

# **Pearson Edexcel Level 2 NVQ Certificate in Housing Specification**

Competence-based qualification

First registration May 2011

Issue 2

## **Edexcel, BTEC and LCCI qualifications**

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This specification is Issue 2. Key changes are listed in the summary table on the next page. We will inform centres of any changes to this issue. The latest issue can be found on the Pearson website: [qualifications.pearson.com](http://qualifications.pearson.com)

This qualification was previously known as:

Edexcel Level 2 NVQ Certificate in Housing (QCF)

The QN remains the same.

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*All information in this specification is correct at time of going to publication.*

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## Summary of Pearson Edexcel Level 2 NVQ Certificate in Housing specification Issue 2 changes

Summary of changes made between previous issue and this current issue	Page number
All references to QCF have been removed throughout the specification	
Definition of TQT added	1
Definition of sizes of qualifications aligned to TQT	2
TQT value added	7
Guided learning definition updated	12
QCF references removed from unit titles and unit levels in all units	15-91

Earlier issue(s) show(s) previous changes.

If you need further information on these changes or what they mean, contact us via our website at: [qualifications.pearson.com/en/support/contact-us.html](http://qualifications.pearson.com/en/support/contact-us.html).

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# Introducing Pearson Edexcel NVQ qualifications

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## What are NVQ qualifications?

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National Vocational Qualifications (NVQs) are work-based qualifications that give learners the opportunity to develop and demonstrate their competence in the area of work or job role to which the qualification relates.

NVQs are based on the National Occupational Standards (NOS) for the appropriate sector. NOS define what employees, or potential employees, must be able to do and know, and how well they should undertake work tasks and work roles. At Level 2 and above, these qualifications are recognised as the competence component of Apprenticeship Frameworks. Qualifications at Level 1 can be used in Traineeships, which are stepping-stones to Apprenticeship qualifications. NVQs qualifications can also be delivered as stand-alone for those who wish to take a work-based qualification.

NVQs qualifications are outcomes-based with no fixed learning programme – allowing flexible delivery that meets the individual learner’s needs. They are suitable for those in employment or those who are studying at college and have a part-time job or access to a substantial work placement so that they are able to demonstrate the competencies that are required for work.

Most learners will work towards their qualification in the workplace or in settings that replicate the working environment as specified in the assessment requirements/strategy for the sector. Colleges, training centres and/or employers can offer these qualifications provided they have access to appropriate physical and human resources.

## Sizes of NVQ/Competence-based qualifications

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For all regulated qualifications, Pearson specify a total number of hours that is estimated learners will require to complete and show achievement for the qualification – this is the Total Qualification Time (TQT). The TQT value indicates the size of a qualification.

Within the TQT, Pearson identifies the number of Guided Learning Hours (GLH) that we estimate a centre delivering the qualification might provide. Guided learning means activities, such as lessons, tutorials, online instruction, supervised study and giving feedback on performance, that directly involve tutors and assessors in teaching, supervising and invigilating learners. Guided learning includes the time required for learners to complete external assessment under examination or supervised conditions.

In addition to guided learning, other required learning directed by tutors or assessors will include private study, preparation for assessment and undertaking assessment when not under supervision, such as preparatory reading, revision and independent research.

As well as TQT and GLH, qualifications can also have a credit value – equal to one tenth of TQT, rounded to the nearest whole number.

TQT and credit values are assigned after consultation with users of the qualifications.

NVQ/Competence-based qualifications are available in the following sizes:

- Award – a qualification with a TQT value of 120 or less (equivalent to a range of 1–12 credits)
  - Certificate – a qualification with a TQT value in the range of 121–369 (equivalent to a range of 13–36 credits)
  - Diploma – a qualification with a TQT value of 370 or more (equivalent to 37 credits and above).
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## Qualification title covered by this specification

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This specification gives you the information you need to offer the Pearson Edexcel Level 2 NVQ Certificate in Housing:

<b>Qualification title</b>	<b>Qualification Number (QN)</b>	<b>Operational Start date</b>
Pearson Edexcel Level 2 NVQ Certificate in Housing	600/1711/9	01/05/2011

Qualifications eligible and funded for post-16-year-olds can be found on the funding Hub. The Skills Funding Agency also publishes a funding catalogue that lists the qualifications available for 19+ funding.

You should use the Qualification Number (QN), when you wish to seek public funding for your learners. Each unit within a qualification will also have a unique unit reference number, which are listed in this specification.

The qualification title and unit reference numbers will appear on the learners' final certification document. Learners need to be made aware of this when they are recruited by the centre and registered with Pearson.

# Key features of the Pearson Edexcel Level 2 NVQ Certificate in Housing

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This qualification is:

- nationally recognised
- based on the Housing National Occupational Standards (NOS). The NOS, assessment strategy and qualification structure are owned by the Sector Skills Council, Asset Skills.

The Pearson Edexcel Level 2 NVQ Certificate in Housing has been approved as a component for the Housing Apprenticeship Level 2 framework.

## What is the purpose of this qualification?

The Level 2 NVQ Certificate in Housing is designed for people who work in the housing sector and covers a range of requirements including housing initiatives, legislation and customer service practices. This qualification focus on promoting equality and diversity whilst developing and maintaining ethical, safe and sustainable working practices. It is suitable for those who want to further their competence in the sector and to develop further experience in working with others.

## Who is this qualification for?

This qualification is for all learners aged 16 and above who are capable of reaching the required standards.

Pearson's policy is that the qualification should:

- be free from any barriers that restrict access and progression
- ensure equality of opportunity for all wishing to access the qualification(s).

## What are the benefits of this qualification to the learner and employer?

This qualification allows learners to demonstrate competence against NOS which are based on the needs of the housing sector as defined by Asset Skills. As such, they contribute to the development of skilled labour in the sector. This qualification contributes towards the competence element of an Apprenticeship.

## What are the potential job roles for those working towards this qualification?

- Housing assistant

**What progression opportunities are available to learners who achieve this qualification?**

This qualification makes up part of the Apprenticeship Framework in Housing. It supports and offers opportunities for progression to the Level 3 NVQ Certificate and Diploma in Housing.



# What is the qualification structure for the Pearson Edexcel Level 2 NVQ Certificate in Housing?

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Individual units can be found in the *Units* section.

The Total Qualification Time (TQT) for this qualification is 160.

The Guided Learning Hours for this qualification are 100.

A minimum total of 16 credits must be achieved to gain the qualification. 10 credits are required from Group A. A minimum of six credits are required from Group B. Group C is mandatory for apprentices, but does not form part of the minimum 16 credits.

## Group A – Mandatory units

Unit	Unit reference	Unit title	Level	Credit value
1	R/601/0450	Develop and Maintain Relationships with Stakeholders in a Housing Context	2	4
2	K/601/0454	Maintain Professional Behaviour and Working Relationships in a Housing Context	2	4
3	M/601/0455	Maintain the Health, Safety and Security of Self and Others	2	2

## Group B – Optional units

Unit	Unit reference	Unit title	Level	Credit value
4	F/601/0461	Process Documents Relating to Housing Activities	2	2
5	Y/601/0465	Undertake Promotional Activity Within the Housing Sector	2	4
6	K/601/0471	Advertise and Market Properties	2	2
7	F/601/0475	Use Organisational ICT Systems in a Housing Context	2	2
8	L/601/0933	Give Customers a Positive Impression of Yourself and Your Organisation	2	5
9	M/601/1508	Recognise and Deal with Customer Queries, Requests and Problems	1	5

<b>Unit</b>	<b>Unit reference</b>	<b>Unit title</b>	<b>Level</b>	<b>Credit value</b>
10	A/601/1530	Support Customer Service Improvements	2	5
11	L/601/0480	Assess Housing Need	3	4
12	K/601/0485	Match the Needs of Individuals with Available Accommodation	3	3
13	A/601/0488	Support Individuals Through the Process of Signing Occupancy Agreements	2	4
14	J/600/3205	Respond to Customer Requests for Repairs	3	2
15	T/601/0490	Organise the Maintenance and Repair of Property	2	2
16	A/601/0507	Check and Record the Condition of Property	2	3
17	J/601/0509	Support Clients to Make Use of the Housing Advice and Guidance Service	2	3
18	H/601/0517	Enable Housing Clients to Access Referral Opportunities	2	4
19	T/601/0523	Provide and Maintain Information Materials for Use in the Housing Organisation	2	2
20	L/601/0530	Help to Develop Individuals to Contribute to Decision Making	2	4
21	H/601/0534	Help to Develop Individuals' Involvement in the Local Community	2	3
22	J/601/0543	Support the Rights of Individuals in the Community	2	4

**Group C – Further optional units  
(mandatory unit for apprentices only)**

<b>Unit</b>	<b>Unit reference</b>	<b>Unit title</b>	<b>Level</b>	<b>Credit value</b>
23	A/502/7524	Employment Rights and Responsibilities in the Facilities Management, Housing and Property Sectors	2	2

# How is the qualification graded and assessed?

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The overall grade for the qualification is a 'pass'. The learner must achieve all the required units within the specified qualification structure.

To pass a unit the learner must:

- achieve **all** the specified learning outcomes
- satisfy **all** the assessment criteria by providing sufficient and valid evidence for each criterion
- show that the evidence is their own.

The qualifications is designed to be assessed:

- in the workplace or
- in conditions resembling the workplace, as specified in the assessment principles for the sector, or
- as part of a training programme.

## Assessment principles

The assessment principles for this qualification has been included in *Annexe C*. It has been developed by Asset Skills in partnership with employers, training providers, awarding organisations and the regulatory authorities. The assessment principles includes details on:

- criteria for defining realistic working environments
- roles and occupational competence of assessors, expert witnesses, internal verifiers and standards verifiers
- quality control of assessment
- evidence requirements.

Evidence of competence may come from:

- **current practice** where evidence is generated from a current job role
- a **programme of development** where evidence comes from assessment opportunities built into a learning/training programme whether at or away from the workplace
- the **Recognition of Prior Learning (RPL)** where a learner can demonstrate that they can meet the assessment criteria within a unit through knowledge, understanding or skills they already possess without undertaking a course of learning. They must submit sufficient, reliable and valid evidence for internal and standards verification purposes. RPL is acceptable for accrediting a unit, several units or a whole qualification
- a **combination** of these.

