

# Highfield Level 2 End-Point Assessment for ST0235 Housing and Property Management Assistant

End-Point Assessment Kit



# Highfield Level 2 End-Point Assessment for ST0235 Housing and Property Management Assistant

EPA-kit

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# How to use this EPA kit

Welcome to the Highfield End-point assessment kit for the Housing and Property Management Assistant standard.

Highfield is an independent end-point assessment organisation that has been approved to offer and carry out the independent end-point assessments for the Level 2 Housing and Property Management Assistant apprenticeship standard. Highfield internally quality assures all end-point assessments in accordance with its IQA process, and additionally, all end-point assessments are externally quality assured by the relevant EQA organisation.

The EPA kit is designed to outline all you need to know about the end-point assessments for this standard and will also provide an overview of the on-programme delivery requirements. In addition, advice and guidance for trainers on how to prepare apprentices for the end-point assessment is included. The approaches suggested are not the only way in which an apprentice may be prepared for their assessments, but trainers may find them helpful as a starting point.

## Key facts

<b>Apprenticeship standard:</b>	Housing and Property Management Assistant
<b>Level:</b>	2
<b>On programme duration:</b>	Typically 12 -18 months
<b>End-point assessment window:</b>	3-4 months
<b>Grading:</b>	Pass or distinction
<b>End-point assessment methods:</b>	Work-based case study, portfolio of evidence and interview/VIVA

## In this kit, you will find:

- an overview of the standard and any on-programme requirements
- a section focused on delivery, where the standard and assessment criteria are presented in a suggested format that is suitable for delivery
- guidance on how to prepare the apprentice for gateway
- detailed information on which part of the standard is assessed by which assessment method
- suggestions on how to prepare the apprentice for each part of the end-point assessment
- a section focused on the end-point assessment method where the assessment criteria are presented in a format suitable for carrying out 'mock' assessments

# Introduction

## Standard overview

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The housing and property management assistant occupation is customer-facing and primarily responsible for the administrative work needed to support the creation and sustainability of successful tenancies in the private and social rented housing sectors. This work must comply with contractual, statutory and legal regulations and approved Codes of Practice.

The work is varied and involves working under the instruction of a supervisor. The role will include undertaking housing duties relevant to the team and organisation such as preparing documentation, dealing with telephone calls, arranging meetings and events, data administration along with filing and scanning duties. It will also involve supporting team members with consultations, undertaking customer and neighbourhood property surveys using company checklists and conducting supervised viewings of properties and rental negotiations.

Housing and property management assistants take responsibility for the quality, accuracy and planning of their work as well as working proactively with colleagues to help find solutions to problems and improvements to ways of work.

The apprenticeship prepares an individual for a range of general housing and property management duties leading to entry-level professional and/or management roles.

On completion of the apprenticeship, apprentices will be able to apply to the following for membership:

- Chartered Institute of Housing (CIH) at Standard Level
- Association of Residential Letting Agents (ARLA) at Associate Level
- Institute of Residential Property Management (IRPM) at Affiliate Level

## On-programme requirements

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Although learning, development and on-programme assessment are flexible, and the process is not prescribed, the following is the recommended baseline expectation for an apprentice to achieve full competence in line with the Housing and Property Management Assistant apprenticeship standard and assessment plan.

The on-programme assessment approach will be agreed between the training provider and employer. The assessment will give an ongoing indication of an apprentice's performance against the final outcomes defined in the standard.

The training programme leading to end-point assessment should cover the breadth and depth of the standard using suggested on-programme assessment methods that integrate the knowledge, skills and behaviour components, and ensure that the apprentice is sufficiently prepared to undertake the end-point assessment.

Throughout the period of learning and development, and at least every 2 months, the apprentice should meet with the on-programme assessor to record their progress against the standard. At these reviews, evidence should be discussed and recorded by the apprentice. The maintenance of an on-programme record is important to support the apprentice, on-programme assessor and employer in monitoring the progress of learning and development and to determine when the apprentice has achieved full competence in their job role and is therefore ready for end-point assessment.

### Portfolio of evidence

Throughout the on-programme period, a portfolio must be gathered. This will be assessed and makes up 70% of the grade. The portfolio of evidence should include:

- regular performance reviews undertaken by the employer and training provider
- evidence that demonstrates competence against the standard and assessment criteria
- target setting, regularly scheduled and recorded one to ones and periodic assessments against targets and 360-degree appraisal
- reflective learning
- observation in key tasks and feedback relevant to the evidence required to demonstrate competence against the standard and assessment criteria
- a behaviours log to assess and record the demonstration of the appropriate behaviours

The portfolio must be accompanied by a portfolio matrix. This can be downloaded from our website. The portfolio matrix must be fully completed, including a declaration by the employer and the apprentice to confirm that the portfolio is valid and attributable to the apprentice.

## Use of Artificial Intelligence (AI) in the EPA

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Where AI has been used as part of the apprentice's day-to-day work and forms part of a project report, presentation, or artefact, it should be referenced as such within the work. AI must not be used to produce the report or portfolio.

Where AI has been used as part of a portfolio that underpins an interview or professional discussion or any other assessment method, it should be fully referenced within the portfolio.

## Additional relevant on-programme qualification

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There are no named mandatory qualifications for apprentices for this standard, however, employers may wish to include relevant regulated qualifications to help structure the on-programme delivery.

## Readiness for end-point assessment

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In order for an apprentice to be ready for the end-point assessments:

- the apprentice must have achieved level 1 English and maths and will also be required to take the tests for level 2.
- the apprentice must have gathered a portfolio of evidence against the required standards to be put forward as a component of the end-point assessment.
- the line manager (employer) must be confident that the apprentice has developed all the knowledge, skills and behaviours defined in the apprenticeship standard and that the apprentice is competent in performing their role. To ensure this, the apprentice must attend a formal meeting with their employer to complete the gateway readiness report.

