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## **Continuing professional development for the quantity surveying profession in South Africa**

*Peer reviewed*

### **Abstract**

A system of Continuing Professional Development (CPD) was introduced into the quantity surveying profession in South Africa during 1999. After the initial 5-year cycle that ended in 2005, it became clear that the system is not without problems and difficulties. This article investigates the CPD system of the quantity surveying and other professions in South Africa and elsewhere and sets out the perceptions of the participants to the system, specifically registered quantity surveyors. Possible changes and improvements that can be implemented to simplify the current system and make it user-friendlier are also discussed.

Keywords: continuing professional development, quantity surveying

### **Abstrak**

'n Stelsel van Voortgesette Professionele Ontwikkeling (VPO) is in 1999 vir die bourekenaarsprofessie in Suid-Afrika ingestel. Na die aanvanklike 5-jaar siklus wat in 2005 ten einde geloop het, het dit duidelik geword dat die stelsel nie sonder probleme was nie. Hierdie artikel ondersoek die Suid-Afrikaanse bourekenaars- en ander professionele VPO-stelsel en bespreek die persepsies van deelnemers daaraan, spesifiek geregistreeerde bourekenaars. Moontlike veranderinge en verbeteringe wat aangebring kan word om die stelsel eenvoudiger en meer gebruikersvriendelik te maak, word ook bespreek.

Sleutelwoorde: voortgesette professionele ontwikkeling, bourekenkunde

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## **1. Introduction**

Continuing Professional Development (CPD) is defined by the Royal Institution of Chartered Surveyors (RICS, 1993) as the "systematic maintenance, improvement and broadening of knowledge and skills, and the development of personal qualities necessary for the execution of professional and technical duties throughout the practitioner's working life." Similarly, Le Roux (2000) quotes the Institution of Surveyors, Australia who defines CPD as "the process by which professions maintain the quality and relevance of professional services throughout their working lives."

The Association of South African Quantity Surveyors (ASAQs) has introduced a CPD policy approximately 7 years ago, and the purpose of this article is to investigate whether this policy was successful and if any adjustments need to be implemented in future to improve the current system.

## **2. The need for CPD**

Talukhaba (2006) states that CPD policies have been developed in many countries such as the UK, New Zealand, Hong Kong, etc. This was done in order to foster professional competency and sustainability among registered persons. Le Roux (2004) is of the opinion that, as a consequence of the rapid move to a knowledge-based global society, careers have moved from 'jobs-for-life', built on a single, specialised skill, to professionals taking more control over their careers that require multiple skills. Rochester (in Le Roux, 2004) stated that obsolescence of qualifications sets in after 5 years and without continuing education, the holders of obsolete qualifications couldn't hope to compete in the labour market, thereby implying that continuing education and training throughout a person's life is necessary.

## **3. CPD in the South African quantity surveying profession**

Before 1998 the only statutory professional council in South Africa who considered the implementation of compulsory professional skills upgrading for registered members, was the former South African Medical Council (currently the Health Professions Council of South Africa) (Le Roux & Nkado, 2002).

On 1 January 1999, the then South African Council for Quantity Surveyors (currently the South African Council for the Quantity Surveying Profession) invoked its authority in terms of the *Quantity Surveying Act* (Act no. 36 of 1970 as amended), to introduce its mandatory

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CPD policy (South Africa, 1970). When the above act was replaced in 2000 with the *Quantity Surveying Profession Act* (Act no. 49 of 2000, Government Gazette, 2000), the *status quo* was upheld and the existing CPD system continued to be approved by the newly elected Council members of the Council for the Quantity Surveying Profession (SACQSP).

