

# Specification

Edexcel competence-based  
qualifications

## Edexcel Level 3 Diploma in Property (Sale of Residential Property) (QCF)

Issue 2

For first registration April 2011

Edexcel, a Pearson company, is the UK's largest awarding organisation offering vocational and academic qualifications and testing, to employers, training providers, colleges, schools, and other places of learning in the UK, and in over 85 countries worldwide.

Our specialist suite of qualifications include NVQs, Apprenticeships, WorkSkills, Functional Skills, Foundation Learning, as well as our exclusive range of BTECs, from entry level right through to Higher National Diplomas.

This specification is Issue 2. Key changes are sidelined. We will inform centres of any changes to this issue. The latest issue can be found on the Edexcel website: [www.edexcel.com](http://www.edexcel.com)

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## Qualification titles covered by this specification

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This specification gives you the information you need to offer the Edexcel Level 3 Diploma in Property (Sale of Residential Property) (QCF):

<b>Qualification title</b>	<b>Qualification Accreditation Number (QAN)</b>	<b>Accreditation start date</b>
Edexcel Level 3 Diploma in Property (Sale of Residential Property) (QCF)	600/1285/7	01/04/11

This qualification has been accredited within the Qualifications and Credit Framework (QCF) and is eligible for public funding as determined by the Department for Education (DfE) under Sections 96 and 97 of the Learning and Skills Act 2000.

The qualification title listed above features in the funding lists published annually by the DfE and the regularly updated website. They will also appear on the Learning Aims Database (LAD), where relevant.

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

The QCF 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 Edexcel.

These titles replace the following qualifications from 01/04/2011:

<b>Qualification title</b>	<b>Qualification Accreditation Number (QAN)</b>	<b>Accreditation start date</b>
Edexcel Level 3 Diploma in Property (Sale of Residential Property) (QCF)	500/9436/1	01/06/10

# Key features of the Edexcel Level 3 Diploma in Property (Sale of Residential Property) (QCF)

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These qualifications:

- is nationally recognised
- is based on the Sale of Residential Property National Occupational Standards (NOS). The NOS, assessment principles and qualification structure(s) are owned by Asset Skills.

The Edexcel Level 3 Diploma in Property (Sale of Residential Property) has been approved as required for the Sale of Residential Property Apprenticeship framework.

## What is the purpose of this qualification?

This qualification has been designed for those working in the sale of residential property. It aims to provide a suitable qualification that will allow individuals to demonstrate their competence and understanding against a clear set of standards based on the needs of the industry.

## Who is this qualification for?

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

Edexcel's policy is that the qualifications should:

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

## What are the benefits of these qualifications to the learner and employer?

This qualification requires individuals to demonstrate competence against National Occupational Standards (NOS) which are based on the needs of the sale of residential property industry as defined by Asset Skills, the Sector Skills Council. As such it contributes to the development of skilled labour in the sector. This qualification may contribute towards the competence element of an Apprenticeship.

## What are the potential job roles for those working towards these qualifications?

- estate agent

**What progression opportunities are available to learners who achieve these qualifications?**

This qualification makes up part of the apprenticeship framework for the sale of residential property. It supports and offers opportunities for progression to further related qualifications such as the Edexcel Level 3, 4 and 5 Management NVQs.

Further information is available in *Annexe A*.

# What is the qualification structure for the Edexcel Level 3 Diploma in Property (Sale of Residential Property) (QCF)?

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Individual units can be found in the *Units* section. The QCF level and credit value are given on the first page of each unit.

Learners must achieve a minimum of 37 credits, 24 from group A and 13 from group B.

Apprentices must achieve a minimum of 41 credits, 24 from group A, 13 from group B and four from group C.

*Units T/601/3146 and A/601/3147 from group C are a forbidden combination.*

## **Core qualification**

### **Group A**

Unit 1: M/600/2775 – Reduce Risks to Health and Safety in the Workplace

Unit 2: J/601/2972 – Maintain the Security of Individuals and Property in a Property Environment

Unit 3: T/601/2949 – Understanding Professional Conduct in a Property Environment

Unit 4: A/601/2967 – Understanding Legislation, Guidelines, Codes of Practice and Statutory Information in Residential Sales

Unit 5: M/601/3145 – Implement and Review Marketing Activities for the Sale of Properties

Unit 6: Y/601/3110 – Match and Promote Properties to Individuals

Unit 7: F/601/3148 – Negotiate the sale of properties in England, Wales and Northern Ireland

### **Group B**

Unit 8: J/601/3068 – Monitor Changes and Assess their Impact in the Local Property Market

Unit 9: J/601/3071 – Undertaking Market Appraisals and Advising on the Presentation of Properties

Unit 10: Y/601/3107 – Obtain Instructions and Agree Marketing Activities for Properties

Unit 11: H/601/3109 – Produce Marketing Materials for Individual Properties (Residential Sales)

Unit 12: T/601/3146 – Conduct Accompanied Visits Around Local Property Areas

*Barred unit: A/601/3147 – Conduct Accompanied Visits Around Development Sites.*

Unit 13: A/601/3147 – Conduct Accompanied Visits Around Development Sites

*Barred unit: T/601/3146 – Conduct Accompanied Visits Around Local Property Areas.*

Unit 14: J/601/3121 – Conduct Accompanied Viewings of Properties

Unit 15: L/601/3153 – Qualify Prospective Buyers of Property

Unit 16: Y/601/3155 – Progress Sales of Residential Property

Unit 17: H/601/3160 – Progress the Part-exchange of Properties

Unit 18: K/601/3161 – Agree Specifications for New Properties with Buyers

Unit 19: J/601/3166 – Hand Over New Properties to Buyers

Unit 20: H/601/3174 – Provide After-sales Support to Buyers of Residential Property

Unit 21: M/601/3212 – Develop Marketing Materials for the Promotion of Residential Property Services

### **Additional units for apprentices**

#### **Group C**

Unit 22: A/502/7524 – Employment rights and responsibilities in the Facilities Management, Housing and Property Sector

Unit 23: R/600/6351 – Develop Yourself in the Job Role

## How are the qualifications graded and assessed?

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The overall grade for each 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 are 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 have been included in *Annexe D*. They have 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 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 following examples:

- direct observation of the learner's performance by their assessor
- outcomes from oral or written questioning
- products of the learner's work
- personal statements and/or reflective accounts
- outcomes from simulation, where permitted by the assessment principles
- professional discussion
- assignment, project/case studies
- authentic statements/witness testimony
- expert witness testimony
- reflective accounts
- evidence of Recognition of Prior Learning.

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 Edexcel standards verifier. A range of recording documents is available on the Edexcel website [www.edexcel.com](http://www.edexcel.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 Edexcel 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. Edexcel 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 Edexcel's quality assurance processes is given in *Annexe B*.

## What resources are required to deliver these qualifications?

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This qualification is designed to support learners working in the sale of residential property 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 D: Assessment principles*. Staff assessing the learner must meet the requirements within the overarching assessment principles for the sector.

# Unit format

Each unit in this specification contains the following sections.

<b>Unit title:</b>					The unit title is accredited on the QCF and this form of words will appear on the learner's Notification of Performance (NOP).
<b>Unit reference number:</b>					This code is a unique reference number for the unit.
<b>QCF level:</b>					All units and qualifications within the QCF have a level assigned to them, which represents the level of achievement. There are nine levels of achievement, from Entry level to level 8. The level of the unit has been informed by the QCF level descriptors and, where appropriate, the NOS and/or other sector/professional.
<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>					A notional measure of the substance of a qualification. It includes an estimate of the time that might be allocated to direct teaching or instruction, together with other structured learning time, such as directed assignments, assessments on the job or supported individual study and practice. It excludes learner-initiated private 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: Reduce Risks to Health and Safety in the Workplace**

**Unit reference number:** M/600/2775

**QCF level:** 2

**Credit value:** 3

**Guided learning hours:** 25

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### **Unit summary**

This unit is about reducing risks to health and safety in the workplace. It is about appreciating significant risks in the workplace and knowing how to identify and deal with them.

### **Assessment principles**

Please refer to Asset Skills Assessment principles in *Annexe D*.

### **Assessment methodology**

This unit is assessed in the workplace or in conditions resembling the workplace. 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 about their organisation's health and safety procedures	<p>1.1 Describe their responsibilities and legal duties for health and safety in the workplace</p> <p>1.2 Identify responsibilities and legal duties for health and safety specific to their own job role</p> <p>1.3 Name and locate the person responsible for health and safety in their area of work</p> <p>1.4 Describe where and when to get additional health and safety assistance</p> <p>1.5 Give reasons why it is important to follow manufacturers' instructions for the safe use of equipment materials and products</p>			
2 Know how to identify the hazards in the workplace	<p>2.1 Define the term 'hazard'</p> <p>2.2 Give examples of hazards which could exist in the workplace and the safe working practices which should be followed and identify those specific to their own job role</p> <p>2.3 Give reasons why it is important to remain alert to the presence of hazards in the whole workplace</p> <p>2.4 Describe why personal presentation and behaviour is important in maintaining health and safety in the workplace</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
3 Know how to evaluate risks in the workplace	3.1 Define the term 'risk' 3.2 Give reasons why they should deal with or report risks 3.3 Describe procedures for reporting risks which they are unable to deal with 3.4 Describe the risks to the environment which may be present in the workplace and your own job			
4 Be able to identify the hazards and risks in the workplace	4.1 Select the workplace instructions are relevant to the job 4.2 Identify aspects of the workplace which could pose a danger to themselves or others 4.3 Give examples of working practices in the job which could pose a danger to people in the workplace 4.4 Assess which aspects of the workplace and working practices pose the highest risk and report them to the relevant person 4.5 Deal with hazards in accordance with instructions and legal requirements			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>5 Be able to reduce the risks to health and safety in the workplace</p>	<p>5.1 Perform duties in accordance with workplace instructions, manufacturers instructions and legal requirements</p> <p>5.2 Use equipment materials and products safely and in accordance with instructions</p> <p>5.3 Use relevant equipment to control risks to health and safety</p> <p>5.4 Make suggestions on how to Reduce Risks to Health and Safety in the Workplace to the relevant person</p> <p>5.5 Describe any differences between workplace instructions and manufacturer's instructions and report these to the relevant person</p> <p>5.6 Describe how your personal presentation and behaviour at work could cause risks to the health and safety of him/herself and others</p>			

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

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

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

Internal verifier signature: \_\_\_\_\_ Date: \_\_\_\_\_  
(if sampled)

**Unit 2:** **Maintain the Security of Individuals and Property in a Property Environment**

**Unit reference number:** J/601/2972

**QCF level:** 2

**Credit value:** 2

**Guided learning hours:** 6

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**Unit summary**

This unit is about contributing to the maintenance of the security of yourself, colleagues, customers and property, covering both personal property and properties available through the organisation. It includes identifying possible risks to security and applying appropriate security procedures at all times both in the office and when offsite at properties.