The apprentice and the employer should then engage with Highfield to agree a plan and schedule for each assessment activity to ensure all components can be completed within the 3-month end-assessment window. Further information about the gateway process is covered later in this kit.

If you have any queries regarding the gateway requirements, please contact your EPA Customer Engagement Manager at Highfield Assessment.

## Order of end-point assessments

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The order of end-point assessments will be the assessment of the case study and portfolio followed by the interview/VIVA.

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# The Highfield approach

This section describes the approach Highfield has adopted in the development of this end-point assessment in terms of its interpretation of the requirements of the end-point assessment plan and other relevant documents.

## Documents used in developing this end-point assessment

Standard (2015)

<https://www.instituteforapprenticeships.org/apprenticeship-standards/housing-and-property-management-assistant-v1-1>

End-point assessment plan (ST0235/AP01)

[https://www.instituteforapprenticeships.org/media/1111/housing\\_-\\_property\\_management\\_assistant.pdf](https://www.instituteforapprenticeships.org/media/1111/housing_-_property_management_assistant.pdf)

## Specific considerations

All of the evidence criteria used within the end-point assessment are taken from the Housing and Property Management Assistant assessment plan.

The assessment plan does not state either the word count of the case study report or the duration of the interview/VIVA. Therefore, Highfield has set a recommended word count of 2000 words (+/-10%) for the case study and the interview/VIVA will be 60-minutes in total. The interview/VIVA will be split into 15 mins for the presentation and 45 mins for the questions and answers (Q&A).

Section 7 of the assessment plan states that 'the interview/VIVA is not assessed but is used as a means of confirming the evidence set out in the portfolio and case study and addressing any areas of perceived weakness in these two documents'. Highfield's approach is that the independent assessor will assess the case study and the portfolio and this will be followed by the interview/VIVA in order to cover any criteria not already met.

The apprentice's line manager and training provider representatives cannot be present at the interview/VIVA. The scoring and grading of the assessment will solely be the responsibility of the independent end-point assessor.

Annex 1 mentions a qualification or test as an assessment method, however, the qualification is optional and there is no test mentioned elsewhere in the assessment plan. Highfield's approach will be that the criteria identified in the table assessed by 'qualification' or 'test' be replaced by the portfolio of evidence.



## Retake and resit information

The assessment plan does state how the assessment methods are individually scored and graded. The overall grade is worked out based on performance across all learning outcomes across both assessment methods. Therefore, if an apprentice fails, it is the employer, provider and apprentice's decision whether to attempt a resit or retake. If a resit is chosen, please call the Highfield scheduling team to arrange the resit. If a retake is chosen, the apprentice will require a period of further learning and will need to submit a retake checklist. Once this is completed, please call the Highfield scheduling team to arrange the retake.

There is no limit to the number of times an apprentice can take a resit or retake on either of the assessment methods.

However, apprentices who achieve a pass grade **cannot** resit or retake the EPA to achieve a higher grade.

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# Gateway

## How to prepare for gateway

After apprentices have completed their on-programme learning, they should be ready to pass through 'gateway' to their end-point assessment.

Gateway is a meeting that should be arranged between the apprentice, their employer and the training provider to determine that the apprentice is ready to undertake their end-point assessment. The apprentice should prepare for this meeting by bringing along work-based evidence, including:

- customer feedback
- recordings
- manager statements
- witness statements

As well as evidence from others, such as:

- mid and end-of-year performance reviews
- feedback to show how they have met the apprenticeship standards while on-programme

In advance of gateway, apprentices will need to have:

- achieved level 1 English
- achieved level 1 maths
- completed a portfolio of evidence

Therefore, apprentices should be advised by employers and providers to gather this evidence and undertake these qualifications during their on-programme training. It is recommended that employers and providers complete regular checks and reviews of this evidence to ensure the apprentice is progressing and achieving the standards before the formal gateway meeting is arranged.

## The gateway meeting

The gateway meeting should last around an hour and must be completed on or after the apprenticeship on-programme end date. It should be attended by the apprentice and the relevant people who have worked with the apprentice on-programme, such as the line manager/employer or mentor, the on-programme trainer/training provider and/or a senior manager (as appropriate to the business).

During the meeting, the apprentice, employer and training provider will discuss the apprentice's progress to date and confirm if the apprentice has met the full criteria of the apprenticeship standard during their on-programme training. The **Gateway Readiness Report** should be used to log the outcomes of the meeting and agreed by all 3 parties. This report is available to download from the Highfield Assessment website.

The report should then be submitted to Highfield to initiate the end-point assessment process. If you require any support completing the Gateway Readiness Report, please contact your EPA Customer Engagement Manager at Highfield Assessment.

**Please note:** a copy of the standard should be available to all attendees during the gateway meeting.

### Reasonable adjustments and special considerations

Highfield Assessment has measures in place for apprentices who require additional support. Please refer to the Highfield Assessment Reasonable Adjustments policy for further information/guidance.

### ID requirements

Highfield Assessment will need to ensure that the person undertaking an assessment is indeed the person they are claiming to be. All employers are therefore required to ensure that each apprentice has their identification with them on the day of the assessment so the end-point assessor can check.

Highfield Assessment will accept the following as proof of an apprentice's identity:

- a valid passport (any nationality)
- a signed UK photocard driving licence
- a valid warrant card issued by HM forces or the Police
- another photographic ID card, such as an employee ID card or travel card

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# The Housing and Property Management Assistant apprenticeship standard

The following pages contain the Housing and Property Management Assistant apprenticeship standard and the assessment criteria in a format that is suitable for delivery.

