

The Authority's List of Assets and Property Management Services

Registration Form (for New Inclusion & Annual Update)

The inclusion criteria, retention criteria and exclusion criteria are attached in **Appendix I** for your reference.

1. Particulars of Applicant

Company Name (in English): _____

Company Name (in Chinese): _____

Date Established: _____

Registered Address: _____

Telephone Number: _____

Fax Number: _____

E-mail Address: _____

Web Site (if any): _____

Any parent, subsidiary and associated firms: Yes No

If yes, please attach organisation chart(s) stating also the relationships among the business entities.

2. Business Registration

Business Registration Cert. No.: _____ Issue Date: _____

Cert. of Incorporation No.: _____ Issue Date: _____

Note: Please provide a copy of the certificate for business registration and incorporation.

3. Registered Property Management Company ("PMC") under the Property Management Services Ordinance

Registered PMC

Ongoing application process (Please provide a receipt of application received from Property Management Services Authority ("PMSA").)

For registered PMC, please complete the following and provide a copy of the proof of licence.

1) Licence No.: _____ 2) Expiry Date: _____

3) No. of Licensed Property Management Practitioner Employed: _____

4. ISO Standard

Is the Applicant certified to any ISO standard?

ISO9001 ISO14001 ISO45001 Others: _____

No (If no, please proceed to Part 5.)

If yes, please complete the following and provide a copy of the Certificate(s).

1) Certificate No.: _____ 2) Issue Date: _____

Scope of Certificate (include any areas/aspects which your quality system specifically excludes):

5. Inclusion in Government List(s)

Is the Applicant currently included in the List of Property Services Agents maintained by the Hong Kong Housing Authority? Yes No (If no, please proceed to Part 6.)

If yes, please complete the following and provide a copy of the letter from the relevant government authority confirming such inclusion.

1) Please select the applicable category/ group: Group PS1 Group PS2

2) PSA List Registration Date: _____

3) Total No. of Active PSA Contracts: _____

4) Total No. of Units under PSA Management:

Residential: _____ Commercial: _____ Others: _____

5) If there are any suspensions, please state the details:

6. Staff Resources in Hong Kong (details as per **Appendix I)**

Please provide the details of the resident partners / directors and, adequate professional, technical and support staff by completing the table in **Appendix II** and, submitting the **organisational chart of the head office** and the **curriculum vitae of the relevant staff**.

7. Job Reference

Please provide details of the relevant property management services in the past five (5) years in Hong Kong by completing the table in **Appendix III** and submitting reference letters from the clients.

8. Registered Estate Agent (Company) under the Estate Agents Ordinance

Is the Applicant currently holding an Estate Agent’s Licence (Company) that is issued by the Estate Agents Authority? Yes No (If no, please proceed to Part 9.)

If yes, please complete the following and provide a copy of the Statement of Particulars of Business.

- 1) Licence number: _____ 2) Expiry Date: _____
- 3) No. of Licensed Salespersons Employed: _____

9. Unresolved Litigation or Arbitration

Is the Applicant currently involved in any unresolved litigation or arbitration?

- Yes No

If yes, please provide details below or on a separate sheet.

10. Applicant’s Permission

In order to allow the Urban Renewal Authority (“the Authority”) to obtain necessary information for the purposes of listing, including the Applicant’s listing status and job performance in the government departments and the statutory bodies, the Applicant is required to grant permission to the Authority by completing and submitting the form in **Appendix IV**.

The Applicant hereby declares that the information given in this form, the appendices and attachments is true, correct and complete.

Authorised Signature (with Company Chop)

Date

Full Name & Title of Signatory: _____

The Authority's List of Assets and Property Management Services ("APMS")

Inclusion, Retention and Exclusion Criteria

Inclusion criteria

A. Minimum Requirement-

Each Applicant will have to fulfil the following minimum criteria for inclusion that are set out by the Authority.

<u>Company Entity</u>	
Time established	Established property management services in Hong Kong for at least 5 calendar years by 1 January 2022. Managerial staff must have post qualification property management experiences in Hong Kong for the past 5 years.
PMC licence	Holders of Property Management Company ("PMC") licence as issued by the Property Management Services Authority ("PMSA"). (Applicants or their delegate (s) / agent (s) who are undergoing their application process should provide a receipt of application from PMSA for URA's deliberations. Transitional period of the licensing regime will end on 31 July 2023 as set by PMSA.)
<u>Staff</u>	
Membership/ licence	At least 2 practicing members of HKIH/ HKIS/ CIH/ RICS/ HKIFM or equivalent and must be a licensed Property Management Practitioner ("PMP Tier 1"); and At least 1 practicing member of HKIA/ HKIE/ Registered Architect/ Registered Professional Engineer or equivalent.
Year of experience	The above staff should have not less than 5 years' full time post-qualification working experience in property management/ maintenance in Hong Kong
<u>Others</u>	
Suspension or restriction from tendering	<u>Not suspended</u> from tendering (including voluntary suspension and restriction) under any of the approved lists of the HKSAR Government, the HKHA and the HKHS.
Performance with URA's projects	<u>In the past 5 years before the closing date of the new inclusion, performances shall not be rated as marginal for 2 times or more consecutively or, unsatisfactory at any time.</u>

Inclusion Criteria (Cont.) - Requirements for Each Category

B. Requirement of Service Categories-

The Applicant meeting the minimum criteria will be eligible for the provision of asset and property management services for different types of properties based on their experience and job reference **in the past five years by 1 January 2022**. The minimum entry requirements for each category are as follows:

	Residential Property	Commercial/ Retail Property	Open Space	Historic building
Number of job references	At least 3 on-going/ completed jobs for the respective category			At least 1 on-going/ completed job
Job nature	Property management services for roles of DMC manager or property management agent of DMC manager, with experience in handover and defect record management for private residential buildings in Hong Kong	Property management and tenancy management services (including handover and takeback services, event management and/or rental review services) for commercial properties	Property management services for public or private open space	Property management services for Declared Monuments or Grade 1, 2 or 3 Historic Buildings
Project size	Not less than 100 residential units for each project	Not less than 20,000 sq. ft. (GFA) for each project	Not less than 3,000 sq. ft. (GFA) for each project	Nil
Estate Agent's Licence (Company)	Optional	Compulsory	Optional	Optional

C. Retention Criteria

The Applicant must fulfil all the Inclusion Criteria in the annual update.

