

# ST0236 Senior Housing and Property Management Apprenticeship Assessment

## Model A

### Assessment methods

- Project with professional discussion
- Interview

## Model B

### Assessment methods

- Project with professional discussion
- Portfolio with professional discussion

## Project with professional discussion

Assessment organisations must design apprenticeship assessments to include at least one project.

The professional discussion will last up to a maximum of 60 minutes.

The project with professional discussion can be conducted and assessed by the training provider or Highfield.

### Rationale

- Mandatory assessment stated in the assessment plan.
- Projects require apprentices to integrate and apply a wide range of knowledge and skills to produce a substantial piece of work with genuine relevance to their role or sector.
- Projects are particularly effective in supporting synoptic assessment, as they require apprentices to plan, research and deliver outputs that draw upon multiple areas of learning in an integrated manner

- Professional discussions can be designed to explore synoptic understanding by asking apprentices to justify decisions and link together multiple strands of knowledge and skills from across the standard.
- Completing a project followed by a professional discussion enables apprentices to demonstrate how different strands of knowledge and skills that have been implemented into their role interconnect in response to structured questioning.

The following will be assessed in the project with professional discussion:

**AO1: Housing services delivery and customer engagement**

| Knowledge/Skill Statement                                                                                                                                                                              | Performance Category            | Pass/Distinction Grading Descriptor                                                                                                                                                                                                                                                   |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| K6: Organisational values, roles and responsibilities and how they contribute to business objectives, priorities, planning and customer engagement.                                                    | Applied Knowledge               | Pass: Demonstrates sound application of housing and property management knowledge to address well-defined but complex and non-routine problems and reach appropriate, generally effective outcomes.                                                                                   |
| <b>K9: Oral and written communication approaches and strategies in a range of contexts, including conflict resolution, and engaging with clients, customers, stakeholders and/or partner agencies.</b> | Communication and Collaboration | Pass: Communicates clearly and collaborates effectively with colleagues and stakeholders in housing and property management, contributing to a responsive service culture and customer-focused delivery.                                                                              |
| <b>S1: Deliver housing and property management services to meet the needs of customers, clients and stakeholders.</b>                                                                                  | Applied Skills                  | Pass: Identifies and applies suitable cognitive and practical skills to complete housing and property management work activities, adapting as necessary to meet requirements. Methods chosen are generally appropriate, with results that meet organisational or sector expectations. |

### AO3: Financial, resource and performance management

| Knowledge/Skill Statement                                                                                                                                                                    | Performance Category        | Pass/Distinction Grading Descriptor                                                                                                                                                                                                                                                            |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>S8: Manage budgets and report on financial performance to ensure value for money.</b>                                                                                                     | Responsibility and Autonomy | Pass: Applies relevant housing and property organisational and regulatory procedures with sound judgement, adapting appropriately to varied and occasionally complex situations.                                                                                                               |
| S9: Apply performance management principles and techniques.                                                                                                                                  | Applied Skills              | Pass: Identifies and applies suitable cognitive and practical skills to complete housing and property management work activities, adapting as necessary to meet requirements. Methods chosen are generally appropriate, with results that meet organisational or sector expectations.          |
| <b><i>K5: Principles and strategies for resource, budget and change management and reporting, including risk management, funding sources and methods for managing rents and arrears.</i></b> | <i>Applied Knowledge</i>    | <i>Distinction: Applies housing and property management knowledge with confidence and precision, consistently producing high-quality outputs in response to well-defined but complex and non-routine problems. Solutions are not only appropriate but often enhance outcomes or processes.</i> |

## AO5: Data, digital and information management

| Knowledge/Skill Statement                                                                                                                               | Performance Category                | Pass/Distinction Grading Descriptor                                                                                                                                                                             |
|---------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>K14: Effective data and information management methods, including strategies for collecting, sharing and analysing data and using digital tools.</b> | Information Use and Decision Making | Pass: Analyses and interprets relevant information to make informed decisions, showing a clear awareness of the housing and property management context and the broader scope of the role or occupational area. |
| <b>S7: Analyse data and share information using the appropriate methods and applications.</b>                                                           | Information Use and Decision Making | Pass: Analyses and interprets relevant information to make informed decisions, showing a clear awareness of the housing and property management context and the broader scope of the role or occupational area. |

