

# **Highfield Level 3 End-Point Assessment for ST0234 Housing and Property Management**

End-Point Assessment Kit



# Highfield Level 3 End-Point Assessment for ST0234 Housing and Property Management

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 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 3 Housing and Property Management 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
<b>Level:</b>	3
<b>On Programme Duration:</b>	Typically 18 months
<b>Grading:</b>	Pass or distinction
<b>End-Point Assessment methods:</b>	Work-based project and VIVA, made up of a presentation and Q&A session

## 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 occupation is customer facing and primarily responsible for the creation and sustainment 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 often includes addressing complex people-related matters (for example, supporting people to live independently) as well as property-related responsibilities. The role incorporates a degree of lone working with minimum supervision whilst predominantly working within the wider organisation and team, communities and external partners.

Housing and property management professionals are proactive in finding solutions to problems and identifying areas for improvement. They take individual responsibility for the quality and accuracy of their work and its administration. At level 3 some housing and property professionals may also have supervisory responsibility for other people.

The apprenticeship prepares an individual for a range of general housing and property management duties leading to operational or specialist roles, such as:

- generic or specialist housing officer or neighbourhood officer (for example, anti-social behaviour, resident involvement, tenancy sustainment, homelessness, repairs, sheltered housing)
- neighbourhood co-ordinator or advisor
- lettings officer, allocations officer, tenancy officer, income management officer
- leasehold management officer, private sector housing officer, strategic housing officer, property manager
- negotiator, senior negotiator

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

- Chartered Institute of Housing (CIH) at Certified Practitioner level
- Association of Residential Letting Agents (ARLA) at Member level
- Institute of Residential Property Management (IRPM) at Associate level

## On-programme requirements

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Although learning, development and on-programme assessment is 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 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 provider will need to prepare the apprentice for the end-point assessment, including collation of the portfolio of evidence and preparation for the project and VIVA.

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 which 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 not be assessed but is required in order to pass through gateway. The portfolio of evidence should include:

- regular performance reviews undertaken by the employer and training provider
- target setting, regularly scheduled and recorded one to ones and periodic assessments against targets
- collection of evidence in undertaking the role relevant to the evidence required to demonstrate competence against the standard and assessment criteria
- reflective learning and feedback
- 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

This will not be assessed but is required in order to pass through gateway. 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.

## **Project**

Apprentices will be required to undertake a project and write a project report accompanied by a diary for their end-point assessment. During on-programme learning, preparation for the project should take place.

Training providers and employers should work with the apprentice to agree on a project brief that allows the apprentice the opportunity to demonstrate the integration of skills, knowledge and behaviours that will be assessed during the end-point assessment. It is expected to stretch both theoretical understanding and practical application of this and so test real acquired skills and knowledge.

It might, for example, outline the practical application of a policy or the impact of legislation in the operation of a housing management function and how this is applied within the apprentice's area of work. It will be necessary to interact with colleagues and tenants in developing and executing the project.

For full guidance on the scope of the work project and an example brief, see 'Assessing the Work-based Project' later in this kit.

## **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 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 2 English and math.
- the apprentice must have gathered a portfolio of evidence against the required standards although it does not form part of the grading process.
- 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 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 assessment of the project report and diary followed by the VIVA, which is made up of a presentation and questions and answers (Q&A) session.

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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-v1-1>

End-point assessment plan (ST0234/IfATE v1.1)

[https://www.instituteforapprenticeships.org/media/1388/housing\\_property\\_management\\_assessment\\_plan.pdf](https://www.instituteforapprenticeships.org/media/1388/housing_property_management_assessment_plan.pdf)

## Specific considerations

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

Page 2 of the assessment plan mentions an 'examination' that must be passed before gateway, however, there is no further information regarding this examination elsewhere within the plan. Therefore, there is no requirement for apprentices to sit an examination in order to pass through gateway.

The assessment plan does not state either the word count of the project report or the duration of the VIVA. Therefore, Highfield has set a recommended word count of 5000 words for the project report and the VIVA will be 60 minutes in total. The VIVA will be split into 15 minutes for the presentation and 45 minutes for the questions and answers (Q&A).