Legislation and regulation	
Knowledge	
<ul style="list-style-type: none"> <li>• Know the principles and practices of relevant landlord and tenant law, applicable Codes of Practice, and relevant legal frameworks.</li> </ul>	
Portfolio of evidence and interview/VIVA	
Criteria covered	
LR1	Describe the main provisions of data protection, safeguarding and <b>other relevant legislation</b> as it applies to housing and property management
LR2	Describe the basic requirements of a contract and the <b>special provisions</b> relating to housing/property contracts
LR3	List the relevant <b>codes of practice and published standards</b> covering the social and private rented sectors
LR4	Describe the <b>legislation and regulations</b> as they apply to housing standards
Amplification and guidance	
<ul style="list-style-type: none"> <li>• <b>Other relevant legislation/legislation and regulations:</b> <ul style="list-style-type: none"> <li>○ Health and Safety at Work etc. Act</li> <li>○ Homes (Fit for Human Habitation) Act 2018</li> <li>○ Relevant landlord and tenant law</li> <li>○ Data protection legislation</li> <li>○ Safeguarding legislation                             <ul style="list-style-type: none"> <li>▪ Identifying the Equality Act 2010</li> </ul> </li> <li>○ Housing Act 1988/1996/2004                             <ul style="list-style-type: none"> <li>▪ Introduced ASTs and Section 8 &amp; Section 21s</li> <li>▪ Introduced deposit protection)</li> </ul> </li> </ul> </li> </ul>	

- Protection from Eviction Act 1977
- Energy Efficiency Regulations 2015 (EPCs)
- **Special provisions:**
  - Any services provided (laundry, concierge)
  - Option to renew
  - Any upgrades to the property or works to be completed
- **Codes of practice and published standards:**
  - Social:
    - The Social Housing Regulator
  - Private:
    - ARLA code of conduct
    - The Property Ombudsman
    - In house materials (Employee handbook)

Organisation background information	
Knowledge	
<ul style="list-style-type: none"> <li>• Know the organisation’s business plan, organisation values, the range of services available to customers/clients, team targets/key performance indicators and understand how their role fits into the organisation.</li> </ul>	
Portfolio of evidence and interview/VIVA	
<b>Criteria covered</b>	
OB1	Describe the impact of the principles, priorities and values of the organisation on the delivery of services to customers
OB2	Describe how personal and team objectives fit into the organisational plan
OB3	Describe the <b>range of services</b> that may be offered in the social or <b>private</b> rented sectors

## Amplification and guidance

- **Range of services:**
  - social:
    - allocations
    - tenancy sustainment
    - anti-social behaviour/mediation
    - maintenance
    - estate management
    - community services
  
  - private:
    - repairs and maintenance
    - renewals
    - fully managed
    - tenant find/let only
    - rent collection
    - viewings
    - referencing
    - right to rent
    - inventory
    - move ins
    - inspections
    - deposits

## Assets

### Knowledge

- Know the social and physical context of estates/neighbourhoods and how to report defects, common problems, health and safety issues and repairs to dwellings.

### Portfolio of evidence and interview/VIVA

#### Criteria covered

AS1 Describe the basic principles of good neighbourhood management

AS2 Describe how to **report repairs** and defects

AS3 Describe the relevant requirements of **health and safety acts and policies**, for housing management and maintenance

### Amplification and guidance

#### Report repairs:

- communication methods:
  - email
  - messaging services
  - social media
  - reminders
  - letters
  - face to face visits
  - monitoring
  - tools
  - technologies that are available and used such as FIXFLO and other maintenance software
  - how they help obtain quotes when major maintenance is required to then put forward to the landlord
  - tenant reporting of maintenance issues (phone call, email, online systems)

**Health and safety acts and policies:**

- Management of Health and Safety at Work Regulations 1999
- Fire safety building regulations in 2021
- The Regulatory Reform (Fire Safety) Order 2005
- Manual Handling Operations Regulations
- Display Screen Equipment (DSE) Regulations
- Workplace (Health, Safety and Welfare) Regulations
- Provision and Use of Work Equipment Regulations
- Control of Substances Hazardous to Health Regulations 2002
- Control of Asbestos Regulations 2012

**Customers**

**Knowledge**

- Know the diversity of the communities which the business serves.

**Work-based case study and interview/VIVA**

**Criteria covered**

CS1 Describe how organisations' **services** meet the diverse needs of a community.

**Amplification and guidance**

**Services:**

- identify areas of support for those where English isn't their first language or who may be hard of hearing or visually impaired.
- supporting tenants/applicants/landlords with completion of forms, offer forms in alternative languages or large print



- finding an interpreter when required
- use of a text phone
- working with other agencies to support the needs of a client with disabilities, change of circumstances or become single occupant

<b>Context</b>	
<b>Knowledge</b>	
<ul style="list-style-type: none"> <li>• Know the current and historical context of the housing market, including social and affordable housing, private rented and owner occupation.</li> </ul>	
<b>Portfolio of evidence and interview/VIVA</b>	
<b>Criteria covered</b>	
CT1	Describe the <b>basic background</b> and context of the social and private rented housing sectors.
<b>Amplification and guidance</b>	
<b>Basic background:</b> <ul style="list-style-type: none"> <li>• Changes over the last 50 years</li> <li>• The welfare reform and the massive change in social housing</li> <li>• Right to buy scheme</li> <li>• House price rises/lack of affordability</li> <li>• Property crash (credit crunch 2008)</li> <li>• Brexit/COVID effects on the market</li> <li>• Social and affordable housing</li> </ul>	

- Private rented and owner occupation changes

## Range of services

### Knowledge

- Know the range of housing services. For example, repairs and maintenance, allocations, lettings, tenancy sustainment, financial and social inclusion, energy efficiency and waste management, tenancy sustainability, anti-social behaviour, care and housing support services, rents and fees, service charges and portfolio accounts, and community involvement.