## AO6: Strategic planning, project delivery and organisational improvement

| Knowledge/Skill Statement                                                                                                                    | Performance Category | Pass/Distinction Grading Descriptor                                                                                                                                                                                                                                                            |
|----------------------------------------------------------------------------------------------------------------------------------------------|----------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>K15: Project management principles and techniques.</b>                                                                                    | Applied Knowledge    | Pass: Demonstrates sound application of housing and property management knowledge to address well-defined but complex and non-routine problems and reach appropriate, generally effective outcomes.                                                                                            |
| K16: Principles of sustainability for housing and property management, including climate change and environmental protection.                | Applied Knowledge    | Pass: Demonstrates sound application of housing and property management knowledge to address well-defined but complex and non-routine problems and reach appropriate, generally effective outcomes.                                                                                            |
| S13: Apply sustainability principles when using resources for example, efficient use of resources, waste minimisation.                       | Applied Skills       | Pass: Identifies and applies suitable cognitive and practical skills to complete housing and property management work activities, adapting as necessary to meet requirements. Methods chosen are generally appropriate, with results that meet organisational or sector expectations.          |
| <b>K8: National housing policy and the strategic value of the historical, social and physical context of the estates and neighbourhoods.</b> | Applied Knowledge    | <i>Distinction: Applies housing and property management knowledge with confidence and precision, consistently producing high-quality outputs in response to well-defined but complex and non-routine problems. Solutions are not only appropriate but often enhance outcomes or processes.</i> |

|                                                                                                                                                       |                                            |                                                                                                                                                                                                                                                                            |
|-------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <i>S10: Apply project management techniques and tools to deliver service improvements.</i>                                                            | <i>Applied Skills</i>                      | <i>Distinction: Adapts and applies cognitive and practical skills with a high degree of flexibility and operational fluency in housing and property management, ensuring that methods are both effective and optimised for quality and efficiency of service outcomes.</i> |
| <b>S12: Apply operational and strategic thinking to make decisions, solve problems, prioritise and meet individual, team and business objectives.</b> | <i>Information Use and Decision Making</i> | <i>Distinction: Analyses, interprets and evaluates information from a range of sources, providing insightful justification for decisions, and demonstrating a strong awareness of broader implications within the housing and property management occupational area.</i>   |

*NOTE: Knowledge and skills statements in **bold** are mandatory and must be assessed in every version of the assessment that is made available. Knowledge and skills statements in italics will be graded against the relevant distinction grading descriptor.*

## **Model A - Interview**

The professional discussion will last up to a maximum of 30 minutes.

Highfield will conduct and assess the interview.

### **Rationale**

- Listed as optional assessment methods available for this standard. Others include presentation, professional discussion, portfolio, additional project, observation and written assessment.
- This method has been chosen as it allows assessors to explore apprentices' knowledge and skills statements through structured questioning.
- Interviews are adaptable, enabling assessors to tailor questions to individual experiences while ensuring coverage of assessment criteria.
- Interviews provide a holistic picture of apprentice competence and can address evidence gaps.

## **Model B - Portfolio with professional discussion**

The professional discussion will last up to a maximum of 30 minutes.

Highfield will conduct and assess the portfolio with professional discussion.

### **Rationale**

- Listed as optional assessment methods available for this standard. Others include presentation, interview, additional project, observation and written assessment.
- This method has been chosen as it allows assessors to tailor questioning to individual performance and supports deeper exploration of complex topics and clarifies areas where evidence within the portfolio may be incomplete or ambiguous.
- Portfolios encourage apprentices to link theory to practice and demonstrate skills in real-world contexts, rather than presenting them in isolation.
- Professional discussions can be designed to explore synoptic understanding by asking apprentices to justify decisions and link together multiple strands of knowledge and skills from across the standard.
- Completing a portfolio followed by a professional discussion enables apprentices to demonstrate how different strands of knowledge and skills interconnect in response to structured questioning.