Section 7 of the assessment plan states that the final assessment requires the apprentice to demonstrate their KSBs in an integrated manner to deliver the learning outcomes required to meet the standard. Highfield's approach is that the independent assessor will assess the project report and diary and this will be followed by the VIVA in order to cover any criteria not already met by the project report or diary. The assessor will focus on meeting the pass criteria before they move on to assess against the distinction requirements. Therefore, particular assessment criteria are **not** assigned to either the project report OR the VIVA, which will allow for full integration of the assessments.

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.

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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 2 English
- achieved level 2 math
- complied their 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's 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 apprenticeship standard

The following pages contain the housing and property management 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>• Understand the principles, practices and legislation relating to current landlord and tenant law for the letting, maintenance and termination of a variety of tenancy types, including but not limited to: shorthold, assured, secure, long leasehold and shared ownership.</li> <li>• Understand the principles, practices and legislation as it applies to governance, court proceedings, contracts, data protection, safeguarding and other relevant areas</li> <li>• Understand legislation and regulations as they apply to housing standards</li> </ul>	
Work-based project and VIVA	
<b>Criteria covered</b>	
LR1	Summarise the <b>issues</b> relating to the letting of property in the <b>social</b> and <b>private</b> rented sectors
LR2	Explain the main provisions of data protection, safeguarding and <b>other relevant legislation</b> as it applies to housing and property management
LR3	Explain the basic requirements of a contract and the <b>special provisions</b> relating to housing/property contracts
LR4	Summarise the <b>codes of practice and published standards</b> covering the <b>social</b> and <b>private</b> rented sectors
LR5	Explain the legislation and regulations as they apply to housing standards
Amplification and guidance	
<b>Issues:</b>	
<ul style="list-style-type: none"> <li>• social:               <ul style="list-style-type: none"> <li>○ repairs not completed in time</li> <li>○ illegal use</li> <li>○ awaiting documentation from support/social worker</li> </ul> </li> </ul>	

- private:
  - no energy performance certificate/no gas safety certificate/no electrical installation condition report
  - issues with tenancy agreement (incorrect details, not signed)
  - deposit/rent not received
  - smoke/carbon monoxide detectors not working/installed
  
- **other relevant legislation:**
  - Health and Safety at Work etc Act 1979
  - Homes (Fit for Human Habitation) Act 2018
  - Housing Act 1988/1996/2004
    - Introduced ASTs and Section 8 & Section 21s
    - Introduced deposit protection)
  - 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

- Understand the principles, priorities and values of the organisation they work for, including an awareness of the business plan, the range of services available to clients and customers, the roles and responsibilities of others and team targets and or Key Performance Indicators.

### Work-based project and VIVA

#### Criteria covered

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

### Amplification and guidance

#### Range of services:

- social:
  - maintenance
  - estate management
  - community services
- private:
  - repairs and maintenance
  - renewals
  - fully managed
  - tenant find/let only

## Assets

### Knowledge

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

### Work-based project and VIVA

#### Criteria covered

- AS1 Explain how design and layout of neighbourhoods can impact upon community safety
- AS2 Explain the **systems** used to deliver economic, efficient and effective asset management programmes
- AS3 Explain the process for delivering an economic, efficient and effective responsive repairs service
- AS4 Diagnose **common housing/building/property defects**
- AS5 Describe the requirements of health and safety acts and policies, for housing management and maintenance including utilities, fire, chemical and biological hazards etc.

### Amplification and guidance

#### Systems:

- planned and programmed maintenance
- improvements
- major repairs
- cyclical (including annual maintenance)

#### Common housing/building/property defects:

- boiler pressure too low preventing boiler working (re-pressurising the boiler)
- filter on washing machine clogged
- condensation caused by lack of ventilation

- damp (penetrating and rising)
- broken guttering
- damp proof course
- damage caused by tenants to doors, walls and cupboards
- appliance problems
- vermin/bins
- drying washing inside
- items resting against walls

## Customers

### Knowledge

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

### Work-based project and VIVA

#### Criteria covered

- CS1 Describe how national equality and diversity legislation applies to housing services provision
- CS2 Explain the diversity of housing service users and their needs
- CS3 Explain sources of good practice guidance to meet the diverse needs of customers.
- CS4 Explain how organisation's services meet the diverse needs of a community

## Context

### Knowledge

- Understand the current and historical context of social/rented/affordable housing and the broader housing market.

