

# Highfield Level 4 End-Point Assessment for ST0236 Senior Housing and Property Management

## End-Point Assessment Kit



# Highfield Level 4 End-Point Assessment for ST0236 Senior 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 Senior 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 4 Senior 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>	Senior Housing and Property Management
<b>Level:</b>	4
<b>On programme duration:</b>	Typically 18 – 24 months
<b>End-point assessment window:</b>	6 months
<b>Grading:</b>	Pass or distinction
<b>End-point assessment methods:</b>	Work-based project and VIVA, made up of a presentation with questions and answers 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 senior housing and property management occupation in both social and private housing sectors is responsible for the management and delivery of housing and property-related services within their business and service area(s). The role involves the management of resources with delegated authority to deliver the business objectives. The work must comply with contractual, statutory and legal regulations.

The senior housing and property manager manages a specific function and associated team(s) whilst working with the wider organisation, team, communities, and external partners.

Senior housing and property management professionals are proactive in finding solutions to problems and identifying areas for improvement. They take individual responsibility for the overall quality and cost-effectiveness of their business and service area(s) and the needs of stakeholders.

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 Fellow Level
- Institute of Residential Property Management (IRPM) at Full Member Level

Apprentices will be able to progress to senior managerial and professional roles within the housing and property sector.

## 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 Senior 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 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.

### Portfolio of evidence

Throughout the on-programme period, a portfolio of evidence must be gathered. This is not required to be submitted and it will not be assessed. It needs to be completed in order to pass through gateway. Once completed, it will need indicating as such on the Gateway Readiness Report (available from Highfield Assessment website).

The portfolio of evidence should include:

- evidence required to demonstrate 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 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

## 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 2 English and math.
- the apprentice must have gathered a portfolio of evidence against the required standards. While the portfolio of evidence is not assessed and does not form part of the grading process, it is a requirement in order to allow learners to continue with the apprenticeship and advance to the end point assessment. Once completed, it will need indicating as such on the Gateway Readiness Report.
- 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 6-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 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

<https://www.instituteforapprenticeships.org/apprenticeship-standards/senior-housing-and-property-management-v1-3>

End-point assessment plan (ST0236/IfATE v1.3)

[https://www.instituteforapprenticeships.org/media/7213/st0236\\_senior\\_housing\\_property\\_management2023.pdf](https://www.instituteforapprenticeships.org/media/7213/st0236_senior_housing_property_management2023.pdf)

## Specific considerations

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 (+/-10%) for the project report and the VIVA will be 60-minutes in total. The VIVA will be split into 15 mins for the presentation and 45 mins for the question and answer session.

All of the evidence criteria used within the end-point assessment are taken from the senior housing and property management assessment plan.

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.

The apprentice's line manager and training provider representatives cannot be present at the VIVA. The scoring and grading of the assessment will solely be the responsibility of the independent end-point assessor. This does not deviate from the assessment plan laid out on the IfATE website.

## Retake and resit information

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.

Where topic areas are assessed by one of the assessment methods only, the apprentice will have to re-attempt the respective method:

- where a topic area is assessed in the work-based project, they will have to re-attempt the work-based project
- where a topic area is assessed in the VIVA, they will have to re-attempt the VIVA

Where topic areas are assessed across both methods, and the apprentice fails to achieve a minimum score of 3 in these topic areas, they will have to re-attempt the work-based project with the VIVA.

Should a large number of topic areas need to be carried over to the VIVA, a decision will be made as to whether the apprentice would be able to attempt them all in the allotted time. If this is not the case, learners will be advised to re-attempt the work-based project again, as well as the VIVA.

There is no limit to the number of times an apprentice resits or retakes either of the assessment methods.

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

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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
- 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

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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 Senior 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 and interpret the principles, practices and legislation relating to current landlord and tenant law, relevant Codes of Practice and legal framework. For example, for the letting, management and termination of a variety of tenancy types. These include, but are not limited to, shorthold, freehold, assured, secure, long leasehold, and shared ownership.</li> <li>Understand and interpret the principles, practices and legislation as it applies to governance, court proceedings, contracts, data protection, safeguarding and other relevant areas.</li> <li>Understand and interpret legislation and regulation as they apply to housing standards for rental and sale properties.</li> </ul>	
VIVA	
Criteria covered	
LR1	Outline key <b>issues</b> related to the letting of property in the social and private rented sectors (regulation, standards, legal, business issues).
LR2	Evaluate company policies related to governance, court proceedings, contracts, data protection, safeguarding and <b>other relevant legislation</b> (as it applies to housing and property management) against validated good or innovative practice.
LR3	Explain the basic requirements of a contract and the <b>special provisions</b> relating to housing/property contracts.
LR4	List and explain the different types of tenancy available in the UK.
LR5	Summarise the relevant <b>codes of practice and published standards</b> covering the social and private rented sectors.
LR6	List and interpret the relevant legislation and regulations as they apply to housing standards for rental and sale properties.
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> </ul> </li> </ul>	

- awaiting documentation from support/social worker
- 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
- 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 and business planning

### Knowledge

- Understand and interpret the business planning process, financial and risk management, organisation values and structure and the range of services available to customers. Understand organisational performance management systems and how the roles and responsibilities contribute to the achievement of the overall business objectives.