The following will be assessed in both models of the assessment (Interview or Portfolio with professional discussion):

#### AO1: Housing services delivery and customer engagement

| Knowledge/Skill Statement                                                                                                                                                                                                                               | Performance Category                | Pass/Distinction Grading Descriptor                                                                                                                                                                                                                                                   |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>K7: The diverse range and requirements of customers, clients and stakeholders, including vulnerable individuals and groups and those with complex needs, safeguarding and the behavioural and ethical considerations needed to engage with them.</b> | Applied Knowledge                   | Pass: Demonstrates sound application of housing and property management knowledge to address well-defined but complex and non-routine problems and reach appropriate, generally effective outcomes.                                                                                   |
| K11: Principles and practices to deliver allocations, lettings, financial and social inclusion services, tenancy sustainment and social value.                                                                                                          | Applied Knowledge                   | Pass: Demonstrates sound application of housing and property management knowledge to address well-defined but complex and non-routine problems and reach appropriate, generally effective outcomes.                                                                                   |
| K17: Policies and procedures for recording and reporting complaints.                                                                                                                                                                                    | Regulatory and Procedural Awareness | Pass: Applies relevant housing and property organisational and regulatory procedures with sound judgement, adapting appropriately to varied and occasionally complex situations.                                                                                                      |
| S5: Ensure services meet the needs of vulnerable individuals and groups, including those with complex needs.                                                                                                                                            | Applied Skills                      | Pass: Identifies and applies suitable cognitive and practical skills to complete housing and property management work activities, adapting as necessary to meet requirements. Methods chosen are generally appropriate, with results that meet organisational or sector expectations. |

|                                                                                                                                                                              |                                     |                                                                                                                                                                                                                                                                               |
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| S11: Record and report complaints in line with policies and procedures.                                                                                                      | Regulatory and Procedural Awareness | Pass: Applies relevant housing and property organisational and regulatory procedures with sound judgement, adapting appropriately to varied and occasionally complex situations.                                                                                              |
| S14: Apply equity, diversity, and inclusion procedures.                                                                                                                      | Regulatory and Procedural Awareness | Pass: Applies relevant housing and property organisational and regulatory procedures with sound judgement, adapting appropriately to varied and occasionally complex situations.                                                                                              |
| <b>S2: Communicate and collaborate effectively with colleagues, clients, customers, stakeholders and/or partner agencies using communication and negotiation strategies.</b> | Communication and Collaboration     | <i>Distinction: Communicates and collaborates with confidence and insight, tailoring approach to meet diverse stakeholder needs in housing and property management, leading on customer service cultures and contributing to improved collaboration and service outcomes.</i> |

## AO2: Legal, regulatory and compliance management

| Knowledge/Skill Statement                                                                                                                                                                                                                                                                                          | Performance Category                | Pass/Distinction Grading Descriptor                                                                                                                                                                 |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>K1: Principles, practices and legislation and the role of regulatory bodies relating to current landlord and tenant law and housing consumer and regulator standards, including the Social Housing Regulation Act, Building Safety Act, the Decent Homes Standard, the Housing Ombudsman, and risk factors.</b> | Regulatory and Procedural Awareness | Pass: Applies relevant housing and property organisational and regulatory procedures with sound judgement, adapting appropriately to varied and occasionally complex situations.                    |
| <b>K2: Equity, diversity, and inclusion in the workplace, mental health and wellbeing regulation, The Equality Act and its requirements on organisations.</b>                                                                                                                                                      | Regulatory and Procedural Awareness | Pass: Applies relevant housing and property organisational and regulatory procedures with sound judgement, adapting appropriately to varied and occasionally complex situations.                    |
| K3: Legislation and regulatory requirements applying to governance, contracts, procurement, reporting, insurance, data protection and conflicts of interest.                                                                                                                                                       | Regulatory and Procedural Awareness | Pass: Applies relevant housing and property organisational and regulatory procedures with sound judgement, adapting appropriately to varied and occasionally complex situations.                    |
| K4: Legal processes to manage contractual arrangements for different tenures.                                                                                                                                                                                                                                      | Regulatory and Procedural Awareness | Pass: Applies relevant housing and property organisational and regulatory procedures with sound judgement, adapting appropriately to varied and occasionally complex situations.                    |
| K12: Processes and strategies for managing anti-social behaviour.                                                                                                                                                                                                                                                  | Applied Knowledge                   | Pass: Demonstrates sound application of housing and property management knowledge to address well-defined but complex and non-routine problems and reach appropriate, generally effective outcomes. |

