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### **香港測量師學會**

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### **免責聲明**

香港測量師學會物業設施管理組製定此小冊子的目的，為提供予公眾人士一些有關本會及本組的初步資料。該些資料將因應需要而會不時地更新或改變，閱覽者若有任何疑問可聯絡本會的秘書處。

此小冊子祇應作為一般閱覽之用。閱覽者不應以內裏的資料作為有關測量業內的專業或法律意見。本會及本組已盡力確保有關的資料的準確性，但仍不能保證或接受任何人士因使用有關資料而引起的責任。

## Property and Facility Management Division

物業設施管理組





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# 1.0 About The Hong Kong Institute of Surveyors

## 1.1 Introduction

Established in 1984, The Hong Kong Institute of Surveyors is the only professional organisation representing the surveying profession in Hong Kong. The Institute's work includes setting standards for professional services and performance, establishing codes of ethics, determining requirements for admission as professional surveyors, and encouraging members to upgrade skills through continuing professional development.

The Institute has an important consultative role in government policy making and on issues affecting the profession. We have advised the Government on issues such as unauthorized building works, building safety campaign, problems of property management, town planning and development strategies, construction quality and housing problems.

**The Institute has reciprocal/mutual recognition arrangements with the following overseas institutes:**

- Australian Property Institute
- Singapore Institute of Surveyors and Valuers
- New Zealand Property Institute
- China Engineering Cost Association
- China Institute of Real Estate Appraisers
- China Association of Engineering Consultants
- The Australian Institute of Quantity Surveyors
- New Zealand Institute of Quantity Surveyors
- The Building Surveyors Institute of Japan
- Canadian Institute of Quantity Surveyors
- Chartered Institution of Civil Engineering Surveyors



**The Institute is a member of the following international organisations:**

- The International Cost Engineering Council
- International Society for Photogrammetry and Remote Sensing
- International Valuation Standards Committee
- Pacific Association of Quantity Surveyors
- World Organization of Building Officials
- World Association of Valuation Organisations

# 關於本會

## 1.1 本會簡介



香港測量師學會是香港唯一的測量專業組織，成立於1984年。本會的工作主要是制訂專業服務的標準，包括制訂專業守則、釐訂加入專業測量師行列的要求，並鼓勵會員透過持續專業進修以增進專業技能。

本會在政府訂定政策方面擔當重要的諮詢角色，並十分關注影響測量專業的事務。我們曾向政府提供的意見包括樓宇僭建問題、樓宇安全運動、物業管理問題、城市規劃及發展策略、建築質素和房屋問題。

本會與下列海外組織訂立了資格互認協議：

- 澳大利亞房地產學會 (API)
- 新加坡測量師及估價師學會 (SISV)
- 新西蘭房地產學會 (NZPI)
- 中國建設工程造價管理協會 (CECA)
- 中國房地產估價師學會 (CIREA)
- 中國建設監理協會 (CAEC)
- 澳大利亞工料測量師學會 (AIQS)
- 新西蘭工料測量師學會 (NZIQS)
- 日本建築積算協會 (BSIJ)
- 加拿大工料測量師學會 (CIQS)
- 土木工程測量師學會 (ICES)

本會為下列國際組織的成員：

- 國際造價工程委員會 (ICEC)
- 國際攝影測量及遙控感應協會 (ISPRS)
- 國際估價標準委員會 (IVSC)
- 太平洋工料測量師協會 (PAQS)
- 世界建築監督組織 (WOBO)
- 世界估價組織協會 (WAVO)



## 1.2 HKIS History

The history of the Surveying profession in Hong Kong dates back to 1843 with the appointment of the first Government Surveyor General.

In the 1960s, the Hong Kong Technical College started to deliver diploma courses in surveying. Now there are three local universities offering degree courses in Surveying.

The Hong Kong Institute of Surveyors (HKIS) was formally established in April 1984. At that time, the number of founding members was 85. The membership has now grown to over 8,000 (of which 5,936 are Corporate Members). The first President of the Institute was Sr KAN Fook Yee.

The HKIS was statutorily incorporated by the Hong Kong Institute of Surveyors Ordinance which was passed in 1990, and is the only surveying professional body incorporated by ordinance. The Surveyors Registration Ordinance was passed in 1991 to set up a Registration Board to administer the registration of professional surveyors.

## 1.3 Organisation Structure

The General Council governs the Institute and oversees the functions and activities of the Divisions, Young Surveyors Group, Board of Membership, Board of Education, Board of Professional Development, *Surveyors Times* Editorial Board, Surveying and Built Environment Editorial Board, and the appointed Committees including the Executive Committee and Standing Committees. The General Council and all boards and divisions are operated by volunteers from the profession and is supported by the HKIS Secretariat with full time staff. The Hong Kong Institute of Surveyors has six Divisions by reference to respective professional practice, namely:

- Building Surveying Division
- General Practice Division
- Land Surveying Division
- Quantity Surveying Division
- Planning and Development Division
- Property and Facility Management Division



## 1.2 本會歷史

香港測量專業的歷史要追溯至1843年，當時首位政府測量總監正式上任。

於60年代，香港工業專門學院，開始設立測量專業文憑課程。時至今日，香港已有三間大學設有測量專業學位課程。

香港測量師學會於1984年4月正式成立，當時創會會員人數有85人，現時已增至8,000多人（其中約5,936人為正式會員）。首屆會長為簡福飴測量師。

於1990年，香港立法局通過了《香港測量師學會條例》，是唯一依法例而成立之測量師專業團體，而《測量師註冊條例》於1991年通過，並根據該法例成立了測量師註冊管理局。

## 1.3 組織架構

本會理事會負責統籌及監督香港測量師學會及其轄下的組織，包括專業組別、青年組、會籍委員會、教育委員會、專業發展委員會、測量師時代編輯委員會、Surveying and Built Environment 編輯委員會，及直接主管的委員會，即執行委員會和常設委員會。理事會、各組別及委員會的決策及實務由會員義務擔任，並交本會秘書處所聘用的全職職員辦理。學會會員按專業範疇分為六大組別，分別是：

- 建築測量組
- 產業測量組
- 土地測量組
- 工料測量組
- 規劃及發展組
- 物業設施管理組



## 2.0

# About Property and Facility Management Division

### 2.1 Chairman's Message



#### Chairman (2013 – 2015) – Sr Dr Edmond Cheng

Property and facility management are closely related to the livelihood of the general public. In recent years, there is increasing demands on professional property and facility management services by the people of Hong Kong. Thus, related legislations have been repealed and amended over the past years to satisfy the appeals of the society. The Property and Facility Management Division has been closely monitoring the prospective amendments on the Building Management Ordinance and related legislations. We shall listen to and collect members' opinions on related issues and timely reflect them to the responsible government departments for considerations. Our Division will publish the Green Management Practice Guide in 2014 to enable members and the general public to implement green management services to help build a sustainable society in Hong Kong. Lastly, our Division will celebrate its 10th Anniversary in 2015. A series of celebration activities are being considered, which will be held together with the PFMD Conference. Our aim is to publicise the contributions of our Division in the promotion of professional property and facility management in the territory.