### VIVA

#### Criteria covered

- OB1 Explain how the **business principles, priorities and values** of the organisation impact on the nature and delivery of services to customers.
- OB2 Describe the organisational performance management system/s.
- OB3 Describe how personal and team objectives relate to the organisational plan and identify any areas for improvement or gaps within the structure.

### Amplification and guidance

#### Business principles, priorities and values

- company mission/values
- customer service policy
- complaint's policy/procedure
- business plan
- dress code
- organisation and company examples:
  - honesty and integrity in everything we do
  - satisfy our customers
  - superior quality, value and service
  - provide attractive returns through sustainable, global growth
  - respect our social and physical environment around the world
  - value and develop our employees' diverse talents, initiative and leadership
  - earn the admiration of all those associated with us

- Values
  - loyalty
  - honesty
  - trust
  - ingenuity
  - accountability
  - simplicity
  - respect
  - value-centricity

Assets	
Knowledge	
<ul style="list-style-type: none"> <li>• Understand the strategic value of the social and physical context of the estates/ neighbourhoods.</li> </ul>	
VIVA	
Criteria covered	
AS1	Understand the value of the social and physical contexts of the estates/ neighbourhoods to the organisation.
AS2	Understand the <b>systems</b> used to deliver economic, efficient and effective asset management programmes, e.g. planned and programmed maintenance, improvements, major repairs, cyclical (including annual maintenance).
Amplification and guidance	
<b>Systems:</b> <ul style="list-style-type: none"> <li>• examples of software systems</li> <li>• monitoring systems</li> <li>• physical inspections/audits</li> <li>• efficiency testing to AMP performance planning and operations</li> <li>• diary log/reminder systems – work auto generation</li> </ul>	

- carrying out regular property inspections
  - Inspection
  - Gas Safeties
  - EPC
  - EICRs
  - Major maintenance programmes
- **social housing elements:**
  - grass cutting
  - general property improvements
  - communal area such as painting

## Customers and stakeholders

### Knowledge

- Respond to and respect the diversity of customers, clients and stakeholders. Ensure the delivery of services to meet diverse requirements.

### Work-based project and VIVA

#### Criteria covered

- CS1 Operate in a way that builds rapport with customers and demonstrates empathy and understanding when dealing with them.
- CS2 Demonstrate consistent accurate and appropriate **communication** through all relevant media.
- CS3 Operate in a way that builds rapport with relevant stakeholders to deliver an acceptable level of customer service.
- CS4 Assess the **range of services** offered by the organisation and how they meet needs.
- CS5 Plan customer engagement to identify, address and meet diverse needs.

### Amplification and guidance

#### Communication:

- Written such as email and letters
- Verbal such as telephone and face-to-face

- Social media
- Twitter
- Instagram
- Face to face
- Non-face to face
- Marketing brochures
- WEB sites
- Social media

**Range of services:**

- social:
  - allocations
  - tenancy sustainment
  - anti-social behaviour/mediation
  - maintenance
  - estate management
  - community services
  - marketing brochures
  - websites
  - social media
- private:
  - information leaflets
  - one to one conversations with private landlords
  - property reports
  - marketing brochures and materials
  - websites
  - social media
  - repairs and maintenance
  - renewals



- fully managed
- tenant find/let only
- rent collection
- viewings
- referencing
- right to rent
- inventory
- move Ins
- inspections
- deposits

Context	
Knowledge	
<ul style="list-style-type: none"> <li>Have a developed understanding of the historical context and current trends in the housing/property markets (i.e. social/rented/affordable/private sector housing) and the strategic housing market.</li> </ul>	
VIVA	
Criteria covered	
CT1	Describe historical and current <b>housing market trends</b> relevant to the area of work.
CT2	Evaluate the impact of external and internal policy decisions on housing markets in the area of work.
Amplification and guidance	
<ul style="list-style-type: none"> <li><b>Housing market trends:</b> <ul style="list-style-type: none"> <li>Identify 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> </ul> </li> </ul>	

- Property crash (credit crunch 2008)
- Brexit/COVID affects to the market
- Tax implications to private stakeholders
- Rent increases in private rented accommodation
- North South divide