In South Africa, the CPD system is administered by the ASAQS in terms of the responsibility delegated to them by the SACQSP (ASAQS, 1999). The ASAQS, in turn, has an in-house Edutech Centre that administers the whole process of accepting submissions, verifying points, keeping the points database updated, etc. In short, the system works as follows (Ibid):

- CPD runs in 5-year cycles, during which period every quantity surveyor registered with the SACQSP is required to accumulate 200 points with a minimum of 25 points per year.
- The points system is divided into 3 categories of educational and developmental activities, category 1 (1 hour = 2 points): appropriate activities arranged by 'outside' organisations, such as conferences, congresses, workshops, lectures, etc.; category 2 (2 hours = 1 point): small-group activities such as in-house skills training, organised small-group discussions, professional administration (committees, boards, etc.) and category 3 (2 hours = 1 point): individual activities such as self-study (i.e. trade journals), under/post graduate teaching, examinations, etc.
- Registered members must submit details of their CPD points annually (the submission period runs from 1 January to 31 December of each year).
- The Edutech Centre scrutinises all submissions and captures the points earned by every member on its database. A copy of the record is sent back to the member for his/her records.
- The ASAQS is responsible (through its Chapters, which is situated in each province of the country) for the validation and monitoring of courses, seminars, lectures and conferences offered for gaining CPD points. Any institution or organisation such as universities/universities of technology, professional councils, bodies or groups offering education and development programmes or courses, manufacturing organisations, etc may apply to the ASAQS to market their programmes and have the appropriate CPD points validated.

#### **4. CPD in other South African professions and abroad**

The Engineering Council of South Africa (ECSA) has introduced CPD from 2006 with the South African Council for the Architectural Profession (SACAP) following suit from January 2007. Because there is little difference between the working of ECSA's and the SACAP's policies, only the ECSA policy will be discussed briefly (ECSA, 2005):

- ECSA's CPD runs in a five-year cycle during which period every registered person is required to accumulate 25 credits in order to retain registration. In any one year, the registered person is required to accumulate a minimum of three credits. Additional credits earned in any one year may be carried over to subsequent years of the five-year cycle.
- The credit system is divided into three categories namely 10 hours of category 1 activities (developmental activities) equal 1 credit; 50 hours of category 2 activities (work-based activities) equal 1 credit and 100 hours of category 3 activities (individual activities) equal 1 credit.
- ECSA conducts random audits of up to 10% of the CPD records of all registered persons. If selected, persons are required to send, within four weeks, verification of their CPD activities for that period.

In the South African medical field, 50 points must be acquired annually and points can be gained for both educational and developmental activities (one hour earns one point). There are three categories, category 1: organisational activities (conferences, workshops, etc.); category 2: small group activities and category 3: individual activities such as self-study, lecturing, higher studies, etc. In addition to complying with these requirements, a maximum of 80% of the points may be accumulated in any one of the above categories. A minimum of two points in professional ethics is required from all practitioners per year.

In the United Kingdom, the Royal Institution of Chartered Surveyors (RICS, 2007: online) seeks to develop ownership of CPD by the individual through:

- Emphasis on learning from a wide range of activities; and
- Integration of learning and work – the concept of work as a learning experience.

The RICS has three categories of CPD, namely professional work-based activities that includes business management skills, coaching/

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mentoring, personnel management skills and planning and running an in-house training event; self-directed and informal learning that includes faculty and forum work and course accreditation exercises; and personal activities outside work such as courses, seminars and conferences.

The RICS requires that all qualified members adhere to CPD requirements, regardless of where in the world they are practicing. The obligation is for members to achieve a minimum of 60 hours of learning every three years, with at least 10 hours completed each year (RICS, 2007).

The Hong Kong Institute of Surveyors (2003) also requires from its corporate members to complete a minimum of 60 hours of CPD activities over a three-year period. It does not have specific categories, but at least 20 of the 60 hours must be in the form of what is termed "formal events" such as courses, seminars, conferences, workshops, etc.

The New Zealand Institute of Quantity Surveyors (NZIQS) introduced a voluntary programme of CPD in 1992 and in 2003 the number of CPD equivalent hours was increased to a minimum of 45 in each three-year period. CPD hours may be claimed for a variety of activities such as attendance at seminars, professional reading, professional body participation, teaching, additional qualifications, research, etc (NZIQS, 2004: online).

From the above it is clear that CPD is not unique to either the quantity surveying profession or South Africa and that the basic concept is fairly similar for different professions and professional bodies.