**Assessment principles**

Please refer to Asset Skills Assessment principles in *Annexe D*.

**Assessment methodology**

This unit is assessed in the workplace or in conditions resembling the workplace. 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 Know how to maintain the security of self and others</p>	<p>1.1 state the main types of risk:</p> <ul style="list-style-type: none"> <li>- within the working environment when visiting properties and development sites which may affect:               <ul style="list-style-type: none"> <li>- self</li> <li>- colleagues</li> <li>- others</li> </ul> </li> </ul> <p>1.2 describe the organisational procedures for minimising the risks to individuals</p> <p>1.3 state the importance of monitoring the whereabouts of colleagues</p> <p>1.4 describe what constitutes:</p> <ul style="list-style-type: none"> <li>- unexpected circumstances</li> <li>- absences</li> <li>- departures from agreed schedules</li> </ul> <p>1.5 describe the procedures which should be followed in the event of an emergency</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
2 know how to maintain the security of information about individuals	2.1 describe the organisational procedures for the security of information 2.2 give examples of types of information which may be sensitive 2.3 state who is entitled to receive different types of information about individuals 2.4 describe the organisational procedures for disposing of information relating to individuals and property that is no longer required			
3 Know how to maintain the security of property	3.1 state the main types of risk to: – personal property – residential properties 3.2 describe the actions and organisational procedures appropriate to minimising the risks to: – personal property – residential properties 3.3 describe the organisational procedures for the security and logging of keys and access codes for properties 3.4 describe the organisational procedures and security arrangements for the handling of cash and cheque payments			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>4 Be able to maintain the security of self and others</p>	<p>4.1 identify risks:</p> <ul style="list-style-type: none"> <li>- within the working environment</li> <li>- when visiting properties and development sites which may affect: <ul style="list-style-type: none"> <li>- self</li> <li>- colleagues</li> <li>- others</li> </ul> </li> </ul> <p>4.2 apply relevant security procedures and guidelines for addressing risks to:</p> <ul style="list-style-type: none"> <li>- self</li> <li>- colleagues</li> <li>- others</li> </ul> <p>4.3 provide clear and accurate information to relevant colleagues regarding own travelling arrangements and schedules when visiting properties and sites</p> <p>4.4 follow the organisational procedures for monitoring the whereabouts of colleagues</p> <p>4.5 respond appropriately to any unexpected circumstances, absences and departures from agreed schedules</p> <p>4.6 follow organisational procedures in the event of an emergency</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>5 be able to maintain the security of property, personal belongings and information</p>	<p>5.1 identify the security risks affecting:</p> <ul style="list-style-type: none"> <li>- properties</li> <li>- personal belongings</li> </ul> <p>5.2 apply the relevant security procedures and guidelines for protecting:</p> <ul style="list-style-type: none"> <li>- properties</li> <li>- personal belongings</li> <li>- valuables</li> <li>- money</li> <li>- keys and access codes</li> </ul> <p>5.3 follow organisational procedures for reporting any security equipment which is not functioning properly</p> <p>5.4 follow organisational procedures for the security of information including the disposal of information which is no longer required</p>			

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

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

Internal verifier signature: \_\_\_\_\_ Date: \_\_\_\_\_  
*(if sampled)*



**Unit 3: Understanding Professional Conduct in a Property Environment**

**Unit reference number:** T/601/2949

**QCF level:** 2

**Credit value:** 1

**Guided learning hours:** 2

**Unit summary**

This unit is about presenting a professional image when working in a property environment. It includes providing information in a way which promotes understanding.

**Assessment principles**

Please refer to Asset Skills Assessment principles in *Annexe D*.

**Assessment methodology**

This unit is assessed in the workplace or in conditions resembling the workplace. 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 present a positive image in a property environment	1.1 describe the standards of appearance and conduct which should be maintained in a property environment 1.2 explain why it is important to maintain standards of appearance and conduct in a property environment		
2	understand the importance of communicating information clearly	2.1 explain why it is important to explain technical terms and abbreviations when providing information 2.2 explain why it is important to avoid jargon when providing information 2.3 explain the importance of checking that the recipient has understood the information given		

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

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

Internal verifier signature: \_\_\_\_\_ Date: \_\_\_\_\_  
(if sampled)

**Unit 4:** **Understanding Legislation, Guidelines, Codes of Practice and Statutory Information in Residential Sales**

**Unit reference number:** A/601/2967

**QCF level:** 3

**Credit value:** 6

**Guided learning hours:** 24

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**Unit summary**

This unit is about the legislation, guidelines, codes of practice and statutory information requirements which need to be adhered to in a residential sales environment.

**Assessment principles**

Please refer to Asset Skills Assessment principles in *Annexe D*.

**Assessment methodology**

This unit is assessed in the workplace or in conditions resembling the workplace. 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 legislation, guidelines and codes of practice in residential sales</p>	<p>1.1 list the:</p> <ul style="list-style-type: none"> <li>- legislation</li> <li>- guidelines</li> <li>- codes of practice</li> <li>- relevant to the:</li> <li>- security of individuals</li> <li>- security of property</li> <li>- providing information to buyers and sellers</li> <li>- production of marketing materials for residential properties for sale</li> <li>- erection of boards</li> <li>- organising market appraisals</li> <li>- undertaking market appraisals</li> <li>- advising sellers on the presentation of properties</li> <li>- obtaining instructions</li> <li>- agreeing marketing activities</li> <li>- implementation of marketing activities</li> <li>- contacting prospective buyers and sellers</li> <li>- describing properties</li> </ul>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	<ul style="list-style-type: none"> <li>- arranging and conducting visits of property areas</li> <li>- organising viewings of properties</li> <li>- progressing viewings of properties</li> <li>- conducting viewings of properties for sale</li> <li>- qualifying prospective buyers</li> <li>- progressing residential sales</li> <li>- money laundering</li> <li>- provision of after-sales service</li> </ul> <p>1.2 explain how legislation, guidelines and codes of practice impact on:</p> <ul style="list-style-type: none"> <li>- security of individuals</li> <li>- security of property</li> <li>- providing information to buyers and sellers</li> <li>- production of marketing materials for residential properties for sale</li> <li>- erection of boards</li> <li>- organising market appraisals</li> <li>- undertaking market appraisals</li> <li>- advising sellers on the presentation of properties</li> </ul>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	<ul style="list-style-type: none"> <li>- obtaining instructions</li> <li>- agreeing marketing activities</li> <li>- implementation of marketing activities</li> <li>- contacting prospective buyers and sellers</li> <li>- describing properties</li> <li>- arranging and conducting visits of property areas</li> <li>- organising viewings of properties</li> <li>- progressing viewings of properties</li> <li>- conducting viewings of properties for sale</li> <li>- qualifying prospective buyers</li> <li>- progressing residential sales</li> <li>- money laundering</li> <li>- provision of after-sales service</li> </ul>			
2 Understand statutory information in residential sales	2.1 describe why it is important to comply with statutory information requirements for properties for sale			

Learner name: \_\_\_\_\_ Date: \_\_\_\_\_  
Learner signature: \_\_\_\_\_ Date: \_\_\_\_\_  
Assessor signature: \_\_\_\_\_ Date: \_\_\_\_\_  
Internal verifier signature: \_\_\_\_\_ Date: \_\_\_\_\_  
(if sampled)



## **Unit 5: Implement and Review Marketing Activities for the Sale of Properties**

**Unit reference number:** M/601/3145

**QCF level:** 3

**Credit value:** 4

**Guided learning hours:** 10

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### **Unit summary**

This unit is about implementing marketing activities for the sale of properties. It includes ensuring that the agreed marketing activities are actioned, and that the progress of activities is monitored and evaluated. It also includes recommending and making tactical changes in response to the outcomes arising.

### **Assessment principles**

Please refer to Asset Skills Assessment principles in *Annexe D*.

### **Assessment methodology**

This unit is assessed in the workplace or in conditions resembling the workplace. 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 organisational procedures and methods of implementing and reviewing marketing activities</p>	<p>1.1 list the range of services provided by the organisation relating to marketing activities and cost structures</p> <p>1.2 explain the following methods for selling property:</p> <ul style="list-style-type: none"> <li>- private treaty</li> <li>- auction</li> <li>- tender and sealed bids</li> </ul> <p>1.3 state the advantages and disadvantages of different methods for selling property</p> <p>1.4 state the main types of marketing activities which may be used for selling residential property</p> <p>1.5 state the advantages and disadvantages of the main types of marketing activities for residential property</p> <p>1.6 list the factors that should be considered when selecting marketing activities for residential property</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>2 Understand how to implement different marketing activities</p>	<p>2.1 list the main types of buyers of residential property</p> <p>2.2 state why certain marketing activities might be more successful with particular types of buyers</p> <p>2.3 state the typical costs and timescales for the production of different types of marketing materials for residential properties for sale</p> <p>2.4 state the impact that changes to the local property market might have on marketing individual properties</p> <p>2.5 state what is required to implement marketing activities</p> <p>2.6 list actions that may be used to assist the sale of properties</p> <p>2.7 state when actions to assist the sale of properties might be progressed</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>3 understand how to review and amend marketing activities</p>	<p>3.1 explain how to monitor and review the implementation of marketing activities</p> <p>3.2 explain how to ascertain if marketing activities are meeting the expected performance requirements</p> <p>3.3 explain why it is important to obtain feedback following viewings of properties</p> <p>3.4 explain how to obtain feedback from viewings of properties</p> <p>3.5 list the types of changes which might be made to a property subsequent to obtaining instructions which would require changes to be made to marketing materials</p> <p>3.6 explain organisational procedures for amending planned marketing activities</p> <p>3.7 state who should be involved in amending planned marketing activities</p> <p>3.8 state who can authorise changes to planned marketing activities</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>4 be able to implement marketing activities for the sale of properties</p>	<p>4.1 implement agreed marketing activities for individual properties</p> <p>4.2 identify factors which have an impact upon selling property</p> <p>4. identify suitable opportunities for additional publicity towards selling property</p> <p>4.4 ensure that the seller is kept up to date with progress in line with organisational procedures</p> <p>4.5 ensure that relevant colleagues are kept up to date with:</p> <ul style="list-style-type: none"> <li>- progress of the marketing activities</li> <li>- changes to the marketing activities</li> </ul> <p>4.6 comply with legislation, guidance and codes of practice relevant to activities for marketing property</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>5 Be able to review marketing activities for the sale of properties</p>	<p>5.1 monitor:</p> <ul style="list-style-type: none"> <li>- implementation of marketing activities</li> <li>- performance of marketing activities</li> <li>- feedback from viewings of properties</li> <li>- in line with organisational procedures</li> </ul> <p>5.2 record feedback from viewings and other relevant sources</p> <p>5.3 analyse feedback from viewings and other relevant sources</p> <p>5.4 identify any problems and significant points associated with selling properties from feedback on viewings and other relevant sources</p> <p>5.5 make recommendations towards addressing problems and significant points associated with selling properties</p> <p>5.6 assess the impact of marketing activities in stimulating interest in properties</p> <p>5.7 agree changes to marketing activities with relevant people</p> <p>5.8 implement changes to marketing activities</p> <p>5.9 respond to changes to properties which impact on marketing activities</p> <p>5.10 evaluate the performance of marketing plans to inform future planning</p>			

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## **Unit 6: Match and Promote Properties to Individuals**

**Unit reference number:** Y/601/3110

**QCF level:** 2

**Credit value:** 3

**Guided learning hours:** 10

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### **Unit summary**

This unit is about reviewing the properties available and matching these to the needs of prospective tenants or buyers known to your organisation. It also addresses contacting the prospective tenants or buyers, providing them with the details of relevant properties towards generating their interest in those properties available.