Organisational policies	
Knowledge	
<ul style="list-style-type: none"> <li>• Understand the <b>organisation's policies and practices</b> and how they relate to service area and business objective. E.g. policies to deliver the housing services, people management and health and safety.</li> </ul>	
VIVA	
Criteria covered	
OP1	Explain the core <b>policies and practices of the organisation</b> and explain how they relate to service areas and business objectives.
Amplification and guidance	
<b>Policies and practices of the organisation:</b> <ul style="list-style-type: none"> <li>• Health and Safety Policy</li> <li>• Environmental Policy</li> <li>• Maintenance Policy</li> <li>• GDPR</li> <li>• Customer service policy (answering the phone in 3 rings, specific greeting, replying to emails within 24 hours)</li> <li>• Complaints process/policy</li> <li>• Dress code (appearance on outside appts and in the office)</li> <li>• Lone working policy (safe word, what to do on appointments outside of office hours)</li> <li>• Anti-Money Laundering checks (referencing, bringing on new landlords)</li> </ul>	

- E&D policy (inclusivity for all stakeholders)
- IT Policies (changing passwords, locking PC's when away)

## Customer service

### Skill

- Provide leadership in relation to the delivery of excellent customer service 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.

### Work-based project and VIVA

#### Criteria covered

- CSS1 Exercise customer service management responsibility with consideration for the organisation's service offer, customer expectations and resources.
- CSS2 Demonstrate ethical and non-judgemental decision making.
- CSS3 Demonstrate leadership role in meeting and delivery in order to exceed customer expectations.
- CSS4 Demonstrate the ability to vary customer service delivery depending on the customers' requirements.

## Communication

### Skill

- Demonstrate effective and appropriate communication skills, both verbal and written, in order to manage staff, resolve conflict and communicate effectively with clients, customers, stakeholders and/or partner agencies.

### Work-based project and VIVA

#### Criteria covered

- CO1 Demonstrate the appropriate **method and style of communication** to changing circumstances and needs.

- CO2 Demonstrate effective communication skills across a range of verbal and written media.  
 CO3 Demonstrate effective mediation and resolution skills to resolve conflict.  
 CO4 Demonstrate effective skills in managing staff.

#### Amplification and guidance

##### Method and style of communication:

- Written e.g. email, letters
- Verbal e.g. telephone, face-to-face
- WEB Cam
- Teams, Zoom, IT platforms during COVID
- Talking louder to meet the needs of someone who has a hearing impairment
- Use of written communications to interact
- Interpreters

## Collaborative working

#### Skill

- Lead and work collaboratively with colleagues across the business and in partnership with external organisations to achieve individual, team and business targets.

#### Work-based project and VIVA

##### Criteria covered

- CW1 Lead the delivery of joint outcomes through working **collaboratively** with individuals and teams.  
 CW2 Analyse the organisations business targets and suggest ways to achieve them.  
 CW3 Lead project members to deliver business targets.

#### Amplification and guidance

##### Collaboratively:

- definition – collaborative working - a variety of ways that two or more organisations can work together

- informal networks and alliances
- joint delivery of projects
- full mergers
- team work to enhance products and sales
- designing publications, leaflets, brochures, newsletters to promote service delivery
- monitoring enquiries and discussing how numbers could be improved
- planning documents used as part of audit trails that set out timescales and milestone
- stakeholder or partner contributions
- a tenant who doesn't provide access to the property to contractors
- lettings working together with property management/contractors/landlords to ensure the property is ready on time
- liaising with guarantors or organisations to resolve referencing issues
- liaising with surveyors, contractors and residents when main works will take place
- major works being completed and communicating this internally and externally

Respond to Vulnerability	
Skill	
<ul style="list-style-type: none"> <li>• Ensure services meet the needs of vulnerable individuals and groups (including those with complex needs).</li> </ul>	
VIVA	
Criteria covered	
RV1 Take a leadership role in ensuring the service meets the needs of <b>vulnerable</b> individuals and groups.	
RV2 Demonstrate understanding of provision required to meet the needs of vulnerable individuals and groups.	
Amplification and guidance	
<b>Vulnerable:</b> <ul style="list-style-type: none"> <li>• supporting someone who was vulnerable or needed help or support with something such as they were disabled in some way, may have had a support/social worker, fleeing domestic violence, someone who was homeless, single parent, widowed, long term separation and mental health issues</li> </ul>	

- young people leaving care
- working with social workers, local authorities, to address housing issues with young adults 16-25
- Working with organisations that support individuals who have been subject of domestic violence
- homeless or partner organisation that try to support homeless people in finding accommodation
- adults with complex needs or disabilities
- supporting vulnerable adults to move to sheltered housing accommodation or disability adapted properties
- supporting property owners to understand legal requirements to make changes to properties to meet the needs of vulnerable adults

## Information collection and sharing

### Skill

- Undertake data analysis, interrogate, interpret and disseminate information using a variety of methods and applications.

### Work-based project and VIVA

#### Criteria covered

IS1 Understand systems available for data analysis.

IS2 Be capable of **interrogating data** and present strategic/management information.

IS3 Prepare data reports including suggestions and conclusions on how the information collection could be improved and/or shared.

