



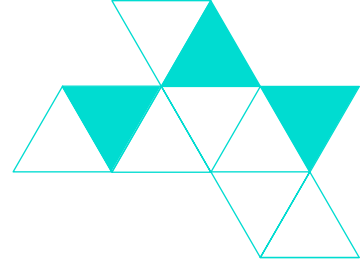
The  
Property  
Institute

Qualification Syllabus

# Leasehold Management

Level 4 Member Course and Exam





## Unit 1: Understand Leasehold Property Management

**Unit Reference Number:** T/650/5081

**Level:** 4

**Credit:** 2

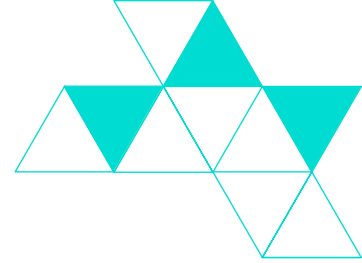
**GLH:** 1

### Unit Summary

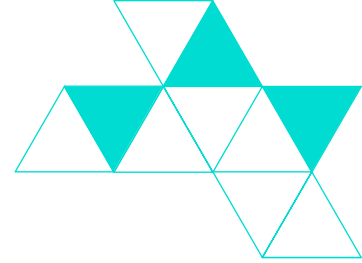
This unit enables learners to explain the management agreement and the lease, control the management of the residential buildings so that services can be provided in line with agreed requirements.

### Assessment Guidance

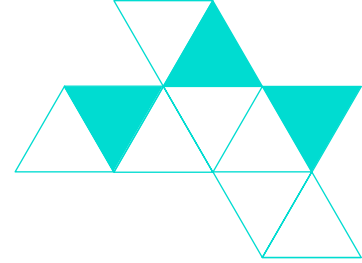
This unit must be assessed using the following method(s): exam.



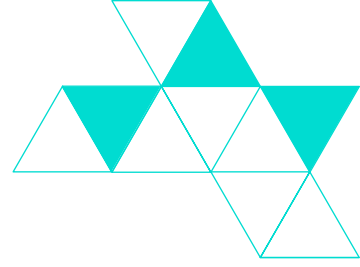
<b>Learning outcomes (LO)</b> <i>The learner will</i>	<b>Assessment criteria (AC)</b> <i>The learner can:</i>	<b>Additional information/notes</b>
<p>1. Understand the process of taking a building into management</p>	<p>1.1 Explain the elements involved in new build management</p> <p>1.2 Explain the <b>elements</b> involved in existing buildings management:</p> <ul style="list-style-type: none"> <li>● Best practice process</li> <li>● Documents and information to request</li> <li>● How to set up a new building – best practice</li> <li>● What to do with the maintenance contracts</li> <li>● What to do with the staff</li> <li>● How to communicate with residents and owners</li> </ul>	<p>1.2 <b>Elements</b> can include:</p> <ul style="list-style-type: none"> <li>● Budget set up</li> <li>● Warranties</li> <li>● Basic understanding of planning</li> <li>● Phased handovers</li> <li>● Creation of RMC</li> <li>● Section 106 understanding</li> <li>● Maintenance contracts setup</li> <li>● Vacant units – service charges</li> <li>● Creating staff teams – things to consider</li> </ul>
<p>2. Understand building insurance</p>	<p>2.1 Describe the correct process of arranging the building insurance</p> <p>2.2 Explain the <b>key terms</b> on the building insurance certificate</p> <p>2.3 Explain the purpose of reinstatement valuation</p>	<p>2.2 <b>Key terms</b> may include:</p> <ul style="list-style-type: none"> <li>● sum insured</li> <li>● reinstatement value</li> <li>● excess etc.</li> </ul>



<b>Learning outcomes (LO)</b> <i>The learner will</i>	<b>Assessment criteria (AC)</b> <i>The learner can:</i>	<b>Additional information/notes</b>
<p><b>3.</b> Understand own responsibilities when managing service providers</p>	<p><b>3.1</b> Explain the criteria and consultation process in line with the Section 20 of the Landlord and Tenant Act 1985</p> <p><b>3.2</b> Explain the criteria and process of Section 20ZA of the Landlord and Tenant Act 1985</p> <p><b>3.3</b> Explain key elements of detailed specifications for services</p> <p><b>3.4</b> Outline best practice in undertaking the tendering process to ensure value for money and appropriate service provision.</p> <p><b>3.5</b> Describe what a contract for works should include to comply with legislation and best practice with a:</p> <ul style="list-style-type: none"> <li>● service provider</li> <li>● contractor</li> </ul> <p><b>3.6</b> Describe how to respond to disputes in service delivery, in line with agreed complaints processes</p> <p><b>3.7</b> Explain the relevance of insurance and registration with specialist bodies when selecting a contractor</p>	



<b>Learning outcomes (LO)</b> <i>The learner will</i>	<b>Assessment criteria (AC)</b> <i>The learner can:</i>	<b>Additional information/notes</b>
<p><b>4.</b> Understand the importance in responding the needs of leaseholders</p>	<p><b>4.1</b> Summarise with reference to relevant law, what information must be provided to a leaseholder about services provided for the building</p> <p><b>4.2</b> Describe how to respond to leaseholders' enquiries in relation to assignment of their lease or landlord's permission beyond the general service charge</p> <p><b>4.3</b> Explain how to respond to breaches of the lease covenants or disputes arising from the lease</p> <p><b>4.4</b> Apply best practice in dealing with disputes between leaseholders including anti-social behaviour</p> <p><b>4.5</b> Explain own responsibilities when disputes are referred to other agencies for resolution</p>	
<p><b>5.</b> Understand own responsibilities when working with clients</p>	<p><b>5.1</b> Describe options available to landlords for dispute resolution including Ombudsman services and how to advise landlords of these</p> <p><b>5.2</b> Explain options when the extent and limit of one's delegated powers is to be exceeded</p> <p><b>5.3</b> Explain best practice in dealing with the client's instruction when in conflict with own contracts</p>	