### **Assessment principles**

Please refer to Asset Skills Assessment principles in *Annexe D*.

### **Assessment methodology**

This unit is assessed in the workplace or in conditions resembling the workplace. 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 how to match properties to individuals	<p>1.1 list the main types of tenant/buyer of residential property</p> <p>1.2 identify factors which influence individuals' decisions about properties</p> <p>1.3 explain how to access information about properties available through the organisation to match to individuals</p> <p>1.4 state what information is required from individuals to be able to match them to available properties</p> <p>1.5 describe the organisational procedures for recording information regarding contacts made and the outcomes</p>			
2 Know how to promote properties to individuals	<p>2.1 describe the organisational procedures for contacting individuals about properties</p> <p>2.2 outline what information can be provided about properties</p> <p>2.3 state what actions should be taken when interest is expressed in a property</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>3 Be able to match properties to individuals</p>	<p>3.1 identify properties which are available through the organisation</p> <p>3.2 assess the types of individuals who are likely to have an interest in the properties</p> <p>3.3 identify the requirements of individuals</p> <p>3.4 match identified requirements with relevant features of properties</p> <p>3.5 provide details of properties to interested parties</p> <p>3.6 ensure that colleagues are informed about information given to individuals</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>4 Be able to promote properties to individuals</p>	<p>4.1 contact individuals using appropriate methods in line with organisational procedures</p> <p>4.2 explain to individuals:</p> <ul style="list-style-type: none"> <li>- the relevant selling features of particular properties</li> <li>- why the selling features match their requirements</li> </ul> <p>4.3 establish whether individuals are interested in particular properties</p> <p>4.4 agree relevant actions towards assisting individuals to review further properties of interest</p> <p>4.5 maintain records of contacts made in line with organisational procedures</p> <p>4.6 ensure that relevant colleagues are informed of possible interest in particular properties</p> <p>4.7 comply with all relevant legislation, guidelines and codes of practice when promoting properties</p>			

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## **Unit 7: Negotiate the sale of properties in England, Wales and Northern Ireland**

**Unit reference number:** F/601/3148

**QCF level:** 3

**Credit value:** 5

**Guided learning hours:** 15

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### **Unit summary**

This unit applies to England, Wales and Northern Ireland and is about exploring the interest of prospective buyers in properties available for sale, and seeking their commitment to making an offer. It includes establishing the buyers' circumstances relevant to their completing the sale on properties and assessing the suitability of offers made. It also includes negotiating the terms and conditions for a sale such that commitment is made by both buyer and seller to progress on agreed sale.

### **Assessment principles**

Please refer to Asset Skills Assessment principles in *Annexe D*.

### **Assessment methodology**

This unit is assessed in the workplace or in conditions resembling the workplace. 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 organisational procedures for negotiating the sale of properties	<p>1.1 state the range of services offered by the organisation which may encourage prospective buyers to progress a sale</p> <p>1.2 describe the organisational procedures for recording information about negotiations and their outcomes</p> <p>1.3 state the limits of own responsibility and authority for negotiating the sale of properties</p> <p>1.4 state the organisational procedures for reporting issues that are outside own responsibility and authority when negotiating the sale of properties</p>			
2 Know the local property area and market	<p>2.1 list the key features of the local property area which are of interest to prospective buyers</p> <p>2.2 describe how to identify:</p> <ul style="list-style-type: none"> <li>- typical property prices in the area</li> <li>- different types of property that are selling</li> </ul> <p>2.3 describe how to obtain information about specifications and fixtures and fittings relevant to the sale of properties</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>3 Know how to develop relationships with prospective buyers</p>	<p>3.1 list the main types of buyers of residential property</p> <p>3.2 identify factors that influence prospective buyers' decisions</p> <p>3.3 state the main concerns and objections given by prospective buyers and how to address these</p> <p>3.4 state the levels of interest and commitment that can be expressed by buyers</p> <p>3.5 explain why it is important to ensure that buyers and sellers understand the processes of buying and selling properties</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>4 Understand how to negotiate the sale of property</p>	<p>4.1 list factors that may affect:</p> <ul style="list-style-type: none"> <li>- the buyers' ability to buy a property</li> <li>- the buyers' acceptability to sellers</li> </ul> <p>4.2 describe the key stages in the process of selling a house</p> <p>4.3 explain the importance of ensuring that offers are recorded</p> <p>4.4 state the advantages and disadvantages of different types of offer</p> <p>4.5 list the different parties involved in buying and selling properties</p> <p>4.6 explain the typical areas for negotiation</p> <p>4.7 explain the importance of establishing limits of negotiations</p> <p>4.8 explain different ways of resolving differences between the sellers' and buyers' proposals when negotiating terms and conditions</p> <p>4.9 explain the risks associated with seeking variations to proposals</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
5 Understand how to complete negotiations for the sale of property	5.1 explain the potential types of conflict of interest that can occur when selling property 5.2 state the parties that need to be notified if conflicts occur 5.3 state the importance of informing all relevant parties regarding the acceptability of offers made 5.4 explain the main terms and conditions for the sale of properties 5.5 explain how to notify all relevant parties of sales agreed 5.6 explain why it is important to notify all relevant parties of sales agreed			
6 Be able to explore interest and obtain commitment from prospective buyers	6.1 confirm buyers' interest in particular properties 6.2 confirm prospective buyers' circumstances relevant to purchasing a property 6.3 identify prospective buyers' timescales for purchasing a property 6.4 identify and address factors that might affect the acceptability of the buyer for a property of interest 6.5 record formal offers on properties 6.6 provide the prospective buyer with information regarding the next stage of the sales process 6.7 check that prospective buyers have understood information provided and encourage questions			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>7 Be able to assess the suitability of offers</p>	<p>7.1 provide the sellers with details of offers made</p> <p>7.2 identify the advantages and disadvantages of the available offers made</p> <p>7.3 identify any potential conflicts of interest</p> <p>7.4 ensure all relevant parties are made aware of potential conflicts of interest in a timely manner</p> <p>7.5 advise the seller of any offers made</p> <p>7.6 take steps to provide information regarding acceptability of offers to all parties in a timely manner</p> <p>7.7 comply with legislation, guidelines and codes of practice relevant to negotiating the sale of properties</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>8 Be able to negotiate the terms and conditions of the sale of a property</p>	<p>8.1 obtain clear instructions regarding the areas and limits for negotiation from the seller</p> <p>8.2 identify any differences between the seller's and buyer's proposals relating to the terms and conditions</p> <p>8.3 liaise with all parties towards closing the sale in line with organisational procedures</p> <p>8.4 ensure all parties are informed of the agreed main terms and conditions for the sale and the risks associated with seeking variations</p> <p>8.5 confirm commitment to the sale by obtaining agreement from all relevant parties</p> <p>8.6 notify all parties of the next stages in the process for the sale</p> <p>8.7 maintain records regarding agreed sales in line with organisational procedures</p>			

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**Unit 8: Monitor Changes and Assess their Impact in the Local Property Market**

**Unit reference number:** J/601/3068

**QCF level:** 3

**Credit value:** 5

**Guided learning hours:** 10

**Unit summary**

This unit is about monitoring changes occurring in the local property market and determining their impact upon the saleability of different properties within it. It includes making reasoned recommendations regarding marketing of properties in the light of findings.

**Assessment principles**

Please refer to Asset Skills Assessment principles in *Annexe D*.

**Assessment methodology**

This unit is assessed in the workplace or in conditions resembling the workplace. 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 to monitor changes in the local property market</p>	<p>1.1 explain why it is important to monitor changes in the local property market</p> <p>1.2 describe the importance of determining a meaningful time-span over which changes can be monitored</p> <p>1.3 describe how to determine the length of a 'meaningful' time-span</p> <p>1.4 list sources of information which can be used to monitor changes in the local property market</p> <p>1.5 describe how to access information about the local property market</p> <p>1.6 explain why it is important to check that information is accurate, complete and current before use</p> <p>1.7 list local and national factors which can cause changes in the local property market</p> <p>1.8 list the typical types of changes which can occur in the local property market</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>2 Know how to assess the impact of changes in the local property market</p>	<p>2.1 describe how changes in the local property market can impact on:</p> <ul style="list-style-type: none"> <li>- the market as a whole</li> <li>- particular types of property</li> </ul> <p>2.2 explain why it is important to assess the relative impact of changes identified in the local property market</p> <p>2.3 explain how the marketing of different types of properties can address changes in the local property market</p> <p>2.4 describe the organisational procedures for reporting the outcomes of monitoring</p> <p>2.5 describe the importance of providing information about own assessment of the local property market only to those who have a right to it</p> <p>2.6 describe the importance of communicating the level of confidence that can be placed in the assessment of the local property market</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>3 Be able to monitor changes in the local property market</p>	<p>3.1 determine the following:</p> <ul style="list-style-type: none"> <li>- size of the local property market</li> <li>- nature of the local property market</li> <li>- period over which changes are to be considered</li> </ul> <p>3.2 identify and review information about the local property market including:</p> <ul style="list-style-type: none"> <li>- the local economy</li> <li>- property prices</li> <li>- property sales and rental activity</li> <li>- new builds and redevelopment in the area</li> </ul>			
<p>4 Be able to assess the impact of changes in the local property market</p>	<p>4.1 analyse all relevant information to identify:</p> <ul style="list-style-type: none"> <li>- factors affecting the local property market</li> <li>- consequent changes</li> </ul> <p>4.2 assess which local and national factors are likely to impact on the local property market in the future</p> <p>4.3 assess the impact of changes in the local property market on different types of property</p> <p>4.4 justify own assessment of the likely impact of changes in the local property market</p> <p>4.5 make reasoned recommendations about how different types of property should be marketed as a result of findings</p>			

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## **Unit 9: Undertaking Market Appraisals and Advising on the Presentation of Properties**

**Unit reference number:** J/601/3071

**QCF level:** 3

**Credit value:** 5

**Guided learning hours:** 15

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### **Unit summary**

This unit is about undertaking market appraisals of residential properties, advising landlords and sellers regarding the outcomes of your appraisals, and providing consequent advice about the presentation of their properties.

