



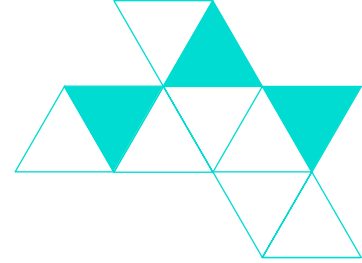
The
Property
Institute

Qualification Syllabus

Leasehold Management

Level 3 Associate Course and Exam





Unit 1: Understand Leasehold Property Management

Unit Reference Number: F/650/2592

Level: 3

Credit: 2

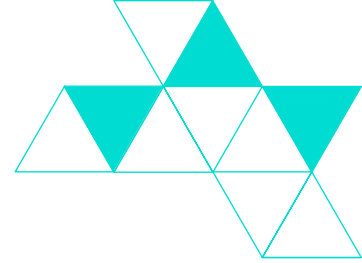
GLH: 1

Unit Summary

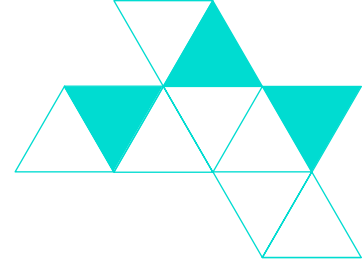
This unit enables learners to explain the management agreement and the lease, control the management of the residential buildings so that services can be provided in line with the agreed requirements.

Assessment Guidance

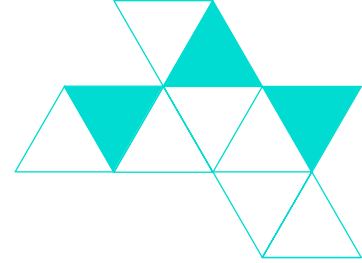
This unit must be assessed using the following method(s): exam.



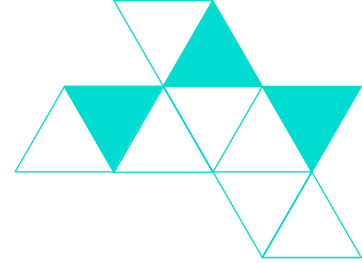
Learning outcomes <i>The learner will</i>	Assessment criteria <i>The learner can:</i>
1. Understand how to manage buildings	1.1 Explain the basic principles of appropriate insurance cover for buildings 1.2 Summarise the best practice in relation to the Reinstatement Cost Assessment 1.3 Outline the typical process for the effective handling of insurance claims 1.4 Explain how to handle findings of a site inspection 1.5 Explain how repair, maintenance and service needs for specific buildings are managed 1.6 Explain how to enforce the covenants of a lease, ensuring the building and services can be maintained 1.7 Describe the process that should be used to undertake a consultation with residents in line with the current S20 of the Landlord and Tenant Act 1985, regarding qualifying works and qualifying long term agreements 1.8 Explain the dispensation from S20 process as per S20ZA of the Landlord and Tenant Act 1985 1.9 Explain the correct process for the following: <ul style="list-style-type: none"> ● General risk assessment ● Fire risk assessment ● Ensuring the safety of residents, visitors, staff and contractors ● Reviewing the safety of residents, visitors, staff and contractors 1.10 Describe how communications with leaseholders should be undertaken to ensure that the information provided is in line with: <ul style="list-style-type: none"> ● Legislation ● Good practice 1.11 Outline key characteristics of Houses of Multiple Occupancy (HMOs) and its management



Learning outcomes <i>The learner will</i>	Assessment criteria <i>The learner can:</i>
2. Understand how to provide services and manage service providers	2.1 Explain what is required for drafting detailed specifications for services 2.2 Explain how to interpret detailed specifications for services 2.3 Explain how to undertake pre-contract inquiries on potential service providers to ensure their suitability, competence and capability for carrying out the required work 2.4 Explain why registration with specialist bodies and insurance requirements are required for service providers 2.5 Outline how to undertake the tendering process to ensure value for money and appropriate service provision 2.6 Explain how contracts are agreed for works with a service provider or contractor including: <ul style="list-style-type: none"> • arrangements for monitoring performance • dealing with shortcomings in the services provided • terminating the arrangements
3. Understand site staff employment process	3.1 Explain how job descriptions and person specifications are agreed for site staff 3.2 Describe the appointment process, including; <ul style="list-style-type: none"> • interviewing • providing terms of appointment • staff induction • training • supervision • appraisal 3.3 Summarise best practice in the case of lone working



Learning outcomes <i>The learner will</i>	Assessment criteria <i>The learner can:</i>
4. Understand why it is important to respond to leaseholders' needs	4.1 Outline the details that should be provided to a leaseholder about services provided 4.2 Explain how to support leaseholders seeking to assign their lease or seek landlord's permission, or for providing other property services outside of the general service charge 4.3 Explain how to respond to disputes in service delivery, in line with agreed complaints processes 4.4 Outline the information required for the Ombudsman following a referral 4.5 Describe when it is necessary to seek instructions from landlords or clients, when responding to breaches of the covenants of the lease or disputes arising from the lease 4.6 Explain how to deal with disputes between leaseholders including anti-social behaviour 4.7 Explain when disputes may need to be referred to other agencies for resolution
5. Understand how to work with clients	5.1 Describe the extent and limit of delegated powers 5.2 Explain how to obtain clients' instructions where decisions are needed that go beyond the delegated power of the managing agent or property manager 5.3 Outline potential conflicts between the needs of the client and the needs of leaseholders and to be able to provide advice and refer to best practice where these conflicts arise 5.4 Explain how to seek resolution of property management problems 5.5 Explain how to advise clients of available options for dispute resolution including application to a First Tier Tribunal (Property Chamber) or other dispute resolution/mediation services 5.6 Describe how to support leaseholders as outlined in the management agreement for: <ul style="list-style-type: none"> ● Residents' Management Companies ● Recognised Tenants' Associations ● Right to Manage companies