## Unit 2: Understand the Legal Aspects of Residential Property Management

**Unit Reference Number:** Y/650/5082

**Level:** 4

**Credit:** 3

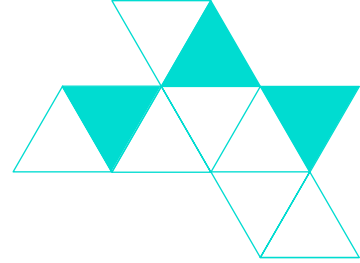
**GLH:** 1

### Unit Summary

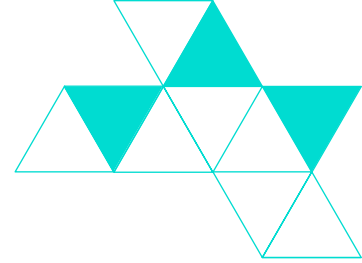
This unit enables learners to explain legal matters contained in management agreements, leases and other legislative documents so that services can be provided in line with the law and requirements.

### Assessment Guidance

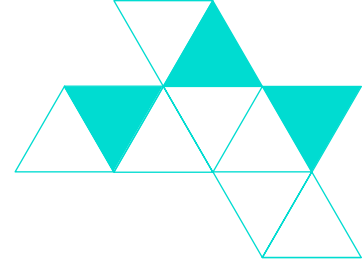
This unit must be assessed using the following method(s): exam.



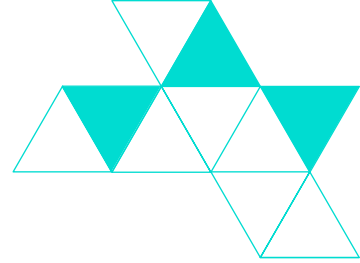
<b>Learning outcomes (LO)</b> <i>The learner will</i>	<b>Assessment criteria (AC)</b> <i>The learner can:</i>	<b>Additional information/notes</b>
<p><b>1.</b> Understand own responsibilities within the Management Agreement</p>	<p><b>1.1</b> Explain best practice in negotiating a new management agreement</p> <p><b>1.2</b> Explain the key legal, customer service and financial elements of the management agreement</p> <p><b>1.3</b> Explain the role of the client and how this may impact on own responsibilities</p> <p><b>1.4</b> Summarise the scope of responsibilities of the Managing Agent</p>	
<p><b>2.</b> Understand own responsibilities within the Lease</p>	<p><b>2.1</b> Explain how a lease is structured and how this may impact on own responsibilities as a Managing Agent</p> <p><b>2.2</b> Explain the implications of the wording of a lease on maintenance services</p> <p><b>2.3</b> Explain own responsibilities created by the contractual obligations of a lease</p> <p><b>2.4</b> Describe how lease covenants impact on the management requirements for a building</p> <p><b>2.5</b> Explain the relationship between setting of service charges and covenants</p> <p><b>2.6</b> Explain the implications on building management of the lease restrictions placed on the parties</p>	



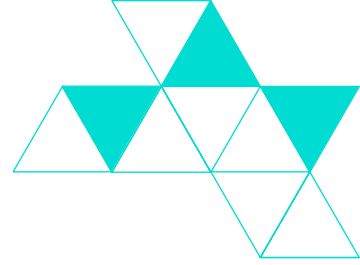
<b>Learning outcomes (LO)</b> <i>The learner will</i>	<b>Assessment criteria (AC)</b> <i>The learner can:</i>	<b>Additional information/notes</b>
<p><b>3.</b> Understand own responsibilities to comply with leaseholder rights</p>	<p><b>3.1</b> Explain own responsibilities to ensure service charges are reasonable</p> <p><b>3.2</b> Explain the leaseholders' statutory rights at the expiry of a lease</p> <p><b>3.3</b> Explain the legislative framework and Acts of Parliament protecting leaseholders for consultation on qualifying works and long-term qualifying agreements</p> <p><b>3.4</b> Describe the relationship between the landlord and the legislative framework including Acts of Parliament</p> <p><b>3.5</b> Explain the leaseholder's ability to challenge management practices including the service charges</p> <p><b>3.6</b> Describe the landlord's requirements in relation to protection of service charges held on behalf of the leaseholders</p> <p><b>3.7</b> Outline the key industry relevant codes of practice and guidance advice issued and supported by professional and trade bodies</p>	



<b>Learning outcomes (LO)</b> <i>The learner will</i>	<b>Assessment criteria (AC)</b> <i>The learner can:</i>	<b>Additional information/notes</b>
<p><b>4.</b> Understand own responsibilities within dispute resolution and the work of the First Tier Tribunal (Property Chamber), the Upper Tribunal and the courts</p>	<p><b>4.1</b> Explain how the jurisdiction of the First Tier Tribunals (Property Chamber) affects own responsibilities as a Managing Agent</p> <p><b>4.2</b> Explain the process of application to the First Tier Tribunal (Property Chamber) and how it affects own responsibilities as a Managing Agent</p> <p><b>4.3</b> Explain how the determinations of the courts and tribunals impact on the practice of residential property management</p> <p><b>4.4</b> Describe the options of Alternative Dispute Resolution, including Adjudication, Mediation, Arbitration etc and where each might be used as real 'alternative'</p> <p><b>4.5</b> Describe the circumstances when and why the Alternative Dispute Resolution might be a preferred course of action</p>	