### Work-based project and VIVA

#### Criteria covered

- CT1 Explain the origins of the housing sector to include local authority social housing, the housing association movement and the private rented housing sector.
- CT2 Summarise the impact of the wider housing market on the development of the local authority, housing association and private rented housing sectors

## Range of services

### Knowledge

- Have an appreciation of the range of applicable housing services for example, repairs and maintenance, allocations, lettings, tenancy sustainment, financial and social inclusion, anti-social behaviour, care and supported housing, rents, service charges and portfolio accounts and community involvement.



Work-based project and VIVA	
<b>Criteria covered</b>	
RS1	Summarise the <b>core services</b> that housing or property management organisations deliver to their customers
Amplification and guidance	
<p><b>Core services:</b></p> <ul style="list-style-type: none"> <li>• social: <ul style="list-style-type: none"> <li>○ allocations</li> <li>○ tenancy sustainment</li> <li>○ anti-social behaviour/mediation</li> <li>○ maintenance</li> <li>○ estate management</li> <li>○ community services</li> </ul> </li>   <li>• private: <ul style="list-style-type: none"> <li>○ repairs and maintenance</li> <li>○ renewals</li> <li>○ fully managed</li> <li>○ tenant find/let only</li> <li>○ rent collection</li> <li>○ viewings</li> <li>○ referencing</li> <li>○ right to rent</li> <li>○ inventory</li> <li>○ inspections</li> <li>○ deposits</li> </ul> </li> </ul>	

<b>Organisational policies</b>	
<b>Knowledge</b>	
<ul style="list-style-type: none"> <li>Understand the principles, policies and practices of the organisation they work for in terms of customer care, employee code of conduct, team working, risk, personal safety, health and safety, equality and diversity, safeguarding and business communications.</li> </ul>	
<b>Work-based project and VIVA</b>	
<b>Criteria covered</b>	
OP1	Explain how <b>organisational principles and policies</b> impact on the delivery of services
OP2	Describe key organisational policies and how they relate to the way services are delivered
<b>Amplification and guidance</b>	
<b>Organisational principles and policies:</b> <ul style="list-style-type: none"> <li>Customer service policy</li> <li>Complaint's process/policy</li> <li>Dress code</li> <li>Lone working policy</li> <li>Anti-Money Laundering checks</li> <li>Equality and Diversity policy</li> <li>IT Policies</li> </ul>	

Customer care	
Skill	Behaviour
<ul style="list-style-type: none"> <li>Apply a range of customer care 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</li> </ul>	<ul style="list-style-type: none"> <li>Demonstrates a responsive approach to customer needs and understands their personal impact on customers and their lives</li> </ul>
<b>Work-based project and VIVA</b>	
<b>Criteria covered</b>	
CC1 Builds rapport with customers and demonstrates empathy and understanding when dealing with them. CC2 Responds to customers, colleagues and <b>partner organisations</b> in a timely, accurate fashion in accordance with service standards and company policies. CC3 Recognises and responds to different <b>types of customers</b> including those who are vulnerable, with additional and complex needs CC4 Demonstrates a genuine interest and care towards their work CC5 Shows consideration and flexibility to people CC6 Consistently offers guidance and support to others	
<b>Amplification and Guidance</b>	
<b>Partner organisations:</b> <ul style="list-style-type: none"> <li>local council</li> <li>stakeholders</li> <li>maintenance contractors</li> </ul> <b>Types of customers:</b> <ul style="list-style-type: none"> <li>tenants</li> </ul>	

- landlords
- former homeless
- vulnerable
- learning disabilities

## Communication

### Skill

- Demonstrate appropriate communication skills to enable timely identification and/or resolution of issues for customers and appropriate signposting to other colleagues and/or partner agencies.

### Work-based project and VIVA

#### Criteria covered

- CO1 Adapts and uses the appropriate **method and style of communication** to changing circumstances and needs  
 CO2 Asks questions and challenges others positively  
 CO3 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 such as:
  - local authority
  - age concern
  - citizens advice
  - shelter
- designated interpreter
- using property ombudsman vulnerability guidance

**Collaborative working**

**Skill**

- Work collaboratively with colleagues and partners to achieve individual, team and business targets.

**Work-based project and VIVA**

**Criteria covered**

CW1 Achieves joint outcomes through working collaboratively with individuals and teams.