### 2.2 Message from Past Chairmen



#### Founding Chairman (2005-2007) – Sr Michael Price

The Property and Facility Management Division is the result of hard working, dedicated Surveyors working together to better serve the Institute. It was clear to us the Institute needed to have a better focus in the important areas of Property Management, Facility Management, Asset Management, and Corporate Real Estate. The Division now provides this focus and continues to grow strongly. I was proud to be the founding chairman, and proud to work with the dedicated colleagues who made this possible. A great and promising future awaits.

# 關於物業設施管理組

## 2.1 主席的話

### 主席（2013-2015年度）— 鄭錦華博士測量師

物業及設施管理與普羅市民的生活息息相關。近年，香港市民對專業物業及設施管理服務的要求日高，導致相關的法例法規不斷修訂，以迎合社會的需求。本組將密切留意建築物管理條例及相關法例法規的修訂工作，並就有關修訂方案聆聽和收集會員的意見，以便悉時向相關政府部門反映專業意見。此外，本組將推出「環保管理實務指引」，以協助會員落實推行環保管理，共建一個可持續發展的社會。最後，物業設施管理組將於2015慶祝成立10周年，適逢管理會議亦將於同年舉辦，多項慶祝活動正在籌劃之中，目的為宣揚本組在推動本港專業物業及設施管理上的貢獻。

## 2.2 歷屆主席的話

### 創組主席（2005-2007年度）— 彭禮善測量師

物業設施管理組的成立，實有賴一群勤奮及勇於承擔的測量師協力而成的結晶，以更能有效地服務學會。顯而易見，學會的確須要加強於「物業管理」、「設施管理」、「物業資產管理」及「企業房地產管理」等方面的焦點。成立本組別可讓學會提高此方面的焦點，讓會員不斷地擴展才能。本人非常驕傲有幸能成為本組別的創組主席，並能有幸地與該群勇於承擔的測量師共同協力，創造成果。我們期待一個偉大及富期望的將來即將降臨。

## 2.2 Message from Past Chairmen



### **Chairman (2007-2009) – Sr Kenneth Chan**

With the recognition by the Hong Kong Housing Authority of Professional Property and Facility Management Surveyors being qualified for assuming the role of Property Manager in outsourced property management contracts, the qualification of “Professional Property and Facility Management Surveyor” will certainly become more widely accepted as the professional who offers quality service in property and facility management. I certainly hope that the PFM Surveyors will become the most sought after qualification in property and facility management in Hong Kong and beyond.



### **Chairman (2009-2011) – Sr Gary Yeung**

Property and facility management services have already become the essential and integral components of our modern day’s society, through bringing in safety, security and environmental friendly operations for users of properties and facilities. It was my honor to mark the inauguration of the Quality Property and Facility Management Award in 2000. Winning the Award is recognition of gratitude for those projects that had been managed most professionally and has displayed remarkable creativity along with astonishing efforts to improving user satisfaction. With the ongoing organisation of the Award, I believe it provides ample opportunity to acknowledge the professional competence of the Property and Facility Management Surveyors and also to promote professionalism of the industry.



### **Chairman (2011-2013) – Sr Dick Kwok**

Since the establishment of The Property and Facility Management Division (PFMD) in 2005, the recognition and membership of the Division have grown. Thanks to the leadership of the past chairmen and support of fellow members and council. The Division shall continue to focus on property and facility management related issues, such as recent licensing of property management companies and practitioners and joint collaboration with the BSD to provide professional services on a pro bono basis for the Home Affairs Department’s (HAD) “Proposed Pilot Scheme for the Provision of Professional Advice to Owners’ Corporations on the Appointment of APs for Building Maintenance Works”. I also look forward to further growth of the Division through establishment of closer relation and co-operation with our China counterparts in Beijing, Shanghai and Guangdong under CEPA arrangement.

## 2.2 歷屆主席的話

### 主席（2007-2009年度）— 陳佐堅測量師

因應香港房屋委員會，正式承認專業物業設施管理測量師的資歷，可從事其外判物業管理服務合約的認可物業經理，本會的專業物業設施管理測量師，將無可置疑地進一步被市場接納，為提供優質物業及設施管理服務不可或缺的專業資格。本人相信，專業物業設施管理測量師，將會成為香港物業設施管理服務市場最受廣泛認同的專業資格，並能進一步推展到其他房地產管理服務範圍。

### 主席（2009-2011年度）— 楊文佳測量師

物業設施管理是現今社會不可或缺的一個基礎專業服務，其重要性亦隨著市民對居住環境的安全性、保安和環保意識的重視程度而增加。本人非常榮幸能夠首次推動2010年度優質物業設施管理大獎，給那些願意付出和改變的專業人士帶來豐盛的收穫，並為他們所曾作出的貢獻給予認同和致以感謝，同時提倡物業設施管理行業的專業形象。得獎項目須具備專業及創新的管理方式，並致力為物業的住戶、設施的使用者提供高質素服務。透過未來的大獎，本人期望物業設施管理測量師的專業蓬勃發展，並樂見行業不斷進步，及業界的專業水平持續不斷地提高。

### 主席（2011-2013年度）— 郭岳忠測量師

自2005年成立以來，物業設施管理組的認受性及會員數目都有所增加。這實有賴所有前主席的領導與會員及理事會的支持。本組將繼續專注於有關物業及設施管理的事宜，如物業管理公司及從業員發牌制度及聯同建築測量組為民政事務總署為業主立案法團就大廈維修工程委任認可人仕提供專業意見之建議試驗計劃提供免費服務。本人亦期待透過更緊密經貿關係的安排，與中國內地於北京、上海及廣東同業，建立更緊密關係及合作，使本組有更大之發展。

### **2.3 PFMD History**

In the past, those of us from the three main branches of specialisation of the Surveying profession, namely Building Surveying, General Practice, Quantity Surveying, were engaged in property and facility management. In 1999, the General Council saw the need to coordinate the activities of professional surveyors in this field and established the first cross-divisional committee on Property Management (PM). The PM Committee acted as the central source for coordinating activities internally and provided representations in non-government and other bodies related to property management activities. In 2003, the PM Committee was renamed Property and Facility Management (PFM) Committee to embrace the growing importance in the development of facility management both globally and locally. Later in the year, the PFM Committee was reformed to become the Property and Facility Management Forum following the amendment of the HKIS constitution recognising the establishment of specialist forums for cross-divisional and specialised services in the profession.