It is important that the evidence is:

<b>Valid</b>	relevant to the standards for which competence is claimed
<b>Authentic</b>	produced by the learner
<b>Current</b>	sufficiently recent to create confidence that the same skill, understanding or knowledge persist at the time of the claim
<b>Reliable</b>	indicates that the learner can consistently perform at this level
<b>Sufficient</b>	fully meets the requirements of the standards.

### **Types of evidence (to be read in conjunction with the assessment principles in *Annexe C*)**

To successfully achieve a unit the learner must gather evidence which shows that they have met the required standard in the assessment criteria. Evidence can take a variety of different forms including the examples below. Centres should refer to the assessment principles for information about which of the following are permissible.

- direct observation of the learner's performance by their assessor (O)
- outcomes from oral or written questioning (Q&A)
- products of the learner's work (P)
- personal statements and/or reflective accounts (RA)
- outcomes from simulation, where permitted by the assessment strategy (S)
- professional discussion (PD)
- assignment, project/case studies (A)
- authentic statements/witness testimony (WT)
- expert witness testimony (EWT)
- evidence of Recognition of Prior Learning (RPL).

The abbreviations may be used for cross-referencing purposes.

Learners can use one piece of evidence to prove their knowledge, skills and understanding across different assessment criteria and/or across different units. It is, therefore, not necessary for learners to have each assessment criterion assessed separately. Learners should be encouraged to reference the assessment criteria to which the evidence relates.

Evidence must be made available to the assessor, internal verifier and Pearson standards verifier. A range of recording documents is available on the Pearson website [qualifications.pearson.com](http://qualifications.pearson.com). Alternatively, centres may develop their own.

# Centre recognition and approval

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## Centre recognition

Centres that have not previously offered Edexcel qualifications need to apply for and be granted centre recognition as part of the process for approval to offer individual qualifications. New centres must complete both a centre recognition approval application and a qualification approval application.

Existing centres will be given 'automatic approval' for a new qualification if they are already approved for a qualification that is being replaced by the new qualification and the conditions for automatic approval are met. Centres already holding Pearson approval are able to gain qualification approval for a different level or different sector via Edexcel online.

## Approvals agreement

All centres are required to enter into an approvals agreement which is a formal commitment by the head or principal of a centre to meet all the requirements of the specification and any linked codes or regulations. Pearson will act to protect the integrity of the awarding of qualifications, if centres do not comply with the agreement. This could result in the suspension of certification or withdrawal of approval.

## Quality assurance

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Detailed information on Pearson's quality assurance processes is given in *Annexe B*.

## What resources are required?

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The qualification is designed to support learners working in the housing sector. Physical resources need to support the delivery of the qualifications and the assessment of the learning outcomes and must be of industry standard. Centres must meet any specific resource requirements outlined in *Annexe C: Assessment principles*. Staff assessing the learner must meet the requirements within the overarching assessment strategy for the sector.

# Unit format

Each unit in this specification contains the following sections.

<b>Unit title:</b>					This is the formal title of the unit that will appear on the learners certificate
<b>Unit reference number:</b>					This is the unit owner's reference number for the specified unit.
<b>Level:</b>					All units and qualifications have a level assigned to them. The level assigned is informed by the level descriptors by Ofqual, the qualifications regulator.
<b>Credit value:</b>					All units have a credit value. The minimum credit value is one, and credits can only be awarded in whole numbers. Learners will be awarded credits when they achieve the unit.
<b>Guided learning hours:</b>					Guided Learning Hours (GLH) is the number of hours that a centre delivering the qualification needs to provide. Guided learning means activities that directly or immediately involve tutors and assessors in teaching, supervising, and invigilating learners, for example lectures, tutorials, online instruction and supervised study.
<b>Unit summary:</b>					This provides a summary of the purpose of the unit.
<b>Assessment requirements/evidence requirements:</b>					The assessment/evidence requirements are determined by the SSC. Learners must provide evidence for each of the requirements stated in this section.
<b>Assessment methodology:</b>					This provides a summary of the assessment methodology to be used for the unit.
<b>Learning outcomes:</b>	<b>Assessment criteria:</b>	<b>Evidence type:</b>	<b>Portfolio reference:</b>	<b>Date:</b>	
			The learner should use this box to indicate where the evidence can be obtained eg portfolio page number.	The learner should give the date when the evidence has been provided.	
Learning outcomes state exactly what a learner should know, understand or be able to do as a result of completing a unit.		The assessment criteria of a unit specify the standard a learner is expected to meet to demonstrate that a learning outcome, or a set of learning outcomes, has been achieved.		Learners must reference the type of evidence they have and where it is available for quality assurance purposes. The learner can enter the relevant key and a reference. Alternatively, the learner and/or centre can devise their own referencing system.	

# Units



# **Unit 1: Develop and Maintain Relationships with Stakeholders in a Housing Context**

**Unit reference number:** R/601/0450

**Level:** 2

**Credit value:** 4

**Guided learning hours:** 30

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## **Unit summary**

This unit is for those working in the housing sector who develop and maintain relationships with individuals, groups and other stakeholders in order to meet identified housing needs.

## **Assessment requirements/evidence requirements**

Please refer to the Asset Skills assessment principles, which can be found in *Annexe C*.

## **Assessment methodology**

This unit is assessed in the workplace or in conditions resembling the workplace when appropriate. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Be able to respect the individual beliefs, expectations and needs of individuals, groups and other stakeholders	1.1 explain the importance of recognising diversity as defined in anti-discriminatory legislation 1.2 give examples of how diversity and inclusion issues affect customer service and relationships with groups and other stakeholders 1.3 perform housing activities in a manner that treats individuals fairly and does not discriminate against or disadvantage them in any way 1.4 follow organisational guidelines to make customer service is inclusive of diverse groups of customers and other stakeholders			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
2 Be able to develop and maintain relationships with individuals, colleagues, groups and other stakeholders	2.1 deal courteously, sensitively and fairly with individuals 2.2 establish appropriate boundaries when working with others 2.3 describe how the views of customers, groups and other stakeholders can affect the level of their trust in the organisation 2.4 describe what can be done to build and maintain trust 2.5 describe the ways the organisation works with tenants and community groups to support effective collaborative working 2.6 engage with individuals, groups and other stakeholders in ways that help them to influence the way in which the service is provided 2.7 balance the need for contact with customers, groups and other stakeholders with being able to work efficiently, safely and securely 2.8 set an example of positive behaviour for others 2.9 maintain customer, group and other stakeholder confidentiality according to organisational policy			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
3 Be able to meet the needs of individuals, colleagues, groups and other stakeholders	3.1 support individuals to communicate their needs and preferences about how they wish to engage with the organisation 3.2 give a positive image of the organisation to customers, groups and other stakeholders 3.3 explain the importance of finding positive solutions to problems 3.4 support individuals, groups and others in making choices 3.5 explain how to deal with difficult situations within own level of responsibility and when difficult situations should be handled by someone else			

Learner name: \_\_\_\_\_

Date: \_\_\_\_\_

Learner signature: \_\_\_\_\_

Date: \_\_\_\_\_

Assessor signature: \_\_\_\_\_

Date: \_\_\_\_\_

Internal verifier signature: \_\_\_\_\_

Date: \_\_\_\_\_

*(if sampled)*

## **Unit 2: Maintain Professional Behaviour and Working Relationships in a Housing Context**

<b>Unit reference number:</b>	K/601/0454
<b>QCF level:</b>	2
<b>Credit value:</b>	4
<b>Guided learning hours:</b>	30

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### **Unit summary**

This unit is for those working in the housing sector who maintain effective working relationships with colleagues and other stakeholders following agreed working procedures.

### **Assessment requirements/evidence requirements**

Please refer to the Asset Skills assessment principles, which can be found in *Annexe C*.

### **Assessment methodology**

This unit is assessed in the workplace or in conditions resembling the workplace when appropriate. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Be able to establish and maintain effective working relationships with colleagues and other stakeholders in a housing context	1.1 deal courteously, sensitively and fairly with individuals 1.2 describe the values and principles of the organisation in the delivery of housing services 1.3 explain how own role relates to the work of others in the organisation and to the wider stakeholder network, including communities 1.4 explain how to cooperate with colleagues and other teams or agencies in order to achieve agreed outcomes 1.5 identify the effects of poor teamwork 1.6 communicate with colleagues and other stakeholders in a way that encourages effective team working 1.7 identify ways of working with individuals, colleagues, teams and other agencies which support good working relationships			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
2 Be able to operate within agreed procedures when working with others in housing context	2.1. explain the organisational requirements to be followed within own work role 2.2. explain the legal framework in which housing functions are performed 2.3. describe the line management procedures to be followed when carrying out housing functions 2.4. describe the sources of advice available when performing housing functions 2.5. explain how advice and line management systems are used when carrying out housing functions 2.6. operate within professional codes of conduct 2.7. maintain client and other stakeholder confidentiality 2.8. meet obligations agreed with individuals, colleagues and other stakeholders 2.9. operate within the limits of own responsibility and refer issues to others when required 2.10. review own personal performance with regard to working to targets, completing specific tasks and the quality of work			

Learner name: \_\_\_\_\_

Date: \_\_\_\_\_

Learner signature: \_\_\_\_\_

Date: \_\_\_\_\_

Assessor signature: \_\_\_\_\_

Date: \_\_\_\_\_

Internal verifier signature: \_\_\_\_\_

Date: \_\_\_\_\_

*(if sampled)*

## **Unit 3: Maintain the Health, Safety and Security of Self and Others**

**Unit reference number:** M/601/0455

**Level:** 2

**Credit value:** 2

**Guided learning hours:** 10

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### **Unit summary**

This unit is for those working in the housing sector who contribute to maintaining the safety and security of themselves and others.

### **Assessment requirements/evidence requirements**

Please refer to the Asset Skills assessment principles, which can be found in *Annexe C*.