**Information collection and sharing**

**Skill**

- Use a variety of methods to identify, collect and communicate technical and other information in a confident and effective manner

Work-based project and VIVA	
<b>Criteria covered</b>	
IS1	Collects, records and stores information that is accurate, sufficient, relevant and in line with the organisation's policies
IS2	Presents and shares information using a variety of methods
IS3	Adopts the most appropriate way to communicate relevant information to stakeholders

Influencing and negotiating skills	
Skill	
Influence and negotiate with customers, partners and suppliers.	
Work-based project and VIVA	
<b>Criteria covered</b>	
NS1	Secures mutually beneficial outcomes through assertive negotiation with customers, partners and suppliers
NS2	Consistently seeks value for money in procurement to ensure efficiency and quality

Self-management	
Skill	
<ul style="list-style-type: none"> <li>Organise and plan their own work to ensure tasks are completed and deadlines met.</li> </ul>	
Work-based project and VIVA	
<b>Criteria covered</b>	

SM1 Plans time and priorities to meet business needs and to complete work on time  
 SM2 Raises concerns about workload and timescales before crises arise

## Problem solving

### Skill

- Use a problem-solving and flexible approach in their day-to-day duties

### Work-based project and VIVA

#### Criteria covered

- PS1 Takes ownership for the investigation and analysis of problems to achieve solutions in line with customer standards  
 PS2 Escalates problems to relevant managers that cannot be solved and follows through to ensure action has been taken  
 PS3 Reviews the outcomes of investigations to determine lessons learnt and identify best practice

## Tools and equipment

### Skill

- Effective use of IT equipment and software, through administration and the appropriate use of work equipment

### Work-based project and VIVA

#### Criteria covered

TE1	Demonstrates proficient use of IT systems to perform housing/property related tasks
TE2	Complies with appropriate <b>regulatory requirements relating to the use of IT equipment</b>
<b>Amplification and guidance</b>	
<b>Regulatory requirements relating to the use of IT equipment:</b>	
<ul style="list-style-type: none"> <li>• Consumer Protection from Unfair Trading Regs 2008</li> <li>• Property must have an EPC before advertising</li> <li>• GDPR compliant</li> <li>• Sends sensitive documents password protected</li> </ul>	
<b>Decision making</b>	
<b>Skill</b>	
<ul style="list-style-type: none"> <li>• Effective decision making in order to apply the businesses objectives and priorities.</li> </ul>	
<b>Work-based project and VIVA</b>	
<b>Pass criteria covered</b>	
DM1	Makes effective decisions in the context of the company's objectives and priorities

<b>Responsive</b>	
<b>Behaviours</b>	
<ul style="list-style-type: none"> <li>• Takes timely and responsive action to address issues</li> </ul>	
<b>Work-based project and VIVA</b>	



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

Trust and integrity
Behaviours
<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>
Work-based project and VIVA
Pass criteria covered
T11 Demonstrates <b>integrity and ethical behaviour</b> in the way they do their job.
Amplification and guidance
<p><b>Integrity and ethical behaviour:</b></p> <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

- Willingness to accept changing priorities and work patterns

### Work-based project and VIVA

#### Pass criteria covered

AD1 Responds positively to change and shows willingness to refocus priorities when required

## Independence

### Behaviours

- Work independently and effectively without close supervision.

### Work-based project and VIVA

#### Criteria covered

IN1 Manages own time well, adjusting schedules, tasks and priorities, when necessary

<b>Dependability</b>	
<b>Behaviours</b>	
<ul style="list-style-type: none"> <li>Meets personal commitments and expectations of others.</li> </ul>	
<b>Work-based project and VIVA</b>	
<b>Pass 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 own personal and professional development</li> </ul>	
<b>Work-based project and VIVA</b>	
<b>Criteria covered</b>	
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

<b>Resilience</b>	
<b>Behaviours</b>	
<ul style="list-style-type: none"> <li>Has a high level of resilience, tenacity and calmness</li> </ul>	
<b>Work-based project and VIVA</b>	
<b>Criteria covered</b>	
RL1	Acknowledges own <b>emotional and professional limits</b> and seeks help when necessary
RL2	Responds calmly and consistently in all situations
<b>Amplification and guidance</b>	
<b>Emotional and professional limits:</b> <ul style="list-style-type: none"> <li>work-life balance</li> <li>not getting too emotionally involved</li> </ul>	

<b>Role model</b>	
<b>Behaviours</b>	
<ul style="list-style-type: none"> <li>Acts as an ambassador/role model for their employer with customers and partners.</li> </ul>	
<b>Work-based project and VIVA</b>	
<b>Criteria covered</b>	
RM1	Displays confidence and professionalism when dealing with people.