### Portfolio of evidence and interview/VIVA

#### Criteria covered

RS1 Summarise the **core services** that housing or property management organisations deliver to their customers

### Amplification and guidance

#### Core services

social:

- allocations
- tenancy sustainment
- anti-social behaviour/mediation
- maintenance
- estate management
- community services
- property swap scheme

private:

- repairs and maintenance
- renewals
- fully managed
- tenant find/let only
- rent collection
- viewings
- referencing
- right to rent
- inventory
- move in's
- inspections
- deposits
- (in some cases) block management

general:

- repairs and maintenance
- allocations
- lettings
- tenancy sustainment
- financial and social inclusion
- energy efficiency and waste management
- tenancy sustainability
- anti-social behaviour
- care and housing support services
- rents and fees

- service charges and portfolio accounts
- and community involvement

## Quality standards

### Knowledge

- Know the **quality standards of the business**. Examples include standards of the neighbourhood/property/building and customer service.

### Work-based case study and interview/VIVA

#### Criteria covered

QS1 Summarise the quality standards for departments you work in and how they are measured.

### Amplification and guidance

**Quality standards of the business:** know the quality standards of the business, including:

- standards of the neighbourhood
- property
- building
- customer service
- home standard
- tenancy standard
- neighbourhood and community standard
- tenant involvement and empowerment standard

Social:

- The Social Housing Regulator

Private:

- ARLA code of conduct
- The Property Ombudsman
- In house materials (Employee handbook)

## Organisation policies

### Knowledge

- Know the principles, policies and practices of the organisation they work for in terms of customer care, complaints handling, employee code of conduct, team working, risk assessments personal safety, data protection, health and safety, equality and diversity, safeguarding and business communications.

### Portfolio of evidence and interview/VIVA

#### Criteria covered

- OP1 Describe how **organisational principles and policies** impact on the delivery of services
- OP2 List key organisational policies and how they relate to the way services are delivered

### Amplification and guidance

**Organisational principles and policies:**

- Customer service policy (answering the phone in 3 rings, specific greeting, replying to emails within 24 hours)
- Complaint's process/policy and handling
- HSE policy
- Environmental
- Share of information
- Customer care
- Employee code of conduct
- Team working
- Risk assessments
- Personal safety
- Data protection
- Health and safety
- Equality and diversity
- Safeguarding
- Business communications.
- Dress code (appearance on outside appts and in the office)
- Lone working policy (safe word, what to do on appointments outside of office hours)
- Anti-Money Laundering checks (referencing, bringing on new landlords)
- E&D policy (inclusivity for all stakeholders)
- IT Policies (changing passwords, locking PC's when away)

## Customer service

### Skill

- Be able to apply a range of customer service skills in order to provide a professional, accurate, timely, ethical and non-judgemental front-line service which meets the needs of a diverse range of customers and stakeholders.

### Portfolio of evidence, work-based case study and interview/VIVA

#### Criteria covered

CSS1 Builds rapport with customers and demonstrates empathy and understanding when dealing with them.

CSS2 Responds to customers, colleagues & **partner organisations** in a timely, accurate fashion in accordance with service standards and company policies

### Amplification and guidance

#### Partner organisations:

- any examples provided by the learner of dealing with a range of stakeholders
- dealing with a landlord/tenant who had previously complained who now actively promotes the organisation through the good work of the apprentice
- dealing with a landlord/tenant where they have previously experienced a poor level of service with another agent
- supporting landlords/tenants through a particularly difficult time (such as redundancy through Covid) – putting in place a payment plan
- landlords sometimes use their own contractors who are not always compliant with legislative requirements (such as gas safety's being over-due or poor service when the apprentice's own contractors may offer a better/cheaper/more reliable service)
- responses should relate to the service standards expected
- ability to follow company policies, for example, SLAs

<b>Respond to vulnerability</b>	
<b>Skill</b>	
<ul style="list-style-type: none"> <li>• Uses appropriate levels of skill and judgment to understand the needs of vulnerable individuals and groups (including those with complex needs) and respond appropriately.</li> </ul>	
<b>Portfolio of evidence and interview/VIVA</b>	
<b>Criteria covered</b>	
RV1	Builds rapport with vulnerable customers to assess individual or group needs
RV2	Responds appropriately to the needs of <b>vulnerable customers</b> , both individuals and groups, including those with complex needs
<b>Amplification and guidance</b>	
<ul style="list-style-type: none"> <li>• <b>Vulnerable customers</b> <ul style="list-style-type: none"> <li>○ disabled in some way</li> <li>○ may have had a support/social worker</li> <li>○ fleeing domestic violence</li> <li>○ someone who was homeless</li> <li>○ a single parent</li> <li>○ widowed</li> <li>○ long term separated</li> <li>○ someone with mental health issues</li> </ul> </li> </ul>	



## Communication

### Skill

- Demonstrate effective and appropriate communication skills to enable timely identification and resolution of issues.
- Be able to signpost customers who need additional support to other colleagues and/or partner agencies.

