrar indicating that mentored
  - experience has been enhanced and/or the quality of final submissions has been improved
- (viii) If an Assessor recommends that a Candidate's admission to an APC interview is to be deferred, a detailed, written motivation is to be provided for approval by the Registration Committee
- (ix) Resubmitted, certified reports will be delivered to the Assessor who evaluated the original (previously rejected) submissions, for re-evaluation, comment and provision of a recommendation to the Registration Committee,
- (x) Candidates receive written confirmation by the Registrar's office of their
  - admission to an APC interview and proposed arrangements, or
  - deferment (with reasons stated)

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

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

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

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

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

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

Project No, date and contract period	Project title, client, project scope, value	SACQSP skills categories / Candidate's personal roles and functions	Name of Employer's firm / supervisor's name & registration no. (printed) signature (for certification) and date
eg No 1: 1999: 6 months	Eg • XYZ Golf Estate and Conference Facilities;  • John Smith	eg 2.1.1 Preparing and using cost data  2.1.2 Preparing estimates	eg ABC Construction (Pty) Ltd  Peter Brown, PrEng

	<ul style="list-style-type: none"> <li>• Conference Centre, clubhouse, residential units, golf course and landscaping</li> <li>• R1.5bn</li> </ul>	2.2.3 Preparing schedules of rates 2.4.3 Cost control during progress of the works 2.4.6 Preparing & agreeing final accounts & contract charges	Reg No 456  <i>Peter Brown</i> 24 January 2011
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## Recognition of Prior Learning: Alternative No 2

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

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

## 5. MEMBER OF THE ROYAL INSTITUTION OF CHARTERED SURVEYORS

The terms of the Memorandum of Understanding between the SACQSP and the RICS will apply

## 6. EMPLOYER'S RESPONSIBILITY

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

- Interim word processed reports are designed to demonstrate not only Candidates' experience, but also their ability to express themselves formally. Interim submissions will be evaluated by SACQSP-appointed assessors and Candidates will be informed of any shortcomings in experience or in report-writing skills.
- Employers and Candidates must ensure compliance with the Rules and that the purpose of an APC is not undermined.

## **7. SUPERVISORS**

- The Employer must appoint a supervisor for every Candidate.
- The supervisor is responsible to the Employer and to the Candidate for ensuring that the Candidate receives appropriate training and the promised experience (or a suitable alternative) and that the Candidate develops professional confidence to perform tasks independently. The supervisor must countersign the Candidate's Diary sheets and Logbook and certify the interim report, which must be submitted to the Council. The Candidate should discuss any problems with the supervisor.
- Prior to the Candidate's application for admission to an APC interview, the supervisor must certify that the Candidate has achieved the required period of training together with the necessary breadth and quality of experience in all areas.
- Supervisors must be Registered Professionals (but not necessarily the Employer) or a senior person within the Employer's own organisation
- The supervisor is also responsible for overseeing the Candidate's day-to-day work. The supervisor must countersign the Candidate's Diary each week and the Logbook every three months, and certify the interim and final reports.
- If the Candidate changes employment or if the supervisor is changed, the Council must be notified immediately.
- The supervisor is responsible for ensuring that, as part of the Candidate's training and experience, the Candidate is given the opportunity to attend at least 20 hours of appropriate Continuing Professional Development during the training period. This is in addition to the minimum requirement of 600 working days.

## ANNEXURE B

### GENERIC SCOPE OF SERVICES TO BE PROVIDED BY A QUANTITY SURVEYOR:

#### B1 Stage 1: Inception

This stage is in broad terms defined as follows:

Establish the **client** requirements and preferences, assess user needs and options, appointment of necessary consultants, establish the **project** brief including **project** objectives, priorities, constraints, assumptions, aspirations and strategies

##### B1.1 Stage 1 services

- Assist in developing a clear **project** brief
- Attend **project** initiation meetings
- Advise on procurement policy for the **project**
- Advise on **other consultants** and services required
- Define the **consultant's scope of work** and **services**
- Conclude the terms of the **agreement** with the **client**
- Advise on economic factors affecting the **project**
- Advise on appropriate **financial design criteria**
- Provide necessary information within the agreed scope of the **project** to the other **consultants**
- Agreed scope of work, agreed services, signed client/quantity surveyor professional services agreement are deliverables applicable to the above

Further **services**:

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##### B1.2 Stage 1 deliverables

- Agreed **scope of work**
- Agreed **services**
- Signed **agreement**

Further **deliverables**:

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#### B2 Stage 2: Concept and Viability

This stage is in broad terms defined as follows:

Prepare and finalize the **project** concept in accordance with the brief including the scope, scale, character, form, function and preliminary programme and viability of the **project**

##### B2.1 Stage 2 services

- Agree the **documentation programme** with the **principal consultant** and **other consultants**
- Attend the design and consultants' meetings
- Review and evaluate design concepts and advise on viability in conjunction with the **other consultants**
- Receive relevant data and cost estimates from **other consultants**
- Prepare preliminary and elemental or equivalent estimates of construction cost
- Assist the **client** in preparing a financial viability report
- Audit space allocation against the initial brief

- Liaise, co-operating and providing necessary information to the **client, principal consultant and other consultants**

Further **services**:

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## **B2.2 Stage 2 deliverables**

- Preliminary estimate(s) of construction costs
- Elemental or equivalent estimate(s) of construction costs
- Space allocation audit for the **project**

Further **deliverables**:

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## **B3 Stage 3: Design Development**

This stage is in broad terms defined as follows:

Develop the approved concept to finalise the design, outline specifications, cost plan, financial viability and programme for the project

### **B3.1 Stage 3 services**

- Review the **documentation programme** with the **principal consultant** and other **consultants**
- Attend design and consultants' meetings
- Review and evaluate design and outline specifications and exercise cost control in conjunction with the **other consultants**
- Receive relevant data and cost estimates from the **other consultants**
- Prepare detailed estimates of construction cost
- Assist the **client** in reviewing the financial viability report
- Comment on space and accommodation allowances and prepare an area schedule
- Liaise, co-operate and provide necessary information to the **client, principal consultant and other consultants**

Further **services**:

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### **B3.2 Stage 3 deliverables**

- Detailed estimate(s) of construction cost
- Area schedule

Further **deliverables**:

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## **B4 Stage 4: Documentation and Procurement**

This stage is in broad terms defined as follows:

Prepare the construction and procurement documentation, confirm and implement the procurement strategies and procedures for effective and timeous procurement of necessary resources for the execution of the **project**

#### **B4.1 Stage 4 services**

- Attend design and consultants' meetings
- Assist the **principal consultant** in the formulation of the procurement strategy for **contractors**, subcontractors and suppliers
- Review working drawings for compliance with the approved budget of construction cost and/or financial viability
- Prepare documentation for both principal and subcontract procurement
- Assist the **principal consultant** with calling of tenders and/or negotiation of prices
- Assist with financial evaluation of tenders
- Assist with preparation of contract documentation for signature

Further **services**:

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#### **B4.2 Stage 4 deliverables**

- Budget of construction cost
- Tender documentation
- Financial evaluation of tenders
- Priced contract documentation

Further **deliverables**:

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#### **B5 Stage 5: Construction**

This stage is in broad terms defined as follows:

Manage, administer and monitor the **contracts** and processes, including the preparation and co-ordination of the procedures and documentation to facilitate practical completion of the works

#### **B5.1 Stage 5 services**

- Attend the **site** handover
- Prepare schedules of predicted cash flow
- Prepare pro-active estimates for proposed variations for client decision-making
- Attend regular **site**, technical and progress meetings
- Adjudicate and resolve financial claims by the **contractor(s)**
- Assist in the resolution of contractual claims by the **contractor(s)**
- Establish and maintain a financial control system
- Prepare valuations for payment certificates to be issued by the **principal agent**  
Prepare final account(s) for the **works** on a progressive basis

Further **services**:

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#### **B5.2 Stage 5 deliverables**

- Schedule(s) of predicted cash flow
  - Estimates for proposed variations
  - Financial control reports
-

- Valuations for payment certificates
  - Progressive and draft final account(s)
- Further **deliverables**:
- 

## B6 Stage 6: Close-Out

This stage is in broad terms defined as follows:

Fulfil and complete the **project** close-out including the preparation of the necessary documentation to facilitate effective completion, handover and operation of the **project**

### B6.1 Stage 6 services

- Valuations for payment certificates to be issued by the **principal agent**
- Conclude final account(s)

Further **services**:

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### B6.2 Stage 6 deliverables

- Valuations for payment certificates
  - Final account(s)
  - Close-out procedures
- Further **deliverables**:
- 

## ADDITIONAL REQUIREMENTS

The **services** to be provided by the Professional Quantity Surveyor in the event that they are required to provide **services** as the **Principal Consultant** and/or **Principal Agent** are as follows:

### Stage 1 services

- |   |                   |        |
|---|-------------------|--------|
| • development of a clear project brief  | Facilitate        | the    |
| • procurement policy for the project  | Establish         | the    |
| • in the procurement of necessary and appropriate other consultants including the clear definition of their roles and responsibilities  | Assist the client |        |
| • conjunction with the client, other consultants and all relevant authorities, the site characteristics, rights and constraints for the proper design of the intended project | Establish         | in     |
| • consultant's scope of work and services   | Define            | the    |
| • terms of the agreement with the client  | Conclude          | the    |
| • schedule of the required consents and approvals   | Facilitate        | a      |
| • ordinate and monitor a project initiation programme   | Prepare,          | co-    |
| • approval of all Stage 1 documentation   | Facilitate        | client |

## Stage 2 services

- in procurement of other consultants Assist the client
- on the requirement to appoint a health and safety consultant Advise the client
- the project brief to other consultants and monitor the development of the concept and viability Communicate and viability
- and procedure for cost control and reporting by other consultants Agree format
- documentation programme and indicative construction programme Prepare a
- concept and viability documentation for presentation to the client for approval Co-ordinate
- approval of the concept and viability by the client Facilitate
- approval of the concept and viability by statutory authorities Facilitate

## Stage 3 services

- implement communication processes and procedures for the design development of the project Agree and
- in the procurement of the necessary other consultants including the clear definition of their roles and responsibilities Assist the client
- ordinate, agree and monitor a detailed design and documentation program Prepare, co-
- record consultants' and management meetings Conduct and
- required by health and safety consultant Facilitate input
- reviews for compliance and cost control Facilitate design
- timeous technical co-ordination Facilitate
- approval of all Stage 3 documentation Facilitate client

## Stage 4 services

- agree procurement strategy for contractors, subcontractors and suppliers with the client and other consultants Recommend and
- agree the procurement programme Prepare and
- in conjunction with the other consultants on the appropriate insurances Advise the client,
- monitor preparation of procurement documentation by consultants in accordance with the project procurement programme Co-ordinate and
- procurement process and recommend contractors for approval by the client Manage
- assembly of the contract documentation for signature Co-ordinate the

## Stage 5 services

- handover to the contractor Arrange site
- construction documentation issue process Establish the



- monitor issue and distribution of construction documentation Agree and
- contractor on behalf of the client to appoint subcontractors Instruct the
- record regular site meetings Conduct and
- and approve the preparation of the construction programme by the contractor Monitor, review
- monitor performance of the contractor against construction programme Regularly
- entitlements that arise from changes required to the construction programme Adjudicate
- ordinate and monitor approval of all contract documentation provided by the contractor(s) Receive, co-
- assurance procedures and monitor implementation thereof by the other consultants and the contractor Agree quality
- preparation and auditing of the contractor's health and safety plan and approval thereof by the health and safety consultant Monitor
- preparation of the environmental management plan by the environmental consultant Monitor
- procedures for monitoring scope and cost variations Establish
- approve and issue certificates Monitor, review,
- and adjudicate any contractual claims Receive, review
- preparation of financial control reports by the other consultants Monitor
- submit progress reports Prepare and
- monitor and issue practical completion lists and the certificate of practical completion Co-ordinate,
- expedite receipt of occupation certificates Facilitate and

#### Stage 6 services

- monitor rectification of defects Co-ordinate and
- procurement of operations and maintenance manuals, guarantees and warranties Manage
- preparation of as-built drawings and documentation Manage
- procurement of outstanding statutory certificates Manage
- and issue payment certificates Monitor, review
- certificates Issue completion
- agreement of final account(s) Manage
- present a project close-out report Prepare and

#### **ANNEXURE C: SACQSP ROUTES TO REGISTRATION:**

**Entry threshold / eligibility: Registration as a Candidate Quantity Surveyor in terms of Section 18 of the Quantity Surveying Profession Act 2000 (Act No 49 of 2000)**

- (i) The curricula of all SACQSP-accredited 480-credit qualification programmes would be accepted as the prerequisite entry-level to Candidacy (without any further “top-up” courses or modules)
- (ii) **All** other qualification programmes (whether SACQSP-accredited or not) would be analysed to ascertain their “shortfalls” of SACQSP “top up” Modules
- (iii) With effect from 1<sup>st</sup> January 2013, holders of all 240- and 360-credit qualifications would **not** be eligible to apply for registration as Candidates until they had successfully completed the “shortfall”/“top up” Modules to be identified by the Council

**REGISTRATION ROUTES FOR CANDIDATE QUANTITY SURVEYORS**

With effect from 1<sup>st</sup> January 2013, the SACQSP Examinations Parts 1 and 2 will no longer be offered by the Council