RM2 Demonstrates the importance of dealing with people in an honest and up-front manner.

## Teamwork

### Behaviours

- Values teamwork and is an effective team player, accepts responsibility for the work of themselves and others. (collaborative)

### Work-based project and VIVA

#### Criteria covered

TW1 Is an enthusiastic and positive team member

TW2 Shares knowledge, ideas and experiences with wider team to assist with continuous improvement

TW3 Demonstrates an open and honest communication style

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# Assessment Summary

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

1. Work-based project report and accompanying diary with a recommended word count of 5000 words
2. VIVA made up of a 15-minute presentation and a 45-minute Q&A session

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 project and VIVA

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Assessors will assess the work-based project evidence (report and diary) prior to the VIVA. After this, any criteria that have not been met will be assessed during the VIVA.

A **Written Submission Sheet** is provided for this purpose and is available 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 project report and the VIVA. This means that the assessor will assess the project report and supporting diary and any areas not fully met will be assessed within the 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 project report, presentation or their responses to questions in the questions and answers (Q&A) session.

	<b>Fail</b>	<b>Pass</b>	<b>Distinction</b>
<b>Score for topic area:</b>	<b>0-2</b>	<b>3</b>	<b>4-5</b>
<b>Basis:</b>	Significant gaps in their ability to demonstrate the assessment criteria	Fully meets all of the assessment criteria in the standard area	Consistently exceeds most 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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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 complete a retake checklist. Once this is completed, please call the Highfield scheduling team to arrange the retake.

When undertaking a resit or retake, either both assessment method(s) can be re-attempted in full, **or** a reattempt of the VIVA only where the apprentice will attempt the topic areas where they failed to achieve at least a score of 3 across the work-based project and VIVA. The EPA Report will contain feedback on areas for development and resit or retake guidance.

There is no limit to the number of times an apprentice take resits or retakes 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 project

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The scope of the project 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 project report and diary, which will form the basis of the assessment. The project report is a recommended 5000 words and the diary is likely to be in addition to this, as an appendix.

The project report and diary should be submitted to Highfield Assessment within **3 weeks** of gateway.

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

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

### Work-based project guidance

The assessment criteria within this standard are flexible to allow apprentices to undertake a project on many different areas of housing and their role.

The project scope should:

- relate to their own role or the wider housing or property management sector.
- not be too large or ambitious to prevent the apprentice from completing the activities required in the time allowed.
- not be too narrow or general, for example, focussing purely on GDPR requirements.
- allow the apprentice to work or liaise with others in their organisation or partner organisations, but not be dependent on them for the completion of the project.
- allow the apprentice to work with and reflect on their interactions with customers or partner organisations.
- allow the apprentice to make recommendations and have a clear outcome.
- allow the apprentice to meet the knowledge, skills and behaviours criteria outlined within this EPA kit.
- allow the apprentice to gather a supporting diary to record milestones and reflection, which may support the achievement of some criteria, for example,



behaviours. The diary should record the date, activity or milestone and key outcomes or actions, as a minimum.

Highfield has produced an example brief that could be used. This is **not** mandatory, as apprentices may wish to undertake a project which covers the criteria in a different way and therefore their project reports and diaries may follow a different format. This is acceptable.

Project topics could include:

- the practical application of a policy or the impact of legislation in the operation of a housing management function and how this is applied within the apprentice's area of work
- review of the current tenant or landlord application process
- review of the methods of interaction and communication between landlords and tenants
- review or create a 'move-in pack' for new tenants
- investigate ways to support older or vulnerable residents
- the impact of Covid-19 on the organisation's service to customers

Apprentices will be assessed against the criteria included later in this document. Some areas of the standard are more generic, such as the areas of context and assets, but these still need to be appropriately covered by the project report and VIVA. The project report example brief on the following pages provides a suggestion for how these areas can also be met.