Unit 2: Understand the Legal Framework in Leasehold Property Management

Unit Reference Number: H/650/2593

Level: 3

Credit: 2

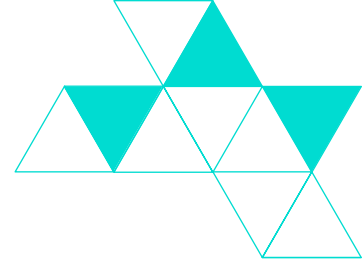
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Unit Summary

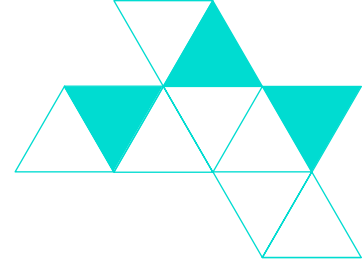
This unit enables learners to explain the law and/or legal matters contained in management agreements, leases and other legislative documents so that services can be provided in line with the law and requirements.

Assessment Guidance

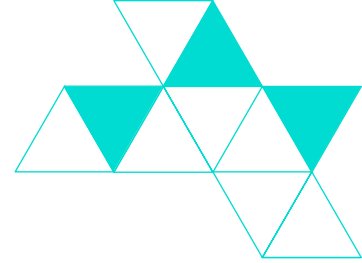
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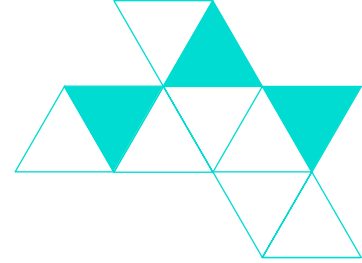
Learning outcomes <i>The learner will</i>	Assessment criteria <i>The learner can:</i>
1. Understand the management agreement	1.1 Explain the role of the client and various types of clients. 1.2 Summarise the scope of responsibilities of the managing agent or the property manager and who a property manager owes a duty of care to. 1.3 Explain the legal, financial, and customer service implications of the management agreement, including implication of long-term qualifying agreement. 1.4 Explain the relevant provisions of the management agreement including: a) Termination clause b) Dispute clause c) Term of the agreement



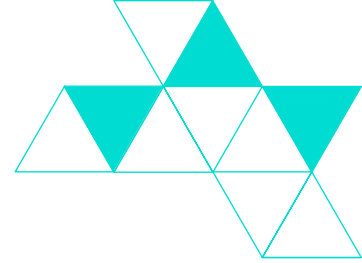
Learning outcomes <i>The learner will</i>	Assessment criteria <i>The learner can:</i>
2. Understand the Lease	<p>2.1 Explain how a lease is structured and who will be party to the lease</p> <p>2.2 Summarise how the lease works as a contract and as an interest in land</p> <p>2.3 Explain how the wording of a lease influences the work of the property manager</p> <p>2.4 Explain how covenants can control the service requirements for a residential block</p> <p>2.5 Explain the potential ramifications of a defective lease.</p> <p>2.6 Outline how the structure and wording of a lease may result in disputes about how services are delivered</p> <p>2.7 Explain the restrictions imposed by a lease on the parties of the lease. Parties may include:</p> <ul style="list-style-type: none"> ● Leaseholder ● Freeholder ● Residents Management Company etc. <p>2.8 Summarise situations where a landlord's consent is required.</p> <p>2.9 Explain how failing to comply with the covenants of a lease can affect both the landlord and the leaseholder.</p> <p>2.10 Explain how the management agreement links to the lease and the property manager's role in implementing the lease.</p>



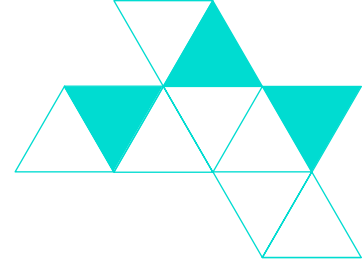
Learning outcomes <i>The learner will</i>	Assessment criteria <i>The learner can:</i>
3. Understand Leaseholders rights and responsibilities	3.1 Explain the legislative framework and Acts of parliament protecting leaseholders including; <ul style="list-style-type: none"> • the reasonableness of service charges • the requirements for consultation on qualifying works and long-term qualifying agreements • the powers to increase control over the decisions of the landlord • the right to manage 3.2 Explain the leaseholder's rights to information from the landlord 3.3 Summarise the leaseholder's ability to challenge service charges 3.4 Explain the leaseholder's ability to challenge management practices 3.5 Summarise the statutory rights for leaseholders at the expiry of a lease 3.6 Summarise the main industry relevant codes of practice and guidance advice, as supported by professional and trade bodies