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|--------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>K13: Processes and approaches to ensuring repairs, maintenance, Health and Safety and housing support service in line with current legislation.</b> | Regulatory and Procedural Awareness        | Pass: Applies relevant housing and property organisational and regulatory procedures with sound judgement, adapting appropriately to varied and occasionally complex situations.                                                                                   |
| <b>S6: Undertake risk analysis and ensure compliance in line with regulation and procedure.</b>                                                        | Regulatory and Procedural Awareness        | Pass: Applies relevant housing and property organisational and regulatory procedures with sound judgement, adapting appropriately to varied and occasionally complex situations.                                                                                   |
| <i>S4: Assist the management of legal processes, for example first-tier tribunals, upper tribunals/ASPs and safeguarding.</i>                          | <i>Regulatory and Procedural Awareness</i> | <i>Distinction: Interprets and applies regulatory and procedural requirements with insight and appropriate flexibility in housing and property contexts, identifying implications and making informed decisions in varied and occasionally complex situations.</i> |

#### AO4: People leadership and collaborative working

| Knowledge/Skill Statement                                                                                                                                                               | Performance Category        | Pass/Distinction Grading Descriptor                                                                                                                                                                                                                                                    |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>K10: Principles and leadership strategies for people management, collaborative working, influencing and negotiating, including performance management principles and techniques.</b> | Applied Knowledge           | Pass: Demonstrates sound application of housing and property management knowledge to address well-defined but complex and non-routine problems and reach appropriate, generally effective outcomes.                                                                                    |
| <b>S3: Manage and mentor individuals or teams, and support training, development and wellbeing needs.</b>                                                                               | Responsibility and Autonomy | <i>Distinction: Proactively takes responsibility for actions and decisions within set parameters. Manages own work and the coordination of others in housing and property management. Independently uses sound judgment about risks and priorities to manage resources or actions.</i> |

NOTE: Knowledge and skills statements in **bold** are mandatory and must be assessed in every version of the assessment that is made available. Knowledge and skills statements in italics will be graded against the relevant distinction grading descriptor.

### **Documents required**

- Assessment specification
- Assessor guide
- Mock assessment materials
- Assessment feedback report
- Project mapping document (optional)
- Written submission sheet (optional)
- Portfolio matrix (optional)



### **Resit and retake guidance**

- There will be no cap on the grade that apprentices can achieve through a resit or retake
- Apprentices can resit or retake to achieve a higher grade
- There will be no cap on the number of resits or retakes that apprentices can undertake
- The failed assessment method will be resat or retaken in full