### Portfolio of evidence, work-based case study and interview/VIVA

#### Criteria covered

- CO1 Adapts and uses the appropriate **method and style of communication** to changing circumstances and needs.  
CO2 Signposts customers to **appropriate services and support**

### Amplification and guidance

#### Method and style of communication:

- verbal
- non-verbal
- written for example, emails and letters
- telephone calls

#### Appropriate services and support:

- signpost to support agencies including:
  - local authority
  - age concern
  - citizens advice
  - shelter
- designated interpreter and translator
- using property ombudsman vulnerability guidance

## Administration

### Skill

- Be able to apply a range of administration skills in order to support a range of housing and property related services

### Portfolio of evidence and interview/VIVA

#### Criteria covered

- AD1 Demonstrates effective **administration skills** which support housing and property related services
- AD2 Adapts and uses appropriate administration skills to suit the task in hand to ensure the task is completed effectively

### Amplification and guidance

#### Administration skills:

- use of telephone
- use of IT equipment
- data administration
- diary management
- ability to write emails and formal letters:
  - use of filing, printing and scanning equipment

Working from home – moving to IT platforms for: team meetings, online viewings and panoramic views.

## Information collection and sharing

### Skill

- Understand and be able to use a variety of methods to collect and present information such as resident, neighbourhood and property data in an effective manner. Information and data must be collected, recorded and presented accurately.

### Portfolio of evidence, work-based case study and interview/VIVA

#### Criteria covered

- IS1 **Collects, records and stores information** that is accurate, sufficient, relevant and in line with the organisation's policies
- IS2 Uses a variety of methods to collect and present information effectively

### Amplification and guidance

#### Collects, records and stores information:

- completion of notes from phone calls
- registration of applicant's details
- making property viewings
- helping obtain quotes for works needed
- helping get all information ready to present to a landlord about an applicant (ready to put offer forward)
- preparing section notices
- updating IT storage systems
- all recorded and stored information is GDPR compliant

Teamwork	
Skill	Behaviours
<ul style="list-style-type: none"> <li>Work with internal colleagues and external partners to achieve individual, team and business targets. Work with colleagues to identify solutions to problems</li> </ul>	<ul style="list-style-type: none"> <li>Be an effective team player, accepts responsibility for their work.</li> </ul>
<b>Portfolio of evidence, work-based case study and interview/VIVA</b>	
<b>Skill criteria covered</b>	
TW1 Achieves individual, team and business outcomes through working collaboratively with colleagues, teams and external partners. TW2 Demonstrates the ability to work with colleagues to resolve problems.	
<b>Behavioural criteria covered</b>	
TW3 Is an enthusiastic and positive team member. TW4 Demonstrates an open and honest communication style TW5 Takes responsibility for their work and understand how this supports the team	

Time-management	
Skill	
<ul style="list-style-type: none"> <li>Organise and plan work in a flexible manner to ensure tasks are prioritised and completed within agreed timescales.</li> </ul>	
<b>Portfolio of evidence and interview/VIVA</b>	
<b>Criteria covered</b>	
TM1 Demonstrates the ability to <b>organise, prioritise and plan</b> their workload to meet deadlines	

TM2	Seeks clarification from their manager if the deadlines are unclear
TM3	Raises concerns about meeting deadlines before the deadline passes
<b>Amplification and guidance</b>	
<b>Organise, prioritise and plan:</b>	
<ul style="list-style-type: none"> <li>• diary management</li> <li>• create a schedule</li> <li>• regularly checking deadlines with manager</li> <li>• keeping a log of work on how long tasks take</li> <li>• allowing time to review deadlines</li> <li>• clearing email inbox regularly</li> <li>• daily task list</li> <li>• to-do lists</li> <li>• project management systems</li> </ul>	

<b>Tools and equipment</b>	
Skill	
<ul style="list-style-type: none"> <li>• Effective use of digital equipment and software, including housing and property management software.</li> <li>• The appropriate use of work equipment.</li> </ul>	
Portfolio of evidence and interview/VIVA	
Criteria covered	
TE1	Demonstrates proficient use of digital equipment and software to perform housing/property related tasks
TE2	Demonstrates the appropriate use of work equipment

TE3 Complies with appropriate organisational and <b>regulatory requirements relating to the use of digital equipment and software.</b>
<b>Amplification and guidance</b>
<p><b>Regulatory requirements relating to the use of digital equipment and software:</b></p> <ul style="list-style-type: none"> <li>• Consumer Protection from Unfair Trading Regulations 2008 <ul style="list-style-type: none"> <li>○ Property must have an EPC before advertising</li> <li>○ GDPR compliant</li> <li>○ Using the organisation’s property related digital system</li> <li>○ Sends sensitive documents password protected</li> <li>○ Preparing property audit/compliance requirement paperwork and saving all documentation to property portfolio</li> </ul> </li> </ul>

<b>Decision making</b>
<b>Skill</b>
<ul style="list-style-type: none"> <li>• Effective decision making in order to ensure work tasks are completed in line with instruction and on time.</li> </ul>
<b>Portfolio of evidence, work-based case study and interview/VIVA</b>
<b>Criteria covered</b>
DM1 Demonstrates effective decision making to ensure work tasks are completed on time DM2 Demonstrates the ability to follow instructions and meet deadlines DM3 Asks for advice when making decisions and following instructions if unclear or the deadline is not going to be achieved.