<b>Learning outcomes (LO)</b> <i>The learner will</i>	<b>Assessment criteria (AC)</b> <i>The learner can:</i>	<b>Additional information/notes</b>
<b>5.</b> Understand the key principles of Commonhold	<b>5.1</b> Explain the key differences between the Commonhold and Leasehold tenure  <b>5.2</b> Explain the property manager's role when managing a Commonhold property	
<b>6.</b> Understand the conveyancing process	<b>6.1</b> Describe the key elements of the conveyancing process  <b>6.2</b> Explain the purpose of the LPE1 form	



## Unit 3: Understand Financial Management of Leasehold Properties

**Unit Reference Number:** A/650/5083

**Level:** 4

**Credit:** 2

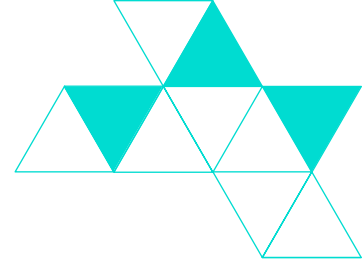
**GLH:** 1

### Unit Summary

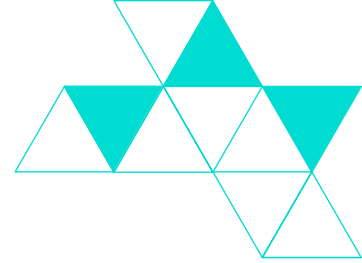
This unit enables learners to provide financial management services within leasehold property management.

### Assessment Guidance

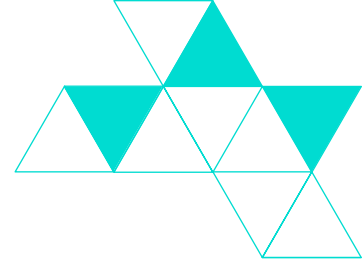
This unit must be assessed using the following method(s): exam



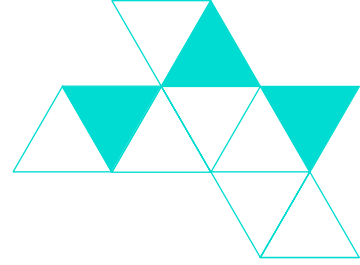
<b>Learning outcomes (LO)</b> <i>The learner will</i>	<b>Assessment criteria (AC)</b> <i>The learner can:</i>	<b>Additional information/notes</b>
<p><b>1.</b> Understand own responsibilities to comply with leaseholder rights</p>	<p><b>1.1</b> Summarise the requirements of the Bribery Act 2010 and how do they apply to the work of property manager</p> <p><b>1.2</b> Explain when VAT is applicable to service charges and the impact of this raising the charges</p> <p><b>1.3</b> Explain own responsibilities for Construction Industry Scheme (CIS) deductions as a Managing Agent</p> <p><b>1.4</b> Explain own responsibilities to comply with professional codes of practice (COP) with regard to the banking of client monies</p> <p><b>1.5</b> Highlight the key elements of the Financial Conduct Authority (FCA) bank deposit protection scheme and how they affect the work of property manager</p> <p><b>1.6</b> Explain how competition legislation relates to own role as a Managing Agent</p> <p><b>1.7</b> Explain the Managing Agent's responsibility in relation to the declaration of commissions to clients and customers</p>	



<b>Learning outcomes (LO)</b> <i>The learner will</i>	<b>Assessment criteria (AC)</b> <i>The learner can:</i>	<b>Additional information/notes</b>
<p><b>2.</b> Understand your responsibilities when accounting for other people's money</p>	<p><b>2.1</b> Explain how money laundering legislation affects the management of service charges in own role as a Managing Agent</p> <p><b>2.2</b> Explain how you account for other people's money according to lease and statutory requirements</p> <p><b>2.3</b> Describe the importance of complying with lease and statutory requirements when accounting for other people's money</p> <p><b>2.4</b> Describe the process of administration charges collection in accordance with the related statutory notices</p> <p><b>2.5</b> Describe the process of ground rent collection in accordance with the related statutory notices</p>	



<b>Learning outcomes (LO)</b> <i>The learner will</i>	<b>Assessment criteria (AC)</b> <i>The learner can:</i>	<b>Additional information/notes</b>
<p><b>3.</b> Understand own responsibilities in service charge accounting</p>	<p><b>3.1</b> Explain how to apply best practice when setting up a service charge budget and how it is affected by lease covenants</p> <p><b>3.2</b> Explain how to set up and budget for reserve funds or sinking funds</p> <p><b>3.3</b> Explain when a property manager may not be able to recover service charges due to contractual and legislative controls</p> <p><b>3.4</b> Explain how schedules and apportionments are used in practice and how discrepancies and issues can be overcome.</p> <p><b>3.5</b> Explain the process of service charge collection in line with the related statutory notices</p> <p><b>3.6</b> Explain own responsibilities on raising the service charge demands for major works estimates</p> <p><b>3.7</b> Explain the process of preparing the year-end financial statements</p> <p><b>3.8</b> Explain the requirements of Sections 18–30 of the Landlord and Tenant Act 1985 and how they affect the work of a property manager</p> <p><b>3.9</b> Explain circumstances when S20B Notifications has to be served</p>	