D. Exclusion Criteria

Circumstances which may lead to exclusion of the Applicant from the List include, but are not limited to:

1. Failure to submit the requested information / particulars at the update;
2. Falsification of relevant submissions, inter alia, is identified during any stage of tendering and service period;
3. Failure to meet the Retention Criteria;
4. In liquidation, winding-up of business, bankruptcy or other financial problems;
5. The Applicant's performance in the provision of property management services for URA's projects shall not be marginal for 2 times or more consecutively, or unsatisfactory at any time. The aforementioned unsatisfactory performance without satisfactory improvement in the performance after action(s) taken such as issue of warning letter(s) to and / or meetings held with the Applicant by subject officer; and
6. Failure to effect payment to workers (of its employees or sub-contractors) as ordered by the Labour Tribunal or any other appropriate authority which demonstrates the serious negligence or incompetence of the defaulting Applicant.

The Approving Authority may consider suspending the Applicant from tendering or excluding the Applicant from any property categories instead of removing it from the List.

The Applicant who has been removed from the List for above item (1) to (3) may be eligible to apply for re-inclusion in the List at any time after removal. However, the Applicant who has been removed from the List for any other reasons is not eligible for re-inclusion in the List for five (5) years from the date of removal.

**The Authority’s List of Assets and Property Management Services
Registration Form (for New Inclusion & Annual Update) – Staff Resources in Hong Kong**

Name of Applicant: _____

The Applicant shall submit an **organisational chart** to indicate the functions of each department, details of different levels of staff, line of responsibilities, etc. **Curriculum vitae, photocopies of all professional/ academic certificates and full employment record** showing the date of employment, name of companies, position held and job description of the following personnel shall also be submitted (see **Appendix I** for the relevant criteria).

Resident Partners / Directors and Professional, Technical and Support Staff							
Name	Job Title	Academic Qualification	Professional Qualification	Year obtained for professional qualification	PMP Licence (if any)		
					Tier (1 or 2)	Number	
1							
2							
3							
4							
5							

Note: Please make copies of this form if required.

**The Authority’s List of Assets and Property Management Services
Registration Form (for New Inclusion & Annual Update) – Job Reference**

Name of Applicant: _____

Please submit **reference letters from the clients** for each submitted reference (see **Appendix I** for the relevant criteria).

1) Project category: Residential Commercial/ Retail Open Space Historical

Project name & location: _____

Job nature: _____

Project size: _____ Contract Period: _____

Client’s Name: _____

2) Project category: Residential Commercial/ Retail Open Space Historical

Project name & location: _____

Job nature: _____

Project size: _____ Contract Period: _____

Client’s Name: _____

3) Project category: Residential Commercial/ Retail Open Space Historical

Project name & location: _____

Job nature: _____

Project size: _____ Contract Period: _____

Client’s Name: _____

4) Project category: Residential Commercial/ Retail Open Space Historical

Project name & location: _____

Job nature: _____

Project size: _____ Contract Period: _____

Client’s Name: _____

5) Project category: Residential Commercial/ Retail Open Space Historical

Project name & location: _____

Job nature: _____

Project size: _____ Contract Period: _____

Client’s Name: _____

Note: Please make copies of this form if required.

The Authority's List of Assets and Property Management Services

Registration Form (for New Inclusion & Annual Update) - Form of Applicant's Permission

To: Urban Renewal Authority

We, _____ (Name of Applicant), hereby authorise the Urban Renewal Authority ("the Authority") to obtain information from the government departments and the statutory bodies (collectively called "the Public Bodies") such as the Hong Kong Housing Authority, the Hong Kong Housing Society, Property Management Services Authority etc. in respect of the following:

- a) Our listing status in the Public Bodies;
- b) Our job performance in the contracts with the Public Bodies;
- c) Records of regulating actions by the Public Bodies against us, including suspension from tendering, removal from lists, etc.; and
- d) Records of offences committed by us.

Signed by:

Authorised Signature (with Company Chop)

Date

Full Name & Title of Signatory: _____

The Authority's List of Assets and Property Management Services**Submission Checklist for Applicants**

Item No.	Items	Remarks
1.	Completed Registration Form	-
2.	Completed Appendix II – Staff Resources in Hong Kong	-
3.	Completed Appendix III – Job Reference	-
4.	Completed Appendix IV – Form of Applicant's Permission	-
5.	Organisation chart(s) showing the relationship among parent, subsidiary and associated firms	If any
6.	Organisation chart(s) of the head office	-
7.	Curriculum vitae, photocopies of all professional/ academic certificates and full employment record of relevant staff	-
8.	Copy of certificate(s) for business registration and incorporation	-
9.	Proof of PMC licence (or receipt of application from PMSA for companies that are undergoing their application process)	-
10.	Copy of certificate(s) for ISO Standard	If any
11.	Copy of letter from HKHA confirming inclusion on the HKHA's List of PSA	For PSA (Group PS1 or PS2) only
12.	Reference letters from clients for submitted job reference	-
13.	Copy of the Statement of Particulars of Business from EAA	If any