With the hard work of the PFM Forum under the leadership of its chairman, Sr Michael Price and the approval of the General Council, the formation of the Property and Facility Management Division was approved with overwhelming support in the Extraordinary General Meeting held on 18 May 2005.

### **2.4 Council and Committee**

The governing body of the Property and Facility Management Division is the Divisional Council which sets out the policies, regulations, direction and manages the income, expenditure, affairs and concerns of the Division. To enable adequate representation from different sectors of organisation, the composition of the Divisional Council purposely designed as follows:

- (a) A Chairperson;
- (b) Vice-Chairperson or such other number of Vice-Chairperson as considered appropriate by the Divisional Council;
- (c) An Honorary Secretary;
- (d) An Honorary Treasurer;
- (e) At least five but not more than fifteen other members from the following areas:
  - Academic (minimum 1 number)
  - Facility Management (minimum 1 number)
  - Property Management (minimum 1 number)
  - Government, Institution and Public Bodies (minimum 1 number)
- (f) Immediate Past Chairperson ex-officio
- (g) Two representatives from the Young Surveyors Group; and
- (h) Not more than two members from Technical Grade.

Divisional Education Committee was formed and, through representation in the Institute's Board of Education, to scrutinise, validate and keep under review academic qualifications for admission to studentship of the Division; to develop, implement and control the qualifying mechanism to corporate membership of the Division; and to establish and maintain a high standard of professional competence of member surveyors.

Divisional Professional Development Committee was formed to organise and promote continuing professional development of member surveyors.

Divisional Membership Committee was formed and, through representation in the Institute's Board of Membership is the gate-keeper of the Division, whereas qualified persons would be admitted, and members with achievements would be upgraded. The Committee also assists in setting up guidelines for the processing of membership applications.

The Divisional Council also nominates Division members be represented in the Editorial Board and other Committees, Working Groups and Task Force being set up by the Institute from time to time.

### 2.3 本組歷史

物業設施管理在過去由三個主要的測量專業所提供。理事會有見需要，於1999年開設首個跨組別的物業管理委員會。物業管理委員會主要作為學會內部活動的集中協調及提供代表出席政府及其他機構有關物業管理的活動。物業管理委員會於2003年改名為物業設施管理委員會以覆蓋在香港及世界各地的重要性都日益增加的設施管理。在該年的後期，根據香港測量師學會修定的章程中認可為一些跨組別及專業服務設立專業論壇，物業設施管理委員會因而改革成為物業設施管理論壇。

然而，設立這一個論壇並未能給予物業設施管理專業在行內及行外有足夠的認知。明顯地，只有在學會內設立物業設施管理組才能使它有進一步發展。在物業設施管理論壇主席Sr Michael Price的領導及其他成員的努力下，加上理事會的批准，物業設施管理組於2005年5月18日的學會特別大會中通過及正式成立。

### 2.4 本組理事會及委員會

物業設施管理組的分組理事會負責制定本分組的政策、規章、未來方向及管理本分組的收入、支出、日常事項及會員關注的議題。為確保分組理事會有足夠的代表性，理事將來自以下不同的機構。

- (a) 主席一名；
- (b) 副主席一名（或由分組理事會認為合適之數目）；
- (c) 義務秘書一名；
- (d) 義務司庫一名；
- (e) 不少於五名但不多於十五名理事代表
  - 學術界別（最少一名）
  - 設施管理界別（最少一名）
  - 物業管理界別（最少一名）
  - 政府部門、社團及公營機構界別（最少一名）
- (f) 上任主席（當然成員）；
- (g) 青年組代表兩名；及
- (h) 不多於兩名技術會員代表。



分組教育委員會的成立及透過教育委員會的主要目標是詳細審閱、認可及不斷檢討接納學員入會的學術資格；制訂、執行及控制學會專業會員的資格檢定機制；建立及維持會員測量師的高水準專業能力；以及組織和促進會員測量師在專業方面的持續發展。

分組持續專業發展委員會的成立乃為會員定期安排及推廣、促進測量師會員的持續專業發展。

分組會籍委員會的成立及透過會籍委員會可說是香港測量師學會的「守門人」，具資格的人士可以入會，有成就的會員其會籍可獲提升，而委員會的工作主要是制訂入會指引，以處理會籍申請事宜。

本組亦有委任會員代表出席編輯委員會及其他常設委員會、工作小組及專項小組，以協助學會執行各項定期的工作。

# 3.0

## Area of Specialisation

### 3.1 Introduction

Professional Surveyors are now employed in over 140 organisations spreading across different sectors including the government, government agencies, public corporations, developers, property and facility management services providers, multi-national companies, international real estate consultants in the provision of in-house or consultancy services in strategic facility planning, asset management, space planning management, real estate design and management, operation and maintenance, property management, corporate real estate and related services.

### 3.2 Property Asset Management

Property asset is one of the most valuable assets of any corporations. The proper and professional management of the assets will support business operations in physical and financial terms. Surveyors are well trained and experienced to advise, negotiate and managing of leases, deeds, agreements and rent reviews. Property Asset Management is the comprehensive management of real estate assets from acquisition, marketing, leasing, property management (including renovation, improvement and production of complex financial packages and projections) through to disposal. Depending on the nature and scale of the asset, this may involve management of extensive facilities including auditorium, theatre, meeting rooms, club house with full range of recreation facilities, business centre, serviced apartments, canteen etc. The ability to provide a caring service to the users, offer innovative value added services and to manage such facilities in a cost effective manner using state of the art technologies is essential.