Learning outcomes <i>The learner will</i>	Assessment criteria <i>The learner can:</i>
<p>4. Understand the dispute resolution and the work of the First Tier Tribunal (Property Chamber), the Upper Tribunal and the courts</p>	<p>4.1 Describe the extent and limit of delegated powers for dispute resolution</p> <p>4.2 Describe the options available for dispute resolution using Ombudsmen Services including;</p> <ul style="list-style-type: none"> ● The Surveyors' Ombudsman Service ● The Ombudsman Service Property ● The Housing Ombudsman ● The Local Government Ombudsman <p>4.3 Explain the jurisdiction of the First Tier Tribunals (Property Chamber)</p> <p>4.4 Explain the process of application to the First Tier Tribunals (Property Chamber)</p> <p>4.5 Explain how the determinations of the First Tier Tribunals (Property Chamber), impact on the practice of residential property management</p> <p>4.6 Explain how the determinations of the Upper Tribunal impact on the practice of residential property management</p> <p>4.7 Explain how the determinations of the courts impact on the practice of residential property management</p> <p>4.8 Show an awareness of other, less adversarial, forms of dispute resolution. Less adversarial forms of dispute resolution could be, for example, Adjudication and Meditation</p>



Learning outcomes <i>The learner will</i>	Assessment criteria <i>The learner can:</i>
<p>5. Understand Company and employment law</p>	<p>5.1 Explain the requirements of company law that affects</p> <ul style="list-style-type: none"> ● managing agents ● employers ● employees ● Resident Management Companies <p>5.2 Outline the fundamental obligation of employers in relation to staff employment in the following key areas:</p> <ul style="list-style-type: none"> ● Recruitment ● Absence ● Disciplinary ● Appraisal process ● Termination ● TUPE process <p>5.3 Describe basic requirements relating to the employer's liability insurance.</p>



Unit 3: Understand Accounting for Service Charges in Leasehold Property Management

Unit Reference Number: J/650/2594

Level: 3

Credit: 2

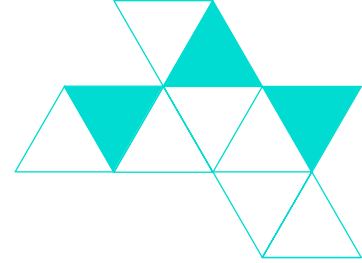
GLH: 1

Unit Summary

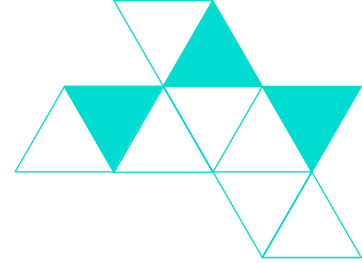
This unit enables learners to provide financial management services within property management.

Assessment Guidance

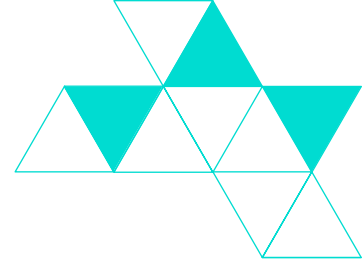
This unit must be assessed using the following method(s): exam



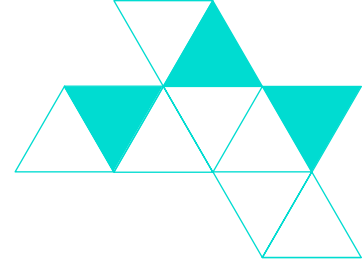
Learning outcomes <i>The learner will</i>	Assessment criteria <i>The learner can:</i>
1. Understand importance of the lease in setting up the structure	1.1 Describe how accounting for other people's money are set out in the lease and statute. Other people's money for example service charges. 1.2 Explain the schedules and apportionments – where they are set out and how they are determined. 1.3 Outline how to identify how many schedules exist in a lease and who pays towards what. 1.4 Explain how to identify what are recoverable costs and what are not. 1.5 Describe what to do if the lease does not allow full recovery of a schedule. 1.6 Outline what to do with the costs that are not recoverable. 1.7 Explain the contractual and legislative controls affecting the recovery of service charges.
2. Understand how to set a budget	2.1 Explain the best practice in setting a budget. 2.2 Summarise documents to assist with setting up a budget, including: <ul style="list-style-type: none"> ● prior budgets ● accounts ● actual spend for the current year ● capex plans ● preventative planned maintenance ● risk assessments ● plans as built ● operational maintenance manuals



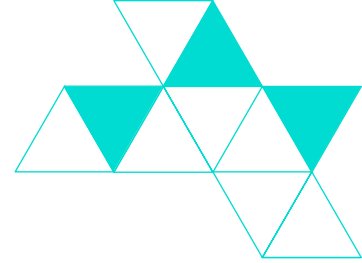
Learning outcomes <i>The learner will</i>	Assessment criteria <i>The learner can:</i>
3. Understand compliance with billing	3.1 Describe how failure to comply correctly when accounting for other people's money with lease and statute requirements may be an offence. 3.2 Outline the accounting requirements of trust accounts and the processes of ensuring good information management and credit control. 3.3 Summarise the key requirements in billing administrative charges, service charge and ground rent. 3.4 Explain Section 47 and Section 48 of Landlord and Tenant Act 1987. 3.5 Explain the document 'Summary of Rights and Obligations' and its role. 3.6 Outline how the possible differences in billing and collection dates can arise and are dealt with.



