

SURVEYORS

測量師時代
Times

Vol.19 • No.8 • August 2010

Annual Conference 2010 "Building Adaptation and Revitalization"

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Surveyors' role on building adaptation and revitalization

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香港測量師學會

Designed and printed by Corporate Press (HK) Ltd.

Contents 目錄

- 2 From the Editor 編者話
- 3 President's Message 會長的話
- 5 HKIS News 學會簡訊
 - Report from HKIS Committees
 - 香港測量師學會名譽會員
 - Council members reaching out
- 11 Divisional News & Activities 組別簡訊
- 20 HKIS CPD / PQSL Events
- 35 Surveying Practice 測量事務
 - 兩地建設工程合同法律事務專欄 — 建築工程合同的保償及保險
 - Constructing a Zero Energy Building
 - Systemic Audit and Substantive Evaluation in the Built Environment
- 50 Education 增值空間
 - An Overview of Claims relating to Unforeseen Ground Conditions
 - Visit to Shanghai International Finance Centre
- 51 Sports and Recreation 運動娛閒
- 54 Calendar of Events 活動日誌
- 55 Back Cover

From the Editor 編者話

The BSD Council met the Chairman of the Bill Reviewing Panel under Legislative Council, Professor Patrick Lau, on 10 August to elaborate our comments on the Building (Amendments) Bill 2010. In addition, the working group is also preparing comments on the draft Code of Practice for MBIS and MWIS. Furthermore, Buildings Department invited the HKIS to express views on the Draft Code of Practice on Fire Safety of Buildings, and our Technical Advisory Panel is preparing the response.

Two representatives from the CIQS, Mr. Ian Duncan and Mr. David Lai visited the HKIS on 20 July. They shared their working experiences in Canada, and told us that quantity surveyors in Canada had not been affected by the economic crisis. A large team of HKIS delegates attended the 7th ICEC World Congress and the 14th PAQS Congress held in Singapore. The ICEC Council meeting was held on 24 July, and the PAQS Board meeting was commenced in the following day. The two-day congress started with a dragon dance and three welcoming speeches. The HKIS delegates also took the opportunity to visit the SISV after the closing of the congress.

The PFMD Council published a new research report on the "Benchmarking of Management Fees for Office Buildings in Hong Kong". The Council also formed a working group to formulate a series of standard agreement for the provision of property and facility management services, security service and cleansing service. The Council met the new president of the HKIH on 22 July and exchanged views on the proposal in respect of "Regulation of the Property Management Industry".

The HKIS CEPA Committee had a meeting with the Development Bureau on 10 August to discuss the progress of cooperation with the Mainland counterparts. After the meeting, the LSD Council provided a list of action items for discussion with the Mainland. These include provision of training for getting their qualification, arrangement for taking their qualification examination, and obtaining their surveying organization qualification certificate. The LSD Council also attended a discussion forum organised by Hon. Patrick Lau on 19 July to exchange views on Tree Management with the Head of the Tree Management Office of the Development Bureau. We expressed our views on how land surveyors can contribute our expertise to support tree management.

While the current GPD Council will have more than one year to go before the next election, interested members may participate in various activities by joining certain working groups, panels, commenting on papers / policy / consultation documents, etc. In past few weeks, the HKIS Working Group is chasing up the progress on RA with CIREA. The Council will give further reports in due course.

At the meeting held on 10 August, the PDD Council requested the Development Bureau to identify a relevant reciprocal professional body in the Mainland China for the Planning and Development Surveyors in Hong Kong.

Dr Paul Ho
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建築測量組理事會於八月十日會晤立法會Bill Reviewing小組主席劉秀成教授，就建築物(修訂)條例草案2010提出意見；組別的工作小組亦就草擬的MBIS及MWIS專業守則準備意見。屋宇署邀請學會就建築物防火安全草擬專業守則發表意見，組別技術顧問小組正研究回應。

兩位 CIQS 代表 Ian Duncan 及 David Lai 於七月二十日到訪學會，分享加拿大的工作經驗，指出加國工料測量師並沒受金融海嘯打擊。龐大的學會代表團到新加坡參加 7th ICEC World Congress 及 PAQS Congress；ICEC 理事會議於七月廿四日召開，PAQS 理事會議則於翌日舉行。兩天的大會以舞獅及三次歡迎致辭展開，學會代表團在大會完結後到訪 SISV。

物業設施管理組就 Benchmarking of Management Fees for Office Buildings in Hong Kong 印發研究報告。組別理事會成立工作小組，為物業設施管理、保安及清潔服務的提供制訂標準協議。理事會於七月廿二日會晤香港房屋經理學會新任會長，就物業管理行業規範交流意見。

學會 CEPA 小組於八月十日與發展局開會，探討業界概況，會後土地測量組理事會列出一系列行動項目，包括提供取得資格的訓練、安排資格考試及獲取資格證書等。

土地測量組於七月十九日參與由劉秀成議員舉辦的論壇，與樹木辦官員交流意見，表達業界可如何支援樹木管理。

產業測量組理事會任期尚有逾一年才結束，會員在此期間可參加工作小組及就論文/政策/顧問文件發表意見。該組過去數周正加緊與 CIREA 商討資格互認，理事會將適時匯報進展。

規劃及發展組理事會要求發展局，為業界訂定一個可作資格互認的內地專業團體。

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Surveyors' role on building adaptation and revitalization

Hong Kong people are used to redeveloping old buildings when they become obsolete. However, economically obsolete buildings need not be demolished to regain their economic value. Modification of existing buildings may sometimes be financially more viable than their redevelopment. In addition, financial viability is often not the only consideration; other factors such as sustainability, social and cultural considerations, and other regulatory constraints are equally important. When considered holistically, the modification of buildings to adapt to a new economic and regulatory environment, in many instances, could be a better option even if redevelopment, in theory, may offer building owners better short term returns. This is certainly the case in Hong Kong now and would be more so in the future.

Surveyors have been playing important roles in matters related to the financial, managerial, legal, and technical aspects of what I describe as the land conversion

process. This process refers to the practice of changing the characteristics of a plot of land (including any structure and natural resource situated on it) to the benefit of the owner or society. In a densely populated area such as Hong Kong, the land conversion process is mainly concerned with the activities within the traditional building life cycle — from land acquisition to development to maintenance and management, demolition, and, finally, redevelopment. In Hong Kong, due to its ever changing economic environment and high land prices, compared to redevelopment, relatively little attention has been paid to extending the life of a building by changing its characteristics and uses. However, the latter is becoming increasingly important in Hong Kong due to recent regulatory, social, and cultural changes.

There are now more concerns about conservation of historic buildings and environmental issues than before. In addition, there are regulatory and policy changes

that generate more demand for building adaptation, such as the recent policy on revitalization of industrial buildings. With all these changes, surveyors are facing new challenges and opportunities. Different type of surveyors can contribute to building adaption and revitalization in different ways. I will elaborate more on this in the coming HKIS Annual Conference in September. An interdisciplinary approach, that synthesis different surveying skills, is essential in making a building adaptation and revitalization project successful.

香港人習慣把老化樓宇重建，不過在經濟價值上未必化算，把現存樓宇改造財務上或更可行，而財務可行性往往並非唯一考慮，可持續性、社會文化因素及其他規管限制同樣重要。整體上看，把樓宇改造以適應新經濟及規管環境，很多時是較佳選擇，即使重建理論上可為業主提供更多短期回報。這是香港目前的情況，未來更甚。

測量師在我稱為土地改良過程中，在財務、管理、法律及技術事項扮演重要角色，為一幅土地改變特點(包括其上的任何結構及天然資源)，讓業主或社會得益。在香港這個人口稠密的地區，土地改良過程主要牽涉傳統建築物周期的活動，由買地、發展、維修管理、拆卸以至最後重建。由於香港的經濟環境不斷轉變及地價高昂，相對重建，較少人關注通過改變其特點及用途，延長建築物周期；考慮到最近規管、社會及文化的變遷，後一種做法顯得重要。

社會日漸關注歷史建築物的保育及環境問題，規管及政策轉變也為樓宇轉型帶來需求，諸如近來的工廈活化。面對這些轉變，測量師遇上嶄新的挑戰和機遇，不同範疇的測量師可各自為樓宇轉型和活化作出貢獻，我會在九月的學會周年會議上加以論述。要令樓宇轉型和活化的項目取得成功，一個融合不同測量技巧的跨界別方案，至關重要。



Reports from HKIS Committees

Administration Committee Chairman: Ms Serena Lau

The Administration Committee was formed to monitor, report and advise on the effectiveness and efficiency of the running of the HKIS Administration Office; to inquire into and advise on the updating of various office operation policies and procedures including but not limited to human resources management, operations management and office accommodation; and to inquire into and investigate complaints, if any, on matters related to office administration and recommend corrective and preventative actions.

Members of Administration Committee:

Chairman:	Ms Serena Lau	
Members:	Mr Edwin Tang	HKIS Hon Secretary
	Ms Rebecca Lo	BSD
	Ms Eugina Fok	GPD
	Mr Chan Yue Chun	LSD
	Mr Albert So	PDD
	Mr Charles Hung	PFMD
	Mr Honby Chan	QSD
	Ms Joanna Kwok	YSG

The Committee has held three meetings to date. Some of the works which have been completed or are in progress include developing guidelines on salary review and guidelines on the procurement of goods and services.

To assist the Committee with some of the numerous works it has been assigned with, two working groups have been formed, namely:

Working Group on HKIS Office Premises

The Convenor of the working group, past President, Mr Tony Tse and representatives from all the Divisions and YSG is tasked with the forward planning of the future HKIS office premises including whether the HKIS should rent or purchase its own premises, the location and size. The lease for the existing HKIS premises will expire on 28 February 2013. Relevant consultation with members will be made before a report of findings is made to the General Council.

Working Group on Revamp of HKIS Library

The Convenor of the working group, Mr Lucas Lau, with

representatives from the Divisions and YSG is tasked to review the existing policy for the Library, which includes developing library guidelines for members, recommending a revamp program of the library and to recommend guidelines in relation to the operation of the library.

Recent news and reports about the handling of personal data has prompted the Committee to review the existing policy on the collection of personal data. The HKIS is committed to complying with the regulations under the Personal Data (Privacy) Ordinance. Any personal data collected will be kept confidential. Guidelines will be developed by the Committee to improve and strengthen the protection of the data held by the HKIS.

The Committee welcomes any suggestions or recommendations from members in relation to its works. Please send an email to info@hkis.org.hk.

Dispute Resolution Committee Chairman: Mr Nelson Cheng

The Dispute Resolution Committee (DRC) was formed to establish policies in regard to the development of dispute resolution activities for the surveying profession including the promotion of arbitration, mediation, adjudication and expert witness. The Committee also establishes and sets criteria and standards for admission into the lists of the HKIS arbitrators and mediators, including setting up of code of practices and guidelines for the accredited arbitrators and mediators.

The Committee on behalf of the HKIS sends representations to the Joint Dispute Resolution Committee set up together with the Hong Kong Institute of Architects (HKIA) for the appointment of arbitrators and mediators under the Standard Form of Building Contract. The Committee is also involved in preparing submission of comments on various consultations, proposed new legislation or amendments to existing legislation relating to mediation and arbitration.

The Committee held its bi-monthly meeting and the promotion of mediation services was high on the agenda. Early this year, the Joint Mediation Helpline Office (JMHO) was set up by eight mediation services providers including the Hong Kong Mediation Council, the Hong Kong Bar Association, the Law Society of Hong Kong, the Chartered Institute of Arbitrators (East Asia Branch), the Hong Kong Institute of Arbitrators, the Hong

Kong Institute of Architects, the Hong Kong Institute of Surveyors and the Hong Kong Mediation Centre, as a non-profit-making organisation with a mission to promote the use of mediation as a means of dispute resolution in Hong Kong. The JMHO officially commenced operation on 12 July 2010. As a mediation service provider, the HKIS will assist in offering mediation services with our areas of expertise.

To cope with the mediation cases referred by the JMHO, a panel of mediators will be formed. At present, HKIS has a list of mediators under the Joint Dispute Resolution Committee with the Hong Kong Institute of Architects. However, all mediators on the list are mostly Quantity Surveyors and some Building Surveyors who can provide mediation services relating to the Standard Form of Building Contract and building matters. The DRC plans to extend the existing list of mediators to include more members having other areas of expertise and specialisation such as experts on land boundary disputes, valuation disputes, compulsory purchase of old buildings for development, defects of new buildings etc. The DRC will recommend ways for HKIS members to obtain mediation qualification and training.

Members of Dispute Resolution Committee:

Chairman: Mr Nelson Cheng
 Members: Mr Anderson Chan, Ms Margaret Chan (BSD)
 Mr Marvin Chau, Mr Simon Kwok (LSD)
 Mr Louie Chan, Mr Lawrence Pang (GPD)
 Mr Ben Chong, Mr Edmond Yew (PDD)
 Mr T T Cheung, Mr Gary Yeung (PFMD)
 Mr Gregory Tung, Mr Bernard Wu,
 Mr Raymond Kong, Mr Chang Ka Chung,
 Mr Francis Leung, Mr Peter Yuen,
 Mr Donald Reader, Mr Daniel Ho,
 Ms Lam Yen Ling, Mr Gilbert Kwok,
 Mr Antony Man (QSD)
 Mr Steve Yu, Ms Alison Lo (YSG)

HKIS/RICS Liaison Committee **Chairman: Mr Wong Bay**

The HKIS/RICS Liaison Committee was formed to foster a better working relationship between the Hong Kong Institute of Surveyors and the Royal Institution Chartered Surveyors Hong Kong and as a platform for finding common grounds of interest and areas of co-operation, matters of mutual concern and a sharing of resources to avoid duplicated efforts.

The Liaison Officer for the HKIS, Mr Wong Bay and the Liaison Officer for RICS Hong Kong, Mr Kenneth Pang, with members of the respective Liaison Committees of the HKIS and RICS Hong Kong, had an informal discussion and exchange of views at a meeting held on 12 July 2010. The importance of closer co-operation between the two institutes was emphasized as there were many short/medium/long term liaison issues that needed to be addressed. As a start, it was agreed to address some non-sensitive issues. The meeting covered annual conferences collaboration, joint CPDs at divisional level, disciplined members holding dual membership, reciprocity enrolment fee reduction for newly qualified HKIS members, higher concessionary rate for members with dual membership in Hong Kong and the recent developments of each institute. There were some issues which had to be reported back to the respective Council/ Board for decision. A further meeting will be arranged later in the year.

Members of HKIS/RICS Liaison Committee:

<u>HKIS</u>	<u>RICS HK</u>
Chairman: Mr Wong Bay	Chairman: Mr Kenneth Pang
Members: Mr Nathan Lee (BSD)	1st Vice Chair: Mr David Tse
Mr Joseph Ho (GPD)	2nd Vice Chair: Mr David Faulkner
Mr Koo Tak Ming (LSD)	Members: Mr Simon Kwok
Mr Cyrus Mok (PDD)	Mr Wong Koon Kau
Mr Charles Hung (PFMD)	Dr Tony Leung
Mr Thomas Tse (QSD)	Mr Kim Berry
Mr Jeffrey Wong (YSG)	Mr Eric Ma
	Mr Edward Au
	Mr Ben Chong

Report from Public and Social Affairs Committee **Chairman: Mr Wong Bay**

The Public and Social Affairs Committee was formed in April 2010, to work out initiatives to enhance the profile of the Institute among the public.

The Committee held meetings on 9 April, 16 April and 29 June 2010. During the meetings, members discussed a proposed PR and Promotional Plan and agreed on meaningful actions to achieve the objective. Further to the suggestions of the meeting, media training has been organized to enhance the ability of spokespersons to make timely and suitable responses to media enquiry. The Secretariat is now circulating news clippings every day and a research assistant is in the process of recruitment. I would like to thank members of the Committee for their support to the Institute.

For the time being, Divisions are invited to work together to further promote the image of the Institute in the society.

Members of Public and Social Affairs Committee

Chairman: Mr Wong Bay	HKIS Senior Vice President
Members: Vincent Ho	BSD
Edwin Tang	BSD
Lesly Lam	LSD
Terry Sham	LSD
Roy Ng	GPD
Thomas Tang	GPD
Cyrus Mok	PDD
Fanny Lam	PDD
Gary Yeung	PFMD
Dick Kwok	PFMD
Paul Ho	QSD
Stephen Lai	QSD
Daniel Ho	QSD (Stand by)
Antony Man	QSD (Stand by)
David So	YSG
Hazel Tee	YSG

Report from HKIS Relief Works Committee Convenor: Mr Yu Kam Hung

To express the appreciation of the HKSAR Government to various professional institutes on the Sichuan Reconstruction Work, a dinner meeting organized by the Development Bureau was held on 14 May 2010.

Representatives from various professional institutes including the HKIS attended the dinner meeting during which a brief history of the Sichuan Reconstruction Work was reviewed and the latest development of the Reconstruction Work supported by the HKSAR Government was introduced to the attendees.

As of 5 May 2010, there have been 151 reconstruction projects supported by the HKSAR Government and the contract sum amounts to approximately HKD 8.58 Billion. The 151 reconstruction projects comprise infrastructure projects, Wolong projects, educational projects, social welfare projects and medical and healthcare projects. Please refer to the table below for the detail of reconstruction projects supported by the HKSAR Government.