### 3.3 Corporate Real Estate

Space and premises are the inseparable parts of the business operation of a corporation. The strategic and effective management of business space and premises will impact on competitiveness and productivity of the corporation. Property and Facility Management Surveyors are employed with major space users or international real estate consultants to take up responsibility in the global and local strategic space planning, research and business relocation planning. They will assist in the acquisition of space and premises, valuation and agreement on terms.

Space standards and guides are formulated by major corporations for worldwide application in space planning. Surveyors can advise on the best practice in Interior design and fit-out planning, procurement, churn management in different operating environments. It is often good and necessary practice to carry out space audit and establishment of space inventory and asset register for review and analysis in the process of development planning.

Employees spent a large of portion of the day life time in occupied space and premises, it is important that the environment that they work and live in are safe and hygienic. Post occupancy evaluation of user needs will have to be conducted to constantly improving the same for the better enjoyment of the people.

# 專業範圍

## 3.1 簡介

物業設施管理測量師受僱於超過140個機構及10種不同行業，包括政府部門、政府有關的組織、公共機構、地產發展商、物業及設施管理服務公司、跨國機構、國際房地產顧問行，主要負責策略設施規劃、資產管理、空間規劃管理、房地產設計及管理、營運及維修、物業管理、企業房地產及其他有關服務。

## 3.2 物業資產管理

物業資產對任何企業來說都是最重要的資產之一。適當和專業的資產管理可以協助企業營運。測量師均擁有充分的訓練和經驗去建議、協商和管理租約、房契、協議及租金檢討。物業資產管理是對房地產由採購、銷售、租務、物業管理（包括修葺、改建及製作複雜的財務報表及預測）、以至轉讓都有充分的管理。所管理的設施會根據其資產的性質和規模而定，包括演奏廳、劇院、會議室、住客會所及其消閒設施、商務中心、服務式住宅、食堂等。測量師需要擁有的能力包括照顧使用者、提供創新的資源增值服務及以具成本效益的方法去管理設施。

## 3.3 企業房地產

主要企業對空間規劃的國際性運用製定了空間規劃的規格和指南。物業設施管理測量師可就不同類型的空間而對有關室內設計和裝修的採購和管理提供最佳建議。

在現代企業的競爭不斷增加的情況下，房地產必須以最有效率的方法去支援商業活動。測量師應進行對資產進行登記以用作對發展規劃的過程進行檢討和分析。

由於一般員工的大部分時間都在建築物內渡過，因此，一個安全而又衛生的工作和居住環境對他們非常重要。測量師定期為他們進行使用後的評估以持續改善工作和居住環境而令他們生活得更加愉快。





### **3.4 Project Management**

Project management for property facilities is the application of managerial knowledge and professional expertise to complete project activities relating to the built environment and to meet or exceed the satisfaction of all stakeholders as a whole. The major incumbents include but not limited to offering professional advice on the feasibility study, desktop design, programme, procurement options, constructability, quality control and the final deliverables throughout the project life cycle from the initiating, planning, executing, controlling until the final closing-off.

In managing a typical building project, there are critical processes that demand for the manipulation of project management skills and techniques to the finalisation of the project scope, the completion of design drawings and specifications, preparation of tendering document and selection of contractors, submission for approval and consent from the government departments and utilities companies, observance of safety and environment requirements in the execution of site activities, quality assurance and supervision, cost control, programme monitoring, settlement of dispute, examination of deliverables, monitoring the defect making-good / outstanding works and the recommendation on the closing-off and handover.

The services of project management will complete with the examination of all closing-off documents and advise on the maintenance program and cost-in-use. The carrying out of post-occupation review and appraisal on the project performance will also be included.

### **3.5 Property Management**

PFM Surveyors as Property Managers have the overall responsibility for up-keeping the standard and enhancing the asset value of their managed properties.

They should maintain the properties in a sound and safe condition. Well planned maintenance schedules can help to upkeep the facilities of the building well so as to maintain the building quality standard. Ongoing renovation, improvement and statutory alteration are the keys to allow the properties held for investment purpose to compete with other new buildings.

The property managers are required, if necessary, to enforce the DMC, house rules and lease agreements so that the conditions imposed will be strictly followed by the occupiers.

PFM practitioners should be equipped with knowledge to effect adequate insurance cover to protect the owner's interest in case of minor accidents up to big disasters resulting in bodily injury or death and monetary loss.

The property managers select suitable cleaning and security personnel by way of tender. Appropriate assessment together with Key Performance Areas or Indicators must be adopted for identifying the competent companies to take up the works under a partnership concept.

Handling crowd control and crisis, such as fire outbreak and flooding, are part of the duties of property managers in which detailed planning and careful logistic preparation are the key factors to success so that the activities will be monitored in a smooth, safe and secure manner.

We have the responsibilities to protect the earth by using environmentally friendly products, consuming less energy and minimising waste in order to support the next generation and to protect the surrounding areas.

### 3.4 項目管理

物業設施的項目管理是利用管理知識及專業去完成整個項目以達到甚或超越所有投資者的期望。其主要範圍包括而又不限於提供專業意見以進行可行性研究、設計、工作計劃、合同辦法、可建性、質量控制及整個項目的週期由開始、計劃、執行、控制直至完工。

在管理一般建築物中，測量師有必要的步驟去運用項目管理的技能以確定項目的範圍、完成設計圖紙和規範、預備招標文件及挑選承建商、提交申請政府部門和公用事業公司的認可、遵守安全和環境要求去進行工地內的活動、檢証和監察品質、控制成本、監控程序、調解糾紛、檢驗貨物、監察修補工程或未完成的工程及提供有關完工和移交的建議。

項目管理的服務在驗收完工文件及提供有關保養計劃和日常開支的建議後便宣告完成。當然，這亦應該包括在完成後對項目表現的檢討和評估。

### 3.5 物業管理

物業設施管理測量師在物業管理方面的職責包括維持物業的質素及為其管理物業的資產增值。

物業經理應該維持物業於良好及安全的狀況。良好的保養計劃可以幫助保持樓宇設施的狀況以維持建築物的質素。持續的修葺和改建可以改善所投資的物業以保持與新落成建築物有所競爭。