## Unit 4: Understand Technical Building Repair and Maintenance

**Unit Reference Number:** D/650/5084

**Level:** 4

**Credit:** 2

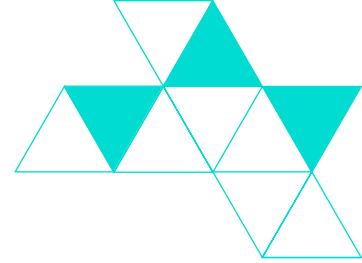
**GLH:** 1

### Unit Summary

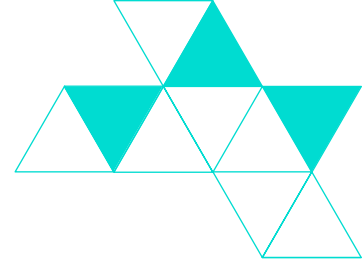
This unit enables learners to understand requirements for long term maintenance and what remedies are available should the structure or services fail.

### Assessment Guidance

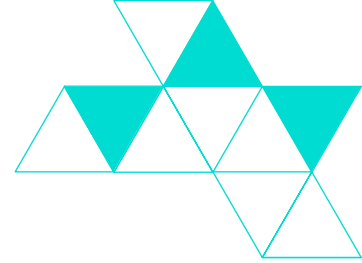
This unit must be assessed using the following method(s): exam



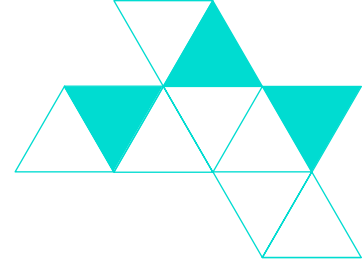
<b>Learning outcomes (LO)</b> <i>The learner will</i>	<b>Assessment criteria (AC)</b> <i>The learner can:</i>	<b>Additional information/notes</b>
<p>1. Understand own responsibilities in long term building maintenance</p>	<p>1.1 Describe the most common materials and construction methods used in building construction</p> <p>1.2 Explain the relationship between construction methods and long-term maintenance in property management</p> <p>1.3 Explain, as a Managing Agent, the main principles of Facilities Management and Preventative Planned Maintenance (PPM) programmes</p> <p>1.4 Outline the importance of accurate document control for <b>mechanical and electrical plant</b></p> <p>1.5 Explain how a CAPEX and PPM schedule work and their connections to setting of service charges</p> <p>1.6 Describe the main type of <b>communal systems</b></p> <p>1.7 Describe best practice for ensuring appropriate disaster recovery is in place for:</p> <ul style="list-style-type: none"> <li>● fire</li> <li>● flood</li> <li>● criminal attack</li> <li>● terrorist attack</li> <li>● person in distress</li> </ul> <p>1.8 Explain the importance the Operations &amp; Maintenance Manual (O&amp;M) and their connections to setting service charges</p>	<p>1.4 <b>Mechanical and electrical plant</b> may include:</p> <ul style="list-style-type: none"> <li>● Lifts</li> <li>● Boilers</li> <li>● Air conditioning</li> <li>● Risers</li> <li>● Water</li> <li>● Fire/heat/smoke detection, alarms and sprinklers</li> <li>● Lighting and emergency lighting</li> <li>● Power</li> </ul> <p>1.6 <b>Communal systems</b> may include: heating and hot water, solar etc.</p>



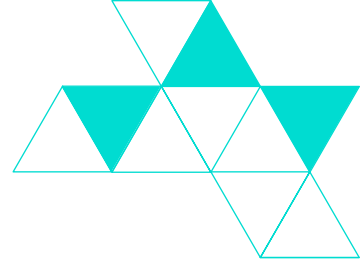
<b>Learning outcomes (LO)</b> <i>The learner will</i>	<b>Assessment criteria (AC)</b> <i>The learner can:</i>	<b>Additional information/notes</b>
<p>2. Understand own responsibilities for repair, maintenance and identifying defects as a Managing Agent</p>	<p>2.1 Describe own responsibilities for immediate and long-term repairs as the Managing Agent</p> <p>2.2 Explain the property manager’s role in presenting environmentally sustainable solutions to their client</p> <p>2.3 Explain how to apply best practice when dealing with <b>common defects</b></p> <p>2.4 Describe the following drainage systems:</p> <ul style="list-style-type: none"> <li>● pumping station</li> <li>● sustainable Drainage Systems (suDS)</li> <li>● rainwater attenuation tanks</li> </ul> <p>2.5 Explain how to apply best practice in environmental waste management</p> <p>2.6 Explain the key principles of efficient residents’ <b>car park management</b></p>	<p>2.3 <b>Common defects</b> may include: leaks, rot, cracks, infestations</p> <p>2.6 <b>Car park management</b> may include: clamping &amp; other types of parking management and electric charging points</p>



<b>Learning outcomes (LO)</b> <i>The learner will</i>	<b>Assessment criteria (AC)</b> <i>The learner can:</i>	<b>Additional information/notes</b>
<p><b>3.</b> Understand as a Managing Agent own responsibilities and regulations affecting the building</p>	<p><b>3.1</b> Explain the main regulations affecting the construction and maintenance of residential buildings and correlation in own role as a Managing Agent</p> <p><b>3.2</b> Explain own responsibilities and the purpose and impact of Statutory controls in property management</p> <p><b>3.3</b> Describe the importance of regulatory controls in property management</p> <p><b>3.4</b> Explain the impact of statutory controls on management of a building:</p> <ul style="list-style-type: none"> <li>● Planning</li> <li>● Conservation Areas</li> <li>● Listed Buildings and those of Townscape Merit</li> <li>● Tree Preservation Orders (TPOs)</li> </ul>	