<b>Responsive</b>	
<b>Behaviours</b>	
<ul style="list-style-type: none"> <li>• Takes timely and responsive action to instructions given, building towards working independently.</li> </ul>	
<b>Work-based case study and interview/VIVA</b>	
<b>Criteria covered</b>	
RE1	Delivers a timely performance with energy and takes responsibility and accountability for <b>quality outcomes</b> .
<b>Amplification and guidance</b>	
<b>Quality outcomes:</b> <ul style="list-style-type: none"> <li>• referring to taking timely and responsive action to instructions given, building towards working independently.</li> <li>• any variation of the property may not be ready for the tenant to move into on the date agreed</li> <li>• helping to cover a colleague's workload unexpectedly</li> <li>• helping chase up missing Applicant and paperwork/deposit</li> <li>• preparing offer negotiation for an applicant</li> <li>• evidence that they took responsibility for the situation</li> </ul>	

<b>Trust and integrity</b>	
<b>Behaviours</b>	
<ul style="list-style-type: none"> <li>• Develops trust by working in a confidential, ethical and empathetic manner with a common sense and professional attitude.</li> </ul>	
<b>Portfolio of evidence and interview/VIVA</b>	

Criteria covered	
T11	Demonstrates <b>integrity and ethical behaviour</b> in the way they do their job.
Amplification and guidance	
<b>Integrity and ethical behaviour:</b> <ul style="list-style-type: none"> <li>• signposting applicants/tenants to other services or organisations when they have not been able to help</li> <li>• seeking a better agreement/service/price for maintenance works</li> <li>• ensuring landlords adhere to legislative requirements</li> <li>• supporting tenants/applicants who may be vulnerable</li> <li>• setting up payment plans rather than serving notice</li> <li>• recommending guarantors or discussing previous CCJs with landlords with a view to supporting applicants</li> </ul>	

Adaptability	
Behaviours	
	<ul style="list-style-type: none"> <li>• Willingness to accept changing priorities and work patterns</li> </ul>
Portfolio of evidence and interview/VIVA	
Criteria covered	
AP1	Responds positively to change and shows willingness to refocus priorities when required



<b>Dependability</b>	
<b>Behaviours</b>	
<ul style="list-style-type: none"> <li>Meets personal commitments and expectations of others.</li> </ul>	
<b>Portfolio of evidence and interview/VIVA</b>	
<b>Criteria covered</b>	
DP1	Consistently meets personal commitments and customer expectations for quality, service and professionalism.

<b>Personal commitment</b>	
<b>Behaviours</b>	
<ul style="list-style-type: none"> <li>Takes responsibility for their <b>own personal development</b>, safety and training.</li> <li>Act as an ambassador for the organisation.</li> </ul>	
<b>Portfolio of evidence and interview/VIVA</b>	
<b>Criteria covered</b>	
PC1	Takes ownership and seeks ways in which to <b>develop own knowledge and skills within the role</b> .
PC2	Shows a genuine determination to learn and develop themselves.
PC3	Displays confidence and professionalism when dealing with people and representing the organisation
<b>Amplification and guidance</b>	
<b>Own personal development:</b>	
<ul style="list-style-type: none"> <li>acting as an ambassador for the organisation</li> </ul>	

- requests further training/shadowing during 1:1s
- asking mentor for support
- subscribes to a professional body to keep up to date with current legislation

## Customer care

### Behaviours

- Demonstrates a responsive approach to customer and client needs and has an awareness of the organisation's impact on customers and their lives.

### Work-based case study and interview/VIVA

#### Criteria covered

- CC1 Demonstrates a genuine interest and care towards their work.  
 CC2 Shows consideration and flexibility to people

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# Assessment summary

The end-point assessment for the Housing and Property Management Assistant apprenticeship standard is made up of 2 components:

1. Work-based case study, followed by the interview/VIVA
2. Portfolio of evidence, followed by the interview/VIVA

As an employer/training provider, you should agree a plan and schedule with the apprentice to ensure all assessment components can be completed effectively.

## Work-based case study and portfolio of evidence followed by interview/VIVA

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Assessors will assess the work-based case study and portfolio of evidence prior to the interview/VIVA. After this, any criteria that have not been met will be assessed during the interview/VIVA.

All evidence must be mapped to the assessment criteria outlined within this document. A **Case Study Submission Sheet** is provided on the Highfield Assessment website.

## Grading

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The learning areas and assessment criteria listed within this kit will be assessed by the case study and the portfolio of evidence. This means that the assessor will assess the case study report and supporting diary, portfolio of evidence and any areas not fully met will be picked up and assessed within the interview/VIVA.

The score for each learning area will be determined based on the coverage of the assessment criteria as well as the depth an apprentice demonstrates in their case study report, portfolio, presentation or their responses to questions in the questions and answers (Q&A) session.

	Fail	Pass	Distinction
Score achieved:	0-2	3	4-5
Basis:	Significant gaps in their ability to demonstrate the assessment criteria	Fully meets all of the assessment criteria in the standard area	Consistently exceeds the assessment criteria

	within the standard area		within the standard area
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The apprentice's final grade will be determined according to the following:

- to achieve a pass the apprentice needs a score of at least 3 in **all** topic areas
- to achieve a distinction the apprentice needs a score of at least 4 in **all** topic areas

## Retake and resit information

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The assessment plan does state how the assessment methods are individually scored and graded. The overall grade is worked out based on performance across all learning outcomes across both assessment methods. Therefore, if an apprentice fails, it is the employer, provider and apprentice's decision whether to attempt a resit or retake. If a resit is chosen, please call the Highfield scheduling team to arrange the resit. If a retake is chosen, the apprentice will require a period of further learning and will need to submit a Retake Checklist. Once this is completed, please call the Highfield scheduling team to arrange the retake.

There is no limit to the number of times an apprentice can take a resit or retake on either of the assessment methods.

However, apprentices who achieve a pass grade **cannot** resit or retake the EPA to achieve a higher grade.

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## Assessing the work-based case study

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The scope of the work-based case study should be agreed between the employer, training provider and the apprentice and must allow the apprentice to meet the assessment criteria, as specified within this document.

After gateway, the apprentice will be required to pull together a work-based case study, which will form the basis of the assessment. The work-based case study is recommended to total 2000 words (+/-10%).

The work-based case study should be submitted to Highfield Assessment within **3 weeks** of gateway.