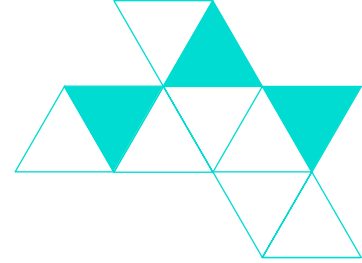
Learning outcomes <i>The learner will</i>	Assessment criteria <i>The learner can:</i>
4. Understand collection of service charges	<p>4.1 Explain the best practice for collecting service charges, in accordance with the related statutory notices.</p> <p>4.2 Explain the best practice for collecting ground rent, in accordance with the related statutory notices.</p> <p>4.3 Explain the best practice for collecting administrative charges, in accordance with the related statutory notices.</p> <p>4.4 Summarise allowance of payment plans and how they must be structured in relation to the lease.</p> <p>4.5 Explain best practice in credit control.</p> <p>4.6 Outline debt collection approaches.</p> <p>4.7 Summarise pre-action protocol requirements.</p> <p>4.8 Describe other channels for debt collection, including:</p> <ul style="list-style-type: none"> ● Forfeiture ● approaching mortgage lenders <p>4.9 Explain how interest is calculated on late payment and when it can be applied.</p> <p>4.10 Explain cash flow on service charge accounts and the steps required when overspending of service charge.</p> <p>4.11 Describe how to deal with under- and over-recovery.</p>



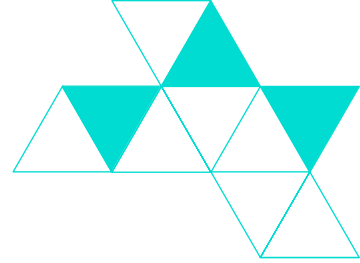
Learning outcomes <i>The learner will</i>	Assessment criteria <i>The learner can:</i>
<p>5. Understand holding client / customer monies</p>	<p>5.1 Summarise the requirements under Section 42 Landlord & Tenant Act 1987.</p> <p>5.2 Describe ring-fencing requirements.</p> <p>5.3 Explain the use of funds being limited as per lease.</p> <p>5.4 Explain the requirement for regular reconciliations and how to deal with differences.</p> <p>5.5 Outline how to manage petty cash.</p> <p>5.6 Describe how to allocate customer receipts appropriately.</p> <p>5.7 Explain options available to the property manager when service charge has low balance.</p> <p>5.8 Explain professional codes of practice with regard to the banking of client monies.</p> <p>5.9 Describe the Financial Conduct Authority (FCA) bank deposit protection scheme.</p> <p>5.10 Summarise the requirements of the Bribery Act 2010.</p>



Learning outcomes <i>The learner will</i>	Assessment criteria <i>The learner can:</i>
6. Supplier invoices	6.1 Describe the requirements for placing and approving work orders. 6.2 Summarise the procedure of processing and approving supplier invoices. 6.3 Outline VAT codes including: <ul style="list-style-type: none"> • Exempt • Standard rate • Reduced rate for domestic energy 6.4 Summarise VAT application depending on service provided. 6.5 Summarise Construction Industry Scheme (CIS) deductions and when it applies. 6.6 Explain competition legislation relevant to the property block management. 6.7 Explain money laundering rules relevant to management of service charges.



Learning outcomes <i>The learner will</i>	Assessment criteria <i>The learner can:</i>
7. Major works and Reserves	7.1 Describe how to set up and budget for reserve funds or sinking funds. 7.2 Summarise the purpose of a 10 year capex plan and how to use when setting annual contributions. 7.3 Explain how to determine what is an allowable reserve cost versus service charge. 7.4 Outline Section 20 criteria and how to determine when the process should be followed. 7.5 Explain calculating S20 thresholds for consultation in the case of major works or long-term contracts. 7.6 Explain the effect of major works estimates on raising the service charge demands and the creation of accounts. 7.7 Outline billing for major works when there is a shortfall against the estimates. 7.8 Describe reconciliation statements for unfunded or partially funded major works.
8. Year end accounting	8.1 Describe best practice for year-end service charge accounts including certification by necessary third party and auditing. 8.2 Explain separation of Residents Management Company and service charge activity. 8.3 Describe the treatment of surplus / deficits (Section 19(1)(a) Landlord & Tenant Act 1985 v Lease). 8.4 Explain the purpose of Section 20b Landlord and Tenant Act 1985 and when to apply. 8.5 Summarise the requirements of Sections 18–30 of the Landlord and Tenant Act 1985. 8.6 Summarise the requirements of Sections 31–48 of the Landlord and Tenant Act 1985. 8.7 Outline the costs of management which may legitimately be recharged to the service charge account. 8.8 Describe the declaration of commissions to clients and customers.



Unit 4: Understand the Principles of Building Construction in Leasehold Property Management

Unit Reference Number: K/650/2595

Level: 3

Credit: 2

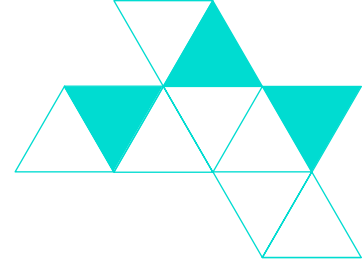
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Unit Summary

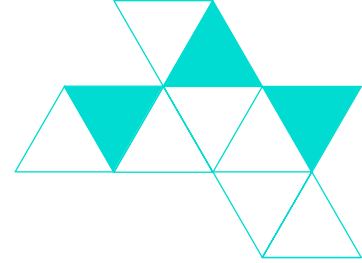
This unit enables learners to understand how building construction influences requirements for long term maintenance and what remedies are available should the structure or services fail.