### **Assessment methodology**

This unit is assessed in the workplace or in conditions resembling the workplace when appropriate. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Be able to contribute to health and safety in the workplace	1.1 deal courteously, sensitively and fairly with individuals 1.2 describe the legal responsibilities of your organisation and yourself in relation to health and safety in the workplace 1.3 identify risks and hazards to people and property in the immediate workplace and report them to the appropriate person 1.4 follow agreed health and safety procedures to minimise risks to people and property 1.5 provide health and safety information to individuals and others 1.6 explain agreed procedures in the event of an incident or emergency 1.7 maintain the security of own immediate workplace following agreed procedures			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
2 Be able to maintain the safety and security of customers, others and self	2.1 take appropriate action to work safely with aggressive or difficult individuals 2.2 explain how to identify the signs and symptoms that individuals are at risk from harm or abuse and how to report concerns to appropriate individuals for further action 2.3 explain how to work safely with individuals in heightened states of emotion 2.4 describe agreed procedures when working with individuals and others in isolation			

Learner name: \_\_\_\_\_

Date: \_\_\_\_\_

Learner signature: \_\_\_\_\_

Date: \_\_\_\_\_

Assessor signature: \_\_\_\_\_

Date: \_\_\_\_\_

Internal verifier signature: \_\_\_\_\_

Date: \_\_\_\_\_

*(if sampled)*

## **Unit 4: Process Documents Relating to Housing Activities**

**Unit reference number:** F/601/0461

**Level:** 2

**Credit value:** 2

**Guided learning hours:** 10

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### **Unit summary**

This unit is for those working in the housing sector who gather and collate information and produce and circulate housing documents.

### **Assessment requirements/evidence requirements**

Please refer to the Asset Skills assessment principles, which can be found in *Annexe C*.

### **Assessment methodology**

This unit is assessed in the workplace or in conditions resembling the workplace when appropriate. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Be able to select information for documents relevant to housing	1.1 describe the legislative requirements relevant to the security and confidentiality of information 1.2 identify the different types of documentation and associated information which apply to the job role 1.3 identify the purpose of and intended audience for documents 1.4 identify and locate the required information 1.5 describe the course of action to take when information is incomplete 1.6 collate information and obtain any additional required information 1.7 check the validity and accuracy of the information 1.8 maintain the security and confidentiality of appropriate information			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
2 Be able to produce and circulate housing documents	2.1 deal courteously, sensitively and fairly with individuals 2.2 apply organisational procedures for processing information 2.3 collate and present documents in an agreed format which is fit for the intended purpose 2.4 produce accurate, legible and complete documents 2.5 circulate documents to the correct people within agreed timescales 2.6 archive documents following agreed procedures			

Learner name: \_\_\_\_\_

Date: \_\_\_\_\_

Learner signature: \_\_\_\_\_

Date: \_\_\_\_\_

Assessor signature: \_\_\_\_\_

Date: \_\_\_\_\_

Internal verifier signature: \_\_\_\_\_

Date: \_\_\_\_\_

*(if sampled)*

## **Unit 5: Undertake Promotional Activity Within the Housing Sector**

**Unit reference number:** Y/601/0465

**Level:** 2

**Credit value:** 4

**Guided learning hours:** 30

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### **Unit summary**

This unit identifies the role of promotional activities in helping to deliver the objectives of an housing organization and the main ways of carrying out such promotional activities.

### **Assessment requirements/evidence requirements**

Please refer to the Asset Skills assessment principles, which can be found in *Annexe C*.

### **Assessment methodology**

This unit is assessed in the workplace or in conditions resembling the workplace when appropriate. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Know the role of promotional activity within housing organisations	1.1 state the positive benefits of promotional activity in relation to the objectives of the organisation 1.2 identify the range of promotional activities within your organisation			
2	Know the stakeholders the organisation works with for promotional activity	2.1 deal courteously, sensitively and fairly with individuals 2.2 identify the main stakeholders the housing organisation works with 2.3 describe which promotional activities are linked to different types of stakeholder			
3	Be able to plan promotional events	3.1 describe own role and that of stakeholders within the promotional activity 3.2 identify sources of information about the issues to be promoted 3.3 identify activities best suited to audience and purpose of the promotional event 3.4 describe how to present a positive image of the organisation when carrying out promotional events 3.5 conduct risk assessments of venues and activities as required 3.6 identify suitable and accessible venues and method of transporting materials and equipment to site			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
4 Be able to carry out promotional events	4.1 identify and collate materials and equipment 4.2 set up and dismantle equipment and materials on site safely 4.3 make use of appropriate non-discriminatory prepared materials and scripts when talking to individuals 4.4 describe how to follow up on interest and commitment after promotional events 4.5 contribute to the evaluation of the effectiveness of promotional activity			

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*(if sampled)*

## **Unit 6: Advertise and Market Properties**

**Unit reference number:** K/601/0471

**Level:** 2

**Credit value:** 2

**Guided learning hours:** 10

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### **Unit summary**

This unit is for those working in the housing sector who work for organisations which offer choice-based lettings where members apply for housing when it is advertised in the media.

### **Assessment requirements/evidence requirements**

Please refer to the Asset Skills assessment principles, which can be found in *Annexe C*.

### **Assessment methodology**

This unit is assessed in the workplace or in conditions resembling the workplace when appropriate. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Understand how to market properties	1.1	explain the range of methods used by the organisation for marketing properties		
		1.2	explain the benefits of each method and when it is used		
2	Be able to gather and collate accurate information about properties	2.1	locate and collate all relevant information about a given property		
		2.2	check that the information is accurate and up to date		
		2.3	provide a description of the property		
3	Be able to market the property to potential applicants	3.1	prepare and proofread details of the property for inclusion in marketing materials		
		3.2	deal courteously, sensitively and fairly with individuals		
		3.3	liaise with media contacts during the marketing of properties		
		3.4	maintain a stock of marketing materials		

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
4 Be able to monitor the marketing process	4.1 deal courteously, sensitively and fairly with individuals 4.2 maintain records of interest in properties from individuals 4.3 track progress and success rates in placing applicants 4.4 collate and present statistics and reports on advertising and marketing activities 4.5 contribute to the evaluation of the marketing of properties			

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## **Unit 7: Use Organisational ICT Systems in a Housing Context**

**Unit reference number:** F/601/0475

**QCF level:** 2

**Credit value:** 2

**Guided learning hours:** 10

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### **Unit summary**

This unit is for those working in the housing sector who make use of a range of software packages to capture, process and maintain housing related information.

### **Assessment requirements/evidence requirements**

Please refer to the Asset Skills assessment principles, which can be found in *Annexe C*.

### **Assessment methodology**

This unit is assessed in the workplace or in conditions resembling the workplace when appropriate. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Know the types of ICT software packages and systems used within own housing organisation	1.1 identify the generic software packages used within the organisation and describe how they are operated 1.2 describe the role of housing-specific software packages and their function			
2 Be able to access, input and modify data and close down IT systems correctly	2.1 demonstrate the correct sequence for opening and closing common software packages in use within the organisation 2.2 demonstrate how to input and manage data in commonly used software packages			
3 Understand the importance of maintaining confidentiality and security of electronic data	3.1 explain why it is important to protect information about individuals 3.2 describe how the organisation complies with data protection legislation in its ICT systems and procedures 3.3 explain how data is protected and kept secure 3.4 describe the procedure for reporting any breaches of data security			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
4 Know the limits of own competence and authority and where to seek help	4.1 deal courteously, sensitively and fairly with individuals 4.2 identify which activities are outside own competence, area of responsibility and authority 4.3 identify sources of support if there are problems with the hardware or software 4.4 describe the training and support available in the use of ICT systems			

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*(if sampled)*

## **Unit 8: Give Customers a Positive Impression of Yourself and Your Organisation**

<b>Unit reference number:</b>	L/601/0933
<b>QCF level:</b>	2
<b>Credit value:</b>	5
<b>Guided learning hours:</b>	33

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### **Unit summary**

Excellent customer service is provided by people who are good with people. The learner's behaviour affects the impression that customers have of the service they are receiving. This unit is about communicating with customers and giving a positive impression whenever dealing with a customer. By doing this the learner can create a positive impression of the organisation and the customer service it provides. All of us enjoy the experience of good customer service if we feel that the person serving us really wants to create the right impression, responds to us and gives us good information. Every detail of the learner's behaviour counts when dealing with a customer.

### **Assessment requirements/evidence requirements**

Wherever possible, the learner's evidence should be based on a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this unit, evidence based on a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this unit.

The learner may collect the evidence for the unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.

The learner must provide evidence that shows they have done this over a sufficient period of time with different customers on different occasions for their assessor to be confident that they are competent.

The learner's communication with customers may be face to face, in writing, by telephone, text message, email, internet (including social networking), intranet or by any other method they would be expected to use within their job role.

The learner must provide evidence of creating a positive impression with customers:

- a) during routine delivery of customer service
- b) during a busy time in their job
- c) during a quiet time in their job
- d) when people, systems or resources have let them down.

The learner must provide evidence that they communicate with customers effectively by:

- a) using appropriate spoken or written language
- b) applying the conventions and rules appropriate to the method of communication they have chosen.

### **Assessment methodology**

This unit is assessed in the workplace or in conditions resembling the workplace when appropriate. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Establish rapport with customers	1.1 meet their organisation's standards of appearance and behaviour 1.2 greet their customer respectfully and in a friendly manner 1.3 communicate with their customer in a way that makes them feel valued and respected 1.4 identify and confirm their customer's expectations 1.5 treat their customer courteously and helpfully at all times 1.6 keep their customer informed and reassured 1.7 adapt their behaviour to respond to different customer behaviour			
2	Respond appropriately to customers	2.1 respond promptly to a customer seeking help 2.2 choose the most appropriate way to communicate with their customer 2.3 check with their customer that they have fully understood their expectations 2.4 respond promptly and positively to their customer's questions and comments 2.5 allow their customer time to consider their response and give further explanation when appropriate			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
3 Communicate information to customers	3.1 quickly find information that will help their customer 3.2 give their customer information they need about the services or products offered by their organisation 3.3 recognise information that their customer might find complicated and check whether they fully understand 3.4 explain clearly to their customers any reasons why their expectations cannot be met			
4 Understand how to give customers a positive impression of themselves and the organisation	4.1 describe their organisation's standards for appearance and behaviour 4.2 explain their organisation's guidelines for how to recognise what their customer wants and respond appropriately 4.3 identify their organisation's rules and procedures regarding the methods of communication they use 4.4 explain how to recognise when a customer is angry or confused 4.5 identify their organisation's standards for timeliness in responding to customer questions and requests for information			

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*(if sampled)*

## **Unit 9: Recognise and Deal with Customer Queries, Requests and Problems**

**Unit reference number:** M/601/1508

**QCF level:** 1

**Credit value:** 5

**Guided learning hours:** 33

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### **Unit summary**

No matter how good the learner is at providing consistent and reliable customer service, some of their customers will, from time to time, expect more. They can signal this in various ways and when they do, the learner must know how to handle it.

