



**Level 3 Diploma in**

**Property: Residential Property Letting and  
Management**

Qualification Specification

Qualification Recognition Number: 600/0988/3

ABBE Qualification Code: DipRPLML311

**December 2017**

## **Why this document is being revised**

This document has been revised by ABBE in December 2017. A summary of the changes made to this document is, as follows:

- Total Qualification Time has been added: TQT 370

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# 1. ABBE - The Awarding Body for the Built Environment

## 1.1 Introduction

ABBE, the Awarding Body for the Built Environment is a forward thinking organisation that offers a range of apprenticeships, qualifications, benefits and support.

ABBE is regulated by Ofqual for the delivery of a range of qualifications. Our qualifications are nationally recognised helping learners to achieve their full potential and ambitions. The full range of qualifications can be found on our website.

## 1.2 Mission Statement

**Our Values - Quality through Standards:** Our aim is to provide a high quality experience by building a strong community of mutual support and trust. We can use our collective talents to build meaningful partnerships to help us all to achieve our goals. ABBE is a recognised Awarding Organisation with strong professional integrity.

**Our Vision:** Is that every learner is confident, successful and has the opportunity to achieve their full potential.

**Our Mission:** ABBE Educates, inspires and empowers learners

## 1.3 ABBE Qualification Specification

This is the ABBE Qualification Specification for the ABBE Level 3 Diploma in Property: Residential Property Letting and Management. The aim of this specification is to provide learners and centres with information about the content of this qualification.

This specification is a live document and, as such, will be updated when required.

Additional qualification details are available for ABBE approved centres in the ABBE qualification handbook.

## 1.4 Enquiries

Any enquiries relating to this qualification should be addressed to:

Awarding Body for the Built Environment (ABBE)  
Birmingham City University  
iCentrum, 6 Holt Street  
Birmingham  
B7 4BP

Tel: 0121 331 5174

Email: [abbeenquiries@bcu.ac.uk](mailto:abbeenquiries@bcu.ac.uk)

Website: [www.abbeqa.co.uk](http://www.abbeqa.co.uk)



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## 2. Qualification Information

### 2.1 Qualification Objective

The ABBE Level 3 Diploma in Property: Residential Property Letting and Management qualification has been developed to enable those working in lettings negotiation, property management, marketing or junior management in a residential lettings environment to take a qualification which not only recognises their current skills and knowledge but gives them an opportunity to develop them further.

The purpose of the qualification is to confirm occupational competence.

On successful completion of the qualification learners can apply for:

- Membership of the Association of Residential Letting Agents
- Associate membership of the Guild of Letting and Management
- RICS assessment of professional competence

### 2.2 Who could take this Qualification?

In order to take the qualification, learners must already be working in a residential lettings environment but it is suitable for those with limited experience, to prepare them for working in this sector, or for more experienced workers to recognise their existing abilities.

### 2.3 Qualification Number

ABBE Level 3 Diploma in Property: Residential Property Letting and Management: 600/0988/3

### 2.4 Qualification Level

This qualification has been listed on the Regulated Qualifications Framework (RQF) at: Level 3

### 2.5 Total Qualification Time

This qualification is allocated Total Qualification Time (TQT) this includes Guided Learning (GL) expressed in hours, which indicates the number of hours of supervised or directed study time and assessment. Credit has also be allocated to this qualification.

- The Total Qualification Time (TQT) for this qualification is: 370
- Guided Learning (GL) for this qualification is: 132
- Credit Value: 37 credits

### 2.6 Progression

This qualification has been designed to encourage participation in education and training in other related areas by:

- enabling current residential letting agency employees to demonstrate the skills and knowledge that they have gained through their employment enabling learners to achieve a nationally recognised qualification
- providing a template for 'best practice' for new entrants to residential letting and management as a guide for their learning and development



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This qualification forms part of a wider suite of property related qualifications including the:

- ABBE Level 2 Certificate in Property: Residential Property Lettings and Management
- ABBE Level 2 Certificate in Property: Sale of Residential Property
- ABBE Level 3 Diploma in Property: Sale of Residential Property

All of these qualifications have been structured in such a way as to allow easy transfer between them to encourage learners to continue developing.