### **Before the assessment:**

Employers/training providers should:

- agree the project title and scope with the apprentice
- ensure the apprentice has prepared a project report 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

## Example apprentice project brief and criteria

In this example brief, apprentices are asked to carry out 3 tasks that together will cover all the relevant parts of the standard.

All 3 tasks could be covered in 1 report, or the apprentice may choose to complete 2 tasks in the report and 1 as part of their VIVA presentation.

1. **Understanding the housing sector, your own organisation and what it does**
2. **Research project** - this allows the apprentice to research an area of housing policy, code of practice, legislation or an organisational process or service and review the impact on customers, their organisation and their own role.
3. **Customer service in action** - this is all about how the apprentice has undertaken their role in a way that positively supports customers, colleagues and organisational requirements.

The apprentice should produce and submit a 5000-word written report, supported by a diary.

The apprentice may submit supplementary evidence within an appendix to accompany the report and diary, which may include customer feedback, recordings, manager statements and witness testimonies. This supplementary evidence will **not** form part of the overall word count.

<b>Understanding the housing sector, your own organisation and what it does</b>
<b>To pass this task, you must meet the criteria contained within the following pages</b>
Produce a written report that describes the context of the housing sector and how your organisation fits within it. You should also undertake research into the regulation and legislation relevant to your role and the organisation, and the systems and technology you use.  In your report you should cover: <ul style="list-style-type: none"><li>• the current and historical context of the housing sector</li><li>• the processes and systems used to deliver economic, efficient and effective asset management programmes</li><li>• the range of services offered by housing or property management organisations and your organisation specifically, including repairs</li><li>• the basic requirements of a contract and special provisions in place</li><li>• the diversity of the communities and customers your organisation serves and how their requirements are met</li><li>• the organisation's core values and how these impact on customer service</li><li>• the key housing legislation, codes of practice, standards, policies and procedures that affect your role and how</li></ul>

- other legislative requirements that affect your role and the services provided by your organisation, such as safeguarding and health and safety
- technology, systems and confidentiality requirements in your role

### **Research project**

**To pass this task, you must meet the criteria contained within the following pages**

Taking a piece of legislation, code of practice, policy, procedure, or a service your organisation offers, research and reflect on the impact this has on customers or your organisation and suggest ways that these can be addressed. In your report you should cover:

- a brief overview of the legislation, code of practice, policy or service chosen
- any issues or repercussions identified
- proposals for how to overcome these, including problem-solving techniques you have used and investigation you have undertaken
- how you have worked with others in coming up with your proposals
- justification or rationale for your proposals, based on decision-making methods and tools utilised
- how value for money has been considered
- methods for communicating proposed changes or information
- a diary of how you have undertaken these tasks

### **Customer service in action**

**To pass this task, you must meet the criteria contained within the following pages**

Reflect on the ways you have worked in your role to support customers, colleagues and meet organisational objectives. In your report you should cover:

- how your personal and team objectives fit into the organisational plan
- how key organisational policies relate to the way services are delivered
- the methods you have used to build rapport with different types of customers and support them appropriately
- ways of negotiating the best outcomes for all parties
- the methods you have used to effectively manage your own time to best support the requirements of your role
- positive behaviours you have demonstrated

## Assessing the VIVA

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The 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 project or could cover some of the more generic areas of the standard where an apprentice has not covered these areas within the project report.

For example, the presentation could cover:

- an overview of the scope of the project
- organisation background information including description of customer base and how their needs are met
- relevant organisational policies and legislation that impacted on the project
- 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 project

The presentation materials do not need to be submitted to Highfield in advance of the 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 questions and answers session to enable discussion of the learning areas 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 project report and the presentation in relation to how they have demonstrated the relevant knowledge, skills and behaviours.

Apprentices may bring resources or on-programme evidence to the 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 project report 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 VIVA by familiarising themselves with the criteria that will be assessed and reflect 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

## 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 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 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 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 questions and answers (Q&A) session.
- consider a video or audio recording of the mock presentation and questions and answers (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 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 allows them to give examples for how they have met each area in the standard. For example:
  - what are the core services that your housing or property management organisation delivers to its customers
  - how do you cater for the diversity of your customer base
  - tell me about your approach to customer service. How do you manage customer relationships