Reconstruction Projects supported by the HKSAR Government

Project Type	Phase I	Phase II	Phase III	Number of Projects	Contract Sum (HKD, Billion)
Infrastructure	1	0	1	2	3.16
Wolong	1	22	0	23	1.59
Educational	5	51	0	56	1.58
Social Welfare	4	7	24	35	0.57
Medical and Healthcare	9	20	6	35	1.68
Number of Projects	20	100	31	151	-
Contract Sum (HKD, Billion)	1.87	3.85	2.85	-	8.58

Source: Development Bureau, the HKSAR Government

As per the information provided, most reconstruction projects were in good progress. For example, infrastructure projects with plenty of input from our institute are halfway completed.

Regarding visits to mainland China for the Sichuan Reconstruction Work, totally 78 volunteers from various professional institutes were involved in 15 visits as of 5 May 2010. The professional institutes include the following:

The Hong Kong Institute of Architects	香港建築師學會
The Hong Kong Institution of Engineers	香港工程師學會
The Hong Kong Institute of Surveyors	香港測量師學會
The Hong Kong Institute of Planners	香港規劃師學會
The Hong Kong Institute of Landscape Architects	香港園境師學會
The Association of Architectural Practices	建築師事務所商會
The Association of Consulting Engineers of Hong Kong	香港顧問工程師協會
Hong Kong Construction Association	香港建造商會
The Hong Kong Electrical & Mechanical Contractors' Association Limited	香港機電工程商協會
ZHONG HUA Construction Foundation	中華建設基金會

Source: Development Bureau, the HKSAR Government

The HKIS will continue to support the Sichuan Reconstruction Work under the leadership of the HKSAR Government. Your participation is most important to us.

Report from Working Group on WKCD Convenor: Dr Paul Ho

West Kowloon Cultural District Authority - Stage 2 Public Engagement Exercise

Stage 2 Public Engagement ("PE") exercise for the West Kowloon Cultural District ("WKCD") was commenced on 20 August and lasts for three months until 20 November 2010. Through the exercise, the WKCD Authority will solicit public views on the three WKCD Conceptual Plan Options prepared by master planning teams.

During the Stage 1 PE exercise, the WKCD Authority received many constructive comments from stakeholders. In Stage 2, the Conceptual Plan Consultants will present their Conceptual Plan Options for public comments. The Stage 2 PE exercise will focus on the master planning of the WKCD. The Conceptual Plan Options will show the layout of the arts and cultural facilities as well as various other land uses, including public open space, commercial, retail, dining, hotel and residential. Internal infrastructure facilities and external and internal transport connectivity are also shown. Specific design of individual buildings and other venues will begin upon the Town Planning Board's agreement to present the Development Plan of the WKCD for public inspection.

At this stage, the public will be asked to indicate their preferred individual features from the three plans, which may be incorporated into the selected Conceptual Plan. The plan eventually selected will be further developed into a detailed Development Plan for the WKCD.

Stage 3 PE exercise is planned for 2011. At that stage, the Conceptual Plan selected will be developed into a detailed Development Plan, whilst detailed technical feasibility studies will also be conducted. Taking into account public views, the WKCD Authority will finalise the detailed Development Plan for submission to the Town Planning Board for consideration.

Report from CEPA Committee Chairman: Mr Stephen Lai

The CEPA Committee was formed to consolidate Divisions' request on CEPA related issues and reflect to Hong Kong and mainland government bodies or officials. The Committee also coordinates divisions attend CEPA related meetings and to observe members' concern on practicing issues under the CEPA.

The Committee held its meeting on 19 July 2010. The current updates from Divisions on their reciprocity arrangement were noted. Members of the Committee also met Mr David Tong, Mr T F Leung and Mr K K Chong of the Development Bureau on 10 August to raise concerns and difficulties. A wish list on CEPA was formally submitted to the Development Bureau.

Members of CEPA Committee

Chairman: Mr Stephen Lai

Members:	Mr Robin Leung, Mr Nathan Lee	BSD
	Mr Charles Chan, Mr K K Chiu	GPD
	Mr Koo Tak Ming, Mr Simon Kwok	LSD
	Mr Edwin Tsang, Dr Tony Leung	PDD
	Mr Dick Kwok, Mr Alan Wong	PFMD
	Mr Arthur Shia	QSD

Report from Research Committee Chairman: Prof Eddie Hui

The Research Committee was formed to initiate and devise research projects and submit to General Council for consideration. The Committee also organized the "Outstanding Final Year Dissertation Awards" for final year students of the HKIS accredited first degree courses, and also the "Dissertation/Thesis Awards" for postgraduate students.

The Committee held its meeting on 11 June 2010. The above-mentioned Awards were being organized. Nominated dissertations/theses were received from universities. Assessments would be arranged accordingly, and results would be announced in December 2010.

The Committee also received several research proposals from Divisions. The proposals would then be vetted and recommended to the Executive Committee for formal approval.

Members of Research Committee

Chairman: Prof Eddie Hui

Members:	Dr Daniel Ho, Dr Edward Yiu	BSD
	Mr S K Pang, Mr Jim Lam	GPD
	Dr Conrad Tang, Mr Cheng Wai Pun	LSD
	Mr Ben Chong, Mr Cyrus Mok	PDD
	Mr Charles Hung, Dr Edmond Cheng	PFMD
	Dr Thomas Ng, Dr Mei-yung Leung	QSD
	Mr C W Tang, Ms Iris Chau	YSG

Report from Strategic Planning Committee Chairman: Mr Wong Bay

The Strategic Planning Committee was formed in March 2010, to work out a detailed action plan for both short term, middle term and long term goals of the Institute.

The Committee held meetings on 29 April, 2 July and 11 August 2010. During the meetings, the core values and vision statement of the Institute were re-visited. The Committee also noted the recommendations from the Finance Committee regarding different ways to improve financial situation of the Institute. Succession planning in Divisions was also discussed. Divisions were also encouraged to consider market expansion on special professional development areas. At the meeting on 11 August, a guideline for nomination to external bodies was also devised. I would like to thank members of the Committee for their support to the Institute.

For the time being, Divisions are invited to give thoughts to the shared vision statement "To Strike for Excellence in the Surveying Profession 測量專業，力臻卓越".

Members of Strategic Planning Committee

Chairman:	Mr Wong Bay	HKIS Senior Vice President
Members:	Prof K W Chau	HKIS President
	Ms Serena Lau	HKIS Vice President
	Mr Edwin Tang	HKIS Honorary Secretary
	Ms Lesly Lam	HKIS Honorary Treasurer
	Mr Kenneth Yun	BSD
	Mr Francis Ng	GPD
	Mr Jason Chan	GPD
	Mr Simon Kwok	LSD
	Mr Gary Yeung	PFMD
	Mr Edwin Tsang	PDD
	Mr Daniel Ho	QSD
	Mr Jeffrey Wong	YSG

香港測量師學會名譽會員

受香港測量師學會會長鄒廣榮教授的委托，前會長劉紹鈞教授代表學會於本年七月一日中午及晚上在北京分別向原國家土地管理局局長、中國土地學會創會理事長王先進教授，及原建設部副部長、現任住房和城鄉建設部特邀顧問、中國房地產估價師協會創會理事長周干峙院士頒發了香港測量師學會名譽會員證書，並代表學會感謝兩位在八十年代中期開始，對學會與內地之專業交流的大力支持和協助，以及代表會長鄒廣榮教授向兩位老先生問好。

七月三日下午，前會長劉紹鈞教授接受了周干峙院士之邀請，到建設部行政大樓與原建設部副部長劉志峰先生會面

(劉先生為現任中國房地產業協會會長、中國房地產研究會會長、全國政協常委及人口資源環境委員會副主任)。前會長劉紹鈞教授向周干峙院士及劉志峰會長 報了香港測量師學會之近況，以及香港房地產市場之最新發展。



左起：劉紹鈞教授、周干峙院士、劉志峰
From left: Professor Francis Lau, Professor Zhou Ganshi, Mr Liu Zhifeng

周干峙院士簡介

周院士為江蘇蘇州人，生於一九三零年，一九五二年畢業於清華大學建築系，現任中國科學院院士，中國工程院院士，住房和城鄉建設部特邀顧問。原任國家建設部副部長，第八屆全國政協副秘書長，第九屆全國政協教科文衛生委員會副主任，中國房地產估價師協會創會理事長。現任中國城市規劃學會名譽理事長，中國風景園林學會名譽理事長，中國房地產研究會名譽會長，全國歷史文化名城專家保護委員會主任委員，中國城市經濟學會副會長，清華大學教授。



王先進教授簡介

王教授為山東海陽市人，生於一九三零年，曾任吉林省省委書記。一九八六年至一九九三年出任國家土地管理局局長。一九九三年至二零零三年擔任第八及第九屆全國人大環境資源保護委員會委員。原任中國土地學會創會理事長(1986-1994)及中國國土經濟學會理事長。現任中國土地學會名譽理事長，中國人民大學教授。



HKIS Honorary Fellow

As commissioned by the HKIS President Prof K W Chau, Past President Prof Francis S K Lau presented the HKIS

Honorary Fellow Certificates to Academician Wang Xianjin, Former Director of State Land Administration and Founding President of China Land Society; and Prof Zhou Ganzhi, Former Vice Minister of Construction, Special Consultant of the Ministry of Housing and Urban-Rural Development (MoHURD) of the PRC and Founding President of China Institute of Real Estate Appraisers at a lunch and a dinner gathering on 1 July 2010 respectively. On behalf of HKIS, Prof Lau sincerely expressed appreciation and thanks of their great support and contribution starting from the era of the mid-80's to the development and exchange of the real estate and construction professions in Hong Kong and the mainland, and also a warm greeting was delivered to the two seniors on behalf of President Prof K W Chau.

In the afternoon of 3 July 2010, Prof Lau was invited by Prof Zhou to a meeting and dinner gathering at the Headquarter of the MoHURD and met with Mr Liu Zhifeng, former Vice Minister of MoHURD, President of China Real Estate and Housing Research Association, President of China Real Estate Developers Association, and Member of the Standing Committee and Vice Chairman of the Population, Resources and Environment Committee of National Committee of the Chinese People's Political Consultative Conference. Prof Lau briefed them on the current situation of Hong Kong Institute of Surveyors and the latest development of Hong Kong real estate and construction market.

Resume of Prof Zhou Ganzhi

Academician Zhou Ganzhi was born in Suzhou of Jiangsu Province in 1930. He was graduated from Department of Architecture of Tsinghua University. He is an Academician of the Chinese Academy of Science; an Academician of the Chinese Academy of Engineering; and a Special Consultant of the MoHURD of the PRC. Prof Zhou was a Vice Minister of the Ministry of Construction; Deputy Secretary General of 8th National Committee of Chinese People's Political Consultative Conference (CPPCC); and the Vice Chairman of the Committee of Education, Science, Culture, Health and Sports of 9th CPPCC; and Founding President of China Real Estate Appraisal Association. Currently, Prof Zhou is an Honorary President of Urban Planning Society of China; Honorary President of Chinese Society of Landscape Architecture; Honorary President of China Real Estate and Housing Research Association; Vice President of China Society of Urban Economy; Convener of National Conservation Commission of Historic Cities, China Society of Urban Economy; and a Professor of Tsinghua University.

Resume of Prof Wang Xianjin

Prof Wang was born in Haiyang City, Shandong Province in 1930. He was a Former Party Secretary of Jilin Provincial.

He worked as Director of the State Land Administration from 1986 to 1993. During 1994 to 2003, he was a member of 8th and 9th Environmental and Natural resources Protection Special Committee of the National People's Congress Standing Committee. He was the Founding President of China Land Society from 1988 to 1994; and President of China Society of Economy. Currently, Prof Wang is a Honorary President of China Land Society and a Professor of Renmin University of China.

Council members reaching out

11 August

Public Consultation on Subsidising Home Ownership organised by Transport and Housing Bureau

Dr Lawrence Poon, Mr Edmond Yew

13 August

Luncheon Seminar: Delivering Service Quality - Experience from Around the World

Mr Kenneth Yun, Mr Simon Kwok

20 August

Opening Ceremony of the West Kowloon Cultural District Stage 2 Public Engagement Exercise

Mr Wong Bay, Ms Serena Lau

21 August

Urban Development, Information and Communications Technology, and Green Group Forum of the Stage 2 Public Engagement Exercise for the West Kowloon Cultural District organised by West Kowloon Cultural District Authority

Mr Lau Chun Kong

25 August

Quality Water Recognition Scheme for Buildings Certificate Presentation Ceremony 2010 organised by Water Supplies Department

Mr Wong Bay

27 August

Luncheon with the HKIE

Prof Chau Kwong Wing, Mr Wong Bay, Mr Kenneth Yun

30 August

Focus Group Meetings on Quality Assurance of Mandatory Safety Training Courses organised by Labour Department

Mr Daniel Pong

Building Surveying Division Chairman's Message



Kenneth Yun BSD Council Chairman

MBIS & MWIS

Although August is a popular time slot for summer vacation, BSD is busy in following up the proposed Mandatory Building Inspection Scheme (MBIS) and Mandatory Window Inspection Scheme (MWIS). In last issue of Surveying Times, a copy of our comments on the Building (Amendments) Bill 2010 has been included. Further to our submission to the Bill Reviewing Panel under Legislative Council, Vincent Ho, Kenny Tse and I met the Chairman of the Panel, Professor Patrick Lau on 10 August to elaborate our comments point by point. Our comments were well received by Professor Lau and we look forward to receiving responses from the administration before finalization of the Bill.

Moreover, the working group being led by Kenny Tse with representatives from other divisions is busy in preparation of comments on the draft Code of Practice for the MBIS and MWIS after receiving responses from the BD on our previous submissions of comments. It is still a long road for this issue to be settled.

Building Surveyors Conference 2010

This year's conference will be held on 23 October 2010 (Saturday) at Harbour Grand Kowloon Hotel in Hung Hom. The main theme of our conference will be on maintenance aspects. The Secretary for Development, Mrs Carrie Lam Cheng Yuet-ngor has confirmed to be our Guest of Honour. Building Surveyors whether working in maintenance field or not should try your best to attend. I can assure you to have sharings from fellow surveyors and practitioners regarding their invaluable experience in building maintenance in different types of buildings and the latest development on maintenance technologies.

Proposed amendments of the Constitution and Bye-Laws for the APC/ATC Reform

Members may be aware that the Board of Education has

initiated a reform exercise on the current APC/ATC system. Their proposal to amend the Constitution and Bye-Laws for the APC/ATC Reform has been submitted to and discussed in the General Council last month. According to the proposal, the current arrangement under the ATC and APC will be combined and an Associated Member Grade of membership will be formed to replace the current Technical Grade Membership. Divisional councils were invited to vote on the abbreviation between AMHKIS and AssoHKIS. Majority of the BSD Council Members preferred AMHKIS.

BEAM Pro Training and Examination

After formation of Hong Kong Green Building Council, joint effort with the BEAM Society was made to promote the training of green building professionals. Building Surveyors are encouraged to join the training course, take the examination and register as BEAM Pro. You can find details of BEAM Pro on the following website: <http://www.hkgbc.org.hk/eng/beampro.aspx>

Comments on Draft Code of Practice on Fire Safety of Buildings

The BD invited our representatives in the Authorized Person Structural Engineer Committee to comment on the draft code of practice. Meanwhile our Technical Advisory Panel is studying and preparing for comments.

Working Group for Revamp of HKIS Library

The Administrative Committee of the Institute has invited divisions to participate in the Working Group. Our Council Member, Ms Caskie Hung will represent the BSD to join the working group. If you have any brilliant ideas to revamp the HKIS Library, please convey your message through Caskie. ■

General Practice Division Chairman's Message



Francis Ng GPD Council Chairman

Members may note recent personnel changes at certain land-related departments/bureaux. However, some may not be aware that apart from seniority, experience and personality, exposure and leadership are important attributes that will be taken into account when considering suitable candidates for promotion.

Some members observed that in a particular department, the outgoing and incumbent heads once served as presidents of a professional institute. Also, its deputy director had also 'gone through' the process.

Serving as a president of an institute will greatly enrich one's communication skill with people thus ironing out mutual differences. Furthermore, it gives the opportunities to face / solve problems which are not entirely relating to office work, making decisions on controversial issues, team buildings with members, etc.

The reward for dedication of one's time and effort on institute affairs may not be forthcoming. However, one may be benefited on a longer term. With regard to the current GPD Council, we still have more than one year to go before the next election. Meanwhile, interested members may wish to consider participating in various activities by joining certain working groups, panels, speaking at CPD forum, commenting on papers / policy / consultation documents, etc.

Should members wish to have details on possible participation, they are always welcome to contact our Hon Secretary, Mr Tony WAN or Hon Treasurer, Mr Edward AU. Their e-mail addresses are: tony.wan@hk.knightfrank.com; edwardshau@hkis.org.hk.

Progress on RA with CIREA

In the past few weeks, the HKIS Working Group has sent draft documents and e-mails to its counterpart. It would seem that apart from our proposal, they have to take other factors into account. Time will be required to resolve outstanding issues.

The Working Group is chasing up progress and will give further reports in due course.