### **Assessment principles**

Please refer to Asset Skills Assessment principles in *Annexe D*.

### **Assessment methodology**

This unit is assessed in the workplace or in conditions resembling the workplace. 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 organisational procedures for undertaking market appraisals and advising on the presentation of properties</p>	<p>1.1 describe how health, safety and security issues should be addressed when visiting a property to undertake market appraisals</p> <p>1.2 describe:</p> <ul style="list-style-type: none"> <li>- the purpose of market appraisals</li> <li>- the benefits of market appraisals</li> <li>- how to prepare market appraisals</li> <li>- points that should be addressed in market appraisals</li> </ul>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>2 Know how to undertake market appraisals</p>	<p>2.1 list factors that affect the sale/rental value and saleability of individual properties</p> <p>2.2 state the importance of obtaining all relevant information prior to undertaking an appraisal</p> <p>2.3 list what information is required prior to undertaking an appraisal</p> <p>2.4 describe how to obtain relevant information prior to undertaking an appraisal</p> <p>2.5 list types of change that can affect the local property market</p> <p>2.6 describe how changes to the local property market can have an impact on properties being appraised</p> <p>2.7 describe how to inspect properties to the standard required by own organisation</p> <p>2.8 state the importance of inspecting properties to the standard required by own organisation</p> <p>2.9 list types of documents that may be required for the appraisal</p> <p>2.10 describe the circumstances when documents are required for appraisals</p> <p>2.11 describe how to obtain documents required for appraisals</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>3 Know how to develop relationships with customers</p>	<p>3.1 list the main types of buyers/tenants of residential properties</p> <p>3.2 identify factors that influence prospective buyers/tenants decisions</p> <p>3.3 describe the importance of:</p> <ul style="list-style-type: none"> <li>- checking customer understanding of market appraisals</li> <li>- providing advice to customers</li> </ul> <p>3.4 state methods used for checking customer understanding and providing advice</p> <p>3.5 give examples of typical questions asked by customers about market appraisals</p> <p>3.6 state how typical questions from customers should be addressed</p> <p>3.7 list ways of presenting properties</p> <p>3.8 give examples of the aspects of properties that can create a positive or negative impression</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>4 Be able to prepare for appraisals of properties</p>	<p>4.1 obtain information relevant to:</p> <ul style="list-style-type: none"> <li>- the property to be appraised</li> <li>- the customers reasons for seeking to sell/let the property</li> </ul> <p>4.2 identify changes occurring in the local property market</p> <p>4.3 assess the impact that changes to the market may have on the property to be appraised</p> <p>4.4 confirm with the customer:</p> <ul style="list-style-type: none"> <li>- own identity</li> <li>- identity of the customer and other parties in attendance</li> <li>- objectives for the visit</li> <li>- proposed schedule for the market appraisal</li> <li>- their expectations</li> </ul>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>5 Be able to appraise properties</p>	<p>5.1 undertake the market appraisal at the agreed time</p> <p>5.2 carry out an inspection covering:</p> <ul style="list-style-type: none"> <li>- the property internally and externally</li> <li>- dimensions</li> <li>- factors relevant to the property</li> </ul> <p>5.3 identify and confirm any work which is claimed to have been carried out to the property</p> <p>5.4 obtain documents relevant to the property</p> <p>5.5 identify the property's main selling features and other factors that may impact upon its sale/rental value</p> <p>5.6 agree the property's main selling features and other factors with the customer</p> <p>5.7 complete the market appraisal following organisational procedures</p> <p>5.8 confirm the next steps with the customer following the market appraisal</p> <p>5.9 maintain clear and accurate records of market appraisals</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>6 Be able to present market appraisal reports and advise upon the presentation of properties</p>	<p>6.1 confirm with the customer the purpose of the market appraisal</p> <p>6.2 provide a realistic market appraisal of the property</p> <p>6.3 explain how relevant factors impact upon the property's sale/rental value to the customer</p> <p>6.4 obtain additional information that may be required</p> <p>6.5 check that customers have understood the information and encourage questions</p> <p>6.6 check the customer's intention to proceed with the sale/let of the property</p> <p>6.7 identify the type of people who are likely to view the property</p> <p>6.8 identify ways in which the property could be presented to attract viewers</p> <p>6.9 identify the value and benefits of proposals for presenting the property, relating to the customer's aims</p> <p>6.10 maintain up-to-date records of relevant points agreed</p> <p>6.11 comply with all relevant legislation, guidelines and codes of practice relating to market appraisals</p>			

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## **Unit 10: Obtain Instructions and Agree Marketing Activities for Properties**

**Unit reference number:** Y/601/3107

**QCF level:** 3

**Credit value:** 5

**Guided learning hours:** 15

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### **Unit summary**

This unit is about obtaining instructions from customers regarding the sale/let of their property and then agreeing with them marketing activities towards achieving a sale or let. It includes preparing and holding sales discussions, during which questions or concerns are handled effectively so that the commitment of the customer is gained. In the context of this unit the customer is the seller or landlord of the property.

### **Assessment principles**

Please refer to Asset Skills Assessment principles in *Annexe D*.

### **Assessment methodology**

This unit is assessed in the workplace or in conditions resembling the workplace. 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 Know how to obtain instructions</p>	<p>1.1 describe the organisational procedures for:</p> <ul style="list-style-type: none"> <li>- obtaining instructions</li> <li>- agreeing marketing activities</li> <li>- progressing marketing activities</li> </ul> <p>1.2 state the importance of obtaining all relevant information prior to seeking to obtain an instruction for a particular property</p> <p>1.3 describe how to conduct and structure a sales presentation when seeking to obtain instructions</p> <p>1.4 describe the difference between the features and benefits of the organisations services</p> <p>1.5 list typical buying signals that customers might provide:</p> <ul style="list-style-type: none"> <li>- verbal</li> <li>- non-verbal</li> </ul>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>2 Know how to agree planned marketing activities</p>	<p>2.1 state the advantages and disadvantages of using the following types of marketing activities:</p> <ul style="list-style-type: none"> <li>- newspaper advertising</li> <li>- web-based media</li> <li>- mail-shots</li> <li>- boards</li> </ul> <p>2.2 list the main types of buyers/tenants of residential properties</p> <p>2.3 identify factors that influence prospective buyer's/tenant's decisions</p> <p>2.4 identify changes occurring in the local property market that will impact on the selection of marketing activities</p> <p>2.5 list typical questions asked about marketing properties</p> <p>2.6 state how typical questions about marketing properties should be addressed</p> <p>2.7 describe how conflicts of interest:</p> <ul style="list-style-type: none"> <li>- can arise when marketing properties</li> <li>- should be addressed</li> </ul>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>3 Be able to obtain instructions</p>	<p>3.1 review all information relevant to:</p> <ul style="list-style-type: none"> <li>- the property</li> <li>- the customer</li> <li>- reasons for seeking to sell/let the property</li> </ul> <p>3.2 discuss with the customer:</p> <ul style="list-style-type: none"> <li>- the organisation's relevant services</li> <li>- the local property market</li> <li>- methods for selling/letting the property</li> <li>- marketing activities</li> <li>- the associated costs</li> <li>- relating these clearly to the customer's circumstances and the property</li> </ul> <p>3.3 identify any features of the organisation's services which do not meet the customer's requirements and address these</p> <p>3.4 identify buying signals given by the customer and act upon them</p> <ul style="list-style-type: none"> <li>- verbal</li> <li>- non-verbal</li> </ul> <p>3.5 prioritise any concerns the customer has about making the instruction</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
3 Be able to obtain instructions	3.6 address and overcome where possible customer's concerns 3.7 agree with the customer: <ul style="list-style-type: none"> <li>- the most appropriate method for the sale/let</li> <li>- terms of the instruction</li> <li>- costs to the customer</li> </ul> 3.8 comply with all relevant legislation, guidelines and codes of practice relating to obtaining instructions			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>4 Be able to agree marketing plans</p>	<p>4.1 confirm all relevant information about the property including the main selling features</p> <p>4.2 review the outcomes of marketing activities used for similar properties</p> <p>4.3 discuss with the customer marketing activities which are likely to be the most effective</p> <p>4.4 agree with the customer:</p> <ul style="list-style-type: none"> <li>- resources available for marketing the property</li> <li>- marketing activities to be used</li> <li>- timing and sequence of marketing activities</li> </ul> <p>4.5 confirm the customer's acceptance of the agreed marketing activities</p> <p>4.6 maintain records of the agreed marketing activities in line with organisational procedures</p> <p>4.7 ensure that marketing activities are progressed in line with organisational procedures</p>			

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**Unit 11: Produce Marketing Materials for Individual Properties (Residential Sales)**

**Unit reference number:** H/601/3109

**QCF level:** 3

**Credit value:** 3

**Guided learning hours:** 15

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**Unit summary**

This unit is about preparing marketing materials in line with planned marketing activities for a property and ensuring that these are produced correctly. It includes liaising with the seller to ensure their approval of the materials and with those involved in the production of final materials to ensure that final materials are correct and available on time.

**Assessment principles**

Please refer to Asset Skills Assessment principles in *Annexe D*.

**Assessment methodology**

This unit is assessed in the workplace or in conditions resembling the workplace. 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 organisational procedures for the production of marketing materials for properties for sale</p>	<p>1.1 list types of marketing materials used to promote properties for sale</p> <p>1.2 describe the advantages and disadvantages of different types of marketing materials used to promote residential properties for sale</p> <p>1.3 describe organisational procedures for preparing and producing marketing materials for residential properties for sale</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>2 Know how to prepare marketing materials for residential properties for sale</p>	<p>2.1 state the typical costs and timescales for the production of different types of marketing materials for residential properties for sale</p> <p>2.2 state the importance of planning marketing activities for individual residential properties</p> <p>2.3 describe why it is important to review all relevant information before developing marketing materials</p> <p>2.4 state the importance of ensuring that key selling features are emphasised and that the materials contain sufficient further information</p> <p>2.5 list the main types of buyers of residential property</p> <p>2.6 state the information which is important to different types of buyers</p> <p>2.7 state the importance of gaining the approval of the seller for the marketing materials before production</p> <p>2.8 list types of changes which might be made to a property subsequent to obtaining instructions which would require changes to be made to marketing materials</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>3 Know how to arrange for the production of final marketing materials for residential property for sale</p>	<p>3.1 state the importance of ensuring that all people involved in the publication of marketing materials are fully briefed</p> <p>3.2 list potential problems that might occur when reviewing published marketing materials</p> <p>3.3 state how to address problems which occur when reviewing published marketing materials</p> <p>3.4 state who final marketing materials should be made available to</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>4 Be able to prepare draft marketing materials for residential property for sale</p>	<p>4.1 review all available information regarding the sale of the property relevant to preparing draft marketing materials including planned marketing activities</p> <p>4.2 identify:</p> <ul style="list-style-type: none"> <li>- marketing activities proposed for the property</li> <li>- associated marketing materials which are required</li> </ul> <p>4.3 identify the information to be conveyed by the marketing materials, including all relevant details of the property and its main selling features</p> <p>4.4 prepare draft marketing materials in line with planned marketing activities and organisational procedures</p> <p>4.5 request comments from the seller in line with organisational procedures and make any required changes if necessary</p> <p>4.6 check that marketing materials comply with all relevant legislation, guidelines and codes of practice</p> <p>4.7 obtain approval for the marketing material from the seller</p> <p>4.8 ensure that the seller is advised of his/her responsibility for providing information regarding any subsequent changes to the property</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>5 Be able to arrange for the production of marketing materials for residential properties for sale</p>	<p>5.1 ensure that all those involved in producing final marketing materials understand their own roles and responsibilities</p> <p>5.2 submit written and visual marketing materials correctly for publication on schedule and in line with organisational procedures</p> <p>5.3 review published materials against agreed drafts to identify any discrepancies or problems with the visual and written information</p> <p>5.4 identify any corrections or improvements required for materials and make changes as necessary</p> <p>5.5 ensure that agreed published materials are delivered to the correct person in line with organisational procedures</p>			