Sometimes customers ask different questions and request special treatment. The learner may be able to help them and they certainly need to know who to ask for help if necessary. Some customers may be dissatisfied with the service and may present a problem. The learner's job is to recognise that there is a problem and make sure that the appropriate person deals with it.

### **Assessment requirements/evidence requirements**

Wherever possible, the learner's evidence should be based on a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this unit, evidence based on a realistic working environment or a work placement is permissible. Simulation is also allowed for evidence within this unit but ideally this should be based on either previous or existing experience from a work placement, a realistic working environment or real work.

The learner may collect the evidence for the unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.

The learner must provide evidence that shows they have done this over a sufficient period of time with different customers on different occasions for their assessor to be confident that they are competent.

The learner's evidence must include examples of problems which are:

- a) brought to their attention by customers
- b) identified first by them and/or by their colleagues.

The problems included in their evidence must include examples of:

- a) a difference between customer expectations and what is offered by their organisation
- b) a problem resulting from a system or procedure failure.

### **Assessment methodology**

This unit is assessed in the workplace or in conditions resembling the workplace when appropriate. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Recognise and deal with customer queries and requests	1.1 deal with queries and requests from customers in a positive and professional way 1.2 seek information or help from a colleague if they cannot answer their customer's query or request 1.3 obtain help from a colleague if they are not able to deal with their customer's request 1.4 always tell their customer what is happening			
2 Recognise and deal with customer problems	2.1 recognise when something is a problem from the customer's point of view 2.2 avoid saying or doing anything which may make the problem worse 2.3 deal with a difficult customer calmly and confidently 2.4 recognise when to pass a problem on to an appropriate colleague 2.5 pass the problem on to their colleague with the appropriate information 2.6 check that the customer knows what is happening			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
3 Know how to recognise and deal with customer queries, requests and problems	3.1 list who in the organisation is able to give help and information 3.2 state the limits of what they are allowed to do 3.3 identify what professional behaviour is 3.4 describe how to speak to people who are dissatisfied 3.5 describe how to deal with difficult people 3.6 state what customers normally expect 3.7 identify how to recognise a problem from what a customer says or does 3.8 describe what kinds of behaviours/actions would make situations worse 3.9 list the organisational procedures they must follow when they deal with problems or complaints 3.10 identify the types of behaviour that may make a problem worse			

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*(if sampled)*

## **Unit 10: Support Customer Service Improvements**

**Unit reference number:** A/601/1530

**QCF level:** 2

**Credit value:** 5

**Guided learning hours:** 33

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### **Unit summary**

Organisations change the way they deliver service to their customers because customer expectations rise and because other organisations improve the services they offer. Often the most important ideas about how to improve customer service come from people dealing directly with customers.

The learner's job involves delivering customer service. If the organisation has decided to make changes, it is the learner's job to support them and to present them positively to customers. Also, by listening to customer comments the learner may have their own ideas about how the service they deliver could be improved.

This unit is about how the learner provides support for changes that their organisation has introduced. In addition, it covers how the learner presents their own ideas for improvements to someone in their organisation who can authorise trying out the change.

### **Assessment requirements/evidence requirements**

The learner's evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this unit, evidence based on a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this unit.

The learner may collect the evidence for the unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.

The learner must provide evidence that shows they have done this over a sufficient period of time with different customers on different occasions for their assessor to be confident that they are competent.

The learner must provide evidence that they have:

- a) contributed to improving customer service through their own efforts
- b) contributed to improving customer service by working with others.

The learner's evidence must cover two changes with which they have been actively involved. In each case they must be able to identify the part they played in:

- a) linking customer feedback with the reasons for the change
- b) implementing the change
- c) gathering customer reactions to the change.

The learner's evidence for each change must show how:

- a) the change has improved customer service
- b) their customers have reacted to the change.

Each change that is part of the learner's evidence must be significant enough for a regular customer to notice that the services or products they are delivering are different or that the way they and their colleagues deliver the services or products is different.

### **Assessment methodology**

This unit is assessed in the workplace or in conditions resembling the workplace when appropriate. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Use feedback to identify potential customer service improvements	1.1 gather informal feedback from their customers 1.2 use their organisation's procedures to collect feedback from their customers 1.3 use the information from their customers to develop a better understanding of their customer service experience 1.4 identify ways the service they give could be improved-based on information they have gathered 1.5 share their ideas for improving customer service with colleagues			
2 Implement changes in customer service	2.1 identify a possible change that could be made to improve customer service 2.2 present their idea for improving customer service to a colleague with the appropriate authority to approve the change 2.3 carry out changes to customer service procedures based on their own idea or proposed by their organisation 2.4 keep their customers informed of changes to customer service 2.5 give customers a positive impression of changes that have been made 2.6 work positively with others to support customer service changes			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
3 Assist with the evaluation of changes in customer service	3.1 discuss with others how changes to customer service are working 3.2 work with others to identify any negative effects of changes and how these can be avoided			
4 Know how to support customer service improvements	4.1 explain how customer experience is influenced by the way service is delivered 4.2 identify how customer feedback is obtained 4.3 explain how to work with others to identify and support change in the way service is delivered 4.4 describe why it is important to give a positive impression to their customer about the changes made by the organisation even if the learner disagrees with them			

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*(if sampled)*

## **Unit 11: Assess Housing Need**

**Unit reference number:** L/601/0480

**QCF level:** 3

**Credit value:** 4

**Guided learning hours:** 30

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### **Unit summary**

This unit is for those working in the housing sector who establish the housing needs of individuals and agree actions with individuals to meet these housing needs.

### **Assessment requirements/evidence requirements**

Please refer to the Asset Skills assessment principles, which can be found in *Annexe C*.

### **Assessment methodology**

This unit is assessed in the workplace or in conditions resembling the workplace when appropriate. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Know the range of the housing services and the types of support provided by the organisation	1.1 identify the role of assessment and its contribution to meeting individual needs 1.2 define what the organisation can provide to prospective users of the service and what it cannot 1.3 describe the types of housing need individuals bring to the organisation 1.4 explain the perceptions which individuals have of the organisation and how this affects trust 1.5 explain how the sources of housing support available in the organisation can be accessed 1.6 describe alternative sources of support for individuals and how to refer clients to them			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
2 Be able to establish and maintain effective communication with individuals	2.1 deal courteously, sensitively and fairly with individuals 2.2 greet individuals in a friendly, welcoming and non-judgemental manner 2.3 show respect for individual beliefs, expectations and needs 2.4 listen, ask questions and check understanding of individual needs 2.5 establish the customers' reasons for approaching the organisation and their expectations 2.6 maintain the confidentiality and privacy of individuals 2.7 assess the likely level of distress or concern that individuals may feel at the time of initial contact			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
3 Be able to establish the housing needs of individuals	3.1 gather essential information from individuals in a sensitive and respectful manner 3.2 describe with sensitivity what the organisation can and cannot provide without alienating individuals 3.3 differentiate between housing needs and other types of support being sought 3.4 identify initial and ongoing housing needs 3.5 review any changes of circumstance with returning individuals and conduct a further assessment of need if appropriate 3.6 record relevant information and actions using agreed procedures and ensure that colleagues and others are informed			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
4 Be able to agree actions with individuals to meet their housing needs	4.1 identify and agree with individuals the appropriate housing support that the organisation can provide 4.2 explain the next steps in the support process and gain individual agreement 4.3 refer individuals to other colleagues, services or organisations as required in a respectful and professional manner which minimises a sense of rejection			

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*(if sampled)*

## **Unit 12: Match the Needs of Individuals with Available Accommodation**

**Unit reference number:** K/601/0485

**QCF level:** 3

**Credit value:** 3

**Guided learning hours:** 20

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### **Unit summary**

This unit is for those working in the housing sector who support individuals to make applications for housing.

### **Assessment requirements/evidence requirements**

Please refer to the Asset Skills assessment principles, which can be found in *Annexe C*.

### **Assessment methodology**

This unit is assessed in the workplace or in conditions resembling the workplace when appropriate. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Be able to support individuals to make applications for housing	1.1 deal courteously, sensitively and fairly with individuals seeking housing 1.2 take full account of individual preferences and needs 1.3 explain the ways in which the organisation meets the diverse needs of individuals 1.4 explain the extent of and limitations on individual choice in the matching process 1.5 refer individuals with accommodation or other needs, that cannot be met, to the appropriate person or organisation 1.6 explain the full range of options and choices available to best meet individual housing need 1.7 give individuals a clear and honest description of the available accommodation 1.8 check with them their reactions and wishes			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
2 Be able to process housing applications	2.1 contact individuals and offer them accommodation in accordance with organisational procedures 2.2 explain the application process and relevant documentation to customers responding to any queries and concerns 2.3 check on the availability of properties and their type, size, location and condition 2.4 follow organisational procedures for processing applications following regulatory requirements 2.5 assist individuals to complete the application process 2.6 follow organisational policy on refusals, appeals or complaints and pass on issues to the appropriate person in the organisation			

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*(if sampled)*

## **Unit 13: Support Individuals Through the Process of Signing Occupancy Agreements**

<b>Unit reference number:</b>	A/601/0488
<b>Level:</b>	2
<b>Credit value:</b>	4
<b>Guided learning hours:</b>	30

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### **Unit summary**

This unit is for those working in the housing sector who support individuals in the completion of occupancy agreements.

### **Assessment requirements/evidence requirements**

Please refer to the Asset Skills assessment principles, which can be found in *Annexe C*.

### **Assessment methodology**

This unit is assessed in the workplace or in conditions resembling the workplace when appropriate. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Be able to support individuals to complete occupancy agreements	1.1 deal courteously, sensitively and fairly with individuals completing tenancy agreements 1.2 make clear the legal nature of the agreement being set up and the rights and responsibilities of each party 1.3 explain the content and legal rights and responsibilities of both parties to the agreement and the related documentation 1.4 respond to customer queries and concerns 1.5 identify customer needs for further information and support and refer them to others as required 1.6 ensure that customers understand and are satisfied with the services being provided to them under the agreement 1.7 explain the appeals and/or complaints procedures clearly and accurately to customers			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
2 Be able to process occupancy agreements	2.1 identify and use the correct documentation for the type of occupancy being proposed 2.2 complete all agreement documentation fully and accurately following organisational procedures, including maintaining customer confidentiality 2.3 verify the accuracy of the information provided by customers 2.4 pass documentation for entry into the organisation's management information system 2.5 carry out the necessary follow-up actions following organisational procedures 2.6 follow agreed quality assurance procedures for tenancy agreements			

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## **Unit 14: Respond to Customer Requests for Repairs**

**Unit reference number:** J/600/3205

**Level:** 3

**Credit value:** 2

**Guided learning hours:** 10

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### **Unit summary**

This unit is about the receiving and responding to requests for repair work from customers. It may involve authorising or commissioning works directly or referring requests to appropriate colleagues.