Coming CPD Seminars

Members may wish to note that the following CPD seminars will be organized by the GPD in the coming months:

1. The Implementation and Impact of New Measures for Sale of Uncompleted Residential Units in HK - by Mr Andrew Yu
2. Wo Shang Wai Residential Development cum Wetland Restoration Project - a Win-Win Case by Mr Augustine Wong Ho Ming
3. The Role of Surveyor as Expert - by Mr F. Y. Kan
4. Lot Boundary Survey in Development projects - The Role of a Professional Land Surveyor - by Mr Joseph Y.C. Wong

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For reservation, please call the Secretariat on
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歡迎預定設施。請電 2526 3679 或
電郵 slcbooking@hkis.org.hk

Land Surveying Division Chairman's Message



Simon Kwok LSD Council Chairman

CEPA

The HKIS CEPA Committee had a meeting with the Development Bureau (DEVB) on 10 August to discuss the progress of cooperation with the Mainland counterparts. We met Mr David Tong, the Principal Assistant Secretary (Works). In the meeting, we informed DEVB the current status of each division of the HKIS in respect of obtaining mainland professional qualification, registration and opening firm in the Mainland to carry out surveying business.

To recap the progress in the land surveying field, we had arranged meeting with the State Bureau of Surveying and Mapping (國家測繪局) and the Chinese Society of Geodesy, Cartography and Photogrammetry (中國測繪學會) on 31 March 2006 and 18 January 2008 to discuss the arrangement for recognition of land surveying professional qualification. On 1 March 2007, the Mainland started to implement the Provisional Rule for Registered Surveyor System (注冊測繪師制度暫行規定). In recent years, the Mainland has been developing the system and training materials for Registered Surveyor Examination.

After the meeting with the DEVB on 10 August, we provided the DEVB a list of action items for discussion with the Mainland. The areas we want to have further progress are:

1. To provide training to the professional land surveyors of Hong Kong for getting the Registered Surveyor qualification of the Mainland (中華人民共和國注冊測繪師資格).
2. To arrange the Hong Kong Professional Land surveyors to take the Examination for Registered Surveyor Qualification (注冊測繪師資格考試).

3. The ways for allowing Hong Kong Land Surveying companies to obtain the surveying organization qualification certificate of the Mainland (內地測繪單位資質證書).

We also requested the DEVB to arrange a meeting for the HKIS to meet the Mainland counterparts for making further progress.

GIS and land surveying support for tree management

The LSD representatives attend a discussion forum organised by Hon Prof. Patrick Lau on 19 July 2010 to exchange views on Tree Management with Ms Kathy NG, the Head of the Tree Management Office (TMO) of the Development Bureau. Tree management is a challenging task requiring not only Government efforts but also united forces from various professional groups and the members of the public.

In the forum, we expressed our views on how land surveyors can contribute our expertise (e.g. spatial data infrastructure, digital mapping, GIS, satellite positioning, location based services and mobile mapping, etc.) to support tree management.

The TMO is very much interested in making use of our expertise, in particular, in GIS. With a view to promote proper tree management in the community, they are currently arranging a seminar for professional groups. The HKIS members will be invited to attend. 🇮🇪

Planning & Development Division Chairman's Message



Francis Lam PDD Council Chairman

CEPA Arrangements

At the meeting between the HKIS CEPA Committee and the HKSAR Government Development Bureau on 10 August, our Division's representative, Mr Tony Leung, raised a formal request to the Development Bureau in respect of identifying a relevant reciprocal professional body in the Mainland China for our Planning and Development Surveyors in Hong Kong. If there is no such compatible Chinese professional body for the time being, we may consider to discuss this issue with the Ministry of Construction later in exploring the possibility of creating a new Chinese professional body in this regard.

Government Consultation on Subsidizing Home Ownership

On 11 August 2010, the HKIS Panel on Subsidizing Home Ownership attended the special consultation session organized by the Transport and Housing Bureau. Our

Division's representative, Mr Edmond Yew, attended the session and offered professional comments on the future government policy for subsidizing home ownership.

CPD Events

Mr Raymond Chan delivered a very successful CPD talk on making town planning applications under Section 12A and Section 16 of the Town Planning Ordinance on 5 August 2010. Some 200 members attended Raymond's event.



Chartered Institute of Arbitrators (East Asia Branch) 特許仲裁學會(東亞分會)



East Asia
Branch

CI Arb

CPD points being applied
from the Law Society of
Hong Kong

Entry Course

The Chartered Institute of Arbitrators (East Asia Branch) is accepting applications from suitably qualified professionals for a 2-day course leading to entry to the Institute as an Associate (which is the first grade). Applicants should hold recognised professional or industry qualifications appropriate to their profession.

Subjects covered include: **Powers & Jurisdiction of the Arbitrator; Preliminary Meetings; Submission to the Arbitrator; Procedure at a Hearing; Awards; Costs & Interest and International Arbitration**, concluding with a written examination.

The examination consists of two elements:

a pre-course assignment which must be handed in on the 1st day of the course	-20% marks
a 2-hour written paper	-80% marks

The course will be held at Hong Kong International Arbitration Centre on Saturday 30 October and 6 November 2010 from 9:00am to 5:00pm followed by an examination on Saturday 13 November 2010 afternoon 2:15pm to 4:30pm.

The cost of the full course will be HK\$3,700 including course materials, a DVD and the examination fee. **Note, this fee will be discounted to HK\$3,400 for applications with accompanying fee received on or before Monday 4th October 2010.**

Please send your application giving (1) **name and ID No.** (2) **occupation, details of education and professional or industry qualifications** (3) **address**, (4) **email address** and (5) **day time telephone number**, along with a cheque made payable to the "Chartered Institute of Arbitrators (East Asia Branch)", c/o Hong Kong International Arbitration Centre, 38/F Two Exchange Square, Central, Hong Kong. Cheques will be returned for unsuccessful applications.

c/o Hong Kong International Arbitration Centre
38/F Two Exchange Square, Central, Hong Kong
Telephone: (+852) 2525 2381 Fax: (+852) 2524 2171 Website: www.ciarbasia.org

Property & Facility Management Division Chairman's Message



Gary Yeung PFMD Council Chairman

Research Report

The Council has just finished the publication of a new research report namely "Benchmarking of Management Fees for Office Buildings in Hong Kong". It was the second similar benchmarking report following the research on residential building published last year.

The level of management fees of office buildings depends largely on the standard of management and maintenance services corresponding to grading, efficiency, customer expectations, materials durability, building size, age and any other special features. The research has focused on the essential components which predominately affect the level of management fees for Grade A, B and C office buildings and the study of their close associated relationships. The data therein obtained is considered very useful to PFM Surveyors in the practice of office building management in Hong Kong.

I would like to thank for the assistance of our Honorary Secretary, Mr Charles Hung, for his tremendous effort working in close collaboration with Dr K.K. Lo of the Hong Kong Polytechnic University. Dr Lo had kindly agreed to conduct a CPD presenting his research findings for the Institute, and the event might possibly be held in around December this year. Similar to last year, a copy of the research report will be dispatched to all participants during the CPD so, if you wish to keep a copy of the report for future reference, please watch out for the schedule of this important CPD event.



a wide adoption in the private market. It is expected that the document could be ready for publication in the later part of this year. If members have any view that consider useful for incorporation into the proposed agreement, please feel free to send an email to me at garymkyeung@hkis.org.hk. I will relate your information to Chris Cheung for arrangement of a more detailed discussion.

Meeting New President of the Hong Kong Institute of Housing

Our Vice chairman, Mr Dick Kwok, Honorary Secretary, Mr Charles Hung, and I met the new president of the HKIH, Mr T.K. Share in a luncheon gathering of 22 July 2010. The Chairman of the Housing Managers Registration Board, Mr Mingo Kwan, Chairman of the Chartered Institute of Housing (Asia Pacific Branch), Mr Sanford Poon, and President of the Hong Kong Institute of Facility Management, Mr Nelson Ho also joined the gathering. Whilst we congratulated Mr Share for his successful election as the new President of the HKIH, we have also exchanged views on the recent proposal submitted by the Home Affairs Department to the Legislative Council in respect of "Regulation of the Property Management Industry". Although there may be a slight dissenting view on some minor aspects, the overall discussion was fruitful and constructive. We expect that there will be frequent gathering between the various Institutes.

Listing of Organizations Providing Property and Facility Management Services

In the January issue of Surveyors Times, I notified members that the Council intends to formulate and maintain a list of organizations providing property and facility management services. We have already received several applications for inclusion onto the Institute's list and the details of some organizations were uploaded to our website after assessment by a designated working group led by our Honorary Secretary. May I remind members once again that you may download the application forms from the Institute website if your organization is still not on the list. Please note that listing is not confined to limited company and non-government organization may also apply for inclusion onto the list subject to meeting the minimum requirements. ■

Standard Management Agreement

The Council has formed a working group which is led by our Council Member, Mr Chris Cheung, in the formulation of a series of standard agreement for the provision of property and facility management services, security service and cleansing service. The first draft of simplified version of property management agreement (English) is close to its final stage. This simplified version of agreement intends to be used by owners corporation in the appointment of property management agent. Hence Chinese translation will also be produced in order to facilitate

Quantity Surveying Division Chairman's Message



Daniel Ho QSD Council Chairman

In the past month, I had several opportunities to meet numerous quantity surveyors/cost engineers coming from all corners of the world. It started with the unofficial visit of the representatives from the Canadian Institute of Quantity Surveyors (CIQS) and then continued during my attendance at the congress in Singapore.

CIQS Visit

On 20 July, two CIQS representatives, viz. Mr Ian Duncan, the past president, and Mr David Lai, the education administrator, together with their wives paid an unofficial visit to the HKIS. They were welcomed in a simple but friendly reception with 10 members of the quantity surveying division (QSD).

Ian and David shared their working experiences in Canada. They told us that quantity surveyors in Canada had not been affected by the economic crisis. The cost professionals were busy in preparing cost estimates and in implementing cost controls in both good times and bad times.

In return, we told them about the operation of the HKIS and the current situation of the construction industry in Hong Kong. They were assured that when they attended the PAQS Congress in Hong Kong in 2014, they would see several new large completed projects including the government headquarters in admiralty and the Kai Tak Cruise Terminal.

Whilst enjoying the Chiu Chow food dinner, they shared with us their travel experiences in Hong Kong. They thanked our warm hospitality and looked forward to our future visit to Canada and CIQS.



7th International Cost Engineering Council (ICEC) World Congress & 14th Pacific Association of Quantity Surveyors (PAQS) Congress

The congress was organized by the Singapore Institute of Surveyors and Valuers (SISV). The theme of the congress was "Sustainable Cost Management: Borderless Innovation".

11 members/delegates of the HKIS attended the 7th ICEC World Congress and the 14th PAQS Congress held in Singapore during 23 to 27 July. The members/delegates included Mr Eric Cheng, Mr TT Cheung, Mr Joseph Chong, Mr Lawrence Chung, Dr Paul Ho, Dr Ellen Lau, Prof Anita Liu, Mr Antony Man, Mr K C Tang, Ms Tzena Wong and I.

For members information, the ICEC comprises 48 members, which are cost engineering, quantity surveying and project management societies, from over 40 countries located in North and South America, Europe, Africa and Asia. The ICEC is divided into four regions according to the geographical areas. The ICEC World Congress is held bi-annually in the four regions by rotation. This year the World Congress was held in Asia (Region 4). The PAQS comprising quantity surveying societies from 13 countries is an international association of national organizations representing quantity surveyors in the Asia and the Pacific region.



The members of the HKIS have great involvement in these two international organizations. This includes:

ICEC

- Mr TT Cheung: Administrative Vice Chair

PAQS

- Mr T T Cheung: Chair of Sustainability Committee
- Mr Joseph Chong: Chair of Young Quantity Surveyors Group (YQSG)
- Dr Paul Ho: Chair of Research Committee
- Prof Anita Liu: Secretary of Education and Accreditation Committee
- Dr Ellen Lau: Secretary of Research Committee

Meetings

The full day ICEC Council meeting was held on 24 July (Saturday). Amongst the 30 items in the agenda, the discussions included the reports from the four regions. Mr Antony Man, Vice-Chairman of the QSD, and I represented the HKIS and reported the updated information of the HKIS to the meeting. Some highlights of the meeting included:

- ICEC was considering the development of an ICEC knowledge portal in respect of international project costs.
- Mr TT Cheung received an ICEC Region and Chairman's Award in recognition of his contribution in the region and assistance to the ICEC Chairman, Mr Peter Cox and the Region 4 Director, Mr Teoh Wooi Sin, in the past two years.
- Mr Murtala Oladapo from Nigeria Institute of Quantity Surveyors (Region 3), Senior Administrative Vice Chairman, was elected as the new Chairman of ICEC for a term of two years from July 2010.

Other key officers of the ICEC elected for a term of two years were:

- Senior Vice Chair : Casten Wrestrom (Denmark)
- Administrative Vice Chair : Ms Alexia Nalewaik (USA) and Mr TT Cheung (Hong Kong)
- Technical Vice Chair : Mr Adesh Jain (India)
- Secretary Treasurer : Dr Peter Smith (Australia)

In the early morning of the following day, the PAQS Board meeting commenced with the report from the

Chairman of PAQS, Mr Teoh Wooi Sin. Amongst others, he thanked the HKIS for contribution to the PAQS funding and encouraged young quantity surveyors to join the Iwata Foundation essay competition in future. He further remarked the big step taken by the PAQS accreditation scheme, which achieved its first accreditation with the University of Unitec of New Zealand.

Following the reports from the committees, the representatives of the member countries presented their reports to the meeting. Mr Antony Man and I represented the HKIS and reported the key developments of the HKIS and the major events of the Hong Kong Construction Industry since the meeting last year.

There were lengthy discussions on two items, viz. setting up a council of advisors and establishing a code of professional conduct for a prospective institute. A consensus was obtained on the former whilst the latter would have to be reviewed by each member country for further deliberation in the next meeting.

Congress

The two-day congress started with a dragon dance and three welcoming speeches. This followed with an impressive speech by the guest-of-honour, Dr Amy Khor, the Senior Parliamentary Secretary and the Ministry of the Environment and Water Resources.

This year, the congress had 38 papers and six of them were from the members/delegates of the HKIS. They included:

- The application of construction cost yardsticks for the planning and control of construction cost for public rental housing in Hong Kong : Mr TT Cheung and Mr Lawrence K W Chung
- How prime are prime cost rates: Mr Eric Cheng
- Probabilistic service life estimation of roofing systems: Dr Paul H K Ho
- A multi-disciplinary approach in reviewing professional codes of conduct: Dr Ellen Lau
- Web-based document management systems in the construction industry of Hong Kong : Ms Tzena Y C Wong
- Costing of 'green' home initiatives in urban renewal projects: Mr Daniel C W Ho

The PAQS has obtained the copyrights of the papers and will post them onto the PAQS web-sites for members information. Further, the QSD will arrange some of the

above members/delegates to present their papers to members of the HKIS in the coming CPD events.


Other highlights

- One of the key note speakers advised that the Singapore government had given full support in sustainable development, which included substantial subsidies on environmental installations e.g. PV panels and mandatory requirements of environmental standards for new developments. Under the government's effort, several 'green' buildings including a zero energy building were built as examples to the construction industry in the past few years.
- We took the opportunity to explore the possibility of establishing a reciprocity agreement with the representative of our American counterpart, the Association for the Advancement of Cost Engineering International (AACEI). We made a good start and would continue the dialogue in the coming months.
- Acquaintance with the delegates from other international societies would facilitate the exchange of information relating to quantity surveying and the practices adopted in other countries. For example, performance auditing in the construction industry is being advocated in the U.S.A. as against traditional control-based systems in the light of the evolving built environment. Quantity Surveyors working in Brunei would be expected to be multi-skilled and to have the ability to manage both building works and building services installations.
- The 15th PAQS Congress with the theme "Cost Control in a world emerging from adversity" will be held in Colombo, Sri Lanka, the pearl of the Indian Ocean. We were advised to be physically fit for attendance in the congress in Sri Lanka as the attendants would be expected to join mountain walks.

Visit to SISV

Ten HKIS members/delegates took the opportunity to pay a visit to the SISV after the closing of the congress. We were received by the President of the SISV QSD, Mr Goh Ngan Hong, the treasurer, Mr Silas Loh and other SISV representatives in its newly owned premise.

Mr Goh briefed us the organization of the SISV. It comprised three divisions, viz. valuers, land surveyors and quantity surveyors. Each division has full autonomy of its business. The head of the division is called the president. One of the presidents takes up the role as the chairman to lead the SISV.

The visit allowed us to have a detailed and fruitful discussion with Mr Goh in respect of the future co-operation between the QSD of SISV, ISM (Institute of Surveyors, Malaysia) and the HKIS. It was agreed that the quantity surveying division (QSD) of the SISV, ISM and HKIS should continue sharing the skills and knowledge of quantity surveying between the three institutes. Such sharing of information should take place through divisional level for the sake of efficiency and effectiveness. During the farewell dinner, we had the same discussion and agreement with Mr Chew Nane Cheong Chris, the Chairman of the ISM QSD, on such co-operation mode. 