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## **Unit 12: Conduct Accompanied Visits Around Local Property Areas**

**Unit reference number:** T/601/3146

**QCF level:** 3

**Credit value:** 3

**Guided learning hours:** 10

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### **Unit summary**

This unit is about accompanying prospective buyers on visits of the local property area. It includes providing the prospective buyers with relevant information and knowledge regarding the area, and identifying properties for sale which are of the type(s) of interest to the buyer.

### **Assessment principles**

Please refer to Asset Skills Assessment principles in *Annexe D*.

### **Assessment methodology**

This unit is assessed in the workplace or in conditions resembling the workplace. 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 organisational procedures for conducting accompanied visits</p>	<p>1.1 state the range of services offered by the organisation which may assist prospective buyers</p> <p>1.2 describe the organisational procedures for:</p> <ul style="list-style-type: none"> <li>- contacting prospective buyers</li> <li>- recording information about visits</li> <li>- recording the outcomes of visits</li> </ul> <p>1.3 state the limits of own responsibility and authority for conducting accompanied visits</p> <p>1.4 state the organisational procedures for reporting issues that are outside own responsibility and authority when conducting accompanied visits</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>2 Know the local property area and market</p>	<p>2.1 list the key features of the local property area which are of interest to prospective buyers</p> <p>2.2 describe how to identify:</p> <ul style="list-style-type: none"> <li>- typical property prices in the area</li> <li>- different types of property that are selling</li> </ul> <p>2.3 state what information is required about prospective buyers to match to available properties</p> <p>2.4 state how to obtain information about prospective buyers</p> <p>2.5 state how to access information about properties for sale to match prospective buyers' requirements</p> <p>2.6 list factors to consider when matching properties to prospective buyers' requirements</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
3 Know how to develop relationships with potential buyers	3.1 list the main types of buyer of residential properties 3.2 identify factors that influence prospective buyers' decisions 3.3 outline what information can be provided to prospective buyers 3.4 describe types of visiting condition and restriction that may apply to different areas 3.5 list typical questions asked by prospective buyers 3.6 state how typical questions from prospective buyers should be addressed 3.7 state what actions should be taken when a prospective buyer expresses interest in a property			
4 Be able to review the local property area	4.1 obtain up-to-date information relevant to the sale of properties within the local area 4.2 identify the types and locations of local services and amenities 4.3 obtain clear and accurate maps of the local property area 4.4 obtain current marketing materials relating to properties for sale with the organisation in the local property area			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
5 Be able to plan to visit property areas with prospective buyers	5.1 confirm the arrangements for the visit with all relevant parties 5.2 obtain marketing materials relating to the identified properties and the local area 5.3 ensure the prospective buyer has accurate and clear directions to the meeting point 5.4 take action to address any problems with visiting the area			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>6 Be able to visit property areas with prospective buyers</p>	<p>6.1 attend appointments at the agreed time and place</p> <p>6.2 confirm with the prospective buyer:</p> <ul style="list-style-type: none"> <li>- own identity</li> <li>- identity of the prospective buyers</li> <li>- objectives for the visit</li> <li>- proposed itinerary</li> <li>- their expectations</li> </ul> <p>6.3 promote the key selling features of the area</p> <p>6.4 check that prospective buyers have understood information and encourage questions</p> <p>6.5 record significant comments regarding properties of interest in line with organisational procedures</p> <p>6.6 identify properties of interest and agree actions with prospective buyer to progress viewings</p> <p>6.7 carry out the visit in accordance with any conditions or restrictions within the area</p> <p>6.8 take steps to maintain health, safety and security for all parties</p> <p>6.9 maintain clear and accurate records and inform relevant colleagues of visits and their outcomes</p> <p>6.10 comply with all relevant legislation, guidelines and codes of practice relevant to conducting accompanied visits</p>			

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## **Unit 13: Conduct Accompanied Visits Around Development Sites**

**Unit reference number:** A/601/3147

**QCF level:** 3

**Credit value:** 4

**Guided learning hours:** 10

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### **Unit summary**

This unit is about accompanying prospective buyers on visits to development sites. It includes providing the prospective buyers with relevant information regarding the development and identifying the type(s) of properties of interest to the buyers.

### **Assessment principles**

Please refer to Asset Skills Assessment principles in *Annexe D*.

### **Assessment methodology**

This unit is assessed in the workplace or in conditions resembling the workplace. 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 organisational procedures for conducting accompanied visits around development sites</p>	<p>1.1 state the range of services offered by the organisation which may assist prospective buyers</p> <p>1.2 describe the organisational procedures for:</p> <ul style="list-style-type: none"> <li>- contacting prospective buyers</li> <li>- recording information about visits</li> <li>- recording the outcomes of visits</li> </ul> <p>1.3 state the limits of own responsibility and authority for conducting accompanied visits around development sites</p> <p>1.4 state the organisational procedures for reporting issues that are outside own responsibility and authority when conducting accompanied visits around development sites</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>2 Understand the new development market</p>	<p>2.1 list the key features of the local property area which are of interest to prospective buyers</p> <p>2.2 describe how to interpret plans, drawings and models relating to development sites</p> <p>2.3 describe the stages and sequences of development at most sites</p> <p>2.4 describe how to identify:</p> <ul style="list-style-type: none"> <li>- typical property prices in the area</li> <li>- different types of property that are selling</li> </ul> <p>2.5 state what information is required about prospective buyers to match to available properties</p> <p>2.6 state how to obtain information about prospective buyers</p> <p>2.7 describe how to access information about the site and the properties being developed</p> <p>2.8 list factors to consider when matching properties to prospective buyers' requirements</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>3 Know how to develop relationships with prospective buyers</p>	<p>3.1 list the main types of buyer of residential properties</p> <p>3.2 identify factors that influence prospective buyer decisions</p> <p>3.3 outline what information can be provided to prospective buyers</p> <p>3.4 describe types of visiting conditions and restrictions that may apply to different development sites</p> <p>3.5 list typical questions asked by prospective buyers</p> <p>3.6 state how typical questions from prospective buyers should be addressed</p> <p>3.7 state what actions should be taken when a prospective buyer expresses interest in a property</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>4 Be able to review development sites</p>	<p>4.1 obtain up-to-date information relevant to the sale of properties on development sites</p> <p>4.2 identify the types and locations of local services and amenities</p> <p>4.3 obtain clear and accurate plans, drawings and access to models of development sites</p> <p>4.4 identify the stages of development of the properties and amenities on sites</p> <p>4.5 obtain current marketing materials relating to sites and the proposed property</p> <p>4.6 identify the main features of the properties available including:</p> <ul style="list-style-type: none"> <li>- type of property</li> <li>- dimensions</li> <li>- construction methods and materials</li> <li>- prices</li> <li>- timescales for occupancy</li> <li>- indication of sales</li> <li>- indication of interest</li> </ul> <p>4.7 identify the arrangements required for accompanying visitors to development sites, including routes which are safe and accessible</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>5 Be able to plan to visit development sites with prospective buyers</p>	<p>5.1 confirm with the potential buyer the types of properties which are of interest</p> <p>5.2 confirm the arrangements for the visit with all relevant parties</p> <p>5.3 ensure the prospective buyer has accurate and clear directions for reaching and accessing sites</p> <p>5.4 ensure that access to sites and properties is available and safe</p> <p>5.5 take action to address any problems with visiting development sites</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>6 Be able to visit development sites with prospective buyers</p>	<p>6.1 attend appointments at the agreed time and place</p> <p>6.2 confirm with the prospective buyer:</p> <ul style="list-style-type: none"> <li>- own identity</li> <li>- identity of the prospective buyer</li> <li>- objectives for the visit</li> <li>- proposed itinerary</li> <li>- their expectations</li> </ul> <p>6.3 promote the key selling points of development sites</p> <p>6.4 provide information about the completion schedule for different stages of the development of sites</p> <p>6.5 provide clear and concise information using plans, diagrams and models with prospective buyers</p> <p>6.6 identify properties of interest and agree actions with the prospective buyer to progress viewings</p> <p>6.7 carry out site visits in accordance with any conditions and restrictions in the area</p> <p>6.8 maintain clear and accurate records and inform relevant colleagues of visits and their outcomes</p> <p>6.9 comply with all relevant legislation, guidelines and codes of practice relevant to conducting accompanied visits</p>			

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## **Unit 14: Conduct Accompanied Viewings of Properties**

**Unit reference number:** J/601/3121

**QCF level:** 2

**Credit value:** 3

**Guided learning hours:** 10

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### **Unit summary**

This unit is about accompanying prospective buyers and tenants to view properties it includes providing them with relevant information and knowledge regarding the property, and answering their questions. This unit is suitable for use in a sales or lettings environment.

### **Assessment principles**

Please refer to Asset Skills Assessment principles in *Annexe D*.