### **Assessment requirements/evidence requirements**

Please refer to the Asset Skills assessment principles, which can be found in *Annexe C*.

### **Assessment methodology**

This unit is assessed in the workplace or in conditions resembling the workplace when appropriate. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Know the organisation's housing stock and possible defects which require repair	1.1 describe the types of properties which the organisation manages 1.2 identify, using the appropriate terminology, the types of faults which can occur in these properties			
2 Know organisational policies and procedures relating to requests	2.1 describe the types of service agreements with customers 2.2 identify the organisational policies and procedures relating to repair requests 2.3 identify repairs which require emergency action			
3 Establish and respond to customer requests for repairs	3.1. clarify requests from customers to determine the exact nature of what is required 3.2. accurately record the details of customers and their requests 3.3. state the other parties involved in the maintenance and repair of the organisation's properties and whether there are any associated charges 3.4. identify requests which are outside the organisation's responsibilities 3.5. describe how to refer customers to other organisations and individuals 3.6. arrange inspection visits and repair work according to organisational policies and procedures 3.7. prioritise urgent repairs			

Learner name: \_\_\_\_\_

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*(if sampled)*

## **Unit 15: Organise the Maintenance and Repair of Property**

**Unit reference number:** T/601/0490

**QCF level:** 2

**Credit value:** 2

**Guided learning hours:** 10

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### **Unit summary**

This unit is for those working in the housing sector who contribute to the planning and delivery of maintenance and repair work on property.

### **Assessment requirements/evidence requirements**

Please refer to the Asset Skills assessment principles, which can be found in *Annexe C*.

### **Assessment methodology**

This unit is assessed in the workplace or in conditions resembling the workplace when appropriate. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Organise the maintenance and repair of property	1.1 obtain all necessary background information 1.2 establish the responsibilities of the relevant parties with respect to the condition of the property 1.3 identify the nature and scale of the work to be done 1.4 operate within own level of responsibility and authority and refer to others as required 1.5 prioritise urgent repairs to avoid health, safety and security risks or those caused by service failure 1.6 identify who has responsibility for carrying out the work 1.7 contact the relevant person when required action is outside own area of responsibility or authority 1.8 identify any health, safety and security issues involved and liaise with relevant people to ensure they are addressed			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
2 Be able to arrange and monitor the maintenance and repair of property	2.1 deal courteously, sensitively and fairly with individuals 2.2 authorise maintenance and repair work within the limits of own authority 2.3 communicate the programme of work to the work team clearly and within appropriate timescales 2.4 make the necessary arrangements for the work to take place 2.5 explain how to check progress at intervals, identify delays and deviations and the appropriate action to take 2.6 explain the organisation's methods for checking that work has been completed according to the specification and that any problems with the completed work have been rectified 2.7 ensure that all records are up to date with actions taken or required clearly specified			

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*(if sampled)*

## **Unit 16: Check and Record the Condition of Property**

**Unit reference number:** A/601/0507

**QCF level:** 2

**Credit value:** 3

**Guided learning hours:** 20

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### **Unit summary**

This unit is for those working in the housing sector who contribute to the process of checking on the condition of property and recoding information on its condition.

### **Assessment requirements/evidence requirements**

Please refer to the Asset Skills assessment principles, which can be found in *Annexe C*.

### **Assessment methodology**

This unit is assessed in the workplace or in conditions resembling the workplace when appropriate. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Plan checks on the condition of property	1.1 establish the previous history of the property and access relevant information 1.2 obtain necessary paperwork for checks 1.3 confirm the type of property, its general layout and common types of problems that may occur 1.4 assess the health, safety and security of self and others and explain how to minimise personal risk 1.5 identify the limits of own responsibility, authority and capability prior to checking property and refer to others as required 1.6 identify the legal responsibilities of the organisation in relation to the condition of property			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
2 Carry out checks on the condition of property	2.1 deal courteously, sensitively and fairly with individuals 2.2 confirm the date and time of the inspection with individuals and other relevant parties as required 2.3 carry out checks safely and correctly following organisational and legal requirements 2.4 record results of checks accurately following organisation's procedures 2.5 identify any problems with the condition of the property and take appropriate action to rectify them 2.6 update records on condition of property accurately 2.7 refer problems and issues regarding the condition of the property to others as required			

Learner name: \_\_\_\_\_

Date: \_\_\_\_\_

Learner signature: \_\_\_\_\_

Date: \_\_\_\_\_

Assessor signature: \_\_\_\_\_

Date: \_\_\_\_\_

Internal verifier signature: \_\_\_\_\_

Date: \_\_\_\_\_

*(if sampled)*

## **Unit 17: Support Clients to Make Use of the Housing Advice and Guidance Service**

<b>Unit reference number:</b>	J/601/0509
<b>QCF level:</b>	2
<b>Credit value:</b>	3
<b>Guided learning hours:</b>	20

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### **Unit summary**

This unit is about enabling and supporting clients to decide whether to use the service, agreeing their use of the service and identifying and providing information required by clients.

### **Assessment requirements/evidence requirements**

Please refer to the Asset Skills assessment principles, which can be found in *Annexe C*.

### **Assessment methodology**

This unit is assessed in the workplace or in conditions resembling the workplace when appropriate. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Know the techniques for enabling clients to communicate their needs	1.1 describe techniques for encouraging clients to communicate their needs 1.2 state why clients might find it difficult to communicate their needs 1.3 describe techniques for confirming and clarifying clients needs 1.4 list the different methods of providing information 1.5 describe how information can be formatted to suit the needs of different clients 1.6 state the types of difficulties that may be encountered			
2	Know what services and information is available to support clients to make use of housing services	2.1 state what services are available to clients 2.2 state what services are offered by external agencies 2.3 describe the procedures for accessing internal and external services 2.4 state what information is available for internal and external services and how to retrieve it 2.5 state why it is important to have accurate and up-to-date information 2.6 state why it is important to check that clients have received the information			

<b>Learning outcomes</b>	<b>Assessment criteria</b>	<b>Evidence type</b>	<b>Portfolio reference</b>	<b>Date</b>
3 Support clients to make use of the housing advice and guidance service	3.1 deal courteously, sensitively and fairly with individuals seeking housing 3.2 show respect for individual beliefs, expectations and needs 3.3 encourage clients to clarify their requirements and circumstances 3.4 identify and provide the client with appropriate and accurate information about the service 3.5 use the information provided to assist clients decide whether their requirements could be met by the service 3.6 clarify clients' expectations and understanding of the service and its policies 3.7 provide clients with information on the advantages and disadvantages of using the service			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
4 Agree with clients their use of the housing advice and guidance service	4.1 clarify and confirm the client's requirements and how these will be met by the service 4.2 agree the way the service will be used 4.3 record contacts and agreements with clients using the appropriate systems			

Learner name: \_\_\_\_\_

Date: \_\_\_\_\_

Learner signature: \_\_\_\_\_

Date: \_\_\_\_\_

Assessor signature: \_\_\_\_\_

Date: \_\_\_\_\_

Internal verifier signature: \_\_\_\_\_

Date: \_\_\_\_\_

*(if sampled)*

## **Unit 18: Enable Housing Clients to Access Referral Opportunities**

**Unit reference number:** H/601/0517

**Level:** 2

**Credit value:** 4

**Guided learning hours:** 30

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### **Unit summary**

This unit is about providing opportunities for clients to be referred to other (external) agencies and services.

### **Assessment requirements/evidence requirements**

Please refer to the Asset Skills assessment principles, which can be found in *Annexe C*.

### **Assessment methodology**

This unit is assessed in the workplace or in conditions resembling the workplace when appropriate. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Know the range of services, external to the organisation, which are available to housing customers	1.1 list the types of services which are offered by external agencies relevant to housing customers 1.2 obtain information on these services, including procedures for referral, eligibility and acceptance criteria 1.3 describe the procedures for checking the services' capacity and resources 1.4 list the objections customers might have in using these external services 1.5 state why it is important to have relevant and up-to-date information on services			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
2 Be able to identify options for referral to external services	2.1 deal courteously, sensitively and fairly with individuals seeking housing 2.2 show respect for individual beliefs, expectations and needs 2.3 obtain information from clients on their requirements 2.4 assess the suitability of other services for meeting clients' requirements 2.5 clarify with clients the appropriateness of the service 2.6 confirm the acceptance criteria and procedures of the service 2.7 review the requirements of clients and check them against the acceptance criteria of the service 2.8 check the service has the capacity and resources to deal with additional clients 2.9 maintain the confidentiality and privacy of the client 2.10 comply with organisational procedures, legal requirements, codes of practice and guidelines			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
3 Assist client with the take up of the referral opportunity	3.1 review the referral options with clients 3.2 identify the advantages and disadvantages of the referral options for clients 3.3 provide clients with information using a suitable communication format to enable the client to make an informed decision 3.4 establish the acceptability of the referral with clients 3.5 inform the client of what information has to be passed between the relevant services 3.6 plan the effective implementation of the referral with the client 3.7 ensure that all referral procedures are completed correctly 3.8 state the procedures for additional support and information			

Learner name: \_\_\_\_\_

Date: \_\_\_\_\_

Learner signature: \_\_\_\_\_

Date: \_\_\_\_\_

Assessor signature: \_\_\_\_\_

Date: \_\_\_\_\_

Internal verifier signature: \_\_\_\_\_

Date: \_\_\_\_\_

*(if sampled)*

## **Unit 19: Provide and Maintain Information Materials for Use in the Housing Organisation**

<b>Unit reference number:</b>	T/601/0523
<b>Level:</b>	2
<b>Credit value:</b>	2
<b>Guided learning hours:</b>	10

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### **Unit summary**

This unit is about obtaining information materials, maintaining the material and improving the use of information materials within the organisation.

### **Assessment requirements/evidence requirements**

Please refer to the Asset Skills assessment principles, which can be found in *Annexe C*.