公契的執行對於地產發展商和買家來說都是十分關鍵的。物業經理在有需要時可執行公契去強制住客遵從公契內的條款。

物業設施管理測量師需要懂得為物業購買適當和充足的保險以保障業主的利益包括小型的意外以至大型的災難而引致的人命和財物的損失。

物業經理應利用招標方法去挑選適合的清潔和保安人員。他們必須採用適當的評核包括評核主要的表現或指標以分辨出有能力的公司並利用夥伴的形式去負責有關的工作。

物業經理的職責亦包括控制群眾秩序及社區活動，詳細的計劃和細心的人流準備都是成功的要素，並且使活動可以順利及安全地進行。

物業經理必須在不同情況下處理危機管理，包括水浸、火災、炸彈恐嚇處理和氣體洩漏。他們都有足夠能力去找出問題所在以避免人命和財物之損失。

物業經理亦有責任去保護地球，包括使用環保產品、節約能源及減少產生廢物以支持保護周圍環境。廢物分類及使用再造紙都是值得鼓勵的方法以減少砍伐樹木及減少棄置於堆填區的廢物。

# 4.0 Membership

## 4.1 Application Procedures

The PFMD follows the membership structure of the Hong Kong Institute of Surveyors which comprises four grades namely Honorary Grade consisting of Honorary Fellows (Hon. FHKIS), Professional Grade consisting of Fellows (FHKIS) and Members (MHKIS), Technical Grade consisting of Associate Members (AMHKIS) and Training Grade consisting of Probationers and Students. Members and Fellows are referred to as Corporate Members.

Generally speaking, members of the PFMD will be admitted through the completion of the Assessment of Professional Competence Scheme (APC). A prospective member has to obtain a recognised academic qualification, join the Institute as a Probationer and commence the divisional APC. As part of this, a Probationer has to complete suitable training for a minimum period of 400 days, and to satisfy the assessments before being considered for admission to the Institute.

A Surveyor holding qualifications from overseas professional surveying institutions can also apply to become a member of the Institute under reciprocal recognition agreements.

The Institute allows alternative routes to technical and professional membership. Simplified flow chart of "Route to Membership" (Figure 1) is appended for reference. For more detailed procedures, prospective candidates may refer to the Rules and Guide published and updated by the Institute from time to time, or may visit the Institute website: [www.hkis.org.hk](http://www.hkis.org.hk).

## 4.2 Recognised Academic Qualification

Formal accreditation has been awarded to the following programmes.

University	Programme
The Hong Kong Polytechnic University	BSc (Hons) in Surveying BSc (Hons) in Property Management
The University of Hong Kong	BSc (Hons) in Surveying MSc in Real Estate (majoring in Facility Management)

The Division also recognises the surveying-related degree programmes and the cognate sub-degree programmes. For other academic qualifications and the overseas academic qualifications, consideration will be made on a case-by-case basis whenever application is received by the Board of Education.

# 成為會員

## 4.1 申請程序

物業設施管理組根據香港測量師學會的會籍分佈分為四級，分別是名譽會員（Hon. FHKIS）組成的名譽會級、由資深專業會員（FHKIS）和專業會員（MHKIS）組成的專業會員級、由副會員（AMHKIS）組成的技術會員級及由見習測量師和學生組成的培訓會員級，其中專業會員和資深專業會員均屬正式會員。

一般而言，學會大部份會員均須完成專業評核試計劃才可成為會員。申請人須取得認可學歷，然後加入學會成為見習測量師，及參加本組別的專業評核試；此外，見習測量師須通過為期四百天的訓練，及須符合其他有關評估，其入會的申請才會獲得考慮。

合資格的測量師亦可透過互認協議認可的海外專業測量學會會籍，申請成為本學會的會員。

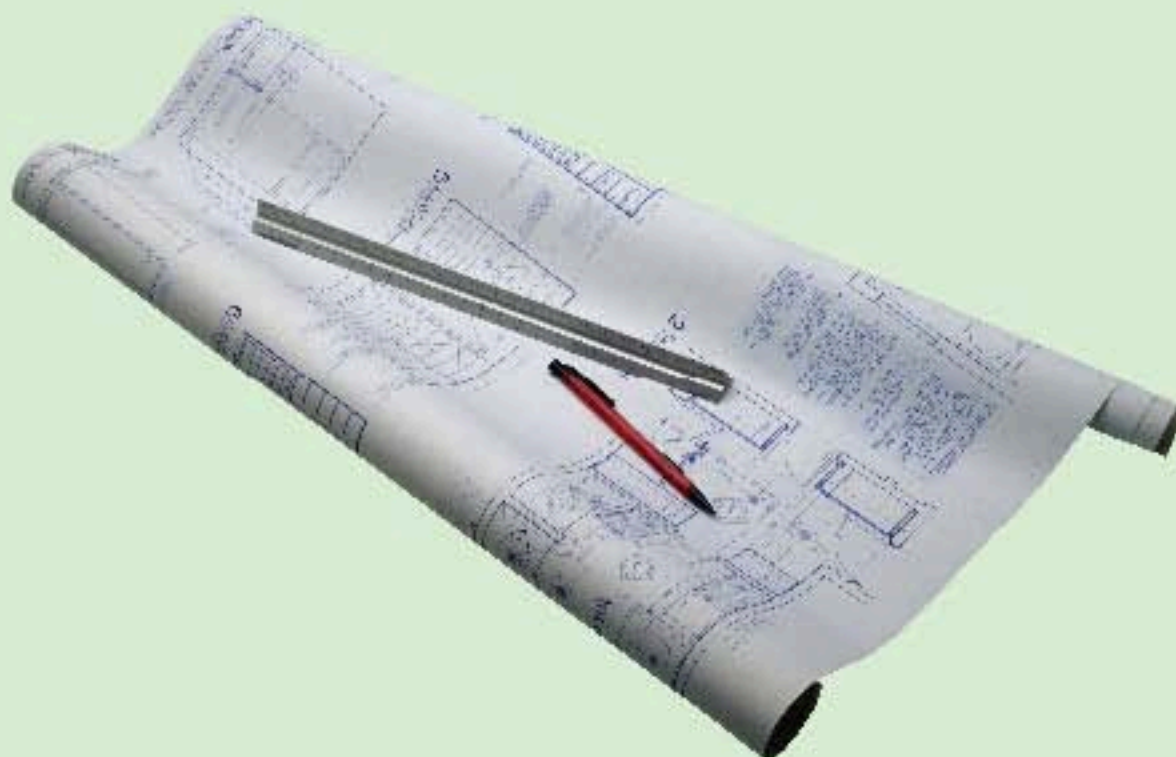
本組亦容許其他申請途徑成為技術或專業會員。請參考下述的圖一「申請成為會員途徑」。有意成為本組會員的考生可參考本組不時制定及更新的申請規章及指引（Rules and Guide）或瀏覽本會網站：[www.hkis.org.hk](http://www.hkis.org.hk)。