It must be accompanied by a **Case Study Submission Sheet** when submitted to Highfield. This is available to download from the Highfield website.

Written submissions may be provided to Highfield in PDF format and uploaded to Highfield Central.

The apprentice should complete their work-based case study unaided. When the work-based case study is submitted, the apprentice and their employer must verify that the submitted work-based case study is the apprentice's own work, by signing the relevant declarations included within the case study report submission sheet.

### Work-based case study guidance

The case study will be completed following the gateway process and provides the opportunity to demonstrate the integration of skills, knowledge and behaviours that will be assessed through the end-point assessment and will:

- cover a wide selection of the knowledge, skills and behaviour across the apprenticeship standard, and
- have direct relevance to the housing/property management roles

The case study will be a practical work-based assignment. This will allow them to demonstrate that they are able to work with others to explore solutions and improvements to ways of working.

Within the case study, the apprentice will:

- be able to describe the situation and the task
- identify the actions they took
- reflect on knowledge, skills and behaviours they used to complete the task
- involve interaction with colleagues and tenants in developing and executing the case study
- include a diary and report of the project activity which will form the basis of the final assessment

### **Before the assessment:**

Employers/training providers should:

- agree the work-based case study and scope with the apprentice
- ensure the apprentice has prepared a work-based case study to be submitted within 3 weeks of gateway
- ensure the apprentice knows which criteria will be assessed (outlined on the following pages)
- encourage the apprentice to reflect on their experience and learning on-programme to understand what is required to meet the standard and, where possible, identify real-life examples
- be prepared to provide clarification to the apprentice and signpost them to relevant parts of their on-programme experience as preparation for this assessment.

## **Assessing the portfolio of evidence**

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Throughout the on-programme period, the apprentice will compile a portfolio which will be developed to satisfy the assessment criteria and will be assessed as part of the end-point assessment. The portfolio of evidence should include:

- regular performance reviews undertaken by the employer and training provider
- evidence that demonstrates competence against the standard and assessment criteria
- target setting, regularly scheduled and recorded one to ones and periodic assessments against targets and 360-degree appraisal
- reflective learning
- observation in key tasks and feedback relevant to the evidence required to demonstrate competence against the standard and assessment criteria
- a behaviours log to assess and record the demonstration of the appropriate behaviours

A portfolio matrix sheet is available to download from the Highfield Assessment website and must be used to map the apprentice's portfolio of evidence to the Housing Property Management Assistant standards and accompany the portfolio when submitted to Highfield Assessment.

Written submissions are to be uploaded to Highfield Central.

## Assessing the interview/VIVA

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The interview/VIVA is made up of two components:

- 15-minute presentation
- 45-minute questions and answers (Q&A) session

An additional 10% is available for the apprentice to naturally end their current point but no further questions may be asked.

### Presentation

The presentation could focus on the main purpose and outcomes of the case study and/or the portfolio of evidence they have completed. If it is felt the apprentice has not covered some of the more generic areas of the standard, these can also be used as the topic of the presentation.

For example, the presentation could cover:

- an overview of the scope of the case study
- documented evidence collated in the portfolio
- organisation background information including description of customer base and how their needs are met
- relevant organisational policies and legislation that impacted the case study
- communication methods used, including collaborative working and customer care methods
- how information was collected and used
- any problem-solving and decision-making methods utilised
- the main outcomes of the case study

The presentation materials do not need to be submitted to Highfield in advance of the interview/VIVA.

### Presentation format

The apprentice is free to use whatever medium they wish, such as a poster, slides, or handouts. The presentation will be given in a controlled environment and free from distractions.

The apprentice will present either via online video conferencing or face-to-face. If using an online platform, Highfield will ensure appropriate measures are in place to prevent misrepresentation and ensure that the apprentice is not aided in any way.

### Questions and answers (Q&A) session

The presentation will be followed by a 45-minute question and answer session to enable discussion of the topics in greater detail and to further draw out the

apprentice's ability to demonstrate how they have met or exceeded the assessment criteria.

The purpose of the questions is to assess the depth and breadth of the apprentice's understanding and to clarify points from the case study report, portfolio and presentation in relation to how they have demonstrated the relevant knowledge, skills and behaviours.

Apprentices may bring resources or on-programme evidence to the interview/VIVA, however, the end-point assessor will only assess the apprentice's responses to the questions posed. Any supplementary evidence not previously submitted as part of the case study report and portfolio will **not** be assessed against the criteria separately. Any supplementary evidence the apprentice wishes to bring with them should be kept to a minimum so that it does not act as a distraction and therefore allows the apprentice to make the best use of time. All supplementary evidence **must** be the apprentice's own work, in accordance with the declaration signed at gateway.

Highfield would encourage the employer/training provider and the apprentice to plan for the interview/VIVA by familiarising themselves with the criteria that will be assessed and reflecting on their experience in a housing role.

#### **Before the assessment:**

Employers/training providers should:

- ensure the apprentice knows the date, time and location of the assessment
- ensure the apprentice knows which criteria will be assessed (outlined on the following pages)
- ensure the apprentice has prepared a presentation
- encourage the apprentice to reflect on their experience and learning on-programme to understand what is required to meet the standard
- be prepared to provide clarification to the apprentice, and signpost them to relevant parts of their on-programme experience as preparation for this assessment

#### **Interview/VIVA mock assessment**

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It is the employer/training provider's responsibility to prepare apprentices for their end-point assessment, and Highfield recommends that the apprentice experiences a mock interview/VIVA in advance of the end-point assessment with the training provider/employer giving feedback on any areas for improvement.

In designing a mock assessment, the employer/training provider should include the following elements in its planning:

- the mock interview/VIVA should take place in a suitable location.