### **Assessment methodology**

This unit is assessed in the workplace or in conditions resembling the workplace when appropriate. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Be able to obtain information materials	1.1 identify appropriate sources of information 1.2 obtain information materials in accordance with organisational procedures 1.3 agree realistic timescales and resources for obtaining the materials 1.4 check the materials against the organisation's agreed evaluation criteria or codes of practice and ethical requirements 1.5 record and store the materials according to organisational procedures 1.6 identify problems with obtaining the information materials 1.7 list the information materials that should be in stock			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
2 Be able to maintain the use of information materials	2.1 maintain sufficient sources of freely available information materials to meet the requirements of clients 2.2 protect information sources from damage and inappropriate use and alteration			
3 Be able to improve the use of information materials	3.1 consult with others in the organisation the effectiveness of the materials in use 3.2 review the information obtained on the effectiveness 3.3 identify the way materials are used 3.4 identify improvements in the way materials can be disseminated 3.5 identify the most appropriate methods for improving the materials 3.6 identify the resources required to implement the improvements 3.7 consult with all relevant people on the proposed improvements			

Learner name: \_\_\_\_\_

Date: \_\_\_\_\_

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Internal verifier signature: \_\_\_\_\_

Date: \_\_\_\_\_

*(if sampled)*

## **Unit 20: Help to Develop Individuals to Contribute to Decision Making**

**Unit reference number:** L/601/0530

**Level:** 2

**Credit value:** 4

**Guided learning hours:** 30

### **Unit summary**

This unit is for those working in the housing sector who help individuals to become involved in the decision-making process.

### **Assessment requirements/evidence requirements**

Please refer to the Asset Skills assessment principles, which can be found in *Annexe C*.

### **Assessment methodology**

This unit is assessed in the workplace or in conditions resembling the workplace when appropriate. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Know and understand the importance of encouraging customers to contribute to decision making	1.1 describe own role in helping customers to contribute to the decision making process 1.2 explain the benefits of encouraging customer involvement in decision making			
2 Establish customer views and needs in relation to contributing to decision making	2.1 deal courteously, sensitively and fairly with individuals 2.2 obtain individual views about what they need to enable them to participate in decision making 2.3 encourage individuals to express their preferences about how they wish to engage in decision making 2.4 identify any barriers to individuals contributing to decision making 2.5 work with individuals to identify ways of overcoming the barriers to participation in decision making 2.6 agree individual needs and next steps in supporting individuals to engage in decision making			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
3 Support customers to contribute to decision making	3.1 identify opportunities for people to contribute to decision making which meets their needs 3.2 identify opportunities for individuals to contribute to decision making and explore them with individuals 3.3 take appropriate action to implement opportunities for individuals 3.4 check and discuss progress with individuals 3.5 review opportunities and use this to improve future practice			
4 Evaluate the provision of opportunities for individuals to participate in decision making	4.1 identify methods of evaluating the provision of opportunities to participate 4.2 obtain feedback from individuals of their experience of participation in decision making and the improvements they would wish to see 4.3 identify where individual participation has been effective and where it has been ineffective 4.4 review how the process could be improved in the future 4.5 make recommendations for changes in the process for both self and the organisation to encourage greater individual participation on decision making			

Learner name: \_\_\_\_\_

Date: \_\_\_\_\_

Learner signature: \_\_\_\_\_

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Assessor signature: \_\_\_\_\_

Date: \_\_\_\_\_

Internal verifier signature: \_\_\_\_\_

Date: \_\_\_\_\_

*(if sampled)*

## **Unit 21: Help to Develop Individuals' Involvement in the Local Community**

<b>Unit reference number:</b>	H/601/0534
<b>Level:</b>	2
<b>Credit value:</b>	3
<b>Guided learning hours:</b>	20

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### **Unit summary**

This unit is for those working in the housing sector who support individuals to engage in local community organisations and events.

### **Assessment requirements/evidence requirements**

Please refer to the Asset Skills assessment principles, which can be found in *Annexe C*.

### **Assessment methodology**

This unit is assessed in the workplace or in conditions resembling the workplace when appropriate. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Recognise individuals' aspirations and needs	1.1 deal courteously, sensitively and fairly with individuals 1.2 identify individuals' aspirations and self-defined needs in relation to involvement 1.3 identify opportunities for consulting with residents on ways of becoming involved in the local community which respects individual and group needs and wishes 1.4 engage with residents in a positive and non-judgemental way			
2 Identify opportunities for individual involvement in the local community	2.1 identify the range of options and opportunities for involvement available to individuals 2.2 establish and maintain contact with resident associations and other networks which provide opportunities for individual involvement 2.3 contribute to local information and support events which assist individuals to participate in local community 2.4 provide information, advice and guidance to individuals on the range of opportunities available 2.5 signpost individuals to other organisations who can support them			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
3 Support residents to engage with the local community	3.1 present accurate, accessible and honest information about opportunities to become involved in the local community 3.2 present opportunities to individuals in a positive and non-judgemental way 3.3 identify opportunities for individuals to build their confidence 3.4 encourage individuals to engage with existing associations and networks 3.5 assist residents in setting up their own groups 3.6 encourage individuals to participate in decision making processes within own organisation			

Learner name: \_\_\_\_\_

Date: \_\_\_\_\_

Learner signature: \_\_\_\_\_

Date: \_\_\_\_\_

Assessor signature: \_\_\_\_\_

Date: \_\_\_\_\_

Internal verifier signature: \_\_\_\_\_

Date: \_\_\_\_\_

*(if sampled)*

## **Unit 22: Support the Rights of Individuals in the Community**

**Unit reference number:** J/601/0543

**QCF level:** 2

**Credit value:** 4

**Guided learning hours:** 30

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### **Unit summary**

This unit is for those working in the housing sector who help individuals to assert their rights in the community.

### **Assessment requirements/evidence requirements**

Please refer to the Asset Skills assessment principles, which can be found in *Annexe C*.

### **Assessment methodology**

This unit is assessed in the workplace or in conditions resembling the workplace when appropriate. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>1 Understand how individuals can exercise their rights in the community</p>	<p>1.1 deal courteously, sensitively and fairly with individuals</p> <p>1.2 describe the needs and expectations of individuals in relation to the wider community</p> <p>1.3 identify the legal and organisational requirements in relation to support and representation</p> <p>1.4 explain how barriers such as discrimination, stereotyping, prejudice and disadvantage can undermine and exclude people from exercising their rights and responsibilities</p> <p>1.5 illustrate potential conflicts between the rights and responsibilities of individuals and those of others in the wider community</p> <p>1.6 explain how to challenge discrimination, disadvantage and exclusion</p> <p>1.7 identify and access sources of information, advice and support on rights and how your organisation and individuals can make use of them</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	<p>1.8 establish the limits of own authority and responsibility in helping individuals to represent and assert their rights and when to pass customers on to other advocates or representatives</p> <p>1.9 identify the other organisations that provide information, advice and support on rights and how to use them to support individuals</p>			
<p>2 Support individuals to exercise their rights in the community</p>	<p>2.1 support the rights of individuals in accordance with legal and organisational requirements within the limits of own authority and responsibility</p> <p>2.2 adopt methods that are legal and effective and do not adversely affect others in the community</p> <p>2.3 make individuals aware of their rights and how they can be represented</p> <p>2.4 identify sources of support and advice in relation to individual needs and access them on behalf of the individual as required</p> <p>2.5 provide support which is based on clearly identified individual need</p> <p>2.6 provide individuals with information which will help them to represent their own interests</p> <p>2.7 support individuals to express their needs clearly</p>			

Learner name: \_\_\_\_\_

Date: \_\_\_\_\_

Learner signature: \_\_\_\_\_

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Assessor signature: \_\_\_\_\_

Date: \_\_\_\_\_

Internal verifier signature: \_\_\_\_\_

Date: \_\_\_\_\_

*(if sampled)*

## **Unit 23: Employment Rights and Responsibilities in the Facilities Management, Housing and Property Sectors**

**Unit reference number:** A/502/7524

**QCF level:** 2

**Credit value:** 2

**Guided learning hours:** 16

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### **Unit summary**

Successful assessment of the unit proves that the candidate has achieved the national occupational standard to understand employment rights and responsibilities.

### **Assessment requirements/evidence requirements**

Please refer to the Asset Skills assessment principles, which can be found in *Annexe C*.

### **Assessment methodology**

This unit is assessed in the workplace or in conditions resembling the workplace when appropriate. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Know employer and employee rights, responsibilities and own organisational procedures	1.1 state employer and employee rights and responsibilities under employment law, including equality act, health and safety and other relevant legislation 1.2 state importance of having employment rights and responsibilities 1.3 describe organisational procedures for health and safety, including documentation 1.4 describe organisational procedures for equality and diversity, including documentation 1.5 identify sources of information and advice on employment rights and responsibilities			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
2 Know factors that affect own organisation and occupation	2.1 describe the role played by own occupation within organisation and industry 2.2 describe career pathways available to them 2.3 state types of representative body related to the industry, their main roles and responsibilities and their relevance to the industry 2.4 identify sources of information and advice on own industry, occupation, training and career 2.5 describe principles, policies and codes of practice used by own organisation and industry 2.6 describe issues of public concern that affect own organisation and industry			

Learner name: \_\_\_\_\_

Date: \_\_\_\_\_

Learner signature: \_\_\_\_\_

Date: \_\_\_\_\_

Assessor signature: \_\_\_\_\_

Date: \_\_\_\_\_

Internal verifier signature: \_\_\_\_\_

Date: \_\_\_\_\_

*(if sampled)*

## Further information

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To get in touch with us visit our 'Contact us' pages:

- Edexcel, BTEC and Pearson Work Based Learning contact details: [qualifications.pearson.com/en/support/contact-us.html](http://qualifications.pearson.com/en/support/contact-us.html)
- books, software and online resources for UK schools and colleges: [www.pearsonschoolsandfecolleges.co.uk](http://www.pearsonschoolsandfecolleges.co.uk)

Key publications

- *Adjustments for candidates with disabilities and learning difficulties, Access and Arrangements and Reasonable Adjustments, General and Vocational qualifications* (Joint Council for Qualifications (JCQ))
- *Supplementary guidance for reasonable adjustments and special consideration in vocational internally assessed units* (Pearson)
- *General and Vocational qualifications, Suspected Malpractice in Examination and Assessments: Policies and Procedures* (JCQ)
- *Equality Policy* (Pearson)
- *Recognition of Prior Learning Policy and Process* (Pearson)
- *UK Information Manual* (Pearson)
- *Pearson Edexcel NVQs, SVQs and competence-based qualifications – Delivery Requirements and Quality Assurance Guidance* (Pearson)

All of these publications are available on our website: [qualifications.pearson.com](http://qualifications.pearson.com)

Further information and publications on the delivery and quality assurance of NVQ/Competence-based qualifications are available at our website on the Delivering BTEC pages. Our publications catalogue lists all the material available to support our qualifications. To access the catalogue and order publications, please go to the resources page of our website.