## 4.2 認可學歷

本組正式認可以下學歷資格：

大學	課程
香港理工大學	地產及建設測量學（榮譽）理學士學位 物業管理榮譽理學士學位
香港大學	理學士（測量學） 理科碩士（房地產）主修物業管理

本組亦認可與測量相關的學位及副學位，至於其他學歷及海外大學所頒授的學位，教育委員會將按個別情況再作考慮。

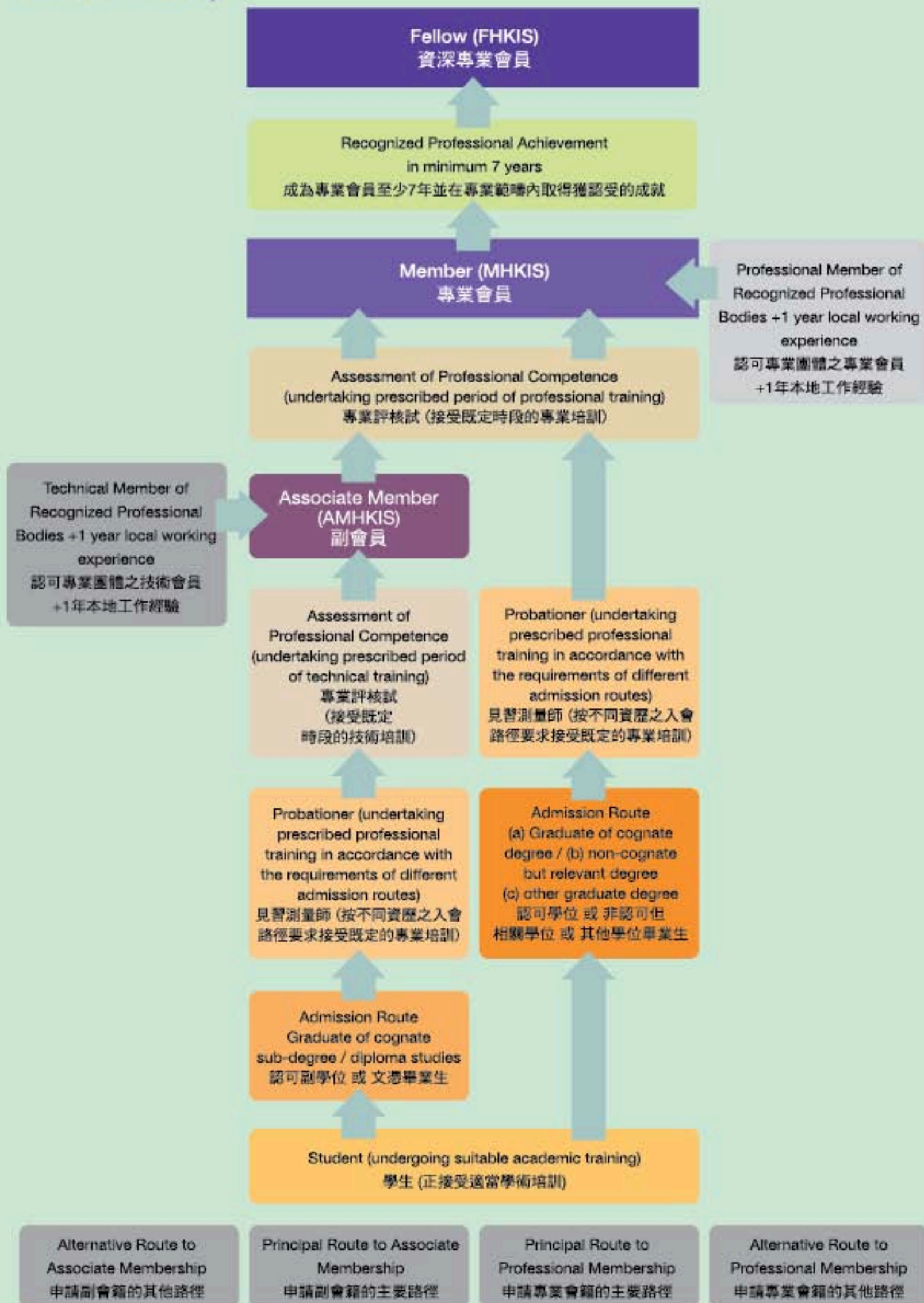


# Figure 1 : Route to Membership

## 圖一：「申請成為會員途徑」

### 成為會員

### Routes to Membership



\* Please refer to the HKIS Bye-Laws for detailed requirements.  
詳情請參考香港測量師學會則例

# HKIS Diploma Presentation Ceremony 香港測量師學會文憑頒授典禮



# 5.0 Professional Development

## 5.1 Assessment of Professional Competence

Candidates must have completed one of the courses recognised by the PFMD before they are eligible to register for the APC and start recording their experience in the Diary and Log Book, so candidates should enroll as Probationer members when applying to enter the APC Scheme. Probationers are required to pass the APC Final Assessment before they are eligible for election to corporate membership of the Institute.

After obtaining the relevant academic qualification, candidates interesting to become Property and Facility Management Surveyors are required to undergo at least 400 days of recognised professional training to acquire the required level of professional competence in three major areas of competences namely Mandatory Competences, Core Competences and Non-Core Competences.



In the area of Mandatory Competences, candidates are expected to achieve general knowledge and understanding in all of the Core Skills: Ethics, knowledge of HKIS structure, rules and regulations; Basic business and communication skills, self management, customer care; Information technology, analysis of information and data; Law, dispute resolution and conflict avoidance; and Health, Safety and Environmental Awareness. They are also required to acquire general knowledge and understanding in all of the other skills: Business management, Organisational Leadership, Negotiation Skills; Management of

People and Resources, Recruitment and Selection; and Accounting Principles and Procedures.