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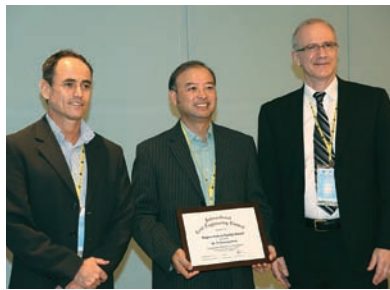
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Email: aw.greenfield@gmail.com

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Visit to ICEC World Congress & PAQS Congress



Summary of HKIS CPD / PQSL Events

02 Sep - 11 Nov 2010

DATE	CODE	EVENT	CPD HOUR(S)	SPEAKERS	RUN BY
02, 16, 30, Sep, 07, 14, 21 Oct	2010094	BSD APC Revision Course 2010 (Part 2)	1.5 per lecture	Vincent Ho, Andrew Woo, Nathan Lee, Peter Wong, Edwin Tang, K W Wong	BSD/YSG
18 Sep	2010103	GPD APC Revision Course on Valuation (Part 3) and Rating Valuation	2	Thomas Tang, Eric Poon, Louie Chan	GPD/YSG
20 Sep	2010074	Experience Sharing of the "WOBO World Congress 2010" and "First Asia/Pacific Symposium of Building Officials"	1.5	Kenneth Yun, Robin Leung, Edwin Tang	BSD
21 Sep	2010086	Rent Review for Public Housing. No Choice but Upward Adjustment Only?	1.5	Joey Yuen	YSG
27 Sep	2010087	Energy Saving Facilities - Some Effective Approaches	1.5	Sunny So	PFMD
05 Oct	2010104	Application of Tree Hazard Assessment to Property Management	1.5	Professor C Y Jim	PFMD
06 Oct	2010085	Modern Delay Analysis Techniques	1.5	Scott Adams	QSD
18 Oct	2010106	Fundamental Practice of Property and Facilities Management in PRC	1.5	Hui Wai Pong Ben	PFMD
19 Oct	2010092	A Critical Review of the Insurance Provisions in the Standard Forms of Contract	1.5	KC Tang	QSD
20 Oct	2010101	Latest Trends of Web GIS	1.5	Paul Tsui	YSG
22 Oct	2010098	Project Management/Commercial Management of Construction	1.5	Jimmy Leong	QSD
26 Oct	2010105	Columbarium - Land Use and Planning	1.5	Albert So	PDD
27 Oct	2010083	The Role of a Professional Land Surveyor in Development Projects	1.5	Joseph Y C Wong	GPD
28 Oct	2010088	Introduction to Arbitration: How is Arbitration Relevant to the Surveyor?	1.5	Glenn Haley	YSG
29 Oct	2010107	PFMD APC Seminar/Workshop	1.5	Kenny Chan, Gary Yeung	PFMD
01, 08, 15, 22, 29 Nov	2010097	Training Course on Standard Form of Building Contract 2005 Edition	2 per lecture	Bernard Wu	QSD
03 Nov	2010102	Latest Developments Affecting the Construction Industry in Hong Kong	1.5	Steven Yip, Ian Cocking, Malcolm Chin	QSD
11 Nov	2010099	Workshop of Property Valuation Report Writing for Public Circular Purpose in Hong Kong	2	CK Lau, Joseph C Ho	GPD

Details of individual CPD/PQSL events are provided in the Surveyors Times and/or HKIS Website www.hkis.org.hk. Please use the STANDARD REGISTRATION FORM overleaf for registration. For enquiries, please email cpd@hkis.org.hk or call the Secretariat on 2526 3679.

CPD/BSD/YSG/2010094

BSD APC Revision Course 2010 (Part 2)

Speakers Mr Vincent Ho, Mr Andrew Woo, Mr Nathan Lee, Mr Peter Wong, Mr Edwin Tang and Ms KW Wong

Date & Venue 7:00 pm - 8:30 pm Thursday 2, 16, 30 September and 7, 14, 21 October 2010 SLC, HKIS

Details	Topic	Date	Speaker
1	Basic structural design consideration in handling A&A works	2/9/2010	Mr. Vincent Ho
2	Design considerations for licensing requirements	16/9/2010	Mr. Andrew Woo
3	How to develop your scheme for practical task?	30/9/2010	Mr. Nathan Lee
4	Review on APC practical task 2009	7/10/2010	Mr. Peter Wong
5	Techniques and strategies for written assessment in APC (BS)	14/10/2010	Mr. Edwin Tang
6	Basic E & M design considerations: What a building surveyor needs to know in handling A&A works	21/10/2010	Ms. K. W. Wong

Language Cantonese supplemented by English Terms **Fee** HK\$100 per lecture, HK\$50 for student member (HK\$20 walk-in surcharge for all pricings listed).

Deadline 2 weeks prior to the event date **Priority** BSD Probationers and Students

CPD/GPD/YSG/2010103

GPD APC Revision Course on Valuation (Part 3) and Rating Valuation



Speakers Mr Thomas Tang, FHKIS, Senior Director of CB Ellis Richard Hong Kong, Vice-chairman of the Board of Education & co-covenor of the of Education Committee of GP Division

Mr Eric Poon, MHKIS MRICS, Principal Valuation Surveyor of the Rating and Valuation Department, HKSARG

Mr Louie Chan, MHKIS MRICS Barrister-at-law

Date & Venue 2:00 pm - 5:00 pm Saturday 18 September 2010 SLC, HKIS

Details The speakers attended the conference and symposium during April this year. In this experience sharing seminar, Mr. Yun will share with you his findings of the WOBO World Congress & Mexico Fire Expo while Mr. Leung & Mr. Tang will introduce the current building control system of the New Zealand & their proposed changes.

Language English supplemented with Cantonese **Fee** HK\$120 per member; additional charge of \$30 for walk-in
Priority GPD Students & Probationers

CPD/BSD/2010074

Experience Sharing of the "WOBO World Congress 2010" and "First Asia/Pacific Symposium of Building Officials"

Speakers Mr Kenneth Yun, FHKIS, Chairman of BSD

Mr Robin Leung, FHKIS, Vice-chairman of BSD

Mr Edwin Tang, FHKIS, Past Chairman of BSD

Date & Venue	7:00 pm - 8:30 pm Monday 20 September 2010 SLC HKIS (original scheduled on Wednesday 28 July 2010)		
Details	The speakers attended the conference and symposium during April this year. In this experience sharing seminar, Mr. Yun will share with you his findings of the WOBO World Congress & Mexico Fire Expo while Mr. Leung & Mr. Tang will introduce the current building control system of the New Zealand & their proposed changes.		
Language	Cantonese supplement with English	Fee	HK\$120 for member; HK\$150 for non member (A HK\$20 surcharge for on spot enrollment would be imposed).
Priority	First-come-first served		

CPD/YSG/2010086

Rent Review for Public Housing. No Choice but Upward Adjustment Only?

Speaker	Ms Joey Yuen, Barrister, New Chambers		
Date & Venue	7:00 pm - 8:30 pm Tuesday 21 September 2010 SLC, HKIS		
Details	<p>Public housing rent has again become the headlines in recent days. The outcome of a recent rent review for public housing intimates the rent is likely to be increased by the end of this year. Surprisingly, the Hong Kong Housing Authority announced that mitigation measures are under consideration at the same time. In this seminar, Joey will discuss the public housing rent adjustment mechanism implemented in 2008 and will share a relevant case which was heard by the Court of Final Appeal.</p> <p>In this seminar, Joey will also explain the correct legal basis for valuation of government rent in context of development sites and discuss the liability of a person, in any capacity, in making land valuation.</p> <p>Joey started her career as a solicitor in 2003 in Sydney and was later admitted to the Hong Kong Bar in 2007. She is currently working as a barrister with New Chambers. Her main areas of practice include contract law, tort law and company winding-up proceedings.</p>		
Language	Cantonese supplemented by English	Fee	HK\$100 for member; HK\$150 for non-member; (HK\$20 walk-in surcharge for all pricings listed)
Priority	First-come-first-served		

CPD/PFMD/2010087

Energy Saving Facilities - Some Effective Approaches

Speaker	Mr Sunny So, Chartered Building Services Engineer, Managing Director of an Energy Saving Firm		
Details	<p>Mr So is a Chartered Building Services Engineer by profession. He has been practicing in the building services engineering field for over 25 years and has been working in different disciplines as well as different positions for client, consultant and contractor. Now he is the Managing Director of an energy saving firm serving clients for energy saving solutions in both air conditioning and the electrical services installation.</p>		
Date & Venue	7:00 pm - 8:30 pm Monday 27 September 2010 SLC, HKIS		
Details	Energy saving - a hot topic in recent property and facilities management industry. With the contribution from every professional and practitioners of the industry, we can help to preserve our beloved earth, to have a better living environment for our future generations. We can also help to cut down a large amount of energy consumed which in turn will be realized in money terms and benefit to the end user, so as to achieve a win-win condition for all of us.		
Language	Cantonese supplemented by English	Fee	HK\$100 per person
Deadline	13 September 2010	Priority	First-come-first-served

CPD/PFMD/2010104

Application of Tree Hazard Assessment to Property Management



Speaker	Professor C.Y. Jim		
	BA(HK), PhD(Reading), CertHydrology(US Geol Survey), MISoilSci, FArborA, FLS, CSci, JP, Chair Professor of Geography, Department of Geography, The University of Hong Kong		
Date & Venue	7:00 pm - 8:30 pm Tuesday 5 October 2010 SLC, HKIS		
Details	Collapse of trees has alarmed the Hong Kong Citizens and the property managers the importance of the examination of the health conditions of the trees. Professor Jim will introduce the assessment methods and measures to assess the trees conditions and any following up actions that property managers need to know.		
Language	English and Cantonese	Fee	HK\$100 per person
Deadline	21 September 2010	Priority	First-come-first-served

CPD/QSD/2010085

Modern Delay Analysis Techniques

Speaker	Mr Scott Adams BEng LLB LLM CEng MICE FCIArb MAPM MAE		
Date & Venue	7:00 pm- 8:30 pm Wednesday 6 October 2010 SLC, HKIS		
Details	Scott Adams is a chartered civil engineer who specialises in time-related construction disputes. In addition to prosecuting or defending claims for extension of time, he regularly gives expert evidence to judicial tribunals in litigation or arbitration proceedings. His paper "Better Ways than the "Best Way"? Improving the Society of Construction Law Delay and Disruption Protocol" was awarded a prize by the Society of Construction Law (UK). This talk will use a practical example to demonstrate the different results obtained when using 'impacted', 'as-built-subtracted' and 'time-slice' delay analysis techniques; their respective advantages and disadvantages; and their suitability (or otherwise) for use with HK standard forms of contract.		
Language	English	Fee	HK\$120 per member; HK\$150 for non-member (HK\$20 walk in surcharge for all pricings listed); Free of charge for full time university student (subject to availability)
Deadline	22 September 2010	Priority	Given to QSD Members; first-come-first-served

CPD/PFMD/2010106

Fundamental Practice of Property and Facilities Management in PRC



Speaker	Mr Hui Wai Pong Ben, General Manager, Shenzhen New World Group - a private enterprise for real estate developer in PRC		
Date & Venue	7:00 pm - 8:30 pm Monday 18 October 2010 SLC, HKIS		
Details	Mr. Ben Hui is responsible for overall property & facility management to monitor and supervise the luxury residential buildings & Grade A offices in Shenzhen. He also acts as supervising team member to monitor the PM & FM performance of Wuxi Shopping Mall of its GFA over 600,000sqm.		

Mr. Hui will update the legislation and practice of PM industry in Shenzhen Region. He will share his relevant working experience in Beijing, Shanghai and South China. Mr. Hui will introduce the existing working environment and share some business information such as salary package & tax arrangement regarding of PM & FM in China market. Any practitioners, who is looking for the opportunities to work in PRC and understand more legislative requirements and the daily practice of PM industry in PRC, will find it useful and practical through the sharing of the speaker.

Language	Cantonese	Fee	HK\$100 per person
Deadline	4 October 2010	Priority	First-come-first-served

CPD/QSD/2010092

A Critical Review of the Insurance Provisions in the Standard Forms of Contract

Speaker Mr KC Tang, FHKIS, FRICS, RPS(QS), AVS

Date & Venue 7:00 pm- 8:30 pm Tuesday 19 October 2010 SLC, HKIS

Details Mr KC Tang is the Managing Director of K C Tang Consultants Ltd. (Quantity Surveyors, Construction Cost and Contract Consultants), with over 34 years' professional experience in quantity surveying.

Mr Tang will critically examine the insurance provisions in the old and new versions of the Standard Form of Building Contract and Standard Form of Nominated Sub-Contract, and give his comments on the deficiencies and pitfalls and his suggestions for improvements.

Language	Cantonese supplemented with English	Fee	HK\$120 per member; HK\$150 for non-member (HK\$20 walk in surcharge for all pricings listed); Free of charge for full time university student (subject to availability)
Deadline	5 October 2010	Priority	Given to QSD Members; first-come-first-served

CPD/YSG/2010101

Latest Trends of Web GIS



Speaker Mr Paul Tsui, MHKIS, MRICS, RPS (LS), MPhil (GIS), Managing Director, Esri China (HK)

Date & Venue 7:00 pm - 8:30 pm Wednesday 20 October 2010 SLC, HKIS

Details Paul is the Managing Director of Esri China (Hong Kong) Limited. Esri is the world leader of GIS and mapping software. He is responsible for the general management and operations of the Hong Kong office of the company. Prior to joining Esri, he worked in Ordnance Survey, the national mapping agency of the United Kingdom (UK), and participated in the project of re-engineering the National Topographic Database of the UK. Paul is also appointed as the Sector Specialist in the Information and Communications Technology Sector by the Hong Kong Council for Accreditation of Academic and Vocational Qualifications.

The geospatial industry, the IT environment, and the world around us are all changing rapidly. Today, GIS continues to evolve in response to infrastructure changes. The Internet and the Web introduces a whole new set of challenges and opportunities to web GIS. The influences of Web 2.0 and Neogeography, Crowd Sourcing and Cloud Computing to the latest development of web GIS will be explored. Recent technological advances are helping us re-envision what a GIS is in a new context. As a Web-hosted or cloud-based system with ready-to-use maps and apps, GIS is rapidly moving toward the vision where it can be used anywhere, anytime, by anyone.

Language	English	Fee	HK\$100 for member; HK\$150 for non-member; (HK\$20 walk-in surcharge for all pricings listed)
Deadline	8 October 2010	Priority	First-come-first-served

PQSL/QSD/2010098

Project Management/Commercial Management of Construction



Speaker Mr Jimmy Leong, Director, Davis Langdon & Seah Hong Kong Ltd.

Date & Venue 7:30 pm - 9:00 pm Friday 22 October 2010 SLC, HKIS

Details This seminar is part of the HKIS QSD PQSL Series 2010 - 2011 and aims to enable candidates to:

a) Project management aspect:

- Identify the client's objects and develop the client's brief.
- Carry out feasibility studies (including risk management).
- Establish the budget and project programme.
- Establish the communication system (e.g. line of communication/ management, follow of design information, etc.).
- Establish the time, cost and quality control systems.

b) Commercial management of construction aspect:

- Apply principles of business management to achieve corporate objectives of contracting organizations.
- Plan/programme construction works (e.g. determine/purchase construction resources and evaluate productivity methods, etc.).
- Undertake financial management of contracting organizations (e.g. regular monitoring and reporting system, cash flow and variance between budget /actual cost, etc.).

Language English **Fee** HK\$100 for member; HK\$150 for non-member; (HK\$20 walk-in surcharge for all pricings listed)

Deadline 8 October 2010 **Priority** Priority is given to QSD Probationers and Students

CPD/PDD/2010105

Columbarium - Land Use and Planning



Speaker Mr Albert So, FHKIS, FRICS, RPS (GP)(P&D)
Co-opted Member of Development Committee,
Board of Management of the Chinese Permanent Cemeteries
Vice Chairman of PDD Council, HKIS
Past Hon. Secretary, HKIS
Past Hon. Treasurer, HKIS
Past Chairman of GP Division, HKIS
Past Chairman of RICS HK Board

Date & Venue 7:00 pm - 8:30 pm Tuesday 26 October 2010 SLC, HKIS

Details Columbarium is a very hot topic these days due to the high cremation rate and the short supply of both public and private niches in the territory. This talk will examine the causes for the shortfall and what land and planning procedures that public and private columbaria have to go through.

Language English/Cantonese **Fee** HK\$100 per person

Deadline 12 October 2010 **Priority** First-come-first-served

CPD/GPD/2010083

The Role of a Professional Land Surveyor in Development Projects

Speaker Mr Joseph Y.C. Wong, MSc, BSc, MHKIS, MRICS, RPS(LS), Authorized Land Surveyor, Director of Land Marker (1980) HK Co Ltd.

Date & Venue 7:00 pm- 8:30 pm Wednesday 27 October 2010 SLC, HKIS

Details Mr Wong is a director of a leading land surveying consultancy based in Hong Kong. He specializes in boundary survey, topographic survey, monitoring survey and all kind of surveys throughout a development project. He is also an experienced expert witness in land surveying and boundary disputes. He has wide experiences in handling development projects for developers, architects, engineers, land owners, government authorities and contractors.

Land value increases rapidly in the last decade that the correctness of a lot boundary is one major factor affecting land values. An accurate boundary defined by an Authorized Land Surveyor in a right time may also improve the efficiency and shorten the completion days of a development project. With an accurate boundary, one may be able to determine the value of a property more precisely.

In this seminar, Mr. Wong will introduce the basic concepts and methods in identifying lot boundary and present the inputs of a professional land surveyor in a development project. He will also share his experiences on a number of cases in handling clients with special requirements.

Language	Cantonese supplemented by English	Fee	HK\$100 per person HK\$150 per person for walk-in participants (subject to availability)
Deadline	13 October 2010	Priority	First-come-first-served

CPD/YSG/2010088

Introduction to Arbitration: How is Arbitration Relevant to the Surveyor?