### Amplification and guidance

#### Interrogating data:

- methods/presentation – quantitative/qualitative data
- cluster analysis
- cohort analysis
- regression analysis
- factor analysis
- neural networks
- data mining
- text analysis

- organisation and interrogation of data to establish strong foundations for analysis
- initial analysis to detect patterns, themes, and relationships in the information
- attribution of cause and effect to test hypotheses
- translation of findings into insights to help draw conclusions and build recommendations
- report writing and dissemination to share findings and encourage uptake

## Influencing and negotiating

### Skill

- Influence and negotiate with partners and suppliers.

### Work-based project and VIVA

#### Criteria covered

NS1 Lead **negotiations** with partners and suppliers.

NS2 Achieve **outcomes** beneficial to the organisation through influence and negotiation.

### Amplification and guidance

#### Negotiations:

- negotiation on fees with a landlord to win the instruction
- offer negotiation from an applicant
- negotiation on maintenance/repairs issues
- setting up a payment plan
- negotiate on terms and conditions of applicant with landlord
- negotiate on move in dates
- extension of term end date
- negotiating sales price, rent charges, or rent increases
- negotiating with other agencies/ partners to find suitable accommodation for a client

**Outcomes:**

- build better relationships
- deliver lasting, quality solutions
- avoids poor short-term solutions
- meets mutual needs
- avoids future problems and conflicts
- negotiation on fees with a landlord to win the instruction
- offer negotiation from an applicant
- negotiation on maintenance/repairs issues
- setting up a payment plan
- negotiate on terms and conditions of applicant with landlord
- negotiate on move in dates
- extension of term end date
- influencing private or commercial property sales, lease holds or private rental
- influencing tenants to gain support from other agencies, help with rent, aids, adaptations to support any additional needs customers have

Financial management	
Skill	
<ul style="list-style-type: none"><li>• Manage budgets and report on financial performance. Ensure value for money.</li></ul>	
Work-based project and VIVA	
Criteria covered	
FM1 Demonstrate effective <b>management of budgets</b> .	
FM2 Demonstrate skills in seeking value for money outcomes.	
FM3 Understand and evaluate financial statements.	



Amplification and guidance
<b>Management of budgets:</b> <ul style="list-style-type: none"> <li>• preparing organisational or departmental budgets (human resources and physical resources required to operate the organisation or department)</li> <li>• checking budgets are on target against monthly cash flow profile</li> <li>• reviewing budgets and adjusting</li> <li>• making cost effective decisions to save money, for example use of printer, printing in black and white on a money saving printing operational setting</li> <li>• managing human resources ensuring they are not overspending on staff</li> </ul>

Performance and project management
Skill
<ul style="list-style-type: none"> <li>• Demonstrate effective performance management. Take the lead on projects through effective project management.</li> </ul>
Work-based project and VIVA
Criteria covered
PPM1 Demonstrate effective project <b>management skills</b> to drive forward projects to achieve timescales and strategic objectives. PPM2 Develop effective <b>project plans</b> . PPM3 Present and report on project progress, successes and challenges to senior managers. PPM4 Lead on projects successfully through to project completion.
Amplification and guidance
<b>Management skills:</b> <ul style="list-style-type: none"> <li>• delegation of tasks</li> <li>• project roles</li> <li>• collaborative working</li> <li>• time-management</li> <li>• problem solving</li> <li>• adaptability</li> </ul>

- leading and managing a project
- preparing in partnership plan of action
- schedule of works

**Project plans:**

- delegation of tasks
- project roles
- collaborative working
- time-management
- problem solving
- adaptability
- managing - work breakdowns
- define the project scope, goals and objectives
- your project goals and objectives set the rules for defining your project scope
- identify project phases and control accounts
- list your project deliverables
- set WBS levels
- create work packages
- choose task owners

People management	
Skill	
<ul style="list-style-type: none"> <li>• Lead, motivate, manage and develop individuals/teams to ensure excellent services are delivered. Coach, mentor and ensure the well-being of staff.</li> </ul>	
Work-based project and VIVA	
Criteria covered	
PM1 Analyse <b>skills and attributes</b> that make an effective team leader.	

PM2 Evaluate own leadership skills and attributes, identifying areas for personal development.  
 PM3 Apply **methods** to encourage team building, mutual trust and respect.  
 PM4 Analyse the effectiveness of line **management approaches** for teams.  
 PM5 Apply performance management principles to team or project work.  
 PM6 Describe the process of managing workplace stress.  
 PM7 Demonstrate effective formal planning.