### **5. The current situation regarding CPD in South Africa**

31 December 2005 was the end of the first 5-year cycle of CPD for the quantity surveying profession in South Africa. It must be noted that the actual time was six and a half years, due to complaints by various members during the start-up period, resulting in the first period of the cycle stretching over two years. The original submission period from 1 July to 30 June of every year was changed in 2003 to run from 1 January to 31 December of every year. This resulted in one 18-month submission period (July 2002 to December 2003). At the end of this first 5-year cycle, the Edutech Centre of the ASAQS received only 135 fully compliant submissions from registered quantity surveyors (ASAQS, 2006). As this was unacceptable to the SACQSP, the deadline for submissions by registered members was extended to 31 December 2006 to bring their CPD programmes up to date (for a 6-year period). This was conveyed via a special, registered letter

to all registered members dated 27 October 2006, followed up by a Council Newsletter during December 2006.

This letter sparked renewed interest among members with a flood of submissions from December 2006 to February 2007. At the end of February 2007, the submissions of fully compliant persons have increased to approximately 550 (Edutech Centre, 2007). With some 1692 persons registered with the SACQSP at the end of 2006 (SACQSP, 2006a), this meant that approximately 33% of the members were fully compliant with their CPD activities by that time. It is interesting to note that the CPD database contained the names of 720 people at the same time, which means that a number of registered persons have submitted one or more CPD submissions during the submission period, but were not fully compliant.

## **6. Opinion survey among quantity surveyors**

In 2006 Gildenhuys (2006) conducted a survey among quantity surveyors in South Africa as part of his post-graduate studies. A questionnaire was drawn up and distributed on a random basis to registered quantity surveyors throughout the country. A total of 56 completed questionnaires out of 70 were returned, a response rate of 80%.

Although the results from the completed questionnaires cannot be seen as a representative indication of the situation regarding CPD in South Africa because of the relatively small sample, some meaningful conclusions can be made from the results. The outcomes of some of the questions are discussed below:

Question: Do you know what the requirements for compliance according to the Council are?

86% of the sample group said that they were aware of the requirements for compliance and therefore it can be assumed that the SACQSP and the ASAQS are successful in informing registered members of what is required of them. On the other hand, all of the respondents indicated in a previous question that they know what CPD is; therefore the question can be asked whether the remaining 14% who are unaware of the requirements are merely not interested?

Question: Have you submitted any CPD points to the ASAQS?

The result of this question was that 64% of the sample group answered "yes". This is in contrast to the reality. As pointed out previously, at the end of 2006 only 720 (43%) of the 1692 registered persons have submitted something.

Question: Is your CPD up to date?

This question went further than the previous and tried to establish how many of the respondents were fully compliant. 43% answered "yes" to this question, again differing from the actual figures as indicated by the Edutech Centre (33% fully compliant by the end of 2006). The only conclusion that can be made from this is that many of the members have enough points to comply and, although they have not submitted it, they consider themselves to be compliant.

Question: If not up to date, what would you say is the reason?

In this question, respondents were given three options to choose from, as well as a combination of the three options. The results were as follows:

1. No time – 40%
2. Not enough points – 20%
3. Not interested / feel it is unnecessary – 11%
4. Combination of 1 and 2 – 6%
5. Combination of 1 and 3 – 11%
6. Combination of 2 and 3 – 3%
7. Combination of 1, 2 and 3 – 3%
8. No response – 6%

From the above it is clear that the lack of time is the most important issue. This is indicative of the current construction boom in the country, but again it must be stressed that the CPD system has been in existence for the past six years and therefore lack of time cannot be put forward as an excuse indefinitely. The good news from the SAC-QSP's perspective is that only 11% of the respondents stated "Not interested/feel it is unnecessary" as the only reason why their CPD is not up to date. Added to this it can be mentioned that two of the respondents qualified their choice of "unnecessary" by indicating that they were close to retirement age and therefore felt that it was unnecessary for them to attend courses, *etc.* Another two respondents indicated that they were recently registered and therefore have not had enough time to accumulate sufficient points.

Question: Does your company or place of employment encourage the gaining of CPD points?