- a 1-hour time slot should be available if it is intended to be a complete mock interview/VIVA covering all relevant standards (outlined in the following pages). However, this time may be split up to allow for progressive learning.
- assign up to 15 minutes for the mock presentation and up to 45 minutes for the mock Q&A session.
- consider a video or audio recording of the mock presentation and Q&A session and allow it to be available to other apprentices, especially if it is not practicable for the employer/training provider to carry out a separate mock interview/VIVA with each apprentice.
- ensure that the apprentice's performance is assessed by a competent trainer/assessor, and that feedback is shared with the apprentice to complete the learning experience. Mock assessment sheets are available to download from the Highfield Assessment website and may be used for this purpose.
- use structured 'open' questions that do not lead the apprentice but allow them to give examples for how they have met each area in the standard. For example:
  - what core services does your housing or property management organisation provide to customers
  - tell me about codes of practice that apply to your role
  - who are your internal and external customers and how do you meet the needs of certain customers

## Case study, portfolio and interview/VIVA assessment criteria

### Knowledge

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#### Legislation and regulation

- LR1 Describe the main provisions of data protection, safeguarding and other relevant legislation as it applies to housing and property management
- LR2 Describe the basic requirements of a contract and the special provisions relating to housing/property contracts
- LR3 List the relevant codes of practice and published standards covering the social and private rented sectors
- LR4 Describe the legislation and regulations as they apply to housing standards

#### Organisation background information

- OB1 Describe the impact of the principles, priorities and values of the organisation on the delivery of services to customers
- OB2 Describe how personal and team objectives fit into the organisational plan
- OB3 Describe the range of services that may be offered in the social or private rented sectors

#### Assets

- AS1 Describe the basic principles of good neighbourhood management
- AS2 Describe how to report repairs and defects
- AS3 Describe the relevant requirements of health and safety acts and policies, for housing management and maintenance

#### Customers

- CS1 Describe how organisation's services meet the diverse needs of a community.

#### Context

- CT1 Describe the basic background and context of the social and private rented housing sectors.

#### Range of services

- RS1 Summarise the core services that housing or property management organisations deliver to their customers

#### Quality standards

- QS1 Summarise the quality standards for departments you work and how they are measured.

### Organisation policies

- |     |  |
|-----|--|
| OP1 | Describe how organisational principles and policies impact on the delivery of services |
| OP2 | List key organisational policies and how they relate to the way services are delivered |

## Case study, portfolio and interview/VIVA assessment criteria

### Skills

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#### Customer service

- |      |   |
|------|---|
| CSS1 | Builds rapport with customers and demonstrates empathy and understanding when dealing with them.  |
| CSS2 | Responds to customers, colleagues & partner organisations in a timely, accurate fashion in accordance with service standards and company policies |

#### Respond to vulnerability

- |     |  |
|-----|--|
| RV1 | Builds rapport with vulnerable customers to assess individual or group needs   |
| RV2 | Responds appropriately to the needs of vulnerable customers, both individuals and groups, including those with complex needs |

#### Communication

- |     |  |
|-----|--|
| CO1 | Adapts and uses the appropriate method and style of communication to changing circumstances and needs. |
| CO2 | Signposts customers to appropriate services and support  |

#### Administration

- |     |  |
|-----|--|
| AD1 | Demonstrates effective administration skills which support housing and property related services                       |
| AD2 | Adapts and uses appropriate administration skills to suit the task in hand to ensure the task is completed effectively |

#### Information collection and sharing

- |     |  |
|-----|--|
| IS1 | Collects, records and stores information that is accurate, sufficient, relevant and in line with the organisation's policies |
| IS2 | Uses a variety of methods to collect and present information effectively   |

#### Teamwork

- |     |   |
|-----|---|
| TW1 | Achieves individual, team and business outcomes through working collaboratively with colleagues, teams and external partners. |
| TW2 | Demonstrates the ability to work with colleagues to resolve problems.   |

### Time-management

- TM1 Demonstrates the ability to organise, prioritise and plan their workload to meet deadlines
- TM2 Seeks clarification from their manager if the deadlines are unclear
- TM3 Raises concerns about meeting deadlines before the deadline passes

### Tools and equipment

- TE1 Demonstrates proficient use of digital equipment and software to perform housing/property related tasks
- TE2 Demonstrates the appropriate use of work equipment
- TE3 Complies with appropriate organisational and regulatory requirements relating to the use of digital equipment and software.

### Decision making

- DM1 Demonstrates effective decision making to ensure work tasks are completed on time
- DM2 Demonstrates the ability to follow instructions and meet deadlines
- DM3 Asks for advice when making decisions and following instructions if unclear or the deadline is not going to be achieved.

## Case study, portfolio and interview/VIVA assessment criteria

### Behaviours

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#### Responsive

RE1 Delivers a timely performance with energy and takes responsibility and accountability for quality outcomes.

#### Trust and integrity

TI1 Demonstrates integrity and ethical behaviour in the way they do their job

#### Adaptability

AP1 Responds positively to change and shows willingness to refocus priorities when required

#### Dependability

DP1 Consistently meets personal commitments and customer expectations for quality, service and professionalism

#### Personal commitment

PC1 Takes ownership and seeks ways in which to develop own knowledge and skills within the role  
PC2 Shows a genuine determination to learn and develop themselves  
PC3 Displays confidence and professionalism when dealing with people and representing the organisation

#### Customer Care

CC1 Demonstrates a genuine interest and care towards their work  
CC2 Shows consideration and flexibility to people

#### Teamwork

TW3 Is an enthusiastic and positive team member.  
TW4 Demonstrates an open and honest communication style  
TW5 Takes responsibility for their work and understand how this supports the team

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