Assessment Guidance

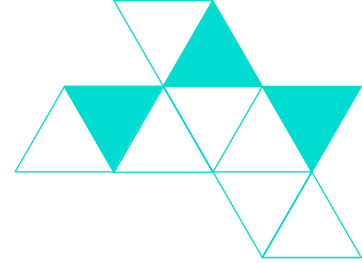
This unit must be assessed using the following method(s): exam



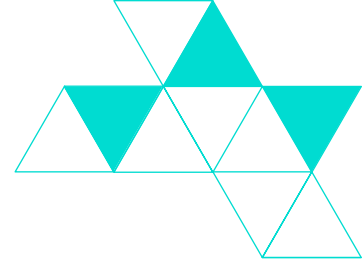
Learning outcomes <i>The learner will</i>	Assessment criteria <i>The learner can:</i> Identify, select	Indicative content <i>This enables you to expand on certain words/phrases so that everyone has the same meaning. It gives you the opportunity to suggest certain reading, websites etc. It also enables you to include assessment requirements, for example, how many times a learner should practice a task etc.</i>
1. Understand building construction	1.1 Explain the most common construction methods of the common services that are installed for each of the following: <ul style="list-style-type: none"> • Foundations • Superstructure • Wall structures • Purpose made and proprietary claddings • Windows and glass • Roofs and coverings • Rainwater goods and waste • Grounds 1.2 Explain the difference between substructure and superstructure. 1.3 Explain how the construction methods influences requirements for long term maintenance 1.4 Explain how the construction methods influences what remedies are available should the structure or services fail	This may include <ul style="list-style-type: none"> • Foundations – e.g. concrete strip footings, driven piles • Superstructure – e.g. solid wall, cavity wall, timber, metal or concrete frames • Wall structures – e.g. brick, heavy or light weight blocks, timber panels, stone, façade systems, insulation & fire barrier protection, balconies • Purpose made and proprietary claddings – e.g. glass or stone; ACM, HPL and EPM • Windows – e.g. timber double hung sashes, side hung casements, single glazing, sealed double glazing • Roofs – e.g. pitched or flat; coverings – e.g. for pitched roofs i.e. clay or concrete tiles, timber shingles, slates, and for flat roofs i.e. felt, asphalt, lead, copper, zinc • Rainwater goods and waste – e.g. materials – cast, iron, PVCu; methods of disposal e.g. mains drainage, soak-away, macerator • Grounds – e.g. retaining walls



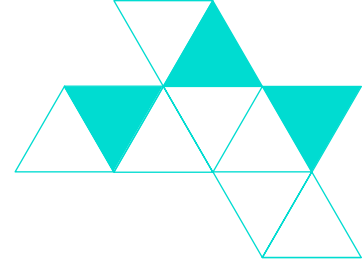
Learning outcomes <i>The learner will</i>	Assessment criteria <i>The learner can:</i>	Indicative content
1. Understand building construction	1.5 Describe how to identify potential defects as follows: <ul style="list-style-type: none"> ● Cracking ● Damp ● Leaks Wood Rot and Insect Infestation 1.6 1.6 Explain defects to warranties or insurance policies to provide for recovery of costs in repair of consequential damage. 1.7 Explain the difference between latent and patent defects. 1.8 Describe the purpose of legally required location and maintenance requirements of mechanical and engineering plant such as: <ul style="list-style-type: none"> 1.8.1 Lifts 1.8.2 Boilers (e.g. hot water and central heating) 1.8.3 Air conditioning (e.g. heating and cooling) 1.8.4 Risers (e.g. dry and wet) 1.8.5 Water (e.g. storage, softeners) 1.8.6 Fire / heat / smoke detection, alarms and sprinklers, AOV system 1.8.7 Lighting and emergency lighting 1.8.8 Power 1.9 Explain the principles of good asset management and planned maintenance programmes	This may include <ul style="list-style-type: none"> ● Cracking – e.g stress fractures, settlement, subsidence ● Damp – e.g. penetrating, rising, condensation ● Leaks – e.g. plumbing, drainage, roof coverings, overflows ● Wood Rot and Insect Infestation – e.g. dry and wet rot, common furniture beetle, death watch beetle; and preventative measures – e.g. treatments, painting and staining



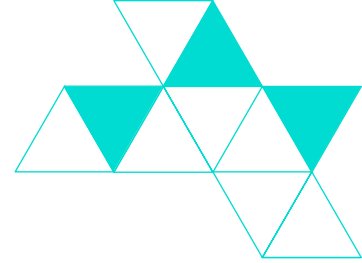
Learning outcomes <i>The learner will</i>	Assessment criteria <i>The learner can:</i>	Indicative content
<p>2. Understand the repairs, maintenance and defects</p>	<p>2.1 Justify the needs to maintain property inspection records</p> <p>2.2 Explain why technical specialists carry out inspections</p> <p>2.3 Explain the definitions of works for immediate and long-term repairs</p> <p>2.4 Summarise authorisation for works, contracts and appointing contractors for works and the information required by all parties and third parties such as insurers.</p> <p>2.5 Explain the financial implications of undertaking works for the client and the leaseholders especially regarding the costs of providing environmentally sustainable solutions or those related to renewable energy.</p>	