### **Assessment methodology**

This unit is assessed in the workplace or in conditions resembling the workplace. 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 how to prepare for viewings	<p>1.1 list the key features of the local property area which are of interest to prospective buyer/tenant</p> <p>1.2 list the types of marketing material regarding the organisation's properties and how to access them</p> <p>1.3 state how to obtain information about any fixtures and fittings which are included in a property</p> <p>1.4 describe how the following are identified:</p> <ul style="list-style-type: none"> <li>- typical property values in the area</li> <li>- types of different property that are being sold/let</li> </ul>			
2 Know how to liaise with prospective buyers/tenants	<p>2.1 list the main types of buyers/tenants of residential properties</p> <p>2.2 identify factors that influence individuals' decisions</p> <p>2.3 outline what information can be provided to individuals about properties</p> <p>2.4 describe types of visiting conditions and restrictions that may apply to different properties</p> <p>2.5 give examples of typical questions asked about properties</p> <p>2.6 state how questions about properties should be addressed</p> <p>2.7 state what actions should be taken when interest is expressed in a property</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>3 Be able to prepare to conduct accompanied viewings</p>	<p>3.1 confirm the property is still available</p> <p>3.2 confirm arrangements for the viewing with all relevant parties</p> <p>3.3 obtain current marketing materials for the property to be viewed</p> <p>3.4 identify all relevant:</p> <ul style="list-style-type: none"> <li>- specifications for the property</li> <li>- details of fixtures and fittings available</li> </ul> <p>3.5 identify the types and locations of local services and amenities</p> <p>3.6 ensure that individuals have accurate and clear directions for the property to be viewed</p> <p>3.7 check that access to the property is available at the time of the proposed viewing</p> <p>3.8 take action to address any problems with the viewing</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>4 Be able to conduct viewings of properties</p>	<p>4.1 attend appointments at the agreed time and place</p> <p>4.2 confirm with the prospective buyer/tenant:</p> <ul style="list-style-type: none"> <li>- own identity</li> <li>- identity of the prospective buyer/tenant</li> <li>- objectives for the viewing</li> <li>- proposed itinerary</li> <li>- their expectations</li> </ul> <p>4.3 promote the key selling points of the property</p> <p>4.4 provide accurate information about local services and amenities</p> <p>4.5 check that individuals have understood information and answer questions asked if any</p> <p>4.6 record significant comments regarding properties of interest in line with organisational procedures</p> <p>4.7 identify properties of interest and agree actions to progress interest</p> <p>4.8 carry out viewings in accordance with any conditions and restrictions</p> <p>4.9 take steps to maintain health, safety and security for all parties</p> <p>4.10 ensure that the property is secure on departure</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	4.11 maintain clear and accurate records of viewings and their outcomes 4.12 ensure that relevant colleagues are kept informed of viewings and their outcomes 4.13 comply with all relevant legislation, guidelines and codes of practice relevant to conducting accompanied viewings			

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## **Unit 15: Qualify Prospective Buyers of Property**

**Unit reference number:** L/601/3153

**QCF level:** 3

**Credit value:** 3

**Guided learning hours:** 10

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### **Unit summary**

This unit is about obtaining information regarding prospective buyers relevant to assessing their suitability towards purchasing properties, including those in which they have expressed an interest.

### **Assessment principles**

Please refer to Asset Skills Assessment principles in *Annexe D*.

### **Assessment methodology**

This unit is assessed in the workplace or in conditions resembling the workplace. 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 organisational procedures for qualifying prospective buyers</p>	<p>1.1 state the range of services offered by the organisation which may assist prospective buyers</p> <p>1.2 state what information can be provided to prospective buyers</p> <p>1.3 state who should be consulted internally about the suitability of prospective buyers</p> <p>1.4 describe the organisational procedures for recording information about qualifying of buyers</p> <p>1.5 state the limits of own responsibility and authority for qualifying prospective buyers</p> <p>1.6 state organisational procedures for reporting issues that are outside own responsibility and authority when qualifying prospective buyers</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>2 Know how to qualify prospective buyers</p>	<p>2.1 describe factors that may affect prospective buyers:</p> <ul style="list-style-type: none"> <li>- ability to buy a property</li> <li>- acceptability to sellers</li> </ul> <p>2.2 state what information is needed to determine prospective buyers' circumstances</p> <p>2.3 state the importance of explaining to the prospective buyer why information about them is required</p> <p>2.4 state what information must be obtained from other organisations</p> <p>2.5 state the importance of maintaining confidentiality when obtaining information from other organisations</p> <p>2.6 list issues that can arise when seeking information</p> <p>2.7 describe how to address any issues that may arise when seeking information</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>3 Be able to obtain information to qualify prospective buyers</p>	<p>3.1 confirm information about prospective buyers to establish their circumstances relevant to buying a property</p> <p>3.2 obtain permission from the prospective buyer to seek further information from other organisations where relevant</p> <p>3.3 follow organisational procedures to obtain information regarding prospective buyers from other organisations</p> <p>3.4 gather information from the prospective buyer including:</p> <ul style="list-style-type: none"> <li>- whether a mortgage is required</li> <li>- whether the prospective buyer has cash available towards a purchase</li> <li>- whether the prospective buyer has a property to sell</li> <li>- the timescale for progressing a sale</li> </ul> <p>3.5 list issues that can arise when seeking information</p> <p>3.6 describe how to address any issues that can arise when seeking information</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
4 Be able to qualify prospective buyers	<p>4.1 determine any factors that will affect prospective buyers' suitability</p> <p>4.2 assess if a prospective buyer could proceed to purchase when interest in a particular property has been expressed</p> <p>4.3 consult with relevant people about assessing the suitability of the prospective buyer</p> <p>4.4 inform the relevant people following the assessment decision including the rationale</p> <p>4.5 check that prospective buyers have understood the information and encourage questions</p> <p>4.6 maintain up to date records in line with organisational procedures</p> <p>4.7 comply with all relevant legislation, guidelines and codes of practice relating to qualifying prospective buyers</p>			

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## **Unit 16: Progress Sales of Residential Property**

**Unit reference number:** Y/601/3155

**QCF level:** 3

**Credit value:** 4

**Guided learning hours:** 10

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### **Unit summary**

This unit is about taking instruction regarding the sale of residential property and progressing the sale in liaison with all relevant parties, such as financial and legal advisers, to a successful conclusion. It includes addressing any factors impacting upon the progress of the sale, such as any changes to circumstances, or the outcomes of reports, in line with your responsibility and authority.

### **Assessment principles**

Please refer to Asset Skills Assessment principles in *Annexe D*.

### **Assessment methodology**

This unit is assessed in the workplace or in conditions resembling the workplace. 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 organisational procedures for progressing the sale of residential property</p>	<p>1.1 describe the organisational procedures for maintaining up-to-date records and agreements about the progress of a sale</p> <p>1.2 state why it is important to:</p> <ul style="list-style-type: none"> <li>- maintain up-to-date records and agreements</li> <li>- record the completion of a sale and to notify all relevant parties</li> </ul> <p>1.3 describe the organisational procedures for amending or disposing of marketing materials following the sale of residential property</p> <p>1.4 state the limits of own responsibility and authority for progressing the sale of residential property</p> <p>1.5 state the organisational procedures for reporting issues that are outside own responsibility and authority when progressing the sale of residential property</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>2 Know which parties and documentation are involved with progressing sales of residential property</p>	<p>2.1 list the different parties involved in progressing the sale of residential property</p> <p>2.2 describe the roles and responsibilities of the different parties involved in the selling process</p> <p>2.3 explain the process when selling residential property</p> <p>2.4 state what information is required in progressing the sale of residential property</p> <p>2.5 state who is responsible for accessing information required to progress a sale</p> <p>2.6 state how to access the information for which you are responsible</p> <p>2.7 list the documentation required to progress a sale</p> <p>2.8 state which parties require documentation to progress a sale</p> <p>2.9 state who is responsible for accessing the documentation to progress a sale</p> <p>2.10 describe factors that can impact upon the progress of a sale</p> <p>2.11 state why it is important to monitor the progress of a sale</p> <p>2.12 describe the actions to take when problems occur when progressing sales</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>3 Understand how to progress sales of residential property</p>	<p>3.1 explain the potential types of dispute that can occur when selling property</p> <p>3.2 describe the organisational procedures for resolving disputes, including the documentation required</p> <p>3.3 explain the importance of ensuring that all parties are informed of the progress of the sale</p> <p>3.4 list the types of payments involved in progressing the sale of residential property</p> <p>3.5 state the points in the sales process where payments are required</p> <p>3.6 explain how to process different types of payment in line with organisational procedures</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>4 Plan and implement the sales of property</p>	<p>4.1 identify the seller, buyer and all relevant parties involved in the sale of the property</p> <p>4.2 identify the information required and necessary actions to progress the sale of the property</p> <p>4.3 determine the sequence, duration and deadlines for completion of the sale within the agreed timescales</p> <p>4.4 identify any factors that could impact upon the conclusion of the sale</p> <p>4.5 follow organisational procedures to address any factors that could impact on the conclusion of the sale</p> <p>4.6 inform all parties of their responsibilities towards ensuring the conclusion of the sale</p> <p>4.7 liaise with all parties and exchange relevant information</p> <p>4.8 communicate information to the relevant parties ensuring that it has been received and understood</p> <p>4.9 ensure that information is presented concisely and promotes understanding</p> <p>4.10 up-to-date records of information received in line with organisational procedures</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>5 Monitor the progress of sales to their conclusion</p>	<p>5.1 monitor the actions undertaken by relevant parties in progressing the sale</p> <p>5.2 identify any factors which impact positively or negatively on the progress of the sale</p> <p>5.3 ensure that all documentation is made available to relevant parties in line with organisational procedures</p> <p>5.4 identify any factors delaying the progress of the sale</p> <p>5.5 identify options for overcoming delaying factors</p> <p>5.6 agree options for overcoming delaying factors with relevant parties</p> <p>5.7 take action where necessary to obtain information to address any disputes following organisational procedures</p> <p>5.8 maintain regular contact with all relevant parties</p> <p>5.9 provide feedback to buyers and sellers regarding the progress of the sale</p> <p>5.10 provide suggestions to buyers and sellers to assist the progress of sales where relevant</p> <p>5.11 ensure that all payments and other requirements for completing the sale are fulfilled within the agreed timescales</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	5.12 inform all relevant parties about the completion of the sale 5.13 ensure that all marketing materials are amended or disposed of following completion 5.14 comply with all relevant legislation, guidelines and codes of practice relating to progressing the sale of residential proper			

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## **Unit 17: Progress the Part-exchange of Properties**

**Unit reference number:** H/601/3160

**QCF level:** 3

**Credit value:** 4

**Guided learning hours:** 10

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### **Unit summary**

This unit is about the part-exchange of properties. It includes advising customers regarding the part-exchanges and obtaining agreement regarding the value of the properties involved. It also includes liaising with relevant parties to progress agreed part-exchanges and monitoring their progress.

### **Assessment principles**

Please refer to Asset Skills Assessment principles in *Annexe D*.