## Useful publications

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Related information and publications include:

- *Centre Handbook for Pearson NVQs and Competence-based Qualifications* published annually
- functional skills publications – specifications, tutor support materials and question papers
- *Regulatory Arrangements for the Qualification Framework* (published by Ofqual, August 2008)
- the current Pearson publications catalogue and update catalogue.

Pearson publications concerning the Quality Assurance System and the internal and standards verification of vocationally related programmes can be found on the Pearson website.

NB: Some of our publications are priced. There is also a charge for postage and packing. Please check the cost when you order.

## **How to obtain National Occupational Standards**

Please contact:

Asset Skills  
Sol House  
29 St Katherine's Street  
Northampton  
NN1 2QZ

Telephone: 01604 233 336

Fax: 01604 233 573

Email: [enquiries@assetskills.org](mailto:enquiries@assetskills.org)

Website: [www.assetskills.org](http://www.assetskills.org)

# Professional development and training

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Pearson supports UK and international customers with training related to NVQ and BTEC qualifications. This support is available through a choice of training options offered in our published training directory or through customised training at your centre.

The support we offer focuses on a range of issues including:

- planning for the delivery of a new programme
- planning for assessment and grading
- developing effective assignments
- building your team and teamwork skills
- developing student-centred learning and teaching approaches
- building functional skills into your programme
- building effective and efficient quality assurance systems.

The national programme of training we offer can be viewed on our website ([qualifications.pearson.com](http://qualifications.pearson.com)). You can request customised training through the website or by contacting one of our advisers in the Training from the Pearson team via Customer Services to discuss your training needs.

The training we provide:

- is active
- is designed to be supportive and thought provoking
- builds on best practice
- may be suitable for those seeking evidence for their continuing professional development.

# Annexe A: Quality assurance

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## Key principles of quality assurance

- A centre delivering Pearson qualifications must be a Pearson recognised centre and must have approval for qualifications that it is offering.
- The centre agrees, as part of gaining recognition, to abide by specific terms and conditions relating to the effective delivery and quality assurance of assessment. The centre must abide by these conditions throughout the period of delivery.
- Pearson makes available to approved centres a range of materials and opportunities to exemplify the processes required for effective assessment and provide examples of effective standards. Approved centres must use the guidance on assessment to ensure that staff who are delivering Pearson qualifications are applying consistent standards.
- An approved centre must follow agreed protocols for: standardisation of assessors; planning, monitoring and recording of assessment processes; internal verification and recording of internal verification processes and dealing with special circumstances, appeals and malpractice.

## Quality assurance processes

The approach to quality assured assessment is made through a partnership between a recognised centre and Pearson. Pearson is committed to ensuring that it follows best practice and employs appropriate technology to support quality assurance processes where practicable. The specific arrangements for working with centres will vary. Pearson seeks to ensure that the quality-assurance processes it uses do not inflict undue bureaucratic processes on centres, and works to support them in providing robust quality-assurance processes.

The learning outcomes and assessment criteria in each unit within this specification set out the standard to be achieved by each learner in order to gain each qualification. Pearson operates a quality-assurance process, designed to ensure that these standards are maintained by all assessors and verifiers.

For the purposes of quality assurance, all individual qualifications and units are considered as a whole. Centres offering these qualifications must be committed to ensuring the quality of the units and qualifications they offer, through effective standardisation of assessors and internal verification of assessor decisions. Centre quality assurance and assessment processes are monitored by Pearson.

The Pearson quality-assurance processes will involve:

- gaining centre recognition and qualification approval if a centre is not currently approved to offer Pearson qualifications
- annual visits to centres by Pearson for quality review and development of overarching processes and quality standards. Quality review and development visits will be conducted by a Pearson quality development reviewer
- annual visits by occupationally competent and qualified Pearson Standards Verifiers for sampling of internal verification and assessor decisions for the occupational sector
- the provision of support, advice and guidance towards the achievement of National Occupational Standards.

Centres are required to declare their commitment to ensuring quality and appropriate opportunities for learners that lead to valid and accurate assessment outcomes. In addition, centres will commit to undertaking defined training and online standardisation activities.

## Annexe B: Centre certification and registration

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Pearson Standards Verifiers will provide support, advice and guidance to centres to achieve Direct Claims Status (DCS). Pearson will maintain the integrity of Pearson NVQs/competence qualifications through ensuring that their awarding is secure. Where there are quality issues identified in the delivery of programmes, Pearson will exercise the right to:

- direct centres to take action
- limit or suspend certification
- suspend registration.

The approach of Pearson in such circumstances is to work with the centre to overcome the problems identified. If additional training is required, Edexcel will aim to secure the appropriate expertise to provide this.

### **What are the access arrangements and special considerations for the qualification in this specification?**

Centres are required to recruit learners to Pearson qualifications with integrity.

Appropriate steps should be taken to assess each applicant's potential and a professional judgement should be made about their ability to successfully complete the programme of study and achieve the qualification. This assessment will need to take account of the support available to the learner within the centre during their programme of study and any specific support that might be necessary to allow the learner to access the assessment for the qualification. Centres should consult Pearson's policy on learners with particular requirements.

Pearson's policy on access arrangements and special considerations for Pearson qualifications aims to enhance access to the qualifications for learners with disabilities and other difficulties (as defined by the 2010 Equality Act) without compromising the assessment of skills, knowledge, understanding or competence. Please refer to *Access Arrangements and Special Considerations for BTEC and Pearson Edexcel NVQ Qualifications* for further details. [qualifications.pearson.com](http://qualifications.pearson.com).



# Annexe C: Assessment principles

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**The Sector Skills Council  
for Property Services, Housing, Cleaning Services  
and Facilities Management**

the sector skills council for the places where we live and work

## **ASSESSMENT PRINCIPLES August 2010**

POLICIES AND PRINCIPLES FOR AWARDING  
ASSET SKILLS COMPETENCE UNITS IN THE QCF

Asset Skills  
2nd Floor  
Sol House  
19 St Katherine's Street  
Northampton  
NN1 2QZ

Tel: 01604 233336  
Fax: 01604 233573  
E-mail: [enquiries@assetskills.org](mailto:enquiries@assetskills.org)  
Website: [www.assetskills.org](http://www.assetskills.org)

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## **1 INTRODUCTION**

ASSET SKILLS has worked with the Awarding Organisations offering qualifications within their footprint to develop these assessment principles for units of assessment which have been submitted to the QCF by Asset Skills

ASSET SKILLS, with the support of industry, is dedicated to embedding the National Occupational Standards and units of assessment into the workplace and to upholding the quality and integrity of the Standards and Units and the Awards, Certificates and Diplomas based upon them.

## **2 ASSESSMENT PRINCIPLES FOR COMPETENCY BASED UNITS**

2.1 *The following principles will apply to Awarding Organisations:*

- 2.1.1 Assessment should normally be at the candidate's workplace, but where the opportunity to assess across the range of standards is unavailable other comparable working environments may be used, following agreement from the External Verifier.
- 2.1.2 A holistic approach towards the collection of evidence should be encouraged, assessing activities generated by the whole work experience rather than focusing on specific tasks.  
  
e.g. If the candidate communicates with a customer whilst engaged in cleaning activities these can be assessed against both cleaning and customer service elements.
- 2.1.3 Assessors can only assess in their acknowledged area of occupational competence.
- 2.1.4 Assessors and Internal Verifiers will be registered with their Approved Centre and be accountable to the organisation for their assessment practice.
- 2.1.5 Health and safety of customers/clients and employees must be maintained throughout the assessment process and if any person carrying out assessment or verification activities does not feel that there is due regard to health and safety then that person should refuse to continue with the activity(ies) until satisfied that due regard to health and safety is being taken.

### **3 SIMULATION AND WITNESS TESTIMONY FOR COMPETENCY BASED UNITS**

There are a few occasions when simulation or witness testimony is warranted where the centre can demonstrate that performance evidence has been impossible to obtain.

The underlying reasons for either simulation or witness testimony are:

- health and safety considerations
- activities that would cause serious inconvenience or loss to an employer if there was an undue delay in their being carried out
- Infrequently occurring activities
- equality of access

#### *3.1 Simulation*

Simulation may be necessary for specific elements of the units. It is advisable that centres refer to the Awarding Organisations in these cases for clear guidelines.

Awarding Organisation guidance to centres must ensure that demands on the candidate during simulation are neither more nor less than they would encounter in a real work situation. In particular:

- All simulations must be planned, developed and documented by the centre in a way that ensures the simulation accurately reflects what the unit seeks to assess
- All simulations should follow these documented plans
- A centre's overall strategy for simulation must be examined and approved by the external verifier
- There should be a range of simulations to cover the same aspect of the standard so that the risk of candidates successfully colluding is reduced
- The physical environment for the simulation must be as realistic as possible and draw on real resources that would be used in the industry
- The nature of the contingency must be realistic.

#### *3.2 Witness Testimony*

Witness testimony should not form the primary source of evidence. Centres must comply with Awarding Organisation guidance over the occupational competence and briefing of witnesses in the use of witness testimony.

## **4 RECOGNITION OF PRIOR LEARNING AND EXPERIENCE**

- 4.1 Evidence from past achievement may be included as permissible evidence within assessment methods.
- 4.2 Evidence of prior knowledge and understanding can be offered as supplementary evidence as long as it is a measurable assessed outcome of learning which links to the unit of assessment
- 4.3 Assessors should make best use of all the assessment methods available to them in ensuring the most reliable and effective use is made of claims of prior learning and experience which relate to the individual circumstances.
- 4.4 All candidates must demonstrate current competence with respect to recognition of prior learning (RPL).