<b>Learning outcomes (LO)</b> <i>The learner will</i>	<b>Assessment criteria (AC)</b> <i>The learner can:</i>	<b>Additional information/notes</b>
<p><b>3.</b> Understand as a Managing Agent own responsibilities and regulations affecting the building</p>	<p><b>3.5</b> Explain the impact of regulatory controls on management of a building:</p> <ul style="list-style-type: none"> <li>● Health &amp; Safety at Work (HASAWA)</li> <li>● Construction Design and Management (CDM) Regulations</li> <li>● Provision and Use of Work Equipment (PUWER)</li> <li>● Environmental Protection Agency requirements</li> <li>● Health and Safety Executive compliant items such as dry risers, smoke vents, static electrical tests</li> <li>● The Lifting Operations and Lifting Equipment Regulations (LOLER) 1998</li> </ul>	



## Unit 5: Understand Mixed Tenure Management and Housing

**Unit Reference Number:** F/650/5085

**Level:** 4

**Credit:** 2

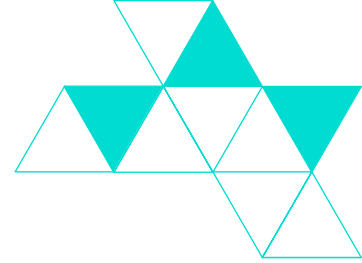
**GLH:** 1

### Unit Summary

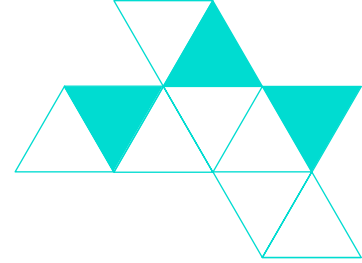
This unit enables learners to explain the different tenures provided in different developments and the management implications associated with mixed tenure schemes.

### Assessment Guidance

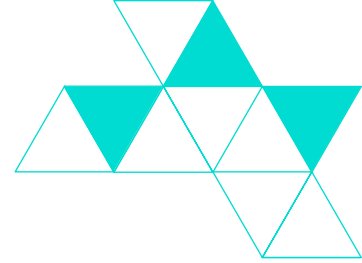
This unit must be assessed using the following method(s): exam



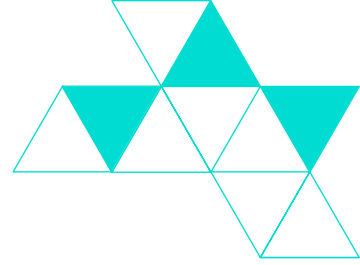
<b>Learning outcomes (LO)</b> <i>The learner will</i>	<b>Assessment criteria (AC)</b> <i>The learner can:</i>	<b>Additional information/notes</b>
<p><b>1.</b> Understand own management responsibilities for mixed tenure developments</p>	<p><b>1.1</b> Outline different tenure types in mixed management</p> <p><b>1.2</b> Explain the main challenges for a Managing Agent when managing mixed tenure schemes</p> <p><b>1.3</b> Describe the responsibilities of intermediate landlords in mixed tenure developments</p> <p><b>1.4</b> Explain client responsibilities for wider estate management and how these impact on own role as the Managing Agent</p> <p><b>1.5</b> Describe who is liable for various service charges and how this impacts overall financial management</p> <p><b>1.6</b> Explain the extent to which <b>current legislation</b> is applicable to mixed tenure properties</p> <p><b>1.7</b> Outline the key management characteristics of Houses of Multiple Occupancy (HMOs).</p>	<p><b>1.6</b> <b>Current legislation</b> includes: Section 20 of the Landlord and Tenant Act 1985</p>



<b>Learning outcomes (LO)</b> <i>The learner will</i>	<b>Assessment criteria (AC)</b> <i>The learner can:</i>	<b>Additional information/notes</b>
<b>2.</b> Understand own responsibilities regarding social neighbourhood management	<b>2.1</b> Explain own role in the management of the overall scheme and the implications of sub leases  <b>2.2</b> Describe how Managing Agents work with a variety of stakeholders	
<b>3.</b> Understand own management responsibilities in affordable housing developments	<b>3.1</b> Outline the key legal arrangements and differences that impact on own role as a Managing Agent between social housing and other leasehold properties  <b>3.2</b> Explain the main governance procedures for housing associations/registered providers  <b>3.3</b> Explain the key requirements of leasehold, assured, assured shorthold, flexible and secure tenancies that a Managing Agent needs to understand  <b>3.4</b> Describe the limits imposed on service charges to leaseholders under the right to buy and right to acquire regulations within the affordable housing framework  <b>3.5</b> Describe how extra-contractual payment options may be offered and operated  <b>3.6</b> Describe how housing associations, as shareholders, can contribute to the governance of Residents' Management Companies (RMCs)  <b>3.7</b> Describe the role of the rent officer and the impact fair rents may have on the service charge	



<b>Learning outcomes (LO)</b> <i>The learner will</i>	<b>Assessment criteria (AC)</b> <i>The learner can:</i>	<b>Additional information/notes</b>
<p><b>4.</b> Understand own responsibilities towards vulnerable residents and resident management</p>	<p><b>4.1</b> Explain the obligations, support and enforcement frameworks available to managing agents</p> <p><b>4.2</b> Explain the property manager’s role in safeguarding residents</p> <p><b>4.3</b> Describe how to take enforcement action against those residents presenting unacceptable antisocial behaviour or otherwise breaching covenants</p> <p><b>4.4</b> Outline the requirements of a Managing Agent to comply with current equality legislation.</p> <p><b>4.5</b> Outline the protected characteristics of individuals and the implications for managing agents</p> <p><b>4.6</b> Describe the managing agent’s role in supporting vulnerable tenants</p> <p><b>4.7</b> Outline property managers’ responsibilities in relation to special adaptations of the building</p>	<p><b>4.4 Current legislation</b> includes: Equality Act 2010</p>