#### Amplification and guidance

##### Skills and attributes:

- be consistent
- set a good example
- empower the team and encourages teamwork
- delegating tasks, avoiding micromanagement
- express interest/concern for team members, their success and personal wellbeing
- be productive/results-orientated
- good communicator – listen and share information - listening skills, being a good listener
- help the team with career development
- have a clear vision/strategy for the team, setting clear objectives and ensuring transparency
- have important technical skills that help advise the team
- showing appreciation
- reliable and trustworthy
- knowledge competence
- use of self-awareness models and theories to develop leadership management skills for managing people, emotions, workloads and skills
- planning
- decision making and problem solving and accepting responsibility
- report writing and use of good communication techniques
- risk management
- understanding own development needs and the drive to set goals
- able to adhere to organisational policies, procedures, ethical codes of conduct, legislation and regulations

**Methods:**

- Management techniques could include:
  - promote honesty and open communication
  - promote employees to feel and know they are heard, respected, and valued by their peers
  - develop opportunities for creative collaboration
- team building exercises could include:
  - social activities to build trust and motivate staff
  - supervision or performance review meetings with individual staff members

**Management approaches:**

- ability to actively listen
- communicate or interact well with others at all levels
- ability to prioritise and delegate
- organisational skills
- good motivational skills
- the ability to persuade and influence others
- conduct 1:1's
- mentoring and coaching skills

## Decision making and prioritising

### Skill

- Apply operational and strategic thinking to inform effective decision making to meet individual, team and overall businesses objectives and priorities. Use a flexible and innovative approach to problem solving. Undertake forward planning.

### Work-based project and VIVA

Criteria covered
DP1 Describe the company objectives and outline how team and own <b>targets</b> meet company objectives.
DP2 Evaluate own working practices against company objectives.
Amplification and guidance
<b>Targets:</b> <ul style="list-style-type: none"> <li>• Company aims, objectives, and vision</li> <li>• Projected Sales targets for private, commercial sales or rental</li> <li>• Departmental targets</li> <li>• Leadership and Management targets</li> <li>• KPIs (personal)</li> <li>• Branch targets</li> </ul>

Tools and equipment
Skill
<ul style="list-style-type: none"> <li>• Effective use of IT equipment and software.</li> </ul>
VIVA
Criteria covered
TE1 Demonstrate effective use of IT systems and software.
TE2 Comply with appropriate <b>regulatory requirements</b> relating to the use of IT equipment.
Amplification and guidance
<b>Regulatory requirements:</b> <ul style="list-style-type: none"> <li>• Consumer Protection from Unfair Trading Regs 2008</li> <li>• GDPR and The Data Protection Act 2018</li> </ul>

Responsive	
Behaviours	
<ul style="list-style-type: none"> <li>Take timely, flexible and responsive action to address complex issues.</li> </ul>	
Work-based project	
Criteria covered	
RS1 Deliver timely performance with energy and takes responsibility and <b>accountability</b> for quality outcomes.	
Amplification and guidance	
<b>Accountability:</b> <ul style="list-style-type: none"> <li>accountability for meeting government guidelines within the housing sector, such as: <ul style="list-style-type: none"> <li>health and safety</li> <li>employment law</li> <li>data protection</li> <li>safeguarding</li> <li>equality diversity</li> </ul> </li> </ul>	

Trust and dependability	
Behaviours	
<ul style="list-style-type: none"> <li>Gain and maintain trust and respect to meet expectations by working in a confidential, ethical and empathetic manner with a professional attitude.</li> </ul>	
Work-based project and VIVA	
Pass criteria covered	
TD1 Demonstrate <b>integrity and ethical behaviour</b> in the way they do their job. TD2 Demonstrate the importance of engaging with people in an honest and up-front manner. TD3 Show confidence and professionalism when dealing with people.	

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>• Embrace changing priorities and work patterns when requirements alter.</li> </ul>
Work-based project and VIVA
Pass criteria covered
AD1 Respond positively to <b>change</b> and shows willingness to refocus priorities when required.
Amplification and guidance
<b>Change:</b> <ul style="list-style-type: none"> <li>• changes to housing policy during COVID19</li> <li>• making environmental improvements</li> <li>• lack of materials, contractors or resources to complete housing projects</li> <li>• working from home during the pandemic and going back to the office</li> <li>• virtual viewings</li> <li>• any kind of unexpected issue that has arisen</li> </ul>

Self-motivation
Behaviours
<ul style="list-style-type: none"> <li>• Work independently and effectively without close supervision.</li> </ul>
Work-based project and VIVA
Criteria covered
SM1 Manage own time well, adjusting schedules, tasks and priorities when necessary.