Speaker Mr Glenn Haley, The Chartered Institute of Arbitrators, East Asia Branch Ex- Chairman

Date & Venue 7:00 pm - 8:30 pm Thursday 28 October 2010 SLC, HKIS

Details The speaker will share his experience with the audience and make reference to recent judgments to demonstrate where the pitfalls lie and ways to protect minority owners interest without compromising the obligations of an Expert Witness. Our role as expert witness is answerable to the Tribunal and we must discharge our duty as a non-partisan expert.

Language	English	Fee	HK\$100 for member; HK\$150 for non-member (HK\$20 walk-in surcharge for all pricings listed)
Deadline	14 October 2010	Priority	First-come-first-served

CPD/PFMD/2010107

PFMD APC Seminar/Workshop

Speakers Mr Kenny Chan, Chairman, Divisional Education Committee, PFMD
Mr Gary Yeung, Chairman, PFMD

Date & Venue 7:00 pm 8:30 pm Monday 29 October 2010 SLC, HKIS (Suite 815, Jardine House, Central, Hong Kong)

Details This APC Seminar/Workshop will focus on explaining the requirements of the APC in PFMD, and the expectations by Assessors during the assessment process. In particular, the assessment strategies for Critical Analysis and Practical Task will be addressed.

All students and probationer members of relevant Divisions are welcomed.

Language	English/Cantonese, where applicable	Fee	HK\$100 per person
Deadline	15 October 2010	Priority	First-come-first-served

CPD/QSD/2010097

Training Course on Standard Form of Building Contract 2005 Edition



Speaker Mr Bernard Wu, BSc, LLB, FHKIS, FRICS, MCI Arb

Mr Wu is a practicing barrister specialized in construction law. He has given lectures on Standard Form of Building Contract 2005 Edition for several intakes at the HKU SPACE and lectures on Construction Law for Professional Diploma Course in 2008 and 2009. He is appointed to be Adjunct Lecturer of HKU SPACE from 1 January 2009 to 31 December 2010.

Mr Wu was invited to be a Guest Speaker for M Sc course of Polytechnic University on construction law subjects from 2008 to 2010. Mr Wu completed his B.Sc. (Building Studies) and B. Building at the University of Hong Kong in 1982 and 1983 respectively, awarded with Hong Kong University Alumni Prize 1983 and obtained his LLB as external student of University of London in 1999. He was awarded Certificate of Mediation by the Accord Group in 2004.

Mr Wu started his career as a quantity surveyor and specialized in claims preparation and settlement of construction disputes. Mr Wu is conversant with drafting contract documents for both main contracts and subcontracts.

Mr Wu has started his legal practice since 2005 and has acted for various clients in resolving construction disputes by means of litigation and arbitration. He is nominated by the Hong Kong Institute of Surveyors to be a member of the Hong Kong International Arbitration Centre Appointment Advisory Board from 1 January 2008 to 31 December 2010. He was appointed to be the Voluntary Legal Consultant of the Hong Kong Construction Sub-Contractors Association for 2007-2009, and Honorary Legal Advisor of the Hong Kong Institute of Project Managers for 2009 and 2010.

Mr Wu serves as a member of the Panel of Experts under the Board of Education, HKIS, for accreditation of university courses in Hong Kong from 1 January 2006 to 31 December 2011. He is one of the members of the Disciplinary Panel of the HKIS and is an arbitrator listed in the HKIS/HKIA Joint Panel of Arbitrators. He is also included in the List of Dispute Resolution Advisers for Architectural Services Department and Housing Authority Projects. He acts as Dispute Resolution Adviser and Arbitrator, apart from acting as counsel in litigation.

Date & Venue 7:00 pm - 9:00 pm Monday 1, 8, 15, 22 and 29 November 2010 SLC, HKIS

Details

	Date	Topic
1	1 November 2010	Overview of the Old and New Form - Comments on the Old Form with reference to the Grove's Report and the Tang Report - Loopholes of the Old Form - Brief introduction of the New Form
2	8 November 2010	Dispute Resolution - Clause 41 Settlement of Disputes - Mediation Procedures - Arbitration Ordinance - Appeals - Arbitration compared with litigation - Comparison of Alternative Dispute Resolution Techniques
3	15 November 2010	Certificates and Payments - Pay when paid/ Pay if paid - Temporary finality of interim certificate - Nominated Subcontractors - Conclusive Evidence of Final Certificate
4	22 November 2010	Extension of time - Acts of Prevention - Condition Precedent - Delay recovery measures - Delay caused by NSC - Penalty/LD - Concurrent Delay
5	29 November 2010	Direct Loss and/or Expenses - Constructive acceleration - Global claims - Notice of claim - Remoteness rule - Items of claim - Concurrent delay

Language English

Fees

Members are welcome to join 1 / 2 / 3 / 4 / 5 lecture(s).
 Members pay \$500 / \$900 / \$1300 / \$1700 / \$2000 for joining 1 / 2 / 3 / 4 / 5 lecture(s) respectively.
 Non HKIS Members pay \$630 / \$1130 / \$1630 / \$2130 / \$2500 for joining 1 / 2 / 3 / 4 / 5 lecture(s) respectively
 * HK\$50 walk-in surcharge each lecture

Deadline	2 weeks prior to the event date	Priority	First Priority to Corporate Members (MHKIS and FHKIS); Corporate Members from the other Professional Institutes are welcomed.
Remark	1) In case of less than 20 applicants, the particular lecture will be cancelled. We will notice the applicants 3 days prior to the event; 2) Certificate of attendance would be issued; and 3) Refreshment would be provided.		

CPD/QSD/2010102

Latest Developments Affecting the Construction Industry in Hong Kong



Speakers	Mr Steven Yip, Mr Ian Cocking and Mr Malcolm Chin		
Date & Venue	7:00 pm - 8:30 pm Wednesday 3 November 2010 SLC, HKISIS		
Details	<p>Steven Yip is a partner with Minter Ellison, and has extensive experience advising on construction issues and dispute resolution in Hong Kong and the Asian region. He has handled a number of major arbitration and litigation proceedings involving building works. Steven has also handled a number of mediations and has been instrumental in settling a number of major civil engineering and building disputes. He has also been assisting a number of foreign investors and clients in major projects in China as well as Chinese investors and contractors working outside China. He is a member of the Chartered Institute of Arbitrators (East Asia Branch) and the current vice chairman of the construction interest group of the Hong Kong Mediation Council.</p> <p>Ian Cocking is a partner with Minter Ellison, and is recognised as a leading legal adviser to the construction, engineering and project development industries in Hong Kong. With 22 years' experience in managing disputes, Ian has a comprehensive understanding of construction arbitration and litigation in Hong Kong. He has taken a key role in a diverse range of major construction and project development matters, regularly advising contractors, proprietors, government, financiers, consultants and insurers on their relationships, risk management strategies, and claims and dispute resolution. Ian is also considered a leading environmental specialist. He became an accredited mediator with HKIAC in 2001.</p> <p>Malcolm Chin is a senior associate with Minter Ellison, and has extensive experience advising on construction and commercial issues, arbitration and civil litigation in Hong Kong and the Asian region. Representative cases include those concerning design, delay and cost issues in building and infrastructure works.</p> <p>Minter Ellison will review some of the more interesting developments in construction law. In addition to providing an update on recent cases, Minter Ellison will highlight some issues which construction professionals should be bear in mind.</p>		
Language	English	Fee	HK\$120 for member; HK\$150 for non-member; free of charge for full time university student (HK\$20 walk-in surcharge for all pricings listed)
Deadline	20 October 2010	Priority	Priority is given to QSD Members on a first-come-first-served

CPD/GPD/2010099

Workshop of Property Valuation Report Writing for Public Circular Purpose in Hong Kong

Speakers	Mr CK Lau, MHKIS, International Director of Jones Lang LaSalle Limited		
	Mr Joseph C. Ho, MHKIS, Managing Director of LCH (Asia-Pacific) Surveyors Limited		
Date & Venue	7:00 pm - 9:00 pm Thursday 11 November 2010 SLC, HKIS		
Details	In preparing property valuation reports for public circular purpose in Hong Kong, members need to comply with the relevant Listing Rules and Valuation Standards, whilst at the same time they need to fulfil the contractual requirements with the client. The purpose of this workshop aims to enhance participants understanding of relevant requirements and to promote the quality and standard of property valuation reports.		
Language	Cantonese supplemented by English	Fee	HK\$100 per person HK\$150 per person for walk-in participants (subject to availability)
Deadline	28 October 2010	Priority	First-come-first-served

Hong Kong Institute of Surveyors Mandatory Continuing Professional Development (CPD) Compliance

To All Corporate and Technical Members,

In pursuance of Part VII of the Bye-laws and according to the Guidance Notes to Mandatory Continuing Professional Development (June 2007), all Corporate and Technical members are required to complete a minimum requirement of 60 CPD hours over a three-year period. The first three-year period has lapsed and it is now time for members to demonstrate compliance. Checking will be conducted in accordance with the Guidance Notes in due course.

All members shall submit their CPD record for the relevant three-year period, (i.e. from 1 June 2007 to 30 June 2010) to the HKIS Secretariat by **no later than 1 November 2010**. Members could either

- (1) submit the hard copy of the CPD Log Sheet or
- (2) log on to the HKIS Website and input the CPD events. Members can add entries to the "CPD profile" of the "Members Corner" in the HKIS Website. Kindly note that the default login name is your HKIS membership number and the default password is your Date of Birth in the "yyyymmdd" format.

Please refer to the Guidance Notes for CPD issued in June 2007 for details of the CPD requirements. The CPD Log Sheet and the Guidance Notes to Mandatory Continuing Professional Development (June 2007) can be downloaded from the HKIS Website (www.hkis.org.hk → Professional Development → CPD-HKIS).

Those members who have already been logging in their CPD profile should check and confirm their entries. No separate submission will be necessary.

Should you have any query, please feel free to contact our Miss Judy Shiu or Miss Donna Yu at 2526 3679.

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Young Surveyors Group Chairman's Message



Jeffrey Wong YSG Committee Chairman

HKIS Dragon Boat Photo sharing Party **Forthcoming CPD events**

A group of dragon boat paddlers shared photos and videos that we took in the past years in our dragon boat event, together with the celebration of birthday boys and girls at the monthly happy hour on 30 July.

On 3 October 2010, our YSG members and paddlers will reignite our engine for 世界龍舟大賽之世界龍王國慶 2010 龍舟大賽, it is believed we shall create a great result again.

HKIS YSG BBQ

The YSG organized a BBQ function in Saturday afternoon on 31 July at a very contemporary venue in Sai Kung. A total of 30 members joined and we ordered tasty seafood and made lots of laugh.

YSG Annual Dinner 2010

Our annual dinner this year will be held on 27 November 2010 at 老上海酒家. Details will be confirmed later. One thing I can confirm which is fun!

Latest CPD events being organised by the YSG are as follows:

Date	Event	Speaker
20 September 2010	Experience sharing of the WOBO World Congress 2010 and First Asia Pacific Symposium of Building Officials	Mr Kenneth Yun, Chairman of BSD; Mr Robin Leung, Vice-Chairman of BSD and Mr Edwin Tang, Past Chairman of BSD
21 September 2010	Rent Review for Public Housing, No choice but upward adjustment only?	Ms Joey Yuen, Barrister
28 October 2010	Introduction to Arbitration: How is arbitration relevant to the Surveyor	Mr Glenn Haley, Ex-Chairman of CI Arb
20 November 2010	深圳福田住宅樓盤考察團及參觀當地城市規劃	和記黃埔地產代表及政府有關部門人士





兩地建設工程合同法律事務專欄 — 建築工程合同的保償及保險

Gilbert Kwok, FHKIS, FRICS

在上一篇文章中，我們介紹了香港一般標準建造工程合同中保償及保險的基本概念。本文將向大家簡單介紹內地保險的一些情況。

內地 2009 年最新修訂的《中華人民共和國保險法》，以及 2009 年最高人民法院公告的《關於適用〈中華人民共和國保險法〉若干問題的解釋（一）》（合稱“保險法”），是內地現行涉及保險事宜的適用法規。

現行的保險法將人身保險合同和財產保險合同兩類保險合同進行了規定，但卻沒有為建設工程相關的保險合同另作特別規定。

中國住房和城鄉建設部的建設工程施工合同（示範文本）的通用條款（“通用條款”）第 40 條，對建設工程施工合同的保險事宜有以下約定。

發包人(即業主)的保險責任

通用條款第 40.1 條規定：“工程開工前，發包人為建設工程和施工場內的自有人員及第三人人員生命財產辦理保險，支付保險費用。”這部分屬於人身保險及財產保險合同，適用保險法有關人身保險及財產保險合同的規定。

通用條款第 40.2 條規定：“運至施工場地內用於工程的材料和待安裝設備，由發包人辦理保險，並支付保險費用。”這部分屬於財產保險合同，適用保險法有關財產保險合同的規定。

承包人(即承建商)的保險責任

通用條款第 40.4 條規定：“承包人必須為從事危險作業的職工辦理意外傷害保險，並為施工場地內自有人員生命財產和施工機械設備辦理保險，支付保險費用。”這部分屬於人身保險及財產保險合同，適用保險法有關人身保險及財產保險合同的規定。

投保建造工程“全險”的責任

值得注意的是，通用條款只是規定承建商須為“自有人員生命財產和施工機械設備”投保，但卻不需要為業主及第三者的生命財產及工程的材料設備等投保。這樣承建商需要投保的內容便不是我們上一篇文章中提及的香港建造工程的“全險”。我們上一篇文章中提到，香港建造工程的“全險”一般而言包括業主的財產保險及第三者責任保險。

另外，根據通用條款第 40.1 條及第 40.2 條，因為業主要為“自有人員”及“第三人人員生命財產”及“工程的材料和待安裝設備”等投保，所以投保建造工程“全險”或“一切

險”的責任由業主承擔。

這點與香港現行一般工程建造合同的做法不同。在香港，建造工程“全險”的投保人一般是承建商（如香港測量師學會 2005 年版的標準建造合同第 21.2 條），而不是業主。

具體投保內容

通用條款沒有詳細說明業主和承建商要辦理的保險的具體投保內容，只是在第 40.6 條作出這樣的規定：“具體投保內容和相關責任，發包人承包人在專用條款中約定。”

相反，香港的標準建造合同卻對建築工程保險的投保內容有頗詳細的要求（詳見香港測量師學會 2005 年版的標準建造合同第 21 條及第 22 條）。

可能因為有保險專業的人士幫助草擬，香港的標準建造合同有關保險的條款對保險內容作出頗詳細的描述。這樣詳細的條款應可以讓承建商知道需要購買保險的內容和要求，方便承建商估計購買保險的成本。

內地的通用條款則比較概括，讓合同雙方在專用條款中約定詳細的保險的內容。由於保險條款的重要性和複雜性，在草擬這些詳細的保險專用條款時，發包方需要專業人士幫助草擬。這樣的安排相對之下比較有靈活性，當合同雙方在不同的情況下，包括市場的變化等，可以自行在專用條款中約定相應的保險細節。

總結

我們這兩篇文章簡單探討了香港和內地兩地的標準工程合同的工程保險的情況。我們可以看到，內地的通用條款沒有像香港的標準建造合同一樣，要求承建商投保建築工程“全險”，相反，建築工程“全險”或“一切險”是由業主負責投保。另外，內地的通用條款對要投保的保險內容比較概括，詳盡事宜留待合約雙方自行約定；香港的標準建造合同相對而言就有比較詳盡的要求。

English Summary

In the last article, we discussed the insurance requirements under the 2005 version of the Hong Kong Standard Form of Building Contract published by the Hong Kong Institute of Surveyors and other institutes. This article covers the insurance requirements under the latest version of the Standard Conditions of Construction Contract published by the Ministry of Housing and Urban-Rural Development of the People's Republic of China.



Constructing a Zero Energy Building

Teoh Wooi Sin, Executive Director, Davis Langdon & Seah Singapore Pte Ltd, and Nancy Lim Yu Ying, Senior Quantity Surveyor, Davis Langdon & Seah Singapore Pte Ltd

Introduction

The Building and Construction Authority (BCA) introduced the Green Mark Scheme, a green building rating tool, in January 2005 to encourage the construction industry to construct environmental friendly buildings (BCA, 2009). The scheme provides the framework for Singapore's 1st Green Building Masterplan which was launched in 2006 to promote environmental sustainability in buildings based on the following strategies (BCA, 2009):-

1. Incentives for the Private Sector
A \$20 million Green Mark Incentives Scheme to encourage the private sector to construct above Green Mark Certified Buildings.
2. Promoting Research and Development (R&D) in Environmental Sustainability
A \$50 million Ministry of National Development (MND) Research Fund for the Built Environment to spur and promote research into developing more viable and cost-effective green building technologies and energy efficiency solutions.
3. Imposing Minimum Standards on Environmental Sustainability for Buildings
The Singapore Building Control Act was amended to meet Green Mark Certified standard.
4. Building up Industry Capability
The BCA Academy (BCAA) to offer Green Mark Manager and Green Mark Professional Course to train the professional to design and operate green buildings.

In response to the Green Building Masterplan and to promote R&D in environmental sustainability, BCA and the National University of Singapore (NUS) took the initiative to construct a Zero Energy Building (ZEB) as a showcase project for the local construction industry to learn and study.