Learning outcomes <i>The learner will</i>	Assessment criteria <i>The learner can:</i>	Indicative content
3. Understand the regulations affecting the buildings	3.1 Justify the main regulations affecting the construction and maintenance of residential buildings, the purpose of these regulations and their impact on property management practices. 3.2 Summarise the purpose and impact of statutory controls for the following: <ul style="list-style-type: none"> ● Planning ● Conservation Areas ● Listed Buildings and those of Townscape Merit ● Tree Preservation Orders 3.3 Explain regulatory controls such as: <ul style="list-style-type: none"> 3.3.1 Health & Safety at Work. 3.3.2 Construction Design and Management (CDM) Regulations. 3.3.3 Provision and Use of Work Equipment (PUWER). 3.3.4 Environmental Protection Agency requirements. 3.3.5 Health and Safety Executive compliant items such as dry risers, smoke vents, static electrical tests. 3.3.6 The Lifting Operations and Lifting Equipment Regulations (LOLER) 1998 	



Learning outcomes <i>The learner will</i>	Assessment criteria <i>The learner can:</i>	Indicative content
3. Understand the regulations affecting the buildings	3.4 Summarise British Standards and other associated requirements such as: 3.4.1 European Standards 3.4.2 BS numbers 3.4.3 Kite Marking 3.4.4 ISO certification	



Unit 5: Understand Mixed Tenure Management and Affordable Housing

Unit Reference Number: L/650/2596

Level: 3

Credit: 2

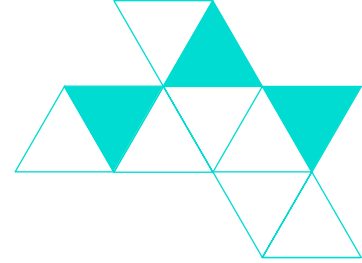
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Unit Summary

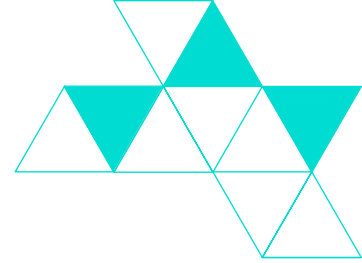
This unit enables learners to explain the different tenures provided in different developments and of any management implications associated with mixed tenure schemes.

Assessment Guidance

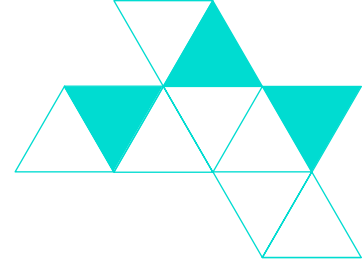
This unit must be assessed using the following method(s): exam



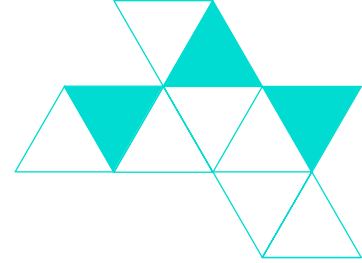
Learning outcomes <i>The learner will</i>	Assessment criteria <i>The learner can:</i>	Indicative content
1. Understand the Management of mixed tenure developments	1.1 Describe the different tenures available in different developments. 1.2 Explain management implications associated with mixed tenure schemes. 1.3 Summarise the roles and responsibilities of intermediate landlords, especially those who are also landlords to affordable housing leaseholders. 1.4 Explain the difference between FRI (Full repair and insure) and IRI (Internal repair and insure) commercial leases and their impact on building management. 1.5 Describe who is liable for various service charges. 1.6 Explain capped service charges for certain dwellings and how this impact on overall financial management. 1.7 Explain how mixed tenure properties can impact on Section 20 consultation procedures and timescales. 1.8 Explain the responsibilities of the client for wider estate management including possible management of the public realm and associated facilities.	1.7 Could include: <ul style="list-style-type: none"> • Play areas • car parking • private roads



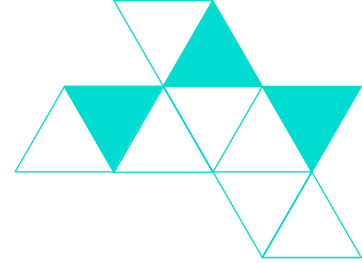
Learning outcomes <i>The learner will</i>	Assessment criteria <i>The learner can:</i>	Indicative content
<p>2. Understand social neighbourhood management</p>	<p>2.1 Explain the implications of sub leases and weekly tenancy agreements on the management of the overall scheme.</p> <p>2.2 Describe how landlords and managing agents work with Registered Providers, housing associations, Arms-Length Management Organisations (ALMOs), local authority and tenant associations.</p>	



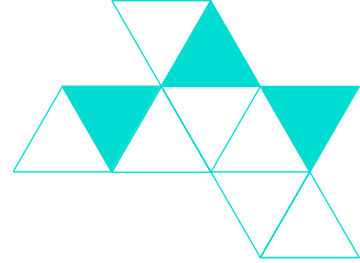
Learning outcomes <i>The learner will</i>	Assessment criteria <i>The learner can:</i>	Indicative content
3. Understand affordable housing management	<p>3.1 Explain how the legal arrangements of social housing differ from general leasehold properties.</p> <p>3.2 Explain how the Homes and Communities Agency works including their service standards.</p> <p>3.3 Describe funding structures for social housing development.</p> <p>3.4 Explain how housing associations/Registered Providers and their governance work.</p> <p>3.5 Describe the different requirements of leasehold, assured, assured shorthold, flexible and secure tenancies.</p> <p>3.6 Describe the purpose of affordable housing schemes for 'home buy' and shared ownership.</p> <p>3.7 Explain the tenant complaints handling procedures and the work of the Housing Ombudsman.</p> <p>3.8 Describe the limits imposed on service charges to leaseholders under the right to buy and right to acquire regulations.</p> <p>3.9 Describe how and when mandatory and discretionary reduction of service charges may apply.</p> <p>3.10 Explain how extra-contractual payment options may be offered and operated, including equity share, equity loan and buyback procedures.</p>	