## 2.7 Age ranges

Pre 16	No
16-18	Yes
18+	Yes
19+	Yes

## 2.8 Structure of the Qualification

To achieve this qualification, learners must successfully complete the seven mandatory units plus 13 credits from the optional units.

Where a learner is following an apprenticeship programme they must also complete sufficient credits from the additional units.

Mandatory Units			
URN	Unit Name	Credit Value	Level
M/600/2775	Reduce risks to health and safety in the workplace	3	2
T/601/2949	Understanding professional conduct in a property environment	1	2
R/601/2960	Understanding legislation, guidelines, codes of practice, contractual arrangements and statutory information in residential lettings	6	3
J/601/2972	Maintain the security of individuals and property in a property environment	2	2
Y/601/3107	Obtain instructions and agree marketing activities for properties	5	3
L/601/3122	Progress applications to rent property	3	3
R/601/3123	Negotiate tenancies	4	3
Optional Units Group A			
J/601/3068	Monitor changes and assess their impact in the local property market	5	3
J/601/3071	Undertaking market appraisals and advising on the presentation of properties	5	3
Y/601/3124	Prepare inventories for properties to let	3	3
T/601/3129	Visit tenanted properties	3	3
K/601/3130	Facilitate the maintenance of managed properties	3	3
M/601/3131	Renew and extend tenancy agreements and review rents	3	3
Y/601/3141	Bring tenancy agreements to an end	3	3
K/601/3144	Implement check-out procedures and dispersals in a letting environment	4	3
Optional Units Group B			
D/601/3108	Prepare for the marketing of properties to let	2	2



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Y/601/3110	Match and promote properties to individuals	3	2
J/601/3121	Conduct accompanied viewings of properties	3	2
K/601/3127	Implement pre-entry and hand-over procedures for property to let	2	2
Additional Units Apprenticeships Only (4 credits in total is required from this group)			
R/600/6351	Develop yourself in the job role	2	2
A/502/7524	Employment rights and responsibilities in the facilities management, housing and property sectors	2	2

## 2.9 Barred Units

Units with the same title at different levels or units with the same content cannot be combined in the same qualification.

## 2.10 Language

ABBE qualifications and assessment materials will be provided through the medium of English.

## 2.11 Grading

This qualification is: Pass/Fail

## 2.12 Pre-course Procedures

This qualification is available to anyone who is capable of reaching the required standards. They have been developed free from any barriers that unfairly restrict access or progression thereby promoting equal opportunities.

## 2.13 Qualification Review Boards

Qualification Review Boards (QRBs) are set up for each qualification. The Boards are drawn from employers, centres, Higher Educational Institutes (HEIs) and others with a vested interest in the sector in which the qualification is used. The purpose of the QRB is to ensure that the content of the qualification and the proposed assessment methodology are fit for purpose and are appropriate to meet the requirements of the sector.

QRBs are ongoing and will be scheduled for specific points within the qualification lifetime; at the notional mid-point and again towards the review date of the qualification. During this process, the QRB will consider any feedback received on the performance of the qualification and will consider if the content, structure, purpose and assessment methodology remain appropriate to the needs of the sector. This will help to improve both our qualification and the specification.



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## 3. Qualification Unit(s)\*

### Unit 1: Reduce risks to health and safety in the workplace

Unit Reference Number: M/600/2775

Level: 2

Credit: 3

#### 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 Guidance

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

- Portfolio of evidence

<b>Learning Outcome The learner will:</b>	<b>Assessment Criterion The learner can:</b>
1. Know about their organisation's health and safety procedures	1.1 Describe their responsibilities and legal duties for health and safety in the workplace
	1.2 Identify responsibilities and legal duties for health and safety specific to their own job role
	1.3 Name and locate the person responsible for health and safety in their area of work
	1.4 Describe where and when to get additional health and safety assistance
	1.5 Give reasons why it