Definition Of Zero Energy Building

Torcellini et al. (2006) commented that the key principle of a ZEB model is that the buildings can meet all their energy requirements from low-cost, locally available, nonpolluting, (and) renewable sources. This implies that a ZEB should be able to generate adequate renewable energy on site to match or surpass its annual energy use (Torcellini et al., 2006) to achieve net zero energy consumption and/or zero carbon emission. However, Torcellini et al. (2006) also stated that an efficient ZEB design 'should first encourage energy efficiency, and then use renewable energy resources available on site'.

Zero Energy Building @ BCA Academy

Project Description

Zero Energy Building @ BCA Academy is part of BCA's initiative to promote sustainable construction. The joint BCA-NUS research project involves retrofitting an existing 3-storey building at BCA Academy to become a zero energy building and to test-bed the following Green Building Technologies (GBTs):-

- Photovoltaic (PV) System;
- Light Pipes;
- Mirror Duct System;
- Light Shelves;
- Vertical Greening;
- Roof Garden;
- Personalized Ventilation System;
- High Performance Glazing;
- Solar Assisted Stack Effect Ventilation System; and
- Building Management System (BMS).

Procurement

The Zero Energy Building @ BCA Academy is the first of its kind in Singapore. Besides being a zero energy building, BCA and NUS are conducting research and test-bedding state of the art technologies. Given its unique status and the project requirements, the project team decided to procure the building based on design-bid-build. This is to ensure that the project team is able to control the quality of the building and the contractor is able to construct the building according to the specifications. This procurement method also facilitates the transfer of knowledge on sustainability design and concepts from the PIs to the consultants and the contractors.

Features

As a net zero energy building, this building generates its own source of energy onsite via the photovoltaic system. The energy generated will be used to power the building and excess energy will be supplied back to the grid. As a showcase project, other GBTs are also installed onsite for research purpose. The GBTs are:-

Photovoltaic (PV) System

Photovoltaic (PV) is a form of clean renewable energy that generates electric power by using solar cells or photovoltaic cells. These cells are joined to form photovoltaic modules and arranged into arrays to convert



the sunlight into electricity (Solar Energy Technologies Program, 2005).

For this project, the 1st Generation monocrystalline / polycrystalline / multicrystalline PV modules (Figure 1), the most efficient solar technology at present, are installed on the roof to generate 90% of the required electricity for the building. Concurrently, the PIs also installed 2nd Generation amorphous thin-film laminate PV panel (Figure 2) and 3rd Generation dye-sensitized thin-film solar cells (Figure 3) on other parts of the façade to study the feasibility of integrating these thin-film PV panels into part of the façade.

The performances of these cells are currently being monitored real-time on ZEB site.



Figure 1: 1st Generation PV Modules installed on Roof



Figure 2: 2nd Generation PV Modules installed on Sunshades



Figure 3: 3rd Generation PV Modules installed on Canopy

Advanced day lighting system

As part of the energy efficiency strategy, the design team has proposed the following daylight systems to be incorporated into the design of the building:-

- Light Pipes: Two types of light pipes, i.e. with and without solar tracking device, are installed on the roof of ZEB (Figure 4 and 5). Apart from testing the effectiveness of vertical light pipes in transporting natural daylight into the building, the team is also testing the effectiveness of the solar tracking device, a device that tracks the position of the sun to adjust the angle of the reflective mirror panels to reflect the maximum amount of sunlight throughout daytime (Solar Tracking Skylights, Inc., 2010). It is projected that with daylight being transported deeper into the building, there will be lesser dependence on artificial lightings which could translate into considerable energy consumption saving.



Figure 4: Light Pipes with Solar Tracking Device

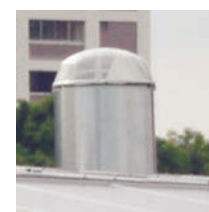


Figure 5: Light Pipes

- Mirror Duct System: The mirror duct system works (Figure 6) based on same principal as the light pipes albeit via horizontal means. The PIs have also taken the opportunity to test out three different types of reflective materials i.e. aluminium alloy, mirrored acrylic and mirrored polycarbonate.



Figure 6: Mirror Duct System installed on the Façade of the building

- High Performance Glazing: As part of an efficient passive solar building design, the selection of the glazing is essential to maintain the balance of daylight and solar heat gain permissible into the building. Four types of high performance glazing, i.e. low-emissivity (low-e) glass (Figure 7), electrochromic glass (Figure

9), BIPV glass (Figure 8) and glass with internal blinds (Figure 10), are installed on the 1st storey west façade to test effectiveness of these glazing in reducing solar heat gain and transmitting daylight into the building in local climate.



Figure 7: Low-Emissivity Glass



Figure 8: BIPV Glass



Figure 9: Electrochromic Glass



Figure 10: Glass with Internal Blinds

- Light Shelves System: Light shelf (Figure 11), an architectural element with mirror finish panel, is installed on the west façade to reflect the daylight deeper into the building. A sunshade (Figure 12) is added to the system to reduce emission of glares into the building.



Figure 11: Light Shelf



Figure 12: Sunshade, installed below the light shelf to reduce glare into the building

Roof Garden and Vertical Greenery System

The concept of integrating greenery with the façade is not novel. Studies by Wong et al. (2007) and Wong et al. (2010) have shown that rooftop / vertical greenery systems (Figures 13 and 14) are able to reduce thermal heat transfer into the building which in turn reduces energy consumption. As part of the passive design study, three types of vertical greenery system, i.e. unit panel system, unit system and panel with support frame system, are installed. Different species of plants are also planted to study the suitability of the plant to be planted on the façade.



Figure 13: Vertical Greenery



Figure 14: Roof Garden

Personalized Ventilation System

The objective of personalised ventilation is to improve the quality of inhaled air and the thermal comfort of each occupant (Schiavon, et al., 2009). This can be achieved by allowing the occupants to control the air distribution rate and temperature within their working zone through a personal air supply devices installed on their working desks (Figure 15). The efficiency and the potential cost and energy saving benefits of the systems are currently being studied in ZEB.



Figure 15: Personalized Ventilation System

Solar Assisted Stack Effect Ventilation System

The design of the solar assisted stack effect ventilation system (Figures 16 and 17) consists of solar chimneys installed on the roof of ZEB with vertical ducts that are connected to the indoor air space via louvered openings. This is an innovation passive design solution proposed by the PIs to enhance natural air movement inside the building 'utilising buoyancy principle' (Wong and Heryanto, 2004) to remove warm air from the building to reduce demand for mechanical ventilation.



Figure 16: Solar Chimneys installed on the Roof of the Building ▲



Figure 17: Ventilation Ducts connected to the Solar Chimneys ►



Building Management System (BMS)

A building management system is installed onsite to monitor and control the performance of the building (Figure 18). Sensors are mounted at various locations to collect data on energy consumption, indoor environment quality, management control and special systems. The data collected will be used to assess the performance of the GBTs installed onsite.

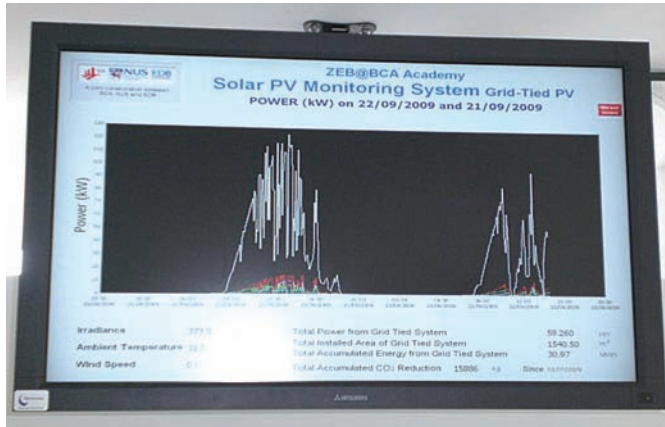


Figure 18: A LCD screen installed on-site to display the performance of the GBTs real-time to the public

Challenges

The Zero Energy Building @ BCA Academy is the first net zero energy building in Singapore. Without prior example to inspect, the project team has to deal with the uncertainties and challenges brought on by the never-been-tested technologies.

Complexity of project

As a test-bedding project, the structure of the project team has been expanded to include the PIs. The PIs, the champions of the project, have to convey their ideas and requirements to the project team.

To bridge the gaps between the PIs and the consultants, the project manager therefore plays a vital role in managing the team to ensure that effective communication network is established. This is to promote the exchange of information among the team members and to minimize confusion over roles and duties of the respective parties. This is of essence to the success of the project when new products, e.g. mirror ducts, solar assisted stack effect ventilation system and personalised ventilation system, are to be incorporated into the design of the building.

Product uniqueness

The GBTs featured in ZEB are state-of-the-art technologies in local context. Prior to ZEB, there are no or very few tried

and tested examples in Singapore for the project team to review. Some of the proposed GBTs are so novel that that the contractor has to either procure the products, e.g. solar tracking light pipes and electrochromic glass, from overseas suppliers or to fabricate the products, e.g. light shelves and solar assisted stack effect ventilation system.

The project manager has to take into consideration of the above factors in planning the schedule of the project as the absence of the products in local market will imply longer lead time to procure the items. In some instances, the contractor also required longer time to review and develop the details of the proposed GBTs which might not be available at the tender stage.

Further to the above, the project team also has to take into consideration that the overseas suppliers might not be able to provide warranties and indemnities for their products and the contractor might not be able to warrant or indemnify the performance of the customised GBTs.

Cost

During the design development stage, the quantity surveyor faced the challenge of allocating sufficient budget for the proposed GBTs as there were no or limited cost information available in local context. The quantity surveyor has to contact specialists or overseas suppliers for cost advice. The accuracy of the cost will depend on the adequacy and availability of information. For quotations that are in foreign currencies, the quantity surveyor has to exercise extra care to account for the differences in exchange rates and to include the shipping and training cost related to the products. Proposals that are too expensive were removed from this project.

Concurrently, the PIs and the quantity surveyors also checked on the products procurement period and the suppliers track records and ensured the products comply with local codes.

Specifications

At the tender stage, the PIs and the consultants faced challenges while preparing the specifications for the proposed GBTs. Very often, the PIs and the consultants would have to liaise closely with the suppliers to obtain adequate information to draft the specifications. In some instances, the PIs may have to draft the specifications based on performance requirements e.g. solar assisted stack effect ventilation system and task lightings.

Bearing in mind that some of the proposed GBTs have never been tested locally, the PIs and the consultants have to ensure that their specifications are able to reflect the design intent and to integrate with the other systems. The project team would also have to ensure the adequacy of the indemnities and warranties for the performance of the



proposed GBTs, notwithstanding the fact that the GBTs are meant for research purpose.

Construction

The proposal for ZEB @ BCA Academy is to retrofit one of the existing blocks to be zero energy building. During construction, the other blocks are in operation. The contractor has to work within restricted hours and to take extra care to minimize noise pollution. As a showcase project, BCA also demonstrated its commitment to sustainable construction by stipulating environmental friendly site management clauses in the contract.

Time is critical in the planning of the programme. The Contractor has to schedule for the timely delivery of the overseas products and the customised products to ensure the building is completed within the contract period.

However, the most critical task for the project team to accomplish is to achieve net zero energy consumption. During the construction, the contractor has to work very closely with the subcontractors, the suppliers and the consultants to fine-tune the designs of the proposed GBTs to derive the best solutions to meet the objective of balancing onsite energy consumption with onsite energy generation.

Construction Cost

The contract is awarded based on \$10,468,213.08. The photovoltaic system accounts for 18.42% of the contract sum. The other GBTs accounts for 14.54% of the contract sum.

Incremental Cost

In total, there is 33% increase in the construction cost due to the GBTs (including the PV system). However, it should be noted that this is test-bedding project. The higher cost is attributed by the following factors:-

- Economic of scale: The scope of work is too small to achieve economic of scale.
- R&D elements: Some of proposed GBTs are not readily available in the market. The suppliers and the subcontractors have to fabricate the products, e.g. light shelves and mirror ducts, for this project. There is a premium attached to this service.
- Risks and uncertainties: The contractor bears the risks to ensure the constructed and installed GBTs are able to perform as per specified, notwithstanding the fact that the design responsibilities lies with the consultants. Subject to the above understanding, the contractor is likely to have priced in the risk factors in the tender price.

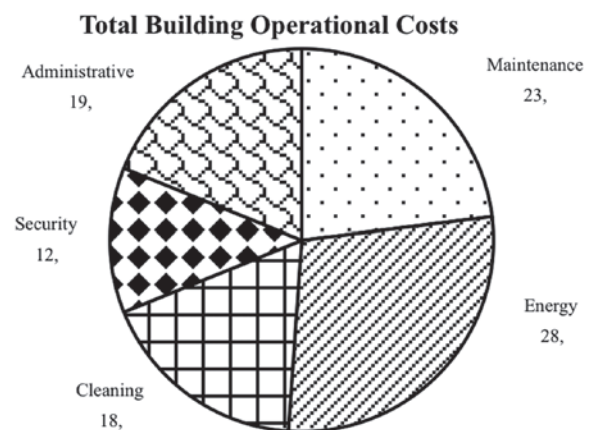
The unit costs of the GBTs installed in ZEB @ BCA Academy are shown in Table 1.

Table 1: GBTs Unit Cost

GBTs	Cost / unit (\$)
Photovoltaic (PV) System (inclusive of Balance of System)	1,500/m ²
Solar Assisted Stack Effect Ventilation System (3m high solar chimney with 32m long ventilation ducts)	48,845/set
Light pipes (inclusive of extension tube)	15,000/unit
• Solar Tracking Skylights (1000mm dia)	7,500/unit
• Solatube (530mm dia)	
Mirror duct system (1500 x 615 x 10900mm)	27,500/unit
Light shelves system including frame and accessories (1200 x 890mm internal light shelf and 1200 x 1050mm external light shelf)	15,000/set
Vertical greening	1,500/m ²
Roof garden	900/m ²
Personalized ventilation system	1,750/set
Electrochromic glass	10,000/m ²
PV glass	1,500/m ²
Glass with internal blinds	2,700/m ²
Low emissivity glass	180 - 200/m ²
Underfloor displacement system	Depend on model and specification
BMS	250 /m ²
WC with integrated basin	230 /set
Waterless urinal	700 /set

Life Cycle Costing / Projected Savings

In a typical commercial building, almost 30% of the operating costs are spent on energy (Knox, 2008) as illustrated in Graph 1:



Graph 1: Total Building Operating Expense



Payback Period for Photovoltaic System

An analysis of the payback period for the photovoltaic system is shown in Table 2. We have discounted the 2nd and 3rd Generation PV system from the analysis as these PV modules are meant for research purpose.

Table 2: Payback period for PV system

Parameter	ZEB
Capital Cost	
• PV Modules*	S\$867,233.00
• Balance of System	S\$738,104.00
Projected annual energy generation	190MWh/Yr
Projected cost saving based on the proposed	S\$100 / day
PV system (based on 19.29 cents/kwh)	S\$36,651 / year
Payback Period	44 years (without government subsidy)
	20 years (with government subsidy)

* The PV modules are funded by Economic Development Board of Singapore

As shown, the payback period for the whole system can take up to 44 years without government subsidy. This is due to the high cost associated with the production of the PV modules with current technology. In the future, the PV modules could be manufactured as Building Integrated Photovoltaic (BIPV) which can replace the traditional materials for façade. The PV manufacturers are also researching on possible means to lower production cost and to enhance module efficiency of the non-crystalline silicon PV modules.

Impact of PV System on Energy Cost

The PV system installed on ZEB @ BCA Academy is suffice to power the whole building without the need to tap onto any electricity from the utility power grid. This could translate to 30% of the operation cost. However, it should be noted that the potential saving generated by the PV will depend on the size of the PV system designed for the proposed building.

Conclusion

After 10 months of construction, the ZEB @ BCA Academy was launched to the public on 26 October 2009 which coincided with the International Green Building Conference 2009.

The success of ZEB @ BCA Academy is attributed to the project team's willingness to cooperate and embrace new technologies. With positive attitude, the project team is

able overcome the challenges posed by the GBTs and the pressure to achieve net zero energy consumption. In the long run, this spirit could be spread to the industry and promotes the growth of innovative green construction.

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Systemic Audit and Substantive Evaluation in the Built Environment

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Introduction

Capital expenditures characteristically receive high visibility on financial statements. In today's era of cost-consciousness, the industry is experiencing an increase in corporate awareness of expenditures, and calls for greater accountability and expenditure controls.

The capital expenditure arena is contentious from the start. "The nature of the typical construction project is such that the parties to various contracts progress from project inception to completion while at the same time endeavoring to satisfy their own (often competing) objectives. The result is an industry and situation characterized by high potential for conflict; history indicates that only the most rare of projects is completed without changes or claims." (Nalewaik, 2010) Even if a project is complete on time and on budget, and achieves quality expectations, measuring the success or failure of a construction project is a complex process, largely because the definition of success varies from stakeholder to stakeholder.

In such an inherently risky environment, audits should be an integral part of every construction project, enabled by "right to audit" contract language that can provide restricted or unrestricted rights to review operations, contracts, projects, programs, and expenditures during the time period of the contract and beyond. However, just as no two construction projects or snowflakes are exactly alike, the scope and objective of construction audits vary considerably by entity and situation. In the built environment, a systemic audit component can provide expenditure assurance through data validation, while a substantive evaluation component can assess how well the program is working and apply best practices to underperforming activities. Different approaches to construction audit, and their benefits, are discussed herein.