This was an important question to see whether companies / firms support their employees in their effort to obtain CPD points by allowing them to attend such events, paying for their attendance, *etc.* 70% of the respondents answered "yes" to this question, which is encouraging. The 30% who answered "no" seems high, but it can also be that these were one-person or small operations where the onus is on the individual to gain CPD points.

Question: What is your opinion on the administration of CPD points?

The aim of this question was to try and gauge the opinion of the registered persons regarding the feedback that they are getting from the ASAQs on their points standing. Whilst 24% of the respondents indicated this to be "good", 50% of the respondents did not have any opinion, indicating either that they were happy with the state of affairs, or that they have not submitted anything and therefore could not have received any feedback from the ASAQs. Of the remaining 26% of the respondents, it was the opinion of 24% that it can be improved, whilst 2% indicated that more contact with members was required. The only real constructive information that came from the responses was that the CPD system could be monitored on a stricter basis.

Question: Do you feel that CPD is necessary for quantity surveyors? Elaborate please.

This was probably the most important question of the survey, as previous questions have been regarding the CPD system, its requirements, consequences, administration, *etc.* This question however is vital in determining whether the CPD system is or will be supported by the persons registered with the SACQSP. The good news, from SACQSP's point of view, is that 77% of the respondents felt that CPD was necessary, 14% felt that it was not necessary and the remaining 9% had no opinion.

Question: Has the SACQSP / ASAQs made enough effort to market / make you aware of the CPD requirements? Do you have any ideas in this regard?

The views expressed by respondents were not too favourable for the SACQSP / ASAQs as 44% answered "no" to this question. Some of the ideas that were mentioned, with comments / explanations in brackets, are as follows (most of the comments were by individuals and no single point stood out above the rest):

- CPD should be earned for work done and a logbook should be kept.

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- Improving on the ASAQS e-mail database so that individual e-mails can be sent out regarding CPD events (this is already done by some of the bigger ASAQS Chapters, i.e. Gauteng and the Western Cape).
- More opportunities available on the internet [at the time of the questionnaire the GoLearning (2006) website of the ASAQS was in operation for almost a year].
- Monthly Chapter lectures and a greater advertising of the Association of Arbitrators' lectures (monthly lectures will be difficult to organise and sustain as this is done on a voluntary basis by members mostly in private practice).
- Make the ASAQS website more interactive.
- Requiring annual compliance for re-registration as a registered professional with CPD compliance being a requirement (see later recommendations).
- Putting arrangements in place with institutions like CETA, CIOB, CIDB, *etc.* and other relevant professions like architects to try and organise events more often (this already happens in some Chapters, but subjects must be of mutual interest).

Question: Are you aware of the GoLearning website where points can be earned over the Internet?

The results showed that more than half (54%) of the respondents indicated that they are aware of the mentioned website to earn points. The reason why the remaining 46% are unaware of the website may be that they have not been informed, are not interested in CPD or do not have Internet access. Members should be urged to use this facility to earn CPD points.

## **7. Recommendations to change the current CPD policy**

After the poor returns of CPD submissions in 2005 (the end of the first 5-year cycle), the SACQSP decided that it was time to have a re-look at the whole CPD policy and system and a CPD committee under chairmanship of Prof. J.J.P. Verster was appointed. This committee investigated the current system and also looked at systems used by other bodies (both in the built environment and elsewhere). The committee reported back to the executive committee of the SACQSP late in 2006 in the form of a draft updated CPD policy document (SACQSP: 2006b). The main differences between the existing and the proposed policies are as follows:

- In future CPD should be linked to annual renewal of registration of registered persons. Currently it is not expected from registered quantity surveyors to renew their registration on a regular basis. Section 22(1) of the *Quantity Surveying Profession Act* however states the following: "A registered person must, at least three months prior to the prescribed expiry date of his or her registration, apply in the prescribed manner to the council for the renewal of his or her registration." Furthermore, according to Section 22(2) of the Act, the council may determine conditions for renewal of registration.
- There can therefore be little doubt that the Act requires the council to set periods of registration (the South African Engineering Council requires its members to re-register every 5 years) and that it is within its rights to set, as a requirement of registration that members have to comply with its CPD requirements.
- It must be mentioned that the concept of re-registration is not new. The 1999 CPD guideline booklet states (in clause 3) that: "The council has delegated its authority...for monitoring, management, delivery and maintenance of standards and outcomes of professional development and training in quantity surveying leading to registration, renewal of registration with council" (author's underlining) (ASAQS, 1999). Furthermore point 7 of the minutes of a Council meeting held on 3 December 1997 states the following: "It was noted that the ASAQS Executive Committee and the ASQAS Board had considered the proposal by the QS Edutech Centre and had resolved that CPD, including training courses, would be instituted as a prerequisite to continued registration with effect from 1 January 1999. It was agreed that this proposal be accepted in principle" (The South African Council for Quantity Surveyors, 1997). From the before mentioned it is clear that the intention of Council was that registered persons should re-register at some intervals of their careers, and that CPD would be a prerequisite for such renewal, but for reasons that are not clear, this was never put into practice.
- *In lieu of points*, registered quantity surveyors will be required to accumulate 25 hours of CPD activities per year. The reason for this is that the current system can be confusing with some members being uncertain whether to claim two points per hour or one point per every two hours. Time-wise it will not make a big difference. Currently members need an average

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of 40 points per year. According to the CPD guide (ASAQS, 1999), a minimum of 80 points should be accumulated in category 1 over a 5-year cycle (average 16 points per year). Say someone gets 20 points in a year in category 1 (10 hours of CPD), then he/she needs another 20 points for the year, which will take him/her another 40 hours in category 2 and/or 3, giving a total of 50 hours of CPD for the year – double the suggested requirement.

- It is proposed that there should be two categories in which to gain CPD points, *in lieu* of the current 3. The proposed categories are as follows: category 1- appropriate activities arranged by 'external' organisations, such as conferences, congresses, lectures, seminars, web-based learning, post-graduate studies, *etc.* Category 2 will be informal, internal activities such as in-house training sessions, small-group discussions, self-study, undergraduate/post-graduate teaching, mentoring, *etc.* (SACQSP, 2006b). The reasoning behind the reduction in the number of categories was again an effort to simplify the process.
- Registered persons may either submit proof of their CPD activities when applying annually for re-registration, or they can submit an affidavit in which they indicate their CPD compliance. In the latter case, persons must retain documentary evidence of all CPD activities during the previous year.
- Random audits will be conducted annually of records. Although it is not specifically stated in the CPD policy how many persons will be audited, the suggestion is that it will be approximately 20% of registered members. This will mean that over a 5-year cycle, the chances are good that every registered person will be audited at least once.
- Non-compliant members will be requested to submit a written explanation giving reasons for their non-compliance and also what they intend to do to rectify the situation. The member's response will be considered by the registration committee of the SACQSP and the committee can either grant an extension of time, determine remedial measures for compliance (such as a structured programme to be followed in order to catch up) or, if all else fails, refer the matter to the executive committee of Council for a final decision. This committee will then decide whether or not such a person's registration should be terminated.

## 8. Conclusion

From the above, the following conclusions can be made:

- The principles regarding CPD are embedded in the professional act, rules and code of conduct of the SACQSP and is therefore here to stay, whether some registered persons agree with the concept or not.
- The only way to make CPD compulsory is to link it to the registration of members, i.e. to make it a requirement of re-registration. Although it was previously implied to be the case, previous Councils never enforced it.
- After going through teething problems during the first 5-year cycle (which was partly the reason why the cycle was extended to run over a six and a half year period), the proposed amendments to the current CPD policy should make it a more user-friendly system.
- Although de-registration should be the last option by the SACQSP against non-complying members, it now has got the authority to do so. Previously it would have been difficult to act in such a manner against a non-compliant member, because CPD was never officially incorporated in either the rules or code of conduct as a prerequisite for registration. Members were also not required to re-register periodically.
- Time will tell whether the SACQSP will have the capacity to annually deal with the re-registration of all registered persons (currently approximate 1692) as well as auditing the CPD returns of a portion of the members (approximately 338 returns if 20% of the total current membership is audited). This will however be an administrative problem and should be overcome with the appointment of more staff if it poses to be a problem.

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