### **Assessment methodology**

This unit is assessed in the workplace or in conditions resembling the workplace. 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 legal and organisational procedures for progressing the part-exchange of properties</p>	<p>1.1 list the:</p> <ul style="list-style-type: none"> <li>- legislation</li> <li>- guidelines</li> <li>- codes of practice</li> <li>- relevant to progressing the part-exchange of properties</li> </ul> <p>1.2 explain how legislation, guidelines and codes of practice impact on progressing the part-exchange of properties</p> <p>1.3 evaluate the range of services offered by the organisation which may assist prospective buyers</p> <p>1.4 explain the organisational procedures for:</p> <ul style="list-style-type: none"> <li>- recording the progress of the part-exchange</li> <li>- amending or disposing of marketing materials</li> </ul> <p>1.5 explain the limits of own responsibility and authority for progressing the part-exchange of properties</p> <p>1.6 state the organisational procedures for reporting issues that are outside own responsibility and authority when progressing the part-exchange of properties</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>2 Know how to progress the part-exchange of properties</p>	<p>2.1 define the different parties involved in progressing the part-exchange of residential property</p> <p>2.2 explain the roles and responsibilities of the different parties involved in progressing the part-exchange of residential property</p> <p>2.3 explain the part-exchange process</p> <p>2.4 describe what information and documentation is required in progressing part-exchanges</p> <p>2.5 identify those who are responsible for accessing information and documentation on progressing part-exchanges</p> <p>2.6 state the parties that require documentation for progressing part-exchanges</p> <p>2.7 give examples of factors that can impact upon the progress of a part-exchange</p> <p>2.8 describe why it is important to monitor the progress of a part-exchange</p> <p>2.9 explain why it is important that relevant parties are informed of the progress of a part-exchange</p> <p>2.10 explain why it is important to record the completion of a part-exchange and to notify relevant parties</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>3 Be able to prepare the part-exchange of properties</p>	<p>3.1 confirm that a part-exchange is suitable with relevant parties</p> <p>3.2 inform prospective buyers of the implications on the costs and timescales for part-exchanging</p> <p>3.3 check that the customer has understood the implications of costs and timescales</p> <p>3.4 obtain information regarding the value of the properties involved</p> <p>3.5 agree the value of the properties involved with relevant parties</p> <p>3.6 identify and address any issues relating to valuations</p> <p>3.7 obtain any necessary approvals for the part-exchange to proceed</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>4 Be able to progress the part-exchange of properties</p>	<p>4.1 issue relevant information about approved part-exchanges to the relevant parties</p> <p>4.2 ensure that information relating to legal and other procedures for approved part-exchanges is processed</p> <p>4.3 monitor the progress of part-exchanges with relevant parties</p> <p>4.4 identify any factors delaying the progress and completion of the part-exchange</p> <p>4.5 identify actions that need to be taken in order to address factors in line with organisational procedures</p> <p>4.6 notify relevant parties of the progress and completion of part-exchanges</p> <p>4.7 maintain records regarding the process and completion of part-exchanges</p> <p>4.8 comply with relevant legislation, guidelines and codes of practice relating to progressing the part-exchange of properties</p>			

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## **Unit 18: Agree Specifications for New Properties with Buyers**

**Unit reference number:** K/601/3161

**QCF level:** 3

**Credit value:** 4

**Guided learning hours:** 10

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### **Unit summary**

This unit is about liaising with buyers regarding the specifications to be included within new properties which they are purchasing. The specifications can cover the structure of the property, finishes, fixtures and fittings, furnishings and any appliances available. It includes agreeing those specifications required and progressing these correctly.

### **Assessment principles**

Please refer to Asset Skills Assessment principles in *Annexe D*.

### **Assessment methodology**

This unit is assessed in the workplace or in conditions resembling the workplace. 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 legal and organisational procedures for agreeing specifications for new properties with prospective buyers</p>	<p>1.1 list the:</p> <ul style="list-style-type: none"> <li>- legislation</li> <li>- guidelines</li> <li>- codes of practice</li> <li>- relevant to agreeing specifications for new properties with buyers</li> </ul> <p>1.2 explain how legislation, guidelines and codes of practice impact on agreeing specifications for new properties</p> <p>1.3 give examples of the types and range of specifications available for new properties</p> <p>1.4 evaluate the advantages and disadvantages of the types and range of specifications available</p> <p>1.5 explain why it is important to ensure that prospective buyers are given an opportunity to consider specifications</p> <p>1.6 explain how to acquire the necessary details from prospective buyers when agreeing their requirements for specifications</p> <p>1.7 explain how to obtain information regarding costs and timescales for different specifications</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>1 Understand legal and organisational procedures for agreeing specifications for new properties with prospective buyers</p>	<p>1.8 describe the organisational procedures for recording information</p> <p>1.9 explain the limits of own responsibility and authority for agreeing specifications for new properties</p> <p>1.10 explain the organisational procedures for reporting issues that are outside own responsibility and authority when agreeing specifications for new properties</p>			
<p>2 Understand how to agree specifications for new properties with prospective buyers</p>	<p>2.1 explain why it is important to obtain approvals and documented agreements from prospective buyers</p> <p>2.2 analyse factors that may impact whether prospective buyers' requirements can be met</p> <p>2.3 give examples of issues that might arise during implementation of the specifications</p> <p>2.4 explain why it is important to address issues that may affect implementation of specifications</p> <p>2.5 explain why it is important to ensure that relevant parties are notified of agreed specifications</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>3 Be able to agree specifications for new properties with prospective buyers</p>	<p>3.1 identify the breadth of specifications available to meet prospective buyers requirements</p> <p>3.2 evaluate with prospective buyers the specifications available for new properties</p> <p>3.3 agree details of prospective buyers' requirements and their preferred specifications</p> <p>3.4 follow organisational procedures for progressing implementation of agreed specifications</p> <p>3.5 maintain up-to-date records of prospective buyers requirements and specifications agreed</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>4 Be able to progress specifications for new properties with prospective buyers</p>	<p>4.1 identify any factors which might affect the requirements being met</p> <p>4.2 notify prospective buyers on the factors that might affect the requirements being met</p> <p>4.3 identify actions that need to be taken in order to address problems</p> <p>4.4 explain the costs and timescales associated with the delivery of specifications to prospective buyers</p> <p>4.5 negotiate prospective buyers agreement regarding specifications required</p> <p>4.6 obtain any necessary approvals for the specifications required</p> <p>4.7 present information to prospective buyers</p> <p>4.8 check that prospective buyers have understood the information and encourage questions</p> <p>4.9 monitor progress in implementing specifications</p> <p>4.10 address any issues that prevent specifications being met where necessary</p>			

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## **Unit 19: Hand Over New Properties to Buyers**

**Unit reference number:** J/601/3166

**QCF level:** 3

**Credit value:** 3

**Guided learning hours:** 10

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### **Unit summary**

This unit is about inspecting new properties during their development to ensure that specifications agreed with your customer are being fulfilled, and then completing the hand-over to the customer when the property is available. The specifications can cover the structure of the property, finishes, fixtures and fittings, furnishings and any appliances available.

### **Assessment principles**

Please refer to Asset Skills Assessment principles in *Annexe D*.

### **Assessment methodology**

This unit is assessed in the workplace or in conditions resembling the workplace. 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 organisational procedures for the hand-over of new properties to buyers</p>	<p>1.1 explain the organisational procedures for inspecting and handing over new properties to buyers</p> <p>1.2 explain why it is important to obtain approvals and documented agreements from prospective buyers</p> <p>1.3 explain the organisational procedures for recording inspections and the hand-over of new properties</p> <p>1.4 explain the limits of own limits of responsibility and authority for the hand-over of new properties</p> <p>1.5 explain the organisational procedures for reporting issues that are outside of own responsibility and authority when handing over new properties</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>2 Understand how to complete the hand-over of new properties to buyers</p>	<p>2.1 explain why it is important to inspect new properties as they are being constructed and fitted out</p> <p>2.2 explain why it is important to ensure that the new property is clean and tidy</p> <p>2.3 explain the documentation and instruction manuals that need to be obtained prior to hand-over to the prospective buyer</p> <p>2.4 give examples of the types of fittings and appliances which require explanation as to how they work</p> <p>2.5 analyse the main types of queries or problems that can arise when moving into a new property</p> <p>2.6 describe the contact procedures available to prospective buyers for dealing with queries or problems</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>3 Be able to inspect new property prior to its hand-over to buyers</p>	<p>3.1 identify the approved specifications for the new property as agreed with the prospective buyer</p> <p>3.2 inspect the progress of new properties at appropriate intervals to monitor that specifications are being met</p> <p>3.3 check that all fittings and appliances are in working order</p> <p>3.4 address any problems with fittings and appliances promptly</p> <p>3.5 identify any variances from agreed specifications</p> <p>3.6 take action to address variances in the specification</p> <p>3.7 address any problems with cleanliness or redundant materials</p> <p>3.8 obtain all documents and instruction manuals relating to properties in preparation for hand-over to buyers</p> <p>3.9 maintain accurate and completed records of inspections</p> <p>3.10 ensure that access to the new property is safe</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>4 Be able to complete the hand-over of a new property</p>	<p>4.1 follow the procedures for handing over new properties to buyers</p> <p>4.2 identify any aspects of the specification which differ from what was agreed with the buyer</p> <p>4.3 explain to the buyer the reasons for any differences to the specification</p> <p>4.4 address any discrepancies to the specification</p> <p>4.5 obtain confirmation from buyers that specifications are accepted where possible</p> <p>4.6 explain to the buyer how fittings and appliances work</p> <p>4.7 provide buyers with all documentation and keys to the property</p> <p>4.8 provide buyers with details for contacting relevant people in the event of any subsequent queries or problems</p> <p>4.9 check that buyers have understood the information provided and encourage questions</p> <p>4.10 maintain accurate records regarding the hand-over in line with organisational procedures</p> <p>4.11 comply with all relevant legislation, guidelines and codes of practice relating to the hand-over of new properties</p>			

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## **Unit 20: Provide After-sales Support to Buyers of Residential Property**

**Unit reference number:** H/601/3174

**QCF level:** 3

**Credit value:** 4

**Guided learning hours:** 10

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### **Unit summary**

This unit is about responding to queries and problems raised by buyers following their purchase of residential property. The queries or problems might be regarding the structure, finishes, fittings, furnishings, appliances or landscaping associated with their property. It includes addressing such queries and problems appropriately, in line with organisational procedures. It includes showing sensitivity for the customer's needs, honouring commitments made and acting within your level of authority and responsibility.

### **Assessment principles**

Please refer to Asset Skills Assessment principles in *Annexe D*.