History

Traditionally, public sector audit has been systems-based, focused on financial accountability and fiscal regularity. The need for accurate accounting of Federal expenditures in the United States was institutionalized by the Accounting and Auditing Act of 1950, which required internal audit functions to be established in Federal agencies. The accounting was considered to be

satisfactory if it demonstrated that transactions were legal, formally authorized, and reported accurately. "Financial audits include financial statement and finance-related audits. A financial statement audit is an examination of a company's financial statements and records, in order to provide reasonable assurance that the data is accurate and complete, and is presented according to generally accepted accounting principles (GAAP)." (Nalewaik, 2007) Indeed, the financial audit component remains an important factor in the review of capital expenditures, applying fixed standards and methodologies and involving attestation of financial statements and reviews of financial controls.

To further complicate matters, some fifty years later the Federal Public Company Accounting Reform and Investor Protection Act of 2002 (the Sarbanes-Oxley Act) was enacted to protect shareholders and public interest. "In addition to other requirements, certain sections of the act require all regulated companies to establish an audit committee, to document internal controls and evaluate their effectiveness, and to certify that financial statements fairly reflect the company's financial situation and operations for the period presented." (Nalewaik, 2007) Because capital expenditures represent substantial investment, often appear on the balance sheet as "assets" and represent potential control risks, the Sarbanes-Oxley Act has pushed some responsibility for expenditure control downward from the financial and internal audit departments, to construction project management and project controls. "Capital assets, construction in progress, bond issuances, leases, depreciation and capitalized interest may be reflected in several places in the financial statement, including the aforementioned balance sheet, income statement, cash flow statements, and notes to the financial statement." (Nalewaik, 2007) Although originally written for regulated companies, this act has had a trickle-over effect to the public sector.

Outside the realm of pure financial auditing, the past thirty years illustrate an ongoing global shift in government administrative culture away from pure reviews of revenues, expenditures, and controls, toward a post-positivist, quality-oriented stance, in which the disciplines and functions of performance auditing and program evaluation developed to supplement the financial audit. "The moves by the United States General Accounting Office (GAO, now known as the Government Accountability Office) into programme evaluation or efficiency auditing in the



late 1960's and early 1970's reflected the view of the Comptroller-General as to what information the legislature needed to exercise appropriate oversight. In general, this extension of the audit mandate reflects a view that full accountability to the legislature requires more than just financial and compliance accountability. (Shand & Anand, 1996) A few years later, the Inspector-General Act of 1978 was yet another response to widespread public concerns about fraud, waste, and abuse, intended to promote the assessment of efficiency, economy, effectiveness, and integrity. Government entities began to establish strict and detailed policies and procedures for performing day-to-day activities, and the role of the external auditor evolved to focus on compliance. "The presumption was that adherence to these procedures would produce the desired level of performance. Audits often resulted in recommendations for more controls to ensure compliance with established guidelines." (Trodden, 1996) The tide continued to shift and, while entities sustained the practice of auditing for financial accountability, there grew ever-greater focus on accountability to the public. Continuing the evolution, in the United States during the Reagan and Bush administrations of the 1980's and 1990's, auditors focused on the legalistic inspection approach of stopping poor or illegal practices, and reviewed operations in terms of whether rules were observed and enforced.

However, the never-ending flood of controls, policies and procedures did not yield the expected improvement in performance. For a century, public administration has built rules and regulations of increasing complexity and formalism, presumably to assure equity and to avoid corruption. Unfortunately experience, at least at all levels of government in the United States, has demonstrated that corruption can adapt to complex rules and procedures but competence cannot. (Walsh, 1996) Clearly, a new solution was needed.

The Government Performance and Results Act (GPRA), passed in 1993, endeavored to link budget inputs with performance outcomes. Additional philosophical shifts during the 1990's resulted in a number of efforts at performance measurement¹, including (among others): benchmarking, balanced scorecards, output measurement, statistical process control, spiral analysis, total quality management (TQM), and six sigma. Although what was measured was likely to be acted upon, organizational paralysis was more often the result, with middle managers focusing on the narrow objectives and specific measures of success that would yield some personal or departmental benefit (such as bonuses, raises, promotions, or the longevity of their particular sector) instead of the broader performance of the program. This likely occurred because performance measurement quantified results against pre-established goals, but did

not necessarily provide a means by which improvement could be effected.

This is the realm of performance assessment, which creates a vehicle for continuous improvement. In this early 21st century, new approaches to organizational performance assessment are based on the concept of public sector entities as adaptive organisms. While for statutory reasons there remains a component of focus on control and accountability, there is a renewal of the common global movement toward performance evaluation. Whereas efforts at establishing accountability focus on the use and abuse of resources and authority within a well-defined statutory box, questions about performance focus on progress, continuous improvement, and evolution. Where the traditional accountant asks, "Were things done the right way?" and verifies the data and reporting, those focusing on performance ask, "Was the right thing done in this specific situation?" and question whether the rules serve their intended purpose, determining whether the rules are appropriate, inadequate, or superfluous. The accountability sphere in the public sector has also been broadened to include procedural (internal control), compliance (contractual and statutory), professional (peer best practices), and political (stakeholder) accountability.

Guidance and Standards

When conducting an audit, the auditor's role is to ensure that the findings are factual and accurate; in a financial statement audit, as mentioned above, that the data is fairly presented and the statements prepared in accordance with generally accepted accounting principles. "Most state legislative audit staffs follow the general guidelines set down in the GAO's [Government Accountability Office] 1972 'Yellow Book' Standards for Audit of Governmental Organizations, Programs, Activities, and Functions. The Yellow Book covers standards for audit work such as staff qualifications, planning, supervision, evidence, reporting, and review." (Craft & Brown, 1980) In addition, these generally accepted government auditing standards (GAGAS), provide a framework for conducting audits and attestation engagements with an assumed level of professional competence, ethics and integrity, objectivity, quality control, and independence. "Laws, regulations, contracts, grant agreements, or policies frequently require audits in accordance with GAGAS. For attestation engagements, GAGAS incorporate the AICPA [American Institute of CPAs] general standard on criteria, and the field work and reporting standards and the related Statements on Standards for Attestation Engagements (SSAE) unless

¹ Countless studies have been conducted and technical papers published, regarding appropriate "critical success factors" to be used in establishing performance criteria for construction projects.



specifically excluded or modified by GAGAS.” (GAO, July 2007) Public organisations turn naturally to the internal audit group to write the request for qualifications (RFQ) or request for proposal (RFP) when advertising the audit opportunity and seeking auditors. Because it is assumed that they know the standards, a Certified Public Accountant (CPA) is often an audit team prerequisite. Because single-audit² or “Yellow Book” is the language best-understood and most familiar in the audit universe, and due to the GAGAS requirements, many public RFQs and RFPs also specify these as requirements, regardless of their appropriateness.

Consulting standards may be applied instead of attestation standards, depending on the engagement. The AICPA acknowledges the differences between attestation engagements and consulting services, stating that “...consulting services differ fundamentally from the CPA’s function of attesting to the assertions of other parties. In an attest service, the practitioner expresses a conclusion about the reliability of a written assertion that is the responsibility of another party, the asserter. In a consulting service, the practitioner develops the findings, conclusions, and recommendations presented. The nature and scope of work is determined solely by the agreement between the practitioner and the client. Generally, the work is performed only for the use and benefit of the client.” (Auditing Standards Board, 2004) In general, the expected standards of care remain the same as for attestation, and the consulting standards are applied where the auditor is providing advisory services.

“There are still no comprehensive standards for performance reporting and auditing” (Holmquist & Barklund-Larsson, 1996), comparable to those used for compliance auditing (the “Yellow Book” . Here, the concept of ‘comprehensive’ is key. GAGAS does include performance audit standards, but they do not differ substantially from the rest of GAGAS, containing guidance on such audit elements as: significance & risk, field work, planning & scoping, supervision, and documentation. This gap has been noted by the industry; the GAO allows auditors conducting performance audits to use other professional standards, such as the International Standards for the Professional Practice of Internal Auditing (published by the Institute of Internal Auditors); Guiding Principles for Evaluators (published by the American Evaluation Association); Program Evaluation Standards (published by the Joint Committee on Standards for Education Evaluation); and Standards for Educational and Psychological Testing (published by the American Psychological Association). (GAO, July 2007) However, even the GAO’s concession to the use of alternate standards requires the auditors to use those in conjunction with GAGAS, and proffers the opinion that

performance audits conducted without applying GAGAS are not performance audits but non-audit services. This has led to additional concerns; “...some of the controversy surrounding the revision and adoption of GAGAS has largely concerned evaluation researchers’ fears that these standards are too closely related to financial auditing practice and are, therefore, inapplicable to many program evaluation situations.” (Davis, 1990) Until a comprehensive and appropriate standard is developed, the realm of performance auditing will likely remain trapped in a mire of insufficient guidelines, and both auditor and auditee will need to work together to determine the appropriate scope and methodologies for each engagement.

Types Of Construction Audit

Traditional control-based systems can be effective in situations where tasks are repetitive and the processes are predictable. However, the construction environment is considerably less stable than the typical project-based environment or governmental organization, such that it is not feasible to create detailed procedures and controls to cover all possible eventualities. The majority of construction audits involve the ex post process of collecting data at a single point in time, yet performance is not a discrete event and the built environment continuously evolves throughout its lifecycle, which results in audit findings becoming outdated almost as soon as (and sometimes before) they are issued. Without a real-time evaluative / audit role, opportunities for improvement would otherwise have to wait for the next annual audit cycle rather than effecting change in real time, and improvements achieved would not be visible until the issuance of the next audit report. Although many audits are conducted on a periodic (often annual) basis, the entity may see a benefit from continuous auditing.

The quality and quantity of audit findings will most often be directly proportional to the level of sophistication of the construction program; as controls and management practices are refined over time, the auditor may report fewer findings. Indeed, as subsequent audits result in fewer best-practice improvement opportunities, the entity may decide to reduce the scope of assessment and expenditure testing, perhaps focusing solely on areas of concern.

² The Single Audit Act of 1984 and the United States (Federal) Office of Management & Budget (OMB) Circular A-133 (“Audits of State, Local Governments, and Non-Profit Organizations”) provide details of financial audit requirements for ensuring that Federal funds are properly expended. The term “single audit” refers to the option for the audited entity to conduct one broadly-based annual audit in lieu of a collection of audits of individual programs.



Predictably, costs questioned during an audit can be easily measurable and quantified, whereas other findings may be more qualitative in nature. The financial consequences of the evaluative (qualitative) findings are difficult to assess but nonetheless of value. The Owner or project culture that is most likely to see significance in qualitative findings will characteristically have strong executive support, desire to challenge the status quo and be identified as a change agent, demonstrate willingness to address and be held accountable for tough problems, and promote an environment that places a premium on continuous improvement. In these environments, a blend of traditional systemic and continuous substantive evaluation is necessary.

Performance Audit

The substantive evaluation component (the performance audit) provides an independent assessment of performance, with the purpose of determining how well pre-defined goals and objectives are being achieved. "Performance auditing is a systematic, objective assessment of the accomplishments or processes of a government program or activity for the purpose of determining its effectiveness, economy, or efficiency." (Waring & Morgan, 2007) This type of operational auditing is also known as management-oriented auditing, in which the external auditor is a valuable part of a team charged with assisting an organization achieve its objectives.

The "Three e's" associated with performance auditing sound similar, but are distinctly different.

- A typical definition of "economy" (Little, Fowler, & Coulson, 1973) may emphasize the element of economic conservation or thriftiness, but in a performance audit the auditor's attention is devoted to demonstrating prudence in the use of funds. One representative activity in construction is value engineering.
- The standard definition of "efficiency" however, is in this instance quite accurate, focusing on producing a result while minimizing waste, and using all available resources (not just funds, but also technology, staffing, and more) productively.
- The concept of "effectiveness" can be difficult to define without reference to the other two, but there is a subtle distinction. Even with the application of economy and efficiency, results may be ineffective. The emphasis here is on whether or not the desired result was achieved; however, as mentioned previously, the "Success" of any construction program is a highly subjective topic, and definitions will vary diversely depending on which stakeholder is polled.

A performance audit for a publicly-funded construction

program will typically combine 1) a compliance [systemic] review of a statistically significant sampling of expenditures, and 2) an [substantive] examination of the effectiveness of program management as practiced, with 3) a financial audit conducted separately. In addition, as with traditional performance audits of organizations, "...there are cross-cutting performance aspects that apply ...such as ethics, integrity, and equity; and continuous improvement." (Waring & Morgan, 2007) Thus, the audit may include some form of expenditure review (limited or broad in scope), and also evaluate other aspects of the program including planning and management processes, contract compliance, and adherence to laws and funding requirements. Again, the list of subject areas addressed when reviewing management functions can be exhaustive, and may include any department or function within the organization.

Clearly, the performance audit methodology can be complex and situational. "Performance audits deal with a multitude of topics and perspectives covering the entire government sector, and it would not be possible to develop detailed standards and procedures that work equally well in all these situations... they operate from a quite different knowledge base to that of traditional auditing. It is not a checklist-based form of auditing. (INTOSAI, 2004) Indeed, the successful and valuable performance audit should combine traditional auditing skill-sets (such as review of expenditures, and testing of preventive and detective controls) with in-depth industry knowledge and social sciences techniques (including interviewing, investigative efforts, and evaluation research methods). However, not all auditors are trained in the softer techniques of data gathering that are well established in the fields of qualitative evaluation.

In situations where it is not feasible to test the entire population of expenditures, the auditor may instead select and test a sample (a smaller population). Sampling theory holds that the findings discovered in testing the few can be assumed to hold true for the whole - "...a demonstrated quality of a representative sample can be extrapolated to the population (Sawyer, Dittenhofer, & Scheiner, 2003) - and that the same results would have been achieved had one hundred percent of the expenditures been tested. This technique has been proven over many decades of financial accountancy. However, in order for the findings to be relevant, the sample itself needs to be well understood in the context of the circumstances and program. Outliers need to be explained, and findings evaluated for materiality (significance, relevance and value of impact)³.

³ An extreme example of an immaterial finding would be a rounding error of two cents on an invoice of several thousand dollars.



Sampling methodologies vary from audit to audit, and can be divided into two main categories - random (statistical) sampling, and judgmental (non-statistical) sampling. In general, it is accepted practice that a larger sample will more accurately represent (be representative of) the broader controls environment, providing greater confidence and reduce audit risk in the results. The sample could be large either in terms of quantity of items (such as payment applications) sampled, or sum total of the expenditures sampled as a percentage of the total expended to date.

It is valid here to question whether statistical sampling is truly effective in the realm of performance auditing, especially for very large programs whose scope include multiple projects and many design, engineering, consultant, and construction contracts. True, the technique of statistical sampling will likely surface routine procedural and controls issues, such as: duplicate payments; whether or not an invoice was reviewed appropriately and approved for payment; rates were charged in accordance with the contract; math was correct; or the expenditure was captured in both the project management software and in the financial system.

However, in the world of construction, there is a history and relationship from period to period that is reflected in the contractor's payment applications. The schedule of values (SOV) and related reporting evolve on a monthly basis in response to project conditions, including both expenditures and change orders, and those SOV changes will be invisible to the auditor if the expenditures are selected and tested singly, out of context, and out of sequence. Thus, the traditional method of testing may actually prevent the auditor from appropriately questioning expenditures, in effect reducing the number of questioned costs and thus the effectiveness of the entire audit.

Examples of high-dollar-value errors that might not surface in random testing of expenditures across a capital mega-program include (but are not limited to):

- Missing deductive (negative) change orders
- Unreasonable inflated charges, especially in change orders
- Excessive hours spent for design, engineering, or installation
- Unexplained variations in the schedule of values
- Charges for materials or equipment purchased but not used
- Differences between material quantities installed and quantities invoiced
- Expenditure totals for rented equipment that exceed the purchase price of the item
- Equipment or personnel hours charged to two projects at the same time

- Owner-purchased or donated equipment not captured in the project reporting
- Issues with information systems used to manage the project

Proposition 39 Performance Audits

Traditional auditors might be lacking even more than just the evaluation skills noted above; many lack the appropriate industry expertise, and some may even have made a grave error in determining which audit procedures to apply. In a very specific instance in the State of California affecting K-12 school districts and community colleges using public funds (General Obligation Bonds) for construction, Proposition 39 requires that the public entity must conduct both an annual independent financial audit and an annual independent performance audit of the bond fund usage. Specifically, the audit should be conducted "... to ensure...voters will be given a list of specific projects their bond money will be used for; to require an annual, independent financial audit of the proceeds from the sale of the school facilities bonds until all of the proceeds have been expended for the specified school facilities projects; and to ensure that the proceeds from the sale of school facilities bonds are used for specified school facilities projects only, and not for teacher and administrator salaries and other school operating expenses, by requiring an annual, independent performance audit to ensure that the funds have been expended on specific projects only. (The Office of the Secretary of State of California, 2000)

Reading the language of the proposition, at first glance this looks like the ideal situation for an agreed-upon procedures⁴ engagement, limiting the scope of the audit to only a comparison of bond fund expenditures against the project list specified in the bond. Indeed, this was the approach taken by many a school district and community college district, and their chosen audit firms. Yet, reading even more closely, the proposition language clearly expects that a performance audit will be conducted. Herein lies the contradiction and the ambiguity, which leads one to question how a limited-scope agreed-upon procedures audit can adequately assess the effectiveness, economy, or efficiency of an entire bond-funded construction program.