## Work-based project and VIVA assessment criteria

### Knowledge

#### Legislation and regulation

- LR1 Summarise the issues relating to the letting of property in the social and private rented sectors
- LR2 Explain the main provisions of data protection, safeguarding and other relevant legislation as it applies to housing and property management
- LR3 Explain the basic requirements of a contract and the special provisions relating to housing/property contracts
- LR4 Summarise the codes of practice and published standards covering the social and private rented sectors
- LR5 Explain 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 Explain how personal and team objectives fit into the organisational plan
- OB3 Explain the range of services that may be offered in the social or private rented sectors

#### Assets

- AS1 Explain how design and layout of neighbourhoods can impact upon community safety.
- AS2 Explain the systems used to deliver economic, efficient and effective asset management programmes e.g. planned and programmed maintenance, improvements, major repairs, cyclical (including annual maintenance)
- AS3 Explain the process for delivering an economic, efficient and effective responsive repairs service
- AS4 Diagnose common housing/building/property defects
- AS5 Describe the requirements of health and safety acts and policies, for housing management and maintenance including utilities, fire, chemical and biological hazards etc.

#### Customers

- CS1 Describe how national equality and diversity legislation applies to housing services provision.
- CS2 Explain the diversity of housing service users and their needs
- CS3 Explain sources of good practice guidance to meet the diverse needs of customers.
- CS4 Explain how organisation's services meet the diverse needs of a community

### Context

- CT1 Explain the origins of the housing sector to include local authority social housing, the housing association movement and the private rented housing sector.
- CT2 Summarise the impact of the wider housing market on the development of the local authority, housing association and private rented housing sectors

### Range of services

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

### Organisational policies

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



## Work-based project and VIVA assessment criteria

### Skills

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#### Customer care

- CC1 Builds rapport with customers and demonstrates empathy and understanding when dealing with them
- CC2 Responds to customers, colleagues & partner organisations in a timely, accurate fashion in accordance with service standards and company policies
- CC3 Recognises and responds to different types of customers including those who are vulnerable, with additional and complex needs

#### Communication

- CO1 Adapts and uses the appropriate method and style of communication to changing circumstances and needs
- CO2 Asks questions and challenges others positively
- CO3 Signposts customers to appropriate services and support

#### Collaborative working

- CW1 Achieves joint outcomes through working collaboratively with individuals and teams

#### Information collection and sharing

- IS1 Collects, records and stores information that is accurate, sufficient, relevant and in line with the organisation's policies
- IS2 Presents and shares information using a variety of methods
- IS3 Adopts the most appropriate way to communicate relevant information to stakeholders

#### Influencing and negotiating skills

- NS1 Secures mutually beneficial outcomes through assertive negotiation with customers, partners and suppliers
- NS2 Consistently seeks value for money in procurement to ensure efficiency and quality

#### Self-management

- SM1 Plans time and priorities to meet business needs and to complete work on time
- SM2 Raises concerns about workload and timescales before crises arise

### Problem solving

- PS1 Takes ownership for the investigation and analysis of problems to achieve solutions in line with customer standards
- PS2 Escalates problems to relevant managers that cannot be solved and follows through to ensure action has been taken
- PS3 Reviews the outcomes of investigations to determine lessons learnt and identify best practice

### Tools and equipment

- TE1 Demonstrates proficient use of IT systems to perform housing/property related tasks
- TE2 Complies with appropriate regulatory requirements relating to the use of IT equipment

### Decision making

- DM1 Makes effective decisions in the context of the company's objectives and priorities

## Work-based project and VIVA assessment criteria

### Behaviours

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#### Customer care

- CC4 Demonstrates a genuine interest and care towards their work
- CC5 Shows consideration and flexibility to people
- CC6 Consistently offers guidance and support to others

#### 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

- AD1 Responds positively to change and shows willingness to refocus priorities when required

#### Independence

- IN1 Manages own time well, adjusting schedules, tasks and priorities when necessary

#### 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

#### Resilience

- RE1 Acknowledges own emotional and professional limits and seeks help when necessary
- RE2 Responds calmly and consistently in all situations

### Role model

- RM1 Displays confidence and professionalism when dealing with people
- RM2 Demonstrates the importance of dealing with people in an honest and up-front manner

### Teamwork

- TW1 Is an enthusiastic and positive team member
- TW2 Shares knowledge, ideas and experiences with wider team to assist with continuous improvement
- TW3 Demonstrates an open and honest communication style

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