Resilience
Behaviours
<ul style="list-style-type: none"> <li>• Has a high level of resilience, tenacity and calmness.</li> </ul>
VIVA
Pass criteria covered
R1 Acknowledge own emotional and professional limits and seeks help when necessary. R2 Respond calmly and consistently in all <b>situations</b> .
Amplification and guidance
<p><b>Situations</b> could include:</p> <ul style="list-style-type: none"> <li>• being shouted out by an unhappy customer</li> <li>• dealing with an emotional customer who may have been served notice</li> <li>• tenant who disputes deposit deduction</li> <li>• applicant who fails referencing</li> <li>• tenants are separating</li> <li>• loss of earnings</li> <li>• inspection findings disputed</li> </ul>



Leadership
Behaviours
<ul style="list-style-type: none"> <li>Be an ambassador/role model.</li> </ul>
VIVA
Pass criteria covered
L1 <b>Ambassador</b> the company's vision and values. L2 Lead by example through behaviour, service delivery, decision making and departmental management.
Amplification and guidance
<b>Ambassador:</b> <ul style="list-style-type: none"> <li>knowledge and appreciation of market</li> <li>online presence</li> <li>passion</li> <li>professionalism</li> <li>trustworthiness</li> </ul>

Customer Care
Behaviours
<ul style="list-style-type: none"> <li>Be responsive and empathetic to client and customer needs.</li> </ul>
Work-based project
Criteria covered
CC1 Demonstrate a <b>responsive</b> service towards client and customer needs. CC2 Show consideration and flexibility to clients and customers. CC3 Meet customer expectations for quality, services and professionalism. CC4 Show <b>guidance and support</b> to others.

Amplification and guidance
<p><b>Responsive:</b></p> <ul style="list-style-type: none"> <li>• customer feedback</li> <li>• good news stories and publications</li> <li>• positive outcomes</li> <li>• going over and above normal duties to meet the needs of a customer</li> </ul> <p><b>Guidance and support:</b></p> <ul style="list-style-type: none"> <li>• providing information, advice and guidance to customers, external partners, and stakeholders</li> <li>• staff training days</li> <li>• signposting staff and clients to different websites to learn more about subject matters</li> </ul>

Teamwork
Behaviours
<ul style="list-style-type: none"> <li>• Be an effective team leader and player.</li> </ul>
Work-based project
Criteria covered
<p>TW1 Demonstrate qualities of an enthusiastic and positive team leader.</p> <p>TW2 Share knowledge, ideas and experiences with team and peers to assist with continuous improvement.</p> <p>TW3 Demonstrate an open and honest communication style.</p>

Personal development	
Behaviours	
<ul style="list-style-type: none"> <li>Be responsible for their continual development. Be a reflective practitioner.</li> </ul>	
VIVA	
Criteria covered	
PD1 Reflect on practice in order to identify areas for improvement either for self, the team, the company or the customer. PD2 Identify gaps or areas of development and plans appropriate learning to meet these needs. PD3 Take ownership and seek ways in which to develop own knowledge and skill. PD4 Show genuine determination to learn and develop themselves.	
Amplification and guidance	
<b>Development:</b> <ul style="list-style-type: none"> <li>requesting further training/shadowing during 1:1s</li> <li>completed research about stamp duty or section notice changes</li> <li>independent research into EICR requirements</li> <li>asking mentor for support</li> <li>not 100% sure on legislative requirements so conducted research into it online or using company literature</li> <li>subscribing to a professional body to keep up to date with current legislation</li> </ul>	

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# Assessment summary

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

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 followed by VIVA

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Assessors will first assess the work-based project evidence (report and diary) prior to conducting the VIVA.

Some topic areas can only be assessed in one of the assessment methods, other areas can be assessed across both (work-based project and VIVA). Where this is the case, any topic areas that have not been attempted in the work-based project or has been attempted but the assessor feels the apprentice needs to provide/demonstrate further information or knowledge of the area, they will provide the learner the opportunity to cover the topic area during the VIVA.

**A Project Report 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. Please note that some topic areas can only be assessed in one of the assessment methods, other areas can be assessed across both.

The score for each learning area will be determined based on the coverage and scoring 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).

	Fail	Pass	Distinction
<b>Score achieved:</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 within the standard area	Fully meets all of the assessment criteria in the standard area	Consistently exceeds the assessment criteria within the standard area

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

- to achieve a pass the apprentice will need a score of at least 3 in **all** topic areas
- to achieve a distinction the apprentice will need 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.

Where topic areas are assessed by one of the assessment methods only, the apprentice will have to re-attempt the respective method:

- where a topic area is assessed in the work-based project, they will have to re-attempt the work-based project
- where a topic area is assessed in the VIVA, they will have to re-attempt the VIVA

Where topic areas are assessed across both methods, and the apprentice fails to achieve a minimum score of 3 in these topic areas, they will have to re-attempt the work-based project with the VIVA.

Should a large number of topic areas need to be carried over to the VIVA, a decision will be made as to whether the apprentice would be able to attempt them all in the allotted time. If this is not the case, learners will be advised to re-attempt the work-based project again, as well as the VIVA.

There is no limit to the number of times an apprentice resits or retakes either of the assessment methods.

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 recommended to total 5000 words (+/-10%) 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.

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

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:

- stretch both theoretical understanding and practical application, and in that sense test real acquired skills and knowledge.
- demonstrate appropriate capability of managing staff and resources.
- 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.