Candidates may choose two out of the four Core Competences and engage themselves in such breadth and depth in knowledge application and analysis with the ability to give advice. These competences are grouped under Property Asset Management, Corporate Real Estate, Project Management, and Property Management.

Finally candidates are required to achieve general knowledge and understanding in two of the five Non-Core Competences: Finance Management, Human Resources and Organisation Management, Information Technology and Communication Management, Quality and Performance Management and Benchmarking, and Major Research.

For more detailed procedures of the APC, prospective candidates and their employers may refer to the latest version of the "Rules and Guide to the Assessment of Professional Competence in PFMD" and the "PFMD Notes for Guidance of Employers, Supervisors and Counsellors" which may be obtained from the HKIS Secretariat or by visiting HKIS website: [www.hkis.org.hk](http://www.hkis.org.hk).

## 5.2 Continuing Professional Development

There is always a need to learn more whether members are newly qualified or have many years' experience. CPD is both a personal and a business opportunity. CPD is "the systematic maintenance, improvement and broadening of knowledge and skill, and the development of personal qualities necessary for the execution of professional and technical duties throughout the practitioner's working life". All corporate members are required to complete a minimum of 60 hours CPD over a three year period. The Institute will carry out spot-checks on a percentage of the membership in due course.

# 專業發展

## 5.1 專業評核試



申請人必須先成為本會的見習測量師，及完成一個由本組認可的課程，才可申請參加專業評核試計劃，及開始記錄至少四百天的「日誌和記錄冊」，若要成為本會的正式會員，見習測量師必須通過專業評核試計劃，當完成整個計劃後才可經理事會核準及委任為正式會員。在取得有關的認可學歷之後，有興趣成為物業設施管理測量師的考生需要取得不少於400日認可專業工作訓練，完成三項主要的稱能。

在必須稱能方面，考生需要取得基本的知識及了解以下的核心技能，包括專業操守、香港測量師學會的結構及規則、基本商業及溝通技巧、自我管理；資訊科技、資料分析；法律、糾紛調解及衝突避免；健康，安全及環保認知。考生亦需要取得以下的技能：包括商業管理、組織領導、協商技能；人力及資源管理、招聘及選拔；及會計學原理及步驟。

考生亦需要從以下四個核心職能中選取兩個以獲得有關知識的深入應用及分析以至有能力去提供意見。這包括物業資產管理、企業房地產、項目管理及物業管理。

最後考生亦需要從以下五個非核心職能中選取兩個以獲得有關的基本知識及理解，包括財務管理、人力資源及組織管理、資訊科技及通訊管理、品質及表現管理及基準評價、及主要研究。有關專業評核試的細則，申請人及其僱主可參考本組不時制定的「物業設施管理組專業評核試規則及指引 (Rules and Guide to the Assessment of Professional Competence in PFMD)」和「物業設施管理組發給僱主、監督員及輔導員指引 (PFMD Notes for Guidance of Employers, Supervisors and Counsellors)」。申請人可向學會秘書處索取該兩類指引或可從本會網站下載：[www.hkis.org.hk](http://www.hkis.org.hk)。

## 5.2 持續專業發展

無論會員是新取得資格或已擁有多多年經驗，都需不斷學習。持續專業發展是個人及商業上的發展機會。持續專業發展是「有系統地維持、改進和擴闊知識和技巧，以及在執業者工作生涯中執行專業和技術職責時所需的個人品質」。所有專業會員都必須在三年期限內完成最少六十小時持續專業發展項目的最低要求；此外，本會並會定期抽查會員的持續專業發展記錄。

在必須稱能方面，考生需要





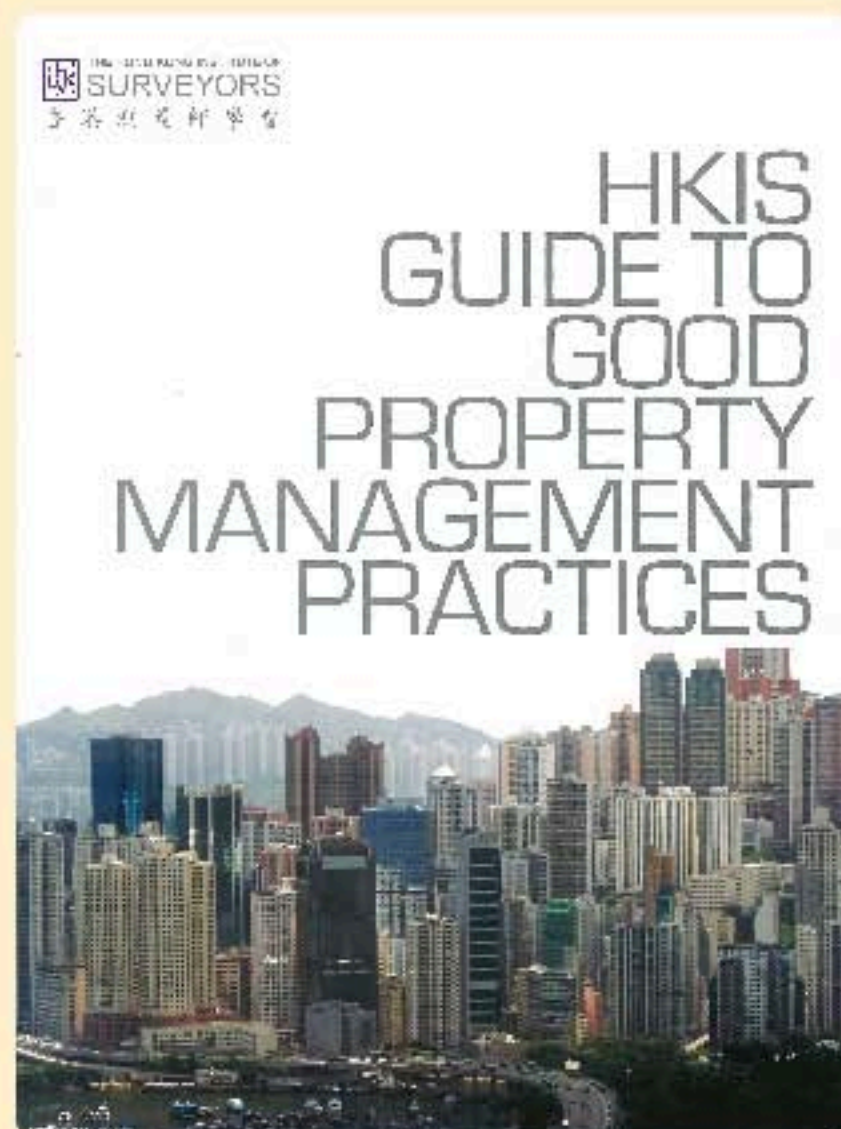
# 6.0 Publication

## 6.1 Practice Guides

Maintaining members' continuing professional competence is the prime objective of PFMD. For the purpose of providing good practice standard to members practising in the property and facility management profession, the PFMD aims to publish practice notes and guides for members working in these areas. These publications include "HKIS Guide to Good Property Management Practice" in 2008, the "Standard Property Management Agreement" in 2013, and the "Green Property Management Practices" in 2014.