Learning outcomes <i>The learner will</i>	Assessment criteria <i>The learner can:</i>	Indicative content
3. Understand affordable housing management	3.11 Explain staircasing rights and procedures (both upwards and downwards). 3.12 Describe how housing associations, as shareholders, can contribute to the governance of Residents' Management Companies (RMCs). 3.13 Describe the role and power of the Rent Officer. 3.14 Describe social housing providers customer service best practices. 3.15 Summarise the Decent Homes Standard 3.16 Explain the framework for setting service charges within the affordable housing framework. 3.17 Outline the operation of Section 20 consultation within a partnering and European procurement framework.	



Learning outcomes <i>The learner will</i>	Assessment criteria <i>The learner can:</i>	Indicative content
4. Understand vulnerable and difficult resident's management	4.1 Describe the support and enforcement frameworks available to property managers. 4.2 Outline the requirements of the Equality Act 2010. 4.3 Explain the protected characteristics of individuals in relation to discrimination and the implications for property managers. 4.4 Explain how to support tenants with known vulnerabilities or special adaptations of the building. 4.5 Describe the role of social housing providers in working with multi-agency partners to address anti-social behaviour 4.6 Describe how enforcement action can be taken against those residents presenting unacceptable behaviour or otherwise breaching covenants.	



Unit 6: An Introduction to the Customer and Consumer in Leasehold Property Management

Unit Reference Number: M/650/2597

Level: 3

Credit: 2

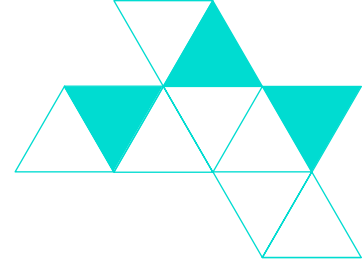
GLH: 1

Unit Summary

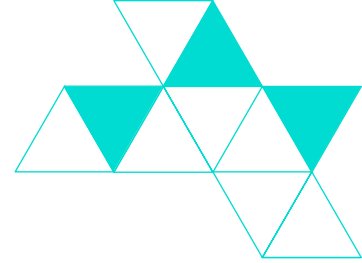
This unit enables learners to explain the business needs for customer service at a strategic, administrative and personal level. They should also be aware of the importance of their work where it affects their customer's homes, and so also their personal lives.

Assessment Guidance

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



Learning outcomes <i>The learner will</i>	Assessment criteria <i>The learner can:</i>
1. Understand the importance of a professional attitude in delivering excellence in customer service	1.1 Explain types of clients in property management and how customer service is affected by the type of client. 1.2 Explain how to build rapport with your clients, customers and consumers. 1.3 Explain the importance of standards and procedures in customer service. 1.4 Identify the differences between an internal customer and an external customer. 1.5 Explain the significance and characteristics of the customer service environment. 1.6 Describe 'the three ring model' of customer service and its application in property management.
2. Understand customer service behaviours	2.1 Describe the key behaviours that support great customer service. 2.2 Explain what 'reactive' and 'proactive' customer service is. 2.3 Explain how to improve customer service through being proactive. 2.4 Describe the process dealing with an enquiry from opening to closing.
3. Understand resilience, discrimination and equality in customer service	3.1 Explain the importance of resilience in customer service. 3.2 Explain stress, its symptoms and how to manage it. 3.3 Outline the protected characteristics under the Equality Act 2010. 3.4 Describe types of discrimination. 3.5 Explain your responsibilities in relation to equality. 3.6 Explain the key concept of equality and discrimination. 3.7 Explain unconscious bias and how to deal with it.



Unit 7: Understand Health and Safety in Leasehold Property Management

Unit Reference Number: R/650/2598

Level: 3

Credit: 2

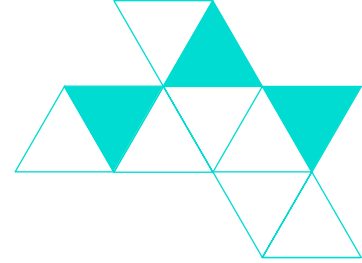
GLH: 1

Unit Summary

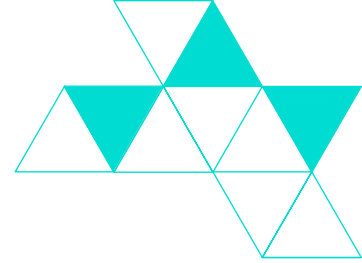
This unit is about health and safety legislation, RICS health and safety requirements, risk management as well as disaster recovery and emergencies in leasehold property management.