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, where topic areas are able to be assessed in both assessment methods, in the VIVA also.

#### **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



# Assessing the VIVA

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The VIVA is made up of two components:

- 15-minute presentation
- 45-minute Q&A session

## 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 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 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 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, such as their completed portfolio of evidence, 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 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 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 are the core services that your housing or property management organisation delivers to 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 assessment criteria

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### Customers and stakeholders

- CST1 Operate in a way that builds rapport with customers and demonstrates empathy and understanding when dealing with them.
- CST2 Demonstrate consistent accurate and appropriate communication through all relevant media.
- CST3 Operate in a way that builds rapport with relevant stakeholders to deliver an acceptable level of customer service.
- CST4 Assess the range of services offered by the organisation and how they meet needs.
- CST5 Plan customer engagement to identify, address and meet diverse needs.

### Customer service

- CS1 Exercise customer service management responsibility with consideration for the organisation's service offer, customer expectations and resources.
- CS2 Demonstrate ethical and non-judgemental decision making.
- CS3 Demonstrate leadership role in meeting and delivery in order to exceed customer expectations.
- CS4 Demonstrate the ability to vary customer service delivery depending on the customers' requirements.

### Communication

- CO1 Demonstrate the appropriate method and style of communication to changing circumstances and needs.
- CO2 Demonstrate effective communication skills across a range of verbal and written media.
- CO3 Demonstrate effective mediation and resolution skills to resolve conflict.
- CO4 Demonstrate effective skills in managing staff.

### Collaborative working

- CW1 Lead the delivery of joint outcomes through working collaboratively with individuals and teams.
- CW2 Analyse the organisations business targets and suggest ways to achieve them.
- CW3 Lead project members to deliver business targets.

### Information collection and sharing

- IS1 Understand systems available for data analysis.
- IS2 Be capable of interrogating data and present strategic/management information.
- IS3 Prepare data reports including suggestions and conclusions on how the information collection could be improved and/or shared.

### Influencing and negotiating

- NS1 Lead negotiations with partners and suppliers.
- NS2 Achieve outcomes beneficial to the organisation through influence and negotiation.

### Financial management

- FM1 Demonstrate effective management of budgets.
- FM2 Demonstrate skills in seeking value for money outcomes.
- FM3 Understand and evaluate financial statements.

### Performance and project management

- PPM1 Demonstrate effective project management skills to drive forward projects to achieve timescales and strategic objectives.
- PPM2 Develop effective project plans.
- PPM3 Present and report on project progress, successes and challenges to senior managers.
- PPM4 Lead on projects successfully through to project completion.

### People management

- PM1 Analyse skills and attributes that make an effective team leader.
- PM2 Evaluate own leadership skills and attributes, identifying areas for personal development.
- PM3 Apply methods to encourage team building, mutual trust and respect.
- PM4 Analyse the effectiveness of line management approaches for teams.
- PM5 Apply performance management principles to team or project work.
- PM6 Describe the process of managing workplace stress.
- PM7 Demonstrate effective formal planning.

### Decision making and prioritising

- DP1 Describe the company objectives and outline how team and own targets meet company objectives.
- DP2 Evaluate own working practices against company objectives.

### Responsive

- RE1 Deliver timely performance with energy and takes responsibility and accountability for quality outcomes.

### Trust and dependability

- TD1 Demonstrate integrity and ethical behaviour in the way they do their job.
- TD2 Demonstrate the importance of engaging with people in an honest and up front manner.
- TD3 Show confidence and professionalism when dealing with people.

### Adaptability

AD1 Respond positively to change and shows willingness to refocus priorities when required.

### Self-motivation

SM1 Manage own time well, adjusting schedules, tasks and priorities when necessary.

### Customer care

CC1 Demonstrate a responsive service towards client and customer needs.  
CC2 Show consideration and flexibility to clients and customers.  
CC3 Meet customer expectations for quality, services and professionalism.  
CC4 Show guidance and support to others.

### Teamwork

TW1 Demonstrate qualities of an enthusiastic and positive team leader.  
TW2 Share knowledge, ideas and experiences with team and peers to assist with continuous improvement.  
TW3 Demonstrate an open and honest communication style.

## VIVA assessment criteria

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### Legislation and regulation

LR1 Outline key issues related to the letting of property in the social and private rented sectors (regulation, standards, legal, business issues).  
LR2 Evaluate company policies related to governance, court proceedings, contracts, data protection, safeguarding and other relevant legislation (as it applies to housing and property management) against validated good or innovative practice.  
LR3 Explain the basic requirements of a contract and the special provisions relating to housing/property contracts.  
LR4 List and explain the different types of tenancy available in the UK.  
LR5 Summarise the relevant codes of practice and published standards covering the social and private rented sectors.  
LR6 List and interpret the relevant legislation and regulations as they apply to housing standards for rental and sale properties.