**QUANTITY SURVEYING QUALIFICATIONS**

Option 1 QS	Option 2 QS	Option 3 QS	Option 4 QS	Option 5 QS	Option 6 QS	Option 7 QS	Option 8 QS	Option 9 QS	Option 10 QS	Option 11 QS	Option 12 QS
Accredite d 480 credit QS University degree	Non accredit ed 480 credit QS University Degrees	Accredite d 360 credit QS University degrees	Non accredit ed 360 credit QS University degrees	Accredite d B Tech (QS)	Non accredit ed B Tech (QS)	Accredite d National Diploma	Non accredit ed National Diploma	Cert (QCP) (UFS)	Post Grade 12 Qualificatio ns	No Qualificatio ns	RICS Membershi p with Accredited Qualificatio n
3 Years in Training	4 Years in Training	5 Years in Training	6 Years in Training	4 Years in Training	5 Years in Training	6 Years in Training	7 Years in Training	6 Years in Training	9 Years in Training	15 Years in Training	1 Year RSA
	Council I + II	Council II	Council I + II	Council II	Council I + II	Council I + II	Council I + II	Council II	Council I +II	Council I + II	
APC Interview	APC Interview	APC Interview	APC Interview	APC Interview	APC Interview	APC Interview	APC Interview	APC Interview	APC Interview	APC Interview	Profession al Interview



**PROFESSIONAL QUANTITY SURVEYOR - PrQS**

**Notes:** Accredited 480 credit QS university degree – recognition of 6 months in training for each year of suitable Professional Quantity Surveying employment as approved by the Council and under the supervision of a professional Quantity Surveyor

**REGISTRATION ROUTES FOR CANDIDATE QUANTITY SURVEYORS**

With effect from 1<sup>st</sup> January 2013, the SACQSP Examinations Parts 1 and 2 will no longer be offered by the Council

# CONSTRUCTION MANAGEMENT QUALIFICATIONS

Option 1 CM	Option 2 CM	Option 3 CM	Option 4 CM	Option 5 CM	Option 6 CM	Option 7 CM	Option 8 CM	Option 9 CM	Option 10 CM
Accredited 480 credit CM University degree	Non accredited 480 credit CM University Degrees	Accredited 360 credit CM University degrees	Non accredited 360 credit CM University degrees	Accredited B Tech (CM)	Non accredited B Tech (CM)	Accredited National Diploma	Non accredited National Diploma	Post Grade 12 Qualification s	No Qualification s
4 Years in Training	5 Years in Training	5 Years in Training	6 Years in Training	5 Years in Training	6 Years in Training	7 Years in Training	8 Years in Training	9 Years in Training	15 Years in Training
Council I + II	Council I + II	Council II	Council I + II	Council II	Council I + II	Council I + II	Council I + II	Council I + II	Council I + II
APC Interview	APC Interview	APC Interview	APC Interview	APC Interview	APC Interview	APC Interview	APC Interview	APC Interview	APC Interview



## PROFESSIONAL QUANTITY SURVEYOR - PrQS

**Notes:**

Accredited 480 credit CM university degree – recognition of 6 months in training for each year of suitable Professional Quantity Surveying employment as approved by the Council and under the supervision of a professional Quantity Surveyor

### ANNEXURE D: LIST OF SACQSP-ACCREDITED PROGRAMMES OFFERED BY TERTIARY INSTITUTIONS IN SOUTH AFRICA:

<b>1.0</b>	<b>UNIVERSITIES</b>	<b>QUALIFICATIONS OFFERED</b>
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1.1	Cape Town	BSc (Construction Studies) BSc (Hons) Quantity Surveying
1.2	Free State	Certificate in Quantity Surveying (QCP) BSc (Quantity Surveying) BSc (Hons) Quantity Surveying
1.3	Johannesburg	National Diploma (Building)
1.4	KwaZulu-Natal	BSc (Quantity Surveying) BSc (Hons) Quantity Surveying
1.5	Nelson Mandela Metropolitan	National Diploma (Building) B-Tech (Quantity Surveying) BSc (Construction Economics) BSc (Construction Studies) BSc (Hons) Quantity Surveying
1.6	Pretoria	BSc (Quantity Surveying) BSc (Hons) Quantity Surveying
1.7	Walter Sisiulu	National Diploma (Building) National Diploma (Extended Programme)
1.8	Witwatersrand	BSc (Construction Studies) BSc (Hons) Quantity Surveying
<b>2.0</b>	<b>UNIVERSITIES OF TECHNOLOGY</b>	
2.1	Durban	National Diploma (Building) B-Tech (Quantity Surveying)
2.2	Mangosuthu	National Diploma (Building)
2.3	Tshwane	National Diploma (Building) B-Tech (Quantity Surveying)