### **Assessment methodology**

This unit is assessed in the workplace or in conditions resembling the workplace. 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 organisational procedures for providing after-sales support to buyers	<p>1.1 explain the range of services offered by the organisation which may assist buyers</p> <p>1.2 explain the organisational procedures for recording queries and problems</p> <p>1.3 explain the limits of own responsibility and authority for providing after-sales support</p> <p>1.4 explain the organisational procedures for reporting issues that are outside own responsibility and authority when providing after-sales support</p>		
2	Understand how to deal with problems, queries and complaints from buyers after purchasing residential property	<p>2.1 describe the types of query and problem that can occur following the purchase of residential property</p> <p>2.2 describe what actions can be taken to resolve queries and complaints</p> <p>2.3 explain why it is important to obtain full details of queries and complaints</p> <p>2.4 explain how to establish the cause of different types of problem that can occur</p> <p>2.5 describe why it is important to communicate in a clear, polite and confident manner with buyers</p>		

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>3 Be able to handle queries or problems received from buyers</p>	<p>3.1 discuss and agree the nature of buyers' queries or problems</p> <p>3.2 analyse the cause of the query or problem</p> <p>3.3 evaluate potential solutions with buyers</p> <p>3.4 check that the buyer has understood the information provided</p> <p>3.5 agree the solution to queries or problems with buyers</p> <p>3.6 refer any queries or problems that are outside own responsibility and authority to the relevant person</p> <p>3.7 progress the solution in line with organisational procedures</p> <p>3.8 ensure that the buyer is updated on progress relating to the query or problem</p> <p>3.9 check with the buyer to ensure that the problem or query has been resolved satisfactorily</p> <p>3.10 provide clear and accurate reasons to the buyer where the query or problem has not been resolved to their satisfaction</p> <p>3.11 maintain records of queries and problems received in accordance with organisational procedures</p> <p>3.12 maintain records of actions taken to address queries and problems in line with organisational procedures</p> <p>3.13 comply with relevant legislation, guidelines and codes of practice relating to after-sales support</p>			

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## **Unit 21: Develop Marketing Materials for the Promotion of Residential Property Services**

**Unit reference number:** M/601/3212

**QCF level:** 3

**Credit value:** 4

**Guided learning hours:** 15

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### **Unit summary**

This unit is about contributing to the development of the organisation's marketing materials designed to promote its services relating to the sale of residential property. It includes agreeing the range and type of materials to be deployed, in line with the audiences to be targeted and objectives to be realised, and also includes developing and researching possible designs, before progressing the agreed, preferred materials.

### **Assessment principles**

Please refer to Asset Skills Assessment principles in *Annexe D*.

### **Assessment methodology**

This unit is assessed in the workplace or in conditions resembling the workplace. 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 organisational procedures for developing marketing materials for the promotion of residential property services	<p>1.1 explain the range of services offered by the organisation which may assist prospective buyers</p> <p>1.2 explain why it is important to develop marketing materials to promote the range of services</p> <p>1.3 give examples of the range of marketing materials used to promote the organisation's services and individual properties</p> <p>1.4 evaluate the advantages and disadvantages of the types of marketing materials used to promote the organisation's services and individual properties</p> <p>1.5 explain the organisational procedures for preparing and producing marketing materials for residential properties for sale</p>			
2 Understand how marketing materials can influence the key audience	<p>2.1 explain the importance of identifying the key audiences to promote services</p> <p>2.2 explain why it is important to identify and prioritise the services to be promoted</p> <p>2.3 explain how to identify the key audiences needs and expectations from using marketing materials</p> <p>2.4 explain the organisation's desired response from the key audience in response to marketing materials</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>3 Understand how to prepare marketing materials for residential properties for sale</p>	<p>3.1 give examples of typical costs and timescales for the production of different types of marketing material for residential properties for sale</p> <p>3.2 explain the importance of planning marketing activities for individual residential properties</p> <p>3.3 explain why it is important to review all relevant information before developing marketing materials</p> <p>3.4 explain the importance of ensuring that key selling features are emphasised and that materials contain sufficient information</p> <p>3.5 give examples of the main types of buyers of residential property</p> <p>3.6 give examples of the information which is important to different types of buyer</p> <p>3.7 explain the importance of gaining the approval of the seller for the marketing materials before production</p> <p>3.8 give examples of the types of change which might be made to a property instructions which require changes to be made to marketing materials</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>4 Understand how to arrange for the production of final marketing materials for residential property for sale</p>	<p>4.1 explain the importance of types and designs of marketing material</p> <p>4.2 explain the organisation's capabilities and resources towards preparing marketing materials</p> <p>4.3 give examples of where the preparation of marketing materials needs to be outsourced</p> <p>4.4 explain the organisational procedures for outsourcing of marketing materials</p> <p>4.5 explain the importance of ensuring that all people involved in the publication of marketing materials are fully briefed</p> <p>4.6 give examples of problems that might occur when reviewing published marketing materials</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>5 Be able to develop recommendations for marketing materials</p>	<p>5.1 analyse and prioritise the services to be promoted</p> <p>5.2 evaluate the objectives to be achieved by the marketing materials</p> <p>5.3 analyse the key audiences for the services to be promoted</p> <p>5.4 evaluate the options regarding the available types of marketing material</p> <p>5.5 recommend and agree the appropriate types of marketing material with senior management</p> <p>5.6 evaluate the resources available towards producing the agreed types of marketing material</p> <p>5.7 analyse the capabilities required to produce the materials</p> <p>5.8 select capabilities in-house and where others are needed to be outsourced for producing marketing materials</p> <p>5.9 analyse the costs and benefits to the organisation of buying-in part or all of the services required</p> <p>5.10 evaluate and agree sources of external design capacity where required</p> <p>5.11 arrange for draft marketing materials to be prepared in order to meet objectives of the marketing plan</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
5 Be able to develop recommendations for marketing materials	5.12 analyse and evaluate the effectiveness of potential designs for marketing materials 5.13 recommend appropriate marketing materials and designs 5.14 prepare a rationale to justify recommendations in line with agreed objectives			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>6 Be able to prepare agreed materials for production</p>	<p>6.1 confirm the agreed types of marketing materials to be produced including style and format</p> <p>6.2 agree information to be included within the marketing materials</p> <p>6.3 brief suppliers of the marketing materials fully providing all necessary information</p> <p>6.4 review the suppliers draft proposals against the agreed format and objectives</p> <p>6.5 accept only those draft proposals that:</p> <ul style="list-style-type: none"> <li>- meet the agreed requirements</li> <li>- are justified as offering value for money</li> <li>- are in line with objectives</li> </ul> <p>6.6 maintain accurate records about the materials following organisational procedures</p> <p>6.7 accept only those draft proposals that:</p> <ul style="list-style-type: none"> <li>- meet the agreed requirements</li> <li>- justified as offering value for money</li> <li>- are in line with objectives</li> </ul> <p>6.8 maintain accurate records about the materials following organisational procedures</p> <p>6.9 ensure that marketing materials comply with relevant legislation, guidelines and codes of practice</p>			

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(if sampled)



## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>1 Know employer and employee rights, responsibilities and own organisational procedures</p>	<p>1.1 state employer and employee rights and responsibilities under employment law, the Equality Act, Health &amp; Safety and other relevant legislation</p> <p>1.2 state importance of having employment rights and responsibilities</p> <p>1.3 describe organisational procedures for health &amp; safety, including documentation</p> <p>1.4 describe organisational procedures for equality &amp; diversity, including documentation</p> <p>1.5 identify sources of information and advice on employment rights and responsibilities</p>			

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

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## **Unit 23: Develop Yourself in the Job Role**

**Unit reference number:** R/600/6351

**QCF level:** 2

**Credit value:** 2

**Guided learning hours:** 12

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### **Unit summary**

This unit is about developing yourself in your job by identifying areas for further development and setting yourself targets for achieving this.

### **Assessment principles**

Please refer to Asset Skills Assessment principles in *Annexe D*.

### **Assessment methodology**

This unit is assessed in the workplace or in conditions resembling the workplace. 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 how to develop him/her self in the job	1.1 identify activities that could help with self development 1.2 describe how to set targets for personal development 1.3 state the importance of setting achievable personal development targets 1.4 identify the types of support available to achieve targets 1.5 describe the procedures for accessing support 1.6 state the importance of reviewing and updating progress 1.7 describe the procedures fore reviewing and updating progress 1.8 list the benefits of discussing progress with others			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
2 Be able to develop him/her self in the job	2.1 identify and agree areas where they could develop further 2.2 agree achievable targets for personal development 2.3 agree the time and support required to achieve targets 2.4 demonstrate new skills in the workplace 2.5 request and use feedback on own performance from others			

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*(if sampled)*



## Further information

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Our customer service numbers are:

BTEC and NVQ	0844 576 0026
GCSE	0844 576 0027
GCE	0844 576 0025
The Diploma	0844 576 0028
DiDA and other qualifications	0844 576 0031

Calls may be recorded for training purposes.

## Useful publications

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Related information and publications include:

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

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

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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Edexcel 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 ([www.edexcel.com/training](http://www.edexcel.com/training)). You can request customised training through the website or by contacting one of our advisers in the Training from Edexcel 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: Progression pathways

The Edexcel qualification framework for the sale of residential property sector

Level	General qualifications	Diplomas	BTEC vocationally-related qualifications	BTEC specialist qualification/professional	NVQ/competence
8					
7					
6					
5					
4					
3					Diploma in Property (Sale of Residential Property)
2					Certificate in Property (Sale of Residential Property)
1					
Entry					



## Annexe B: Quality assurance

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### Key principles of quality assurance

- A centre delivering Edexcel qualifications must be an Edexcel 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 around the effective delivery and quality assurance of assessment; the centre must abide by these conditions throughout the period of delivery.
- Edexcel 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 Edexcel 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 for 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 Edexcel. Edexcel is committed to ensuring that it follows best practice and employs appropriate technology to support quality assurance process where practicable. Therefore, the specific arrangements for working with centres will vary. Edexcel seeks to ensure that the quality assurance processes that it uses do not place undue bureaucratic processes on centres and works to support centres 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. Edexcel operates a quality assurance process, which is 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 Edexcel.

The Edexcel quality assurance processes will involve:

- gaining centre recognition and qualification approval if a centre is not currently approved to offer Edexcel qualifications
- annual visits to centres by Edexcel for quality review and development of overarching processes and quality standards. Quality review and development visits will be conducted by an Edexcel quality development reviewer
- annual visits by occupationally competent and qualified Edexcel 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 C: Centre certification and registration

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

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

The approach of Edexcel 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 qualifications in this specification?**

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

Appropriate steps should be taken to assess each applicant's potential and a professional judgement 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 Edexcel's policy on learners with particular requirements.

Edexcel's policy on access arrangements and special considerations for Edexcel qualifications aims to enhance access to the qualifications for learners with disabilities and other difficulties (as defined by the 1995 Disability Discrimination Act and the amendments to the Act) without compromising the assessment of skills, knowledge, understanding or competence. Please refer to *Access Arrangements and Special Considerations for BTEC and Edexcel NVQ Qualifications* for further details. [www.edexcel.com](http://www.edexcel.com).



# Annexe D: 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**

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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.  
  
eg 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 Asset Skills does not prescribe a minimum number of observations, however, evidence provided must demonstrate that competency is consistent and reliable.
  - 2.1.4 Assessors can only assess in their acknowledged area of occupational competence.
  - 2.1.5 Assessors and Internal Verifiers will be registered with their Approved Centre and be accountable to the organisation for their assessment practice.
  - 2.1.6 Health and safety of customers/clients and employees must be maintained throughout the assessment process and if any person carrying out assessment or health and safety then that person should refuse to continue with the activity(ies) until satisfied that due regard to health and safety verification activities does not feel that there is due regard to 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:**

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:**

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

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.

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