### Organisation background information and business planning

OB1 Explain how the business principles, priorities and values of the organisation impact on the nature and delivery of services to customers.  
OB2 Describe the organisational performance management system/s.  
OB3 Describe how personal and team objectives relate to the organisational plan and identify any areas for improvement or gaps within the structure.

### Assets

- AS1 Understand the value of the social and physical contexts of the estates/ neighbourhoods to the organisation.
- AS2 Understand 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).

### Customers and stakeholders

- CST6 Operate in a way that builds rapport with customers and demonstrates empathy and understanding when dealing with them.
- CST7 Demonstrate consistent accurate and appropriate communication through all relevant media.
- CST8 Operate in a way that builds rapport with relevant stakeholders to deliver an acceptable level of customer service.
- CST9 Assess the range of services offered by the organisation and how they meet needs.
- CST10 Plan customer engagement to identify, address and meet diverse needs.

### Context

- CT1 Describe historical and current housing market trends relevant to the area of work.
- CT2 Evaluate the impact of external and internal policy decisions on housing markets in the area of work.

### Organisational policies

- OP1 Explain the core policies and practices of the organisation and explain how they relate to service areas and business objectives.

### Customer service

- CS1 Exercise customer service management responsibility with consideration for the organisation's service offer, customer expectations and resources.
- CS2 Demonstrate ethical and non-judgemental decision making.
- CS3 Demonstrate leadership role in meeting and delivery in order to exceed customer expectations.
- CS4 Demonstrate the ability to vary customer service delivery depending on the customers' requirements.

### Communication

- CO1 Demonstrate the appropriate method and style of communication to changing circumstances and needs.
- CO2 Demonstrate effective communication skills across a range of verbal and written media.
- CO3 Demonstrate effective mediation and resolution skills to resolve conflict.
- CO4 Demonstrate effective skills in managing staff.

### Collaborative working

- CW4 Lead the delivery of joint outcomes through working collaboratively with individuals and teams.
- CW5 Analyse the organisations business targets and suggest ways to achieve them.
- CW6 Lead project members to deliver business targets.

### Respond to vulnerability

- RV1 Take a leadership role in ensuring the service meets the needs of vulnerable individuals and groups.
- RV2 Demonstrate understanding of provision required to meet the needs of vulnerable individuals and groups.

### Information collection and sharing

- IS4 Understand systems available for data analysis.
- IS5 Be capable of interrogating data and present strategic/management information.
- IS6 Prepare data reports including suggestions and conclusions on how the information collection could be improved and/or shared.

### Influencing and negotiating

- NS3 Lead negotiations with partners and suppliers.
- NS4 Achieve outcomes beneficial to the organisation through influence and negotiation.

### Financial management

- FM1 Demonstrate effective management of budgets.
- FM2 Demonstrate skills in seeking value for money outcomes.
- FM3 Understand and evaluate financial statements.

### Performance and project management

- PPM1 Demonstrate effective project management skills to drive forward projects to achieve timescales and strategic objectives.
- PPM2 Develop effective project plans.
- PPM3 Present and report on project progress, successes and challenges to senior managers.
- PPM4 Lead on projects successfully through to project completion.

### People management

- PM1 Analyse skills and attributes that make an effective team leader.
- PM2 Evaluate own leadership skills and attributes, identifying areas for personal development.
- PM3 Apply methods to encourage team building, mutual trust and respect.
- PM4 Analyse the effectiveness of line management approaches for teams.
- PM5 Apply performance management principles to team or project work.
- PM6 Describe the process of managing workplace stress.



### People management

PM7 Demonstrate effective formal planning.

### Decision making and prioritising

DP1 Describe the company objectives and outline how team and own targets meet company objectives.

DP2 Evaluate own working practices against company objectives.

### Tools and equipment

TE1 Demonstrate effective use of IT systems and software.

TE2 Comply with appropriate regulatory requirements relating to the use of IT equipment.

### Trust and dependability

TD4 Demonstrate integrity and ethical behaviour in the way they do their job.

TD5 Demonstrate the importance of engaging with people in an honest and up front manner.

TD6 Show confidence and professionalism when dealing with people.

### Adaptability

AD2 Respond positively to change and shows willingness to refocus priorities when required.

### Self-motivation

SM1 Manage own time well, adjusting schedules, tasks and priorities when necessary.

### Resilience

R1 Acknowledge own emotional and professional limits and seeks help when necessary.

R2 Respond calmly and consistently in all situations.

### Leadership

L1 Ambassador the company's vision and values.

L2 Lead by example through behaviour, service delivery, decision making and departmental management.

### Personal development

PD1 Reflect on practice in order to identify areas for improvement either for self, the team, the company or the customer.

PD2 Identify gaps or areas of development and plans appropriate learning to meet these needs.

PD3 Take ownership and seek ways in which to develop own knowledge and skill.

PD4 Show genuine determination to learn and develop themselves.

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