

# Project Report Guidelines

## Partial Fulfillment of the Articling Process Towards Obtaining A Commission as an Alberta Land Surveyor.

The following sets out some guidelines to be used when undertaking a project report as part of the requirements of articling. These guidelines are not intended to be used as a 'cook book'. **This is your project.**

The Registration Committee has determined that the following categories or heading must be identified and incorporated into the project report. The comments provided by the pupil should be brief and to the point.

### Project Categories:

Projects shall be in one of each of the following project categories:

A. A Parcel Survey/Subdivision (must be a plan of survey or a bare land condominium);

B. A stand-alone Right-of-Way or Road Survey;

C. Pupil selected, (the pupil may not repeat a project from group A or B) This option will require pre-approval from the Committee unless written on a real property report, a condominium survey, or a wellsite survey.

It will be up to the pupil and the principal to determine the **ORDER IN** which these projects are completed.

However, pupils may submit only one project in any one category.

### Initial Contact:

An account of at least the following:

- Initial client contact method, i.e. telephone, fax, letter.
- How was compensation arrived at?
- Was there a formal contract?
- How was the scope of work arrived at?
- Provide the components of your cost estimate (do not give hourly rates). Examples of components are crew time, ALS time, drafting, third party, disbursements and so on. This is not an exhaustive list.

### Approvals Required:

This will of course depend on the project but in nearly all cases there is some type of approval, either explicit or implied, required before proceeding with a survey. The report should have a paragraph outlining the approvals required, who obtained them and how this was confirmed.

### Job Setup

This category covers the research done prior to any actual preliminary plan preparation or field operations and would include all searches for information, i.e. Land Titles, SPIN etc. The report should outline which searches were done and why others were not done. Not all projects would require a search of all the possible sources of information.

### Field Work

- The pupil should be prepared to personally complete the field work for each of the three projects.
- The report should describe instructions to the field crew.
- A brief discussion of any re-establishments that were done, both the re-posted and the "on paper" types, with an explanation why the lost corners were not re-posted.
- Any boundary uncertainties encountered should be discussed in some detail.
- What unforeseen difficulties were encountered?

### **Plan Preparation and the Returns.**

Briefly outline the process followed to get from the field notes to a completed, checked and registered (where applicable) plan. The following steps should be included:

- Plan checking
- Approvals if any
- Endorsements by encumbrance holders.
- Partial discharges.
- Accompanying documents.
- Conclusions / Project Summary and Analysis

### **Conclusions/Project Summary and Analysis**

This section should outline the following:

- Any problems encountered during the completion of the project.
- What could have been done to avoid or minimize problems?
- Did you meet or exceed your projected budget? Why or why not? How was this handled with the client (no dollar values required).
- What did you learn from the project?

The completed written portion of the report should not exceed four pages (not including attachments). The report should document the process. Attachments should include the following

- job request form
- job setup sheet
- document searches
- title/disposition searches and related documents
- brief summary of any correspondence
- field notes
- check lists
- copies of all forms and documents required for submission to approving authorities
- listing of registered plans and documents searched and a copy of registered plans used.
- other supporting information
- final product
- signed principal certification form; if the land surveyor supervising the project is not your principal, please have the supervising ALS sign the principal certification form as well.

**The report shall be presented in a professional style suitable in format for presentation to a client and should address all significant aspects of the job along with cost justifications.**

**Please remember that the foregoing is a guideline not a checklist.**

## **EXPLANATORY NOTES**

### **Time Line:**

*The schedule for submission of two copies of the required three project reports is:*

*For articulated students, a minimum of one project report must be submitted within two years of the student signing articles with a minimum of one project report per year thereafter.”*

### **Affiliate Members:**

*Affiliate members are expected to submit project reports at the level of a land surveyor.*

### **Pupil Involvement:**

It is expected that the extent of the pupil's involvement with the project will increase substantially with each project. For instance the 'hands on' involvement with the first project will likely be confined to the field work and the pre drafting computations, while playing a lesser role in the client liaison, job setup and final submission phases. Pupil involvement with the last project shall be hand on in every aspect of the project; drafting the project excepted. The pupil should be prepared to personally complete the field work for each of the three project reports at the party chief or supervisory level.

### **Principal Involvement:**

The project is to be viewed as such, a project. The pupil shall complete each phase of the project under the supervision of the principal. The purpose of completing the project is to familiarize the pupil with each part of a survey project, from the initial inquiry by the client to the final product. One of the most fundamental reasons for doing a project is to provide an opportunity for the principal and the pupil to focus on each aspect of the project. It cannot be over emphasized that principal involvement in each project is paramount. The principal is expected to proofread the pupil's report.

The 'Principal Certification Form' contains the following 'table'. (For Affiliate Members, substitute pupil with Affiliate Member and Principal Signature with Affiliate Member Signature.) This form is on the ALSA website at [www.alsa.ab.ca](http://www.alsa.ab.ca).

PROJECT REPORT #A	Category	Reviewed by The pupil	Completed by The Pupil
Title:	The initial contact was		
	The approval process was		
Supervising ALS Signature:	The project setup and research was		
	The field survey was		
Principal Signature:	The plan preparation was		
	Final checking of the returns was		
Date:	Final plan processing was		

PROJECT REPORT #B	Category	Reviewed by The Pupil	Completed by The Pupil
Title:	The initial contact was		
	The approval process was		
Supervising ALS Signature:	The project setup and research was		
	The field survey was		
Principal Signature:	The plan preparation was		
	Final checking of the returns was		
Date:	Final plan processing was		

PROJECT REPORT #C	Category	Reviewed by The Pupil	Completed by The Pupil
Title:	The initial contact was		
	The approval process was		
Supervising ALS Signature:	The project setup and research was		
	The field survey was		
Principal Signature:	The plan preparation was		
	Final checking of the returns was		
Date:	Final plan processing was		

Please check one item in each category.

**Reviewed by:** indicates that the particular function was actually completed by someone else but was subsequently reviewed by the pupil in conjunction with the principal.

**Completed by:** indicates the pupil actually completed that particular function by his own hand. The principal and the pupil then reviewed the task.