Please use the below table to provide feedback on how the **project with professional discussion** has been mapped:

| Assessment Outcome                                                              | Knowledge/<br>Skills | Performance Category                | Pass/<br>Distinction | Comments |
|---------------------------------------------------------------------------------|----------------------|-------------------------------------|----------------------|----------|
| <b>AO1: Housing services delivery and customer engagement</b>                   | K6                   | Applied Knowledge                   | Pass                 |          |
|                                                                                 | K9                   | Communication and Collaboration     | Pass                 |          |
|                                                                                 | S1                   | Applied Skills                      | Pass                 |          |
| <b>AO3: Financial, resource and performance management</b>                      | S8                   | Responsibility and Autonomy         | Pass                 |          |
|                                                                                 | S9                   | Applied Skills                      | Pass                 |          |
|                                                                                 | K5                   | <i>Applied Knowledge</i>            | <i>Distinction</i>   |          |
| <b>AO5: Data, digital and information management</b>                            | K14                  | Information Use and Decision Making | Pass                 |          |
|                                                                                 | S7                   | Information Use and Decision Making | Pass                 |          |
| <b>AO6: Strategic planning, project delivery and organisational improvement</b> | K15                  | Applied Knowledge                   | Pass                 |          |
|                                                                                 | K16                  | Applied Knowledge                   | Pass                 |          |
|                                                                                 | S13                  | Applied Skills                      | Pass                 |          |

| Assessment Outcome                                                                          | Knowledge/<br>Skills | Performance Category                           | Pass/<br>Distinction | Comments |
|---------------------------------------------------------------------------------------------|----------------------|------------------------------------------------|----------------------|----------|
| <b>AO6: Strategic planning,<br/>project delivery and<br/>organisational<br/>improvement</b> | <b>K8</b>            | <i>Applied Knowledge</i>                       | <i>Distinction</i>   |          |
|                                                                                             | <b>S10</b>           | <i>Applied Skills</i>                          | <i>Distinction</i>   |          |
|                                                                                             | <b>S12</b>           | <i>Information Use and<br/>Decision Making</i> | <i>Distinction</i>   |          |

Please use the below table to provide feedback on how the **interview** and **portfolio with professional discussion** has been mapped:

| Assessment Outcome                                            | Knowledge/<br>Skills | Performance Category                   | Pass/<br>Distinction | Comments |
|---------------------------------------------------------------|----------------------|----------------------------------------|----------------------|----------|
| <b>AO1: Housing services delivery and customer engagement</b> | <b>K7</b>            | Applied Knowledge                      | Pass                 |          |
|                                                               | K11                  | Applied Knowledge                      | Pass                 |          |
|                                                               | K17                  | Regulatory and Procedural Awareness    | Pass                 |          |
|                                                               | S5                   | Applied Skills                         | Pass                 |          |
|                                                               | S11                  | Regulatory and Procedural Awareness    | Pass                 |          |
|                                                               | S14                  | Regulatory and Procedural Awareness    | Pass                 |          |
|                                                               | <b>S2</b>            | <i>Communication and Collaboration</i> | <i>Distinction</i>   |          |
| <b>AO2: Legal, regulatory and compliance management</b>       | <b>K1</b>            | Regulatory and Procedural Awareness    | Pass                 |          |
|                                                               | <b>K2</b>            | Regulatory and Procedural Awareness    | Pass                 |          |
|                                                               | K3                   | Regulatory and Procedural Awareness    | Pass                 |          |

| Assessment Outcome                                              | Knowledge/<br>Skills | Performance Category                           | Pass/<br>Distinction | Comments |
|-----------------------------------------------------------------|----------------------|------------------------------------------------|----------------------|----------|
| <b>AO2: Legal, regulatory<br/>and compliance<br/>management</b> | K4                   | Regulatory and<br>Procedural Awareness         | Pass                 |          |
|                                                                 | K12                  | Applied Knowledge                              | Pass                 |          |
|                                                                 | K13                  | Regulatory and<br>Procedural Awareness         | Pass                 |          |
|                                                                 | S6                   | Regulatory and<br>Procedural Awareness         | Pass                 |          |
|                                                                 | S4                   | <i>Regulatory and<br/>Procedural Awareness</i> | <i>Distinction</i>   |          |
| <b>AO4: People leadership<br/>and collaborative<br/>working</b> | K10                  | Applied Knowledge                              | Pass                 |          |
|                                                                 | S3                   | <i>Responsibility and<br/>Autonomy</i>         | <i>Distinction</i>   |          |