Within the past year, the stakeholder and taxpaying community has focused intensely on this, along with the State of California Controller's Office and the Little Hoover

⁴ In an agreed-upon procedures (AUP) engagement, the objective is to conduct clearly delineated audit procedures on a limited subject matter. The auditor does not perform an examination or a review, and merely describes the procedures and reports the results without expressing any opinion about the findings.



Commission (LHC)⁵. In a letter issued to the California Board of Accountancy in November 2009, the California League of Bond Oversight Committees (CALBOC) challenged the status quo, stating that ...[the] AICPA expects a performance audit to offer much more than a review of the agreed upon procedures. Most, if not all, licensees of the board, engaged in the practice of public accountancy, lack the staff and expertise to measure the efficiency, effectiveness and economy of a facilities program. A typical CPA firm does not have experience and expertise in managing a school facilities program. We contend that one cannot judge and evaluate the performance of processes and systems in which one is not experienced. The California State Controller's Office has concluded that an "agreed upon procedures review" does not constitute a performance audit. (CALBOC, 2009) It can be foreseen that Districts currently conducting an "agreed upon procedure" review will soon find that the tide has turned, as the State Controller's Office and LHC consider their audits to be insufficient as required by the State constitution. Quoting the LHC's findings, CALBOC has taken the stance that "... these inadequate "audits" are causing the school districts to lose opportunities to save millions in taxpayers money. A number of licensees of the Board of Accountancy, therefore, are complicit in violating Proposition 39 by continuing to offer "agreed upon procedures" and presenting them and/or allowing them to be presented as performance audits. (CALBOC, 2009) The State Controller's Office has recommended that the State more clearly define the purpose and objectives of required audits, (Little Hoover Commission, June 2009) and the State Governor has issued an executive order demanding accountability and transparency from agencies administering publicly-funded programs, proclaiming "Accountability consists both of ensuring that bond expenditures contribute to long-lasting, meaningful improvements to critical infrastructure, and providing the public with readily accessible information about how the bonds they approved and are paying for are being spent." (Schwarzenegger, 2007) Assuming a particularly aggressive stance, CALBOC has also demanded that firms conducting agreed-upon procedures be investigated for unethical and unprofessional conduct and subject to appropriate sanctions and penalties, and that the California Board of Accountancy be advised of current issues. Although it appears to be an extreme reaction, this may in actuality be very appropriate, considering that a firm may be in violation of GAGAS if they conduct a performance audit of a construction program and do not have team members who have specialized knowledge and demonstrated expertise in the technical subject matter.

Expenditure Audit

The systemic audit component is typically effected through

expenditure audit, which can take many forms including contract audit, review of expenditures on projects or programs, and specialty audits of such items as change orders, overtime charges, payment applications, labor burden, reimbursable expenses, and more. The objective of the audit may be to satisfy external or internal audit requirements, or the investigation may be prompted by events, rumors, or allegations.

Expenditures may be reviewed in their entirety, or in part (by testing a statistically relevant portion). Here, as discussed earlier, the same statistical testing issues apply. However, by reviewing a greater population of expenditures in context and possibly in sequence or batches, it is more likely that in conducting a detailed expenditure audit the auditor will gain a greater understanding of the history and relationship from period to period that is reflected in the invoices or payment applications. This may in effect increase the number of questioned costs and thus the overall effectiveness of the audit.

Contract Audit

The most detailed of the expenditure audits may well be the contract audit, because the construction contract is the single most powerful and legally binding document of the project. "Among other things, it defines the key parties to the contract, delineates their rights and obligations, establishes the methodology for contract administration, sets the payment terms, and clarifies allowable/unallowable expenditures." (Nalewaik, 2010) In addition, the contract and addenda establish project expectations by providing detail about the means and methods of the project itself, explaining "...how work will be accomplished, the roles and responsibilities of the parties, the methods to handle change, and how to resolve disputes." (Krebs, 2000) The language within the contract can be used to determine the viability of applications for payment, potential change orders, and claims.

⁵ "The Little Hoover Commission, formally known as the Milton Marks "Little Hoover" Commission on California State Government Organization and Economy, is an independent state oversight agency that was created in 1962. The Commission's mission is to investigate state government operations and – through reports, recommendations and legislative proposals – promote efficiency, economy and improved service. ... Unlike fiscal or performance audits, the Commission's studies look beyond whether programs comply with existing requirements, instead exploring how programs could and should function in today's world. The Commission produces in-depth, well-documented reports that serve as a factual basis for crafting effective reform legislation. Based on its reports, the Commission follows through with legislation to implement its recommendations, building coalitions, testifying at hearings and providing technical support to policy makers." (The Little Hoover Commission, 2010)



In a contract audit, the auditor will typically validate that approvals were received prior to expenditure, review the use of allowances and contingency, ensure that supporting documentation was provided to justify expenditures, and review cost charges against both funding source requirements and contract language. The level of review and type of findings will vary according to the type of contract (such as guaranteed maximum price, time & materials, lump sum, etc). For certain types of contract, the scope of the audit can be seemingly without limit, as every dollar spent can be traced to many levels and sub-levels of supporting documentation.

Interestingly, one study has demonstrated that capital project owners and auditors have not utilized this important tool to maximum effect and contract audits are, surprisingly, a less than common occurrence in the construction industry, despite overwhelming evidence of their value.

Of 61 study participants, only 63 percent conducted audits of their capital programs, those who did conduct contract audits reviewed fewer than half of their construction contracts, and only one respondent included audit-trained engineers as part of the audit team. “The auditors participating in the study reported finding significant overcharges during their audits. Twenty-eight percent found significant overcharges on 1-24 percent of their audits; 38 percent did so on 25-49 percent of audits; and 17 percent did on 50-99 percent of audits. Only seven percent indicated finding significant overcharges on all of their audits. Interestingly, all of the auditors who reported finding overcharges on every audit included an audit of the contractor's own records in their audit scope.” (Cashell, Aldhizer, & Eichmann, 1999) As discussed above, it is natural for organisations to turn to their internal audit group to scope the engagement and specify the standards. Although some large public megaprograms have included contract audit in rigorous continuous review of expenditures, some owners new to capital construction (whose core business is not construction and who are for the first time in a long while adding, retrofitting, or expanding facilities) might not be fully aware of the benefits of contract audit.

Other Audits

Many other types of audit can be conducted in the built environment. In fact, in the categories discussed above, one may find when observing the actual activities of public sector agencies that the majority of construction audits are hybrids. Some technical audit scopes may focus less on expenditures and more on issues encountered during the project or contract (sometimes known as a project audit). This may include forensic assessment and review

of installed materials and equipment to ensure that the project was delivered in accordance with expectations, closeout achieved (both occupancy and formal closeout), the contract specifications were met, and/or the quantities invoiced matched those installed. These may or may not include expenditure testing.

Investigations of this type require the use of team members who have an engineering background and very specific skillsets. The AICPA has provided for this eventuality, through Pronouncement SAS 73 (Using the Work of a Specialist), a less commonly used section of the generally accepted auditing standards that allows auditors to seek the assistance of third party experts. “The auditor's education and experience enable him or her to be knowledgeable about business matters in general, but the auditor is not expected to have the expertise of a person trained for or qualified to engage in the practice of another profession or occupation.” (Auditing Standards Board, 1994) Indeed, by invoking SAS 73 and teaming with specialists who have experience in both audit and construction, a number of CPA firms could generate a more relevant workproduct, and identify more findings of value to the client.

Conclusion

Because capital expenditures are highly visible on financial statements and today's economic environment is inspiring an era of extreme cost-consciousness, there is a renewed global focus on corporate awareness of expenditures, and calls for greater accountability and expenditure controls. Audits of capital programs fill this need. However, the scope and objective of construction audits vary considerably by entity and situation.

An independent assessment of performance can be commissioned to determine how well pre-defined goals and objectives are being achieved, with a focus on the effectiveness, economy, or efficiency of the construction program or project. This type of engagement may combine traditional auditing skill-sets (such as review of expenditures, and testing of preventive and detective controls) with in-depth industry knowledge and social sciences techniques (including interviewing, investigative efforts, and evaluation research methods).

Expenditure audits typically review incurred costs in greater detail, and may have a specific focus such as the construction contract, consultant contracts, change orders, overtime charges, payment applications, labor burden, reimbursable expenses, and more.

Many other types of audit can be accomplished in the built environment. Some technical audit scopes may focus less



on expenditures and more on issues encountered during the project or contract. These may or may not include expenditure testing.

By embracing a combination of systemic audit and substantive evaluation, and making a commitment to using the audit recommendations to effect change, an entity can adopt an action-oriented philosophy. Not just reactively adapting to change in the environment, these entities are leading their peers by becoming learning organizations, discarding poor-performing management practices and anticipating the future. These owners are at the forefront of a global wave of public entities and Fortune 500 companies that are using performance assessment and expenditure audits in new ways to affect progress, continuous improvement, and evolution.

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An Overview of Claims relating to Unforeseen Ground Conditions

Kathy Cheung, QSD

On 22 June 2010, the Quantity Surveying Division (QSD) invited Mr Justin Wong to speak on “What Lies Beneath??? An Overview of Claims relating to Unforeseen Ground Conditions”.

Justin is a Chartered Civil Engineer & a resident Geotechnical Engineer with rich experience in both of consultant and project site. He shared his views in dealing with claims relating to geotechnical works with unforeseen ground conditions. The talk was successful with more than 150 members attending and they raised many questions during the Questions and Answers section.

Justin’s presentation covered the following areas:

1. Basic principles relating to contractual issues arising from unforeseen ground conditions

2. Risk allocations under various standard contract forms of contracts and the common law
3. Common issues arising from adverse ground conditions; and
4. Recent developments on allocation of ground risks in Hong Kong

The event was well attended and the participants gained a better understanding on the impact of unforeseen ground conditions on project delays and cost overrun.

I, on behalf of the QSD, presented a souvenir to the speaker at the end of the seminar.



Visit to Shanghai International Finance Centre

Iris Lee, QSD

A half-day CPD event was held in the afternoon of 31 July for the HKIS members in Shanghai. We visited Shanghai IFC developed by Sun Hung Kai Group. The development comprises Ritz-Carlton Hotel on top of Grade A office building and a shopping mall, both of which have been opened recently. There is another high rise building of the development which is under construction.

With the kind approval and assistance provided by Sun Hung Kai, we were hosted by the General Manager of Ritz-Carlton Hotel. After a dim sum lunch at a Cantonese restaurant in the shopping mall, we gathered at the hotel lobby and started the CPD event. About 20 HKIS members together with another 20 members of the HKIA who stationed in Shanghai joined this event.

There was firstly an introduction by the Owner’s representative, Mr T. S. Lee (Project Director), followed by a talk by Mr Rainer Burkle, the General Manager of the Hotel and Mr Chris Che, Director of P&T Group. They talked about the difficulties encountered during design stage as well as the characteristics of the development which make the IFC unique in Shanghai.

After the seminar, the hotel staff toured us around the hotel, including the guest rooms, restaurants and ballrooms. After about an hour and a half, we had a short coffee break followed by a visit to the central control room



of the shopping mall. The CPD ended with the final activity shopping in the newly opened shopping mall!

Members of both the HKIS and HKIA expressed that the visit was fruitful. With so many new projects under construction in Shanghai, there will surely be more gatherings in the year 2010.

I have been keeping a name list of the HKIS members in Shanghai. There are currently about 70 members from Hong Kong and 18 members from Shanghai. As there will be more and more new comers to Shanghai or adjacent cities, please feel free to contact me in order to be in the loop. My email address is iris.lee@cn.rlb.com



Bowling

- **Joint Professional Bowling Tournament 2010**
Team Captain: Mr Tommy LAM

The Joint Professional Bowling Tournament was successfully held on 15 August from 1- 6pm at Olympian City. Our bowling team members got a fruitful reward after the tough practices and got the second runners-up.

Teammates included Rainbow Wan, Jason Fung, Stanley Law, Tommy La, Lesly Lam and Tzena Wong. Our teammate - Rainbow Wan even got the Ladies Individual Champion.

The President of the Hong Kong Medical Association presented the second Runners-up Medals to the HKIS Bowling Team.



Basketball

- **HKIS Basketball Team More Strong Players required!**
Team Captain: Mr Ming Shum / Mr Arthur CHEUNG

The Joint Professional Basketball Tournament will be held in January/February 2011 again. Our basketball team captain would like to appeal more strong players to join the basketball team.

Singing

- **HKIS Singing Team Band Practices commenced**
Team Captain: Miss Michelle CHUNG

It is glad to let you know that the HKIS Band is formally formed. The first practice commenced on 30th August 2010. We are surely looking for more members who can play various instruments to join the band. Please do register with the HKIS Office.



Running

- **HKIS Running Team Appeal for Participations**
Team Captain: Mr Lesly LAM / Miss Kathy CHEUNG

"UNICEF Charity Run" and "The HKDRC 33rd Hong Kong Green Half Marathon" will be held at the Hong Kong Disneyland Resort and Tai Mei Tuk respectively in November. The courses are flat, speedy and scenic.

Moreover, please make registrations to the Hong Kong Standard Chartered Marathon 2011. Please let us know by email once you have registered. The HKIS Running Team would like to form a strong running team.





Sailing

- **HKIS Sailing Team Regular Training / Hebe Haven Yacht Club 24 Hours Charity Race**

Team Captain and Coach: *Mr Christopher WONG / Mr Ben CHONG*

The first regular trainings cum seafood tasting at Sai Kung Po Toi O was successfully held on 8 August. 16 teammates came to learn a tutorial of tacking, down and up wind sailing. All teammates enjoyed a fruitful sailing day under gorgeous weather.

The sailing team is planning to join Hebe Haven Yacht Club 24 Hours Charity Race to be held on 9-10 Oct 2010. More crews are required. Please do register if you have interest to be on board.

Ski and snowboarding

- **HKIS Ski and Snowboarding Interest Group — Plan for the coming snow season**

Group Convener: *Mr Lesly LAM*

The ski and snowboarding trips in the coming snow season are being planned. Please let us know if you want to join this interest group and have interest to go to the trips together. Free tutorials on-site will be conducted by the group convener.





Snooker

- **Joint Professional Snooker Tournament 2010 Champion of the Year**

Team Captain: Mr. Jeremy TSE / Mr. Willie TANG

It is the first time that the HKIS Snooker Team won the Champion among professional bodies. The seven teammates included (1) Jeremy Tse; (2) Ho Chi Sing; (3) Horace Lam; (4) Ricky Tang; (5) Derek Lai; (6) Eddie Kwok; (7) Andy Chan. They have undergone tough trainings for the whole year. Congratulations to the team.



Snooker Team Captain - Jeremy Tse received the Champion trophy from the Chairman of Joint Professional Sports Committee.

Swimming

- **HKIS Swimming Team The HK 13th Life Saving Marathon**

Team Captain: Mr William LAI / Mr CY WAN

The HKIS Swimming Team will join an open sea swimming competition on 12 Sept 2010 at South Bay - The HK 13th Life Saving Marathon. The distance is 1600m. Members are welcomed to give support to the competition from 10am.

More swimming teammates are wanted for various short and long distance competitions to the coming few months.

Photography

- **HKIS Photography Interesting Group Interested Members are invited !**

Group Leaders: Mr Arthur CHEUNG / Mr Kim TSUI

The group leaders of the photography interesting group would like to appeal more interested members to join and share the beautiful photos & photographic knowledge. Tentatively, a few photo-taking sessions and trips are proposed. Models will be provided if required. In the future, the group members will be invited to take photos in various important functions of the Institute.

For those members who have interest to participate in various sports, please contact Chairman or Donna YU at cpd@hkis.org.hk / 2526 3679 for registration. Recruitment of players is always open for all qualified members, probationers and student members. Look forward to seeing you.



Chairman:
Lesly LAM,
leslylam@hkis.org.hk



The Hong Kong Institute of Surveyors
Sports Team / Interest Group



Date	Event	Organiser	Location	
2010				
Sept	4	HKIS Annual Conference 2010	HKIS	Conrad Hong Kong
	13	Board of Membership meeting	HKIS	Board Room, HKIS
	30	HKIS Executive Committee meeting	HKIS	Board Room, HKIS
	30	HKIS General Council meeting	HKIS	Board Room, HKIS
Oct	8	LSD Annual Dinner 2010	HKIS	Eaton Hotel Hong Kong
	20	HKIS Executive Committee meeting	HKIS	Board Room, HKIS
	23	Building Surveyors Conference 2010	HKIS	Harbour Grand Kowloon
Nov	2	HKIS Annual Dinner 2010	HKIS	Grand Hyatt Hong Kong
	10	Board of Membership meeting	HKIS	Board Room, HKIS
	25	HKIS Executive Committee meeting	HKIS	Board Room, HKIS
	25	HKIS General Council meeting	HKIS	Board Room, HKIS

For details, please visit www.hkis.org.hk or contact the HKIS office on 2526 3679. Board Room, HKIS = 810 Jardine House, 1 Connaught Place, Central, Hong Kong. SLC, HKIS = 811 Jardine House, 1 Connaught Place, Central, Hong Kong.



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Thank you very much!



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