## Unit 6: Understand Staff and Team Management and Development

**Unit Reference Number:** H/650/5086

**Level:** 4

**Credit:** 2

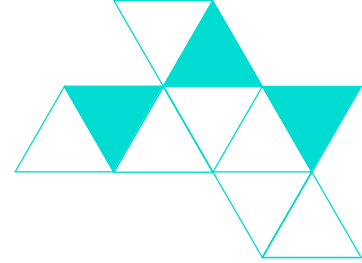
**GLH:** 1

### Unit Summary

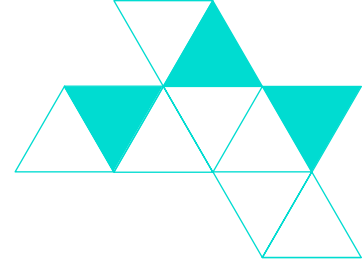
This unit enables learners to understand employment law and how to recruit and retain productive staff.

### Assessment Guidance

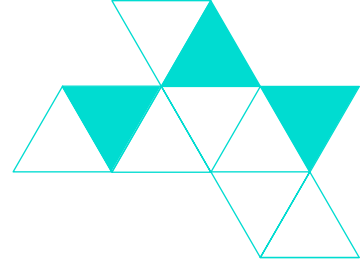
This unit must be assessed using the following method(s): exam



<b>Learning outcomes (LO)</b> <i>The learner will</i>	<b>Assessment criteria (AC)</b> <i>The learner can:</i>	<b>Additional information/notes</b>
<p><b>1.</b> Understand own responsibilities under company and employment law as a managing agent</p>	<p><b>1.1</b> Explain the key requirements of company law that affect own responsibilities as a Managing Agent</p> <p><b>1.2</b> Explain best practice and own obligations towards staff in:</p> <ul style="list-style-type: none"> <li>● Recruitment</li> <li>● Absence</li> <li>● Disciplinary</li> <li>● TUPE</li> <li>● Appraisals</li> <li>● Termination</li> </ul>	
<p><b>2.</b> Understand own responsibilities when employing site staff</p>	<p><b>2.1</b> Describe how to agree job descriptions and person specifications for site staff to comply with current legislation</p> <p><b>2.2</b> Explain own role during the site staff recruitment process</p>	



<b>Learning outcomes (LO)</b> <i>The learner will</i>	<b>Assessment criteria (AC)</b> <i>The learner can:</i>	<b>Additional information/notes</b>
<p><b>3.</b> Understand how to be a successful team leader</p>	<p><b>3.1</b> Explain how to manage a successful, motivated and healthy workforce</p> <p><b>3.2</b> Describe the attributes of a successful leader</p> <p><b>3.3</b> Outline best practice in managing poor performance</p> <p><b>3.4</b> Explain how to support own team in their professional development</p> <p><b>3.5</b> Explain the key principles of managers' duty of care towards their team</p>	



## Unit 7: Understand Project Management

**Unit Reference Number:** J/650/5087

**Level:** 4

**Credit:** 2

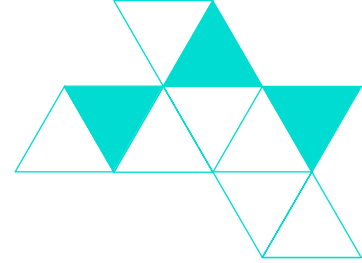
**GLH:** 1

### Unit Summary

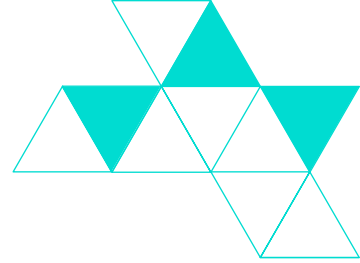
This unit enables learners to apply project management techniques within leasehold property management..

### Assessment Guidance

This unit must be assessed using the following method(s): exam



<b>Learning outcomes (LO)</b> <i>The learner will</i>	<b>Assessment criteria (AC)</b> <i>The learner can:</i>	<b>Additional information/notes</b>
<p><b>1.</b> Understand project management in relation to property management</p>	<p><b>1.1</b> Explain the role of the project manager</p> <p><b>1.2</b> Describe the project initiation process</p> <p><b>1.3</b> Describe the key planning tools used in project management</p> <p><b>1.4</b> Explain how to communicate with stakeholders of the project</p> <p><b>1.5</b> Explain how to manage stakeholders of the project</p> <p><b>1.6</b> Describe management techniques used in project management including poor performance management</p>	
<p><b>2.</b> Understand how to evaluate property management projects</p>	<p><b>2.1</b> Explain how to review the project scope</p> <p><b>2.2</b> Describe how to measure the success of a project</p> <p><b>2.3</b> Explain how to incorporate lessons learned in future projects</p>	



## Unit 8: Understand Health and Safety in Leasehold Property Management

**Unit Reference Number:** K/650/5088

**Level:** 4

**Credit:** 2

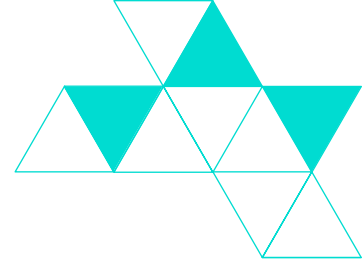
**GLH:** 1

### Unit Summary

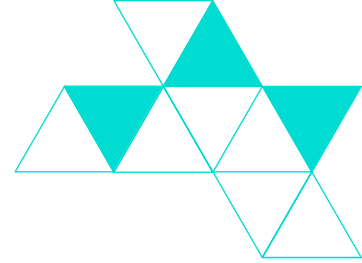
This unit enables learners to understand health and safety legislation, RICS health and safety requirements, risk management as well as disaster recovery and emergencies in leasehold property management.