## **5 EXTERNAL QUALITY ASSURANCE OF ASSESSMENT**

- 5.1 Awarding organisations will operate a Risk Rating system of Approved Centres. This will be applied UK wide. Awarding organisations will provide details of their plans and criteria for risk rating at the time of qualifications' submissions.
  - 5.1.1 The Awarding Organisations will carry out risk assessment annually and risk rate each Approved Centre and will take appropriate action to ensure quality assurance is maintained.

## **6 FRAMEWORK CRITERIA FOR THE APPOINTMENT OF EXTERNAL VERIFIERS**

- 6.1 ASSET SKILLS aims to ensure that the technical and quality aspirations of industry are met, in order to inspire confidence in the national occupational standards and qualifications. ASSET SKILLS will work with the Awarding Organisations to implement a practical and cost effective external verification process that will strengthen the rigour and consistency of assessment.
- 6.2 The criteria will apply to existing and new External Verifiers.

### **6.3 Verification Competence**

- 6.3.1 *Awarding Organisations will ensure that External Verifiers:*

Hold an appropriate external verifier qualification (D35 or V2), or be working towards the V2 qualification, and demonstrate evidence of knowledge, understanding and experience of the assessment process (together with the occupational competence requirements below).

  - In England, Wales, Northern Ireland new External Verifiers must achieve unit V2 within 12 months of beginning external verification.
  - In Scotland ,all new EVs should have an assessment plan for achieving the V2 and be working towards achieving the awards. There is no timescale attached to the achievement of Unit V2.

## 6.4 Occupational Competence

All External Verifiers must

- 6.4.1 provide evidence of knowledge, understanding and application of the National Occupational Standards, Units of Assessment and Assessment Principles, together with technical definitions where appropriate. Awarding Organisations should cover this requirement as part of their normal appointment process.
  - 6.4.2 have verifiable relevant experience and current knowledge of the occupational working area at or above the level being verified. This experience and knowledge must be of sufficient depth to be effective and reliable when verifying judgements about assessors' assessment processes and decisions. External verifiers' experience and knowledge could be verified by:
    - curriculum vitae and references
    - possession of a relevant qualification
    - corporate membership of a relevant professional institution
  - 6.4.3 have up to date knowledge and experience of the particular aspects of work they are verifying. This could be verified by records of continuing professional development achievements
  - 6.4.4 have a sound in-depth knowledge of, and uphold the integrity of the NOS, Units of Assessment and these Assessment Principles
  - 6.4.5 undertake continuous professional development to ensure that they are working to the current National Occupational Standards in assessment and verification.
  - 6.4.6 be aware of national issues affecting vocational education, training and qualifications in the sector.
  - 6.4.7 have appropriate knowledge of the ASSET SKILLS framework of qualifications in relevant areas to the qualifications being externally verified.
  - 6.4.8 demonstrate their ability to maintain credibility and retain the confidence of the industry through commitment to continuous personal and professional development.
  - 6.4.9 provide evidence of knowledge, understanding and application of the Regulatory Authorities' codes of practice
- 6.5 Awarding Organisations may have generic criteria and personnel specifications in addition to the above.

## 7 FRAMEWORK CRITERIA FOR THE APPOINTMENT OF INTERNAL VERIFIERS

- 7.1 Internal Verifiers are appointed by an Approved Centre and approved by the Awarding Organisation through their External Verifier.
- 7.2 This criteria will apply to existing and new Internal Verifiers.
- 7.3 Internal Verifiers should only verify the decisions of assessors which fall within their acknowledged area of technical and occupational competence.
- 7.4 Internal Verifiers should be seen as the person responsible for an approved centre's assessment quality in order to facilitate the assessment process and should be one of the following:
- 7.4.1 Internal Verifiers will be employed directly or contractually by the same organisation (approved centre) as the assessors

Or:

- 7.4.2 Acting as a counter-signatory on a short term basis, a maximum period of 18 months, where Internal Verifier(s) have not yet achieved their V1 award.
- 7.5 Internal Verifiers will either:
- a Hold an appropriate internal verifier qualification (D34 or V1) , or be working towards a V1 qualification.
- In England, Wales and Northern Ireland all new internal verifiers should achieve unit V1 within 18 months of beginning internal verification duties. Internal verification decisions by verifiers who are still working towards certification must be countersigned by a Verifier who has gained certification.
  - In Scotland, all new Verifiers should have an assessment plan for achieving the V1 and be working towards achieving the award. External Verifiers will monitor progress and achievement towards the achievement of V1 during centre visits
  - All new Internal Verifiers must hold units A1 and/or A2

Or:

- b Where employers opt for an '**employer direct**' model, the qualification requirements specified by the regulatory authorities may be waived as described below.

**The 'employer direct' model is where colleagues, supervisors and/or managers in the workplace are involved in the assessment process. Under this model, the employer, with the agreement of their Awarding Organisation and Asset Skills and the approval of the qualifications Regulators, may choose between:**

Achieving the appropriate regulatory body approved unit qualifications for internal verification

Or:

Demonstrating that the employer's training and development activity undertaken to prepare, validate and review these verification roles, maps 100% to the National Occupational Standards which these qualifications are based on. The mapping process **must** be agreed by the Awarding Organisation as providing the equivalent level of rigour and robustness as achievement of the unit qualification.

**The alternative option described above, which waives the need for the regulatory approved units, must be confined in application to an 'organisation by organisation' and 'qualification by qualification' basis, and agreed by the qualification regulators. Prospective organisations must be able to confirm that their in-house practices conform to the requirements of the Standards in association with the relevant Awarding Organisation.**

7.5.2 It is desirable that all Internal Verifiers hold a relevant qualification  
Internal Verifiers will:

- 7.5.3 have verifiable relevant experience and current knowledge of the occupational working area at or above the level being verified. This experience and knowledge must be of sufficient depth to be effective and reliable when verifying judgements about assessors' assessment processes and decisions. Internal verifiers' experience and knowledge could be verified by:
- curriculum vitae and references
  - possession of a relevant qualification
  - corporate membership of a relevant professional institution
- 7.5.4 have expertise so they have up to date knowledge and experience of the particular aspects of work they are verifying. This could be verified by records of continuing professional development achievements
- 7.5.5 have a sound in-depth knowledge of, and uphold the integrity of the NOS, Units of Assessment and these Assessment Principles
- 7.5.6 be prepared to participate in training activities for their continued professional development
- 7.5.7 demonstrate their ability to maintain occupational competence by continuous professional development
- 7.5.8 undertake continuous professional development to ensure that they are working to the current National Occupational Standards in assessment and verification.
- 7.5.9 have knowledge of the requirements and application of the Asset Skills Assessment Principles
- 7.5.10 provide evidence of knowledge, understanding and application of the Regulatory Authorities' codes of practice
- 7.6 Centres will be responsible for ensuring that internal verifiers plan and maintain continuous professional development
- 7.7 Approved Centres may have generic criteria and personnel specifications in addition to the above.

## 8 FRAMEWORK CRITERIA FOR THE APPOINTMENT OF ASSESSORS

- 8.1 This section is intended to assist Approved Centres in the recruitment of those individuals who will act as Assessors within the Approved Centre.
- 8.2 Assessors are appointed by an Approved Centre and approved by the Awarding Organisation through their External Verifier.
- 8.2.1 They should only assess in their area of technical and occupational competence as approved by their Awarding Organisations.
- 8.3 *Assessors should be one of the following:*
- 8.3.1 Employed directly or contractually by the same organisation (centre) as the candidate

Or:

- 8.3.2 Acting as a counter signatory on a short term basis (18 months) where the Centre Assessor has not yet achieved their A1 or A2 awards.
- 8.4 *The Assessor should have the following:*
- Assessment Competence
- Either:
- 8.4.1
- a Hold D32 and/or D33 or A1 and or A2 or be working towards A1 and/or A2 Assessor Awards.

- In England, Wales and Northern Ireland, new Assessors must achieve unit A1 or A2 within 18 months of beginning assessment duties. Assessment decisions by Assessors who are still working towards certification must be countersigned by an Assessor who has gained certification.
- In Scotland, all new Assessors should have an assessment plan for achieving A1 or A2 and be working towards achieving the award. External Verifiers will monitor progress and achievement towards the achievement of A1 or A2 during centre visits.

Candidates in possession of a TQFE without having an appropriate A1 or A2 award should undertake continuing professional development to demonstrate that they are working to the appropriate A Unit standard.

Or:

- b Where employers opt for an '**employer direct**' model, the qualification requirements specified by the regulatory authorities may be waived as described below.

**The 'employer direct' model is where colleagues, supervisors and/or managers in the workplace are involved in the assessment process. Under this model, the employer, with the agreement of their Awarding Organisation and Asset Skills and the approval of the qualifications Regulators, may choose between:**

Achieving the appropriate regulatory body approved unit qualifications for assessment.

Or:

Demonstrating that the employer's training and development activity undertaken to prepare, validate and review these assessment roles, maps 100% to the National Occupational Standards which these qualifications are based on. The mapping process **must** be agreed by the Awarding Organisation as providing the equivalent level of rigour and robustness as achievement of the unit qualification.

**The alternative option described above, which waives the need for the regulatory approved units, must be confined in application to an 'organisation by organisation' and 'qualification by qualification' basis, and agreed by the qualification regulators. Prospective organisations must be able to confirm that their in-house practices conform to the requirements of the Standards in association with the relevant Awarding Organisation.**

## 8.5 Occupational Competence

All assessors must

- 8.5.1 have verifiable relevant current industry experience and knowledge of the occupational working area at or above the level being assessed. This experience and knowledge must be of sufficient depth to be effective and reliable when judging candidates' competence. Assessors' experience and knowledge could be verified by: curriculum vitae and references
- possession of a relevant qualification
  - corporate membership of a relevant professional institution
- 8.5.2 have sufficient occupational expertise so they have up to date knowledge and experience of the particular aspects of work they are assessing. This could be verified by records of continuing professional development achievements
- 8.5.3 have a sound in-depth knowledge of, and uphold the integrity of the sector's NOS, units of Assessment and these Assessment Principles
- 8.5.4 be prepared to participate in training activities for their continued professional development

- 8.6 Centres will be responsible for ensuring that assessors plan and maintain continuous professional development
- 8.7 Approved Centres may have generic criteria and personnel specifications in addition to the above.

## **Annexe D: Additional requirement for qualifications that use the term 'NVQ' in a QCF qualification title**

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Please go to [www.ofqual.gov.uk](http://www.ofqual.gov.uk) to access the document '*Operating rules for using the term 'NVQ' in a QCF qualification title*'.

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