## 6.2 Research

Members knowledge would also be enriched through conducting research in their area of profession but time and other resources would usually be personal hurdle blocking such action. Hence, the PFMD decided in year 2007 to commit periodic research exercises so as to provide members with updated market and technological information from time to time. The PFMD collaborated with the City University of Hong Kong in 2007 to commence a research named as "Benchmarking of Management Fees for Residential Properties in Hong Kong" which was published in 2009.



In year 2008, PFMD committed a second research and collaborated with the Hong Kong Polytechnic University as co-researcher. It was named as "Benchmarking of Management Fees for Office Buildings in Hong Kong". The report was published in 2010.

The PFMD also collaborated with the City University of Hong Kong in 2009 to commence a third research named as "Facility Management for the Elderly in Public and Subsidised Housing" which was published in 2012.

In year 2013, PFMD committed a fourth research and collaborated with the Hong Kong Polytechnic University as co-researcher. It was named as "Contributions of The Property and Facility Management Industry In Terms of Gross Domestic Product (GDP) to Hong Kong Economy". The report will be published in 2014.

# 出版刊物

## 6.1 實務指引

能夠不斷維持及提升會員的專業技術乃本組的宏願。為促使本組從事物業及設施管理服務的會員更能有效地發揮其專業才能，本分組理事會致力擬備一些實務指引，供會員參考。包括於2008年發行的「香港測量師學會良好物業管理實務指引」、2013年發行的「標準物業管理協議」及於2014年發行的「綠色物業管理實務指引」。

## 6.2 研究報告

會員在他們的專業範疇內作進一步的學術研究可增強他們的專業知識，但奈何基於個人時間及其他資源的局限之下不能成事。因此，本分組理事會於2007年中決定由本組開展學術研究，並印製報告，以能定期給會員提供一些市場及技術資訊，務求加強會員的專業知識。

本組已於2007年委任香港城市大學進行第一項有關香港住宅屋苑的維修及管理費用的借鑑研究。是項研究報告已於2009年發行。

於2008年，本組亦開展第二項學術研究，並同時與香港理工大學協作進行。研究的課題為延續第一項有關香港的維修及管理費用的借鑑，但是次對象為香港的辦公室大廈。是項研究報告已於2010年發行。

本組亦於2009年委任香港城市大學進行第三項有關改善長者於公共及資助房屋之設施研究。是項研究報告已於2012年底發行。

於2013年，本組亦展開第四項學術研究，並同時與香港理工大學協作進行。研究的課題為物業設施管理行業對香港經濟本地生產總值之貢獻。是項研究報告將於2014年發行。



## 7.0 Way Forward



As a result of the property boom in the late eighties and the rapid growth of economy in the early nineties in Hong Kong, the demand for private residential building and prestigious commercial properties had risen drastically relative to some twenty three years ago. Consequently, the desire for professional real estate management services accelerated disproportionately.

Policy repositioning of the Hong Kong Government in the early twenty-first century turning to increasing

privatisation of facility management services to free market, resulting another rapid change of the size and number of professional facility management service providers. More dominant advocates on privatisation of property and facility management services are the Hong Kong Housing Authority, Government Property Agency and Leisure and Cultural Services Department. We expect, in the short run, the Government sticks to this outsourcing policy.

With the advantages of Eastern-Western cultural integration background of Hong Kong professionals, coupled with investment growth of international organisations in the mainland including some major Hong Kong developer giants contributes to further expansion of these facility management practices into China. The Hong Kong Institute of Surveyors reckoned the growth in this profession and the need for specialisation in this area such that the Property and Facility Management Division was formed in May 2005. Membership growth in the past few years was faster than expected and parallel with market momentum.

It is likely that the long term focus would be on the mainland alongside with its continuous economic growth and expansion of real estate development. Taking the benefit of CEPA, the PFMD would strive to achieve mutual recognition with relevant property management institute in China so as to allow PFMD members to obtain proper practising qualification. The PFMD would closely monitoring on the regulation of the property management industry and review of related government ordinances.

## 展望未來



由於香港在八十年代末期的樓市迅速發展及九十年代初期的急速經濟增長，對私人住宅樓宇及優質商業樓宇的需求比起之前的二十、三十年前大大增加。因而對房地產管理服務的專業人員的渴求更是不成比例地急促增長。二十一世紀初期香港政府改變政策，積極

私有化物業及設施管理服務，外判予私人市場，此舉進一步引致物業及設施管理服務提供者的規模以及數目急劇擴充。私有化管理服務的政府部門較為顯著的有香港房屋委員會、政府產業處及康樂文化事務署。我們預期香港政府外判服務的政策短期內不會改變。

香港的專業人士擁有獨特的中西文化交融的背景優勢，加上國際機構投資者向中國擴展投資，特別是香港一批房地產發展商加強投資國內地產項目，種種原因引致香港的物業及設施管理服務提供者的規模向中國進一步擴張。香港測量師學會早已察覺這個專業範疇的增長優勢，故於2005年成立物業設施管理組，加強關注這項專業的發展。過去幾年，本組的會員人數增長速度比預期滿意，並同時與市場走勢同步發展。



長遠而言，中國的持續經濟增長及房地產發展的走勢將會是本組關注的焦點。加上中、港雙方共同簽署的更緊密經濟合作協議進一步落實，本組將爭取與中國相關專業團體尋求互認，以便本組會員更有優勢地在中國內地執業。本組將會繼續緊密關注物業管理行業之規管及相關條例法規之修訂。