### Assessment Guidance

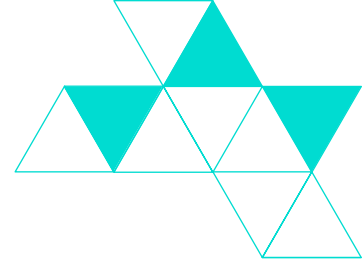
This unit must be assessed using the following method(s): exam



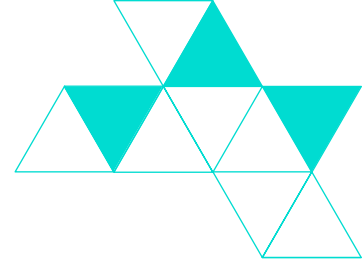
<b>Learning outcomes (LO)</b> <i>The learner will</i>	<b>Assessment criteria (AC)</b> <i>The learner can:</i>	<b>Additional information/notes</b>
<p><b>1.</b> Understand health and safety legislation in Leasehold Property Management</p>	<p><b>1.1</b> Explain the health and safety legal framework background</p> <p><b>1.2</b> Explain the law regarding ‘competence’ relating to health and safety</p> <p><b>1.3</b> Describe the criminal and civil law process regarding health and safety</p> <p><b>1.4</b> Explain the meaning of the term ‘responsible person’</p> <p><b>1.5</b> Define the legal basis for obligations on the landlord</p> <p><b>1.6</b> Explain the term ‘house in multiple occupation’ (HMO)</p> <p><b>1.7</b> Explain your liabilities for managing properties</p> <p><b>1.8</b> Describe the process for gaining admission to demised areas</p> <p><b>1.9</b> Define best practice in accord with the Reporting of Injuries, Diseases and Dangerous Occurrences (RIDDOR) regulations for incidents and accident reporting</p> <p><b>1.10</b> Explain the non-compliance obligations and consequences by landlords or agents</p> <p><b>1.11</b> Explain how to evaluate the fitness of a dwelling using the housing health and safety rating system (HHSRS)</p>	



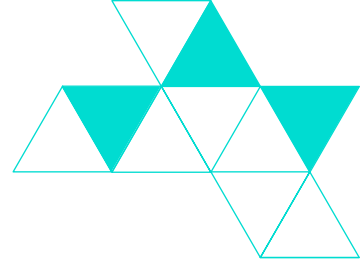
<b>Learning outcomes (LO)</b> <i>The learner will</i>	<b>Assessment criteria (AC)</b> <i>The learner can:</i>	<b>Additional information/notes</b>
<p><b>2.</b> Understand risk management in Leasehold Property Management</p>	<p><b>2.1</b> Define the key concepts in risk assessment</p> <p><b>2.2</b> Explain how to identify and maintain a safe system of work</p> <p><b>2.3</b> Explain the requirements for statutory testing and maintenance for items of plant and equipment</p> <p><b>2.4</b> Explain the term 'planned preventative maintenance' (PPM)</p> <p><b>2.5</b> Explain the management, inspections and contractual obligation to the fabric of the building</p> <p><b>2.6</b> Describe the various elements in the control of access into and around a building</p> <p><b>2.7</b> Explain the risks of lone working</p> <p><b>2.8</b> Explain the types of lone working</p> <p><b>2.9</b> Explain asset management in terms of the statutory obligations in place to ensure the safety and safe operation of a buildings plant and equipment</p>	
<p><b>3.</b> Understand disaster recovery</p>	<p><b>3.1</b> Explain the importance of an incident management and disaster recovery strategy when responding to a major incident</p>	



<b>Learning outcomes (LO)</b> <i>The learner will</i>	<b>Assessment criteria (AC)</b> <i>The learner can:</i>	<b>Additional information/notes</b>
<p><b>4.</b> Understand emergencies in Property Management</p>	<p><b>4.1</b> Explain fire safety risk management in life safety and protection of life</p> <p><b>4.2</b> Explain how fire doors are an integral part of the wider fire compartmentation</p> <p><b>4.3</b> Explain why furniture and furnishings safety must be fire resistant compliant</p> <p><b>4.4</b> Describe why kitchen and other extract systems must be kept clean</p> <p><b>4.5</b> Explain why detection systems and alarms are an integral part of a fire strategy</p> <p><b>4.6</b> Explain the circumstances where personal emergency evacuation plans (PEEPs) may be required and what they may contain</p> <p><b>4.7</b> Describe the legal requirements for smoke and carbon monoxide detection for landlords</p> <p><b>4.8</b> Explain the legal requirements for gas safety for landlords</p> <p><b>4.9</b> Explain the legal requirements for electrical safety for landlords</p>	



