

**Specification of Competency Standards**  
**for the Property Management Industry**  
**Unit of Competency**

Functional Area - Property Management Services for Owners, Tenants & the Community

Title	Plan as a whole on the tendering, pre-management, takeover and handover related matters
Code	110503L5
Range	Tendering and pre-management works, applicable to coordination of bidding for property management service, building takeover/handover, setting up management office and management teams, and following up on reinstatement works
Level	5
Credit	6
Competency	<p>Performance Requirements</p> <p>1. Proficient in bidding and procedures of pre-management</p> <ul style="list-style-type: none"> <li>• Proficient in the standards and techniques of bidding tender for property management services</li> <li>• Proficient in plans, procedures and standards for pre-management, takeover and handover of properties</li> </ul> <p>2. Devise property management service tender</p> <ul style="list-style-type: none"> <li>• Be able to participate in bidding tender for property management services, including attendance at tender briefings, plan the management services, and devise tenders that tailored to market and client needs</li> <li>• Be able to represent the company in the bidding process, including attending interviews or consultation sessions for property management services tenders, introducing services to owners corporation/owners or clients and responding to questions</li> <li>• Be able to set future management budgets to determine the level of management fees</li> </ul> <p>3. Plan as a whole the pre-management works</p> <ul style="list-style-type: none"> <li>• Be able to coordinate the pre-management of the property, including manpower arrangement, setting of management fee, procurement of facilities and equipment, production of various information booklets and procedural guidelines, and setting of handover procedures</li> <li>• Be able to establish communication and work procedures with developer, project consultant/registered authorized person and general building contractor, be proficient in testing and commissioning procedures and standards of the developer</li> <li>• Be able to set up a takeover/handover team to be responsible for takeover/handover of building/flats, and determine the handover procedures and handover items</li> <li>• Be able to produce handover brochure and documents related to takeover/handover</li> <li>• Be able to set up the management office, control center, customer service office, or set up each work team according to the service content and scale, arrange the overall management manpower and provide training</li> </ul> <p>4. Plan as a whole the takeover and handover services</p> <ul style="list-style-type: none"> <li>• Be able to determine the emergency vehicular access, driving routes, entrances and exits, location of the loading and unloading bays, the adequacy of equipment and facilities in multi-purposes room, the market positioning and trade-mix of commercial buildings, the location of signs/notice boards, washroom facilities, etc. before taking over the property, purchase the necessary equipment and facilities, make detailed plans and guidelines for future operation and use, and supervise the staff and contractors to provide services effectively</li> </ul>

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	<ul style="list-style-type: none"> <li>• Coordinate the testing and commissioning of common parts, common facilities and systems, etc., and follow up on the progress and quality of the rectification</li> <li>• Be able to establish policies and procedures of after-sales service, and determine the quality of handover service</li> <li>• Be able to establish handover procedures and negotiate repair arrangements with developer</li> </ul> <p>5. Plan as a whole the financial arrangement</p> <ul style="list-style-type: none"> <li>• Be able to coordinate the financial department to set up separate bank- account, and deal with the income and expenditure of the pre-management account and the owners'account respectively</li> <li>• Be able to analyse financial information and data, monitor expenses during the takeover period, and clearly distinguish between the expenditures in the building accounts or developer accounts, and handle the arrangement of management fees for unsold units</li> </ul>
Assessment Criteria	<p>The integral outcome requirements of this UoC are:</p> <ul style="list-style-type: none"> <li>• Be proficient in the standards and techniques of bidding tender for property management services, be proficient in the plans, procedures and standards for pre-management, takeover and handover of properties;</li> <li>• Be able to effectively devise property management tenders and participate in the bidding process on behalf of the company;</li> <li>• Be able to organize the pre-management systematically, coordinate and complete the services, operations and processes of the pre-management;</li> <li>• Be able to analyse the progress of each process and assess the condition of the property, and make detailed plans and guidelines for future operation and use, so as to commence management services on time and supervise the effective provision of services by subordinates and contractors;</li> <li>• Be able to coordinate the testing and commissioning of common parts, common facilities and systems effectively, and follow up on the progress and quality of rectification; and</li> <li>• Be able to fully manage the items of management expenditure and the budget, monitor the expenditure, accounts arrangement and classification, clearly and accurately handle the accounts of the pre-management period and the occupation period.</li> </ul>
Remark	