Assessment Guidance

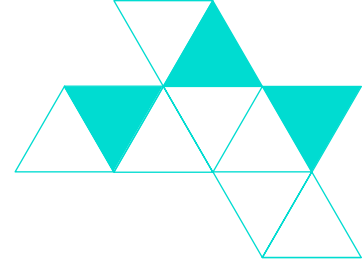
This unit must be assessed using the following method(s): exam



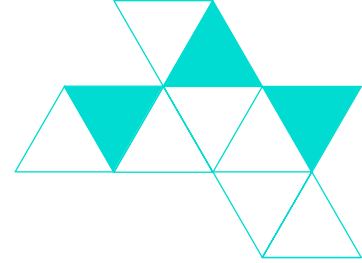
Learning outcomes <i>The learner will</i>	Assessment criteria <i>The learner can:</i>
1. Understand health and safety legislation in Leasehold Property Management	1.1 Explain the health and safety legal framework background 1.2 Explain the law regarding ‘competence’ relating to health and safety 1.3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



Learning outcomes <i>The learner will</i>	Assessment criteria <i>The learner can:</i>
2. Understand risk management in Leasehold Property Management	2.1 Define the key concepts in risk assessment. 2.2 Explain how to identify and maintain a safe system of work. 2.3 Explain the requirements for statutory testing and maintenance for items of plant and equipment. 2.4 Explain the term planned preventative maintenance (PPM). 2.5 Explain the management, inspections and contractual obligation to the fabric of the building. 2.6 Describe the various elements in the control of access into and around a building. 2.7 Explain the risks and types of lone working. 2.8 Explain asset management in terms of the statutory obligations in place to ensure the safety and safe operation of a buildings plant and equipment. 2.9 Explain the process to ensure contractor competence, procurement, assessment and management. 2.10 Define when a 'permit to work' is required. 2.11 Explain your duties in asbestos management. 2.12 Describe the legal requirements when working at height. 2.13 Explain the importance of water hygiene management. 2.14 Explain the legal definition of 'construction work' and the regulations for health and safety considerations.
3. Understand disaster recovery	3.1 Explain the importance of an incident management and disaster recovery strategy when responding to a major incident.



Learning outcomes <i>The learner will</i>	Assessment criteria <i>The learner can:</i>
4. Understand emergencies in Property Management	4.1 Explain fire safety risk management in life safety and protection of life. 4.2 Explain how fire doors are an integral part of the wider fire compartmentation. 4.3 Explain why furniture and furnishings safety must be fire resistant compliant. 4.4 Describe why kitchen and other extract systems must be kept clean. 4.5 Explain why detection systems and alarms are an integral part of a fire strategy. 4.6 Explain the circumstances where a personal emergency evacuation plans (PEEPs) may be required and what it may contain. 4.7 Describe the legal requirements for smoke and carbon monoxide detection for landlords. 4.8 Explain the legal requirements for gas safety for landlords. 4.9 Explain the legal requirements for electrical safety for landlords.
5. Understand the potential impact of emerging legislation and guidance on health and safety and fire	5.1 Explain the importance of continual professional development in preparing for legislative changes in risk management 5.2 Identify key emerging legislation that is likely to impact on residential property management 5.3 Identify key emerging best practice guidance that is likely to impact on residential property management



Unit 8: Understand Ethics and Behaviours in Leasehold Property Management

Unit Reference Number: T/650/2599

Level: 3

Credit: 2

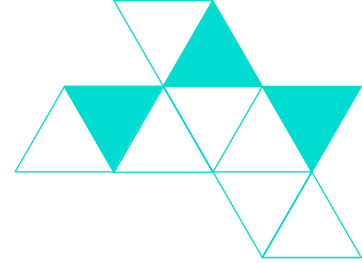
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Unit Summary

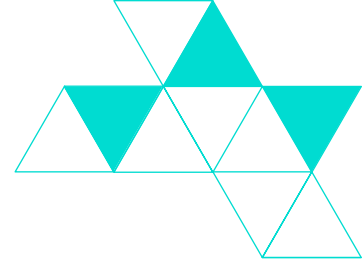
This unit is about enabling managing agents to give consideration towards ethics and behaviours in leasehold property management, based on the International Ethics Standards (IES).

Assessment Guidance

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



Learning outcomes <i>The learner will</i>	Assessment criteria <i>The learner can:</i>
1. Understand the basic principles of ethics and behaviours in Leasehold Property Management	1.1 Explain the meaning of the term ‘ethics’. 1.2 List the ethical areas applicable to leasehold property management. 1.3 Outline the consequences of breaching ethical standards in property management.
2. Understand how common ethical principles relate to leasehold property management	2.1 Give examples of ‘integrity’ as it relates to leasehold property management. 2.2 Outline why ‘honesty’ is essential in leasehold property management 2.3 Explain the meaning of ‘respect’ relating to leasehold property management. 2.4 Explain the meaning of ‘accountability’ relating to leasehold property management. 2.5 Outline what is meant by ‘competence’ in leasehold property management. 2.6 Explain ‘confidentiality’ relating to leasehold property management. 2.7 Identify common conflicts of interests in leasehold property management. 2.8 Outline the steps to be taken when faced with an ethical issue or dilemma in the workplace.



Learning outcomes <i>The learner will</i>	Assessment criteria <i>The learner can:</i>
3. Understand the importance of giving due attention to social and environmental considerations	3.1 List the social and environmental considerations that are important in leasehold property management. 3.2 Explain how leasehold property management companies may choose to be more environmentally ethical in their operations.
4. Understand how to behave when faces with legal and ethical issues in leasehold property management	4.1 Identify common legal requirements in leasehold property management. 4.2 Outline the steps to be taken when you identify a legal breach.
5. Understand the benefits of reflection in improving ethics and behaviours	5.1 Explain the meaning of the term ‘reflection’ relating to the workplace. 5.2 Give examples of how reflection can benefit people and organisations in practice.



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