<b>Learning outcomes (LO)</b> <i>The learner will</i>	<b>Assessment criteria (AC)</b> <i>The learner can:</i>	<b>Additional information/notes</b>
<p><b>5.</b> Understand the potential impact of emerging legislation and guidance on health and safety and fire</p>	<p><b>5.1</b> Explain the importance of continual professional development in preparing for legislative changes in risk management</p> <p><b>5.2</b> Identify key emerging legislation that is likely to impact on residential property management</p> <p><b>5.3</b> Identify key emerging best practice guidance that is likely to impact on residential property management</p> <p><b>5.4</b> Explain how new laws and guidance directly affect residential property management practice within the context of health, safety and fire risk management</p>	



## Unit 9: Understand the Customer and the Consumer in Leasehold Property Management

**Unit Reference Number:** L/650/5089

**Level:** 4

**Credit:** 2

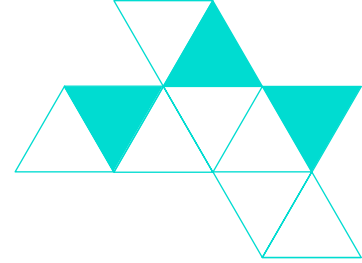
**GLH:** 1

### Unit Summary

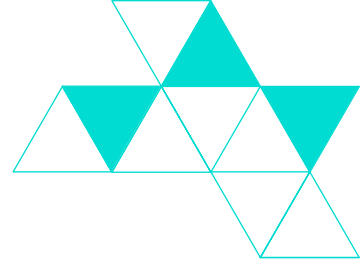
This unit enables learners to explain the business needs for customer service at a strategic and personal level.

### Assessment Guidance

This unit must be assessed using the following method(s): exam



<b>Learning outcomes (LO)</b> <i>The learner will</i>	<b>Assessment criteria (AC)</b> <i>The learner can:</i>	<b>Additional information/notes</b>
<p><b>1.</b> Understand own responsibilities in customer service</p>	<p><b>1.1</b> Describe how customer service operates alongside the contractual and legislative requirements of the residential property manager</p> <p><b>1.2</b> Describe how the needs of the client and customer, impact on the services and policies delivered by the managing agent</p> <p><b>1.3</b> Outline own obligations and benefits as a managing agent to contribute towards creating a culture of understanding customer needs</p> <p><b>1.4</b> Describe how the managing agent can measure customer satisfaction</p> <p><b>1.5</b> Explain the importance of <b>wider stakeholder</b> engagement when managing a development</p> <p><b>1.6</b> Explain the importance of customer engagement in managing a development</p>	<p><b>1.5 Wider stakeholders</b> may include:</p> <ul style="list-style-type: none"> <li>● Councillors</li> <li>● Neighbours</li> <li>● Local businesses</li> </ul>



## Unit 10: Understand Ethics and Behaviours in Leasehold Property Management

**Unit Reference Number:** T/650/5090

**Level:** 4

**Credit:** 2

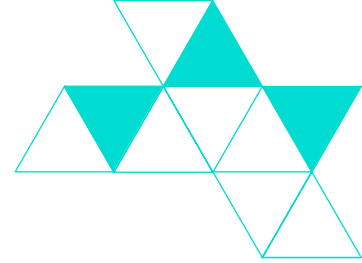
**GLH:** 1

### Unit Summary

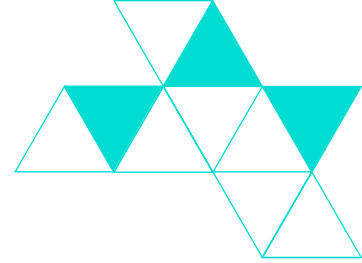
This unit enables learners to consider ethics and behaviours in leasehold property management, based on the International Ethics Standards (IES).

### Assessment Guidance

This unit must be assessed using the following method(s): exam



<b>Learning outcomes (LO)</b> <i>The learner will</i>	<b>Assessment criteria (AC)</b> <i>The learner can:</i>	<b>Additional information/notes</b>
<b>1.</b> Understand the basic principles of ethics in Leasehold Property Management	<b>1.1</b> Explain the meaning of the term ‘ethics’ <b>1.2</b> List the ethical areas applicable to leasehold property management <b>1.3</b> Outline the consequences of breaching ethical standards in property management	
<b>2.</b> Know how common ethical principles relate to property management	<b>2.1</b> Give examples of integrity as it relates to property management <b>2.2</b> Outline issues of honesty in property management <b>2.3</b> Explain the meaning of the term ‘respect’ as it relates to property management <b>2.4</b> Explain the meaning of the term ‘accountability’ as it relates to property management <b>2.5</b> Outline what is meant by the term ‘competence’ in property management <b>2.6</b> Explain the term ‘confidentiality’ as it relates to property management <b>2.7</b> Identify common conflicts of interests in property management	



<b>Learning outcomes (LO)</b> <i>The learner will</i>	<b>Assessment criteria (AC)</b> <i>The learner can:</i>	<b>Additional information/notes</b>
<b>3.</b> Know the importance of giving due attention to social and environmental considerations	<b>3.1</b> List the social and environmental considerations that are important in property management  <b>3.2</b> Explain how property management companies may choose to be more environmentally ethical in their operations	
<b>4.</b> Know how to behave when faced with ethical issues in property management	<b>4.1</b> Identify common legal requirements in property management  <b>4.2</b> Outline the steps to be taken when you identify a legal breach  <b>4.3</b> Outline the steps to be taken when faced with an ethical issue or dilemma in the workplace	
<b>5.</b> Understand the benefits of reflection in improving ethics and behaviours	<b>5.1</b> Explain the meaning of the term 'reflection' as it relates to the workplace  <b>5.2</b> Give examples of how reflection can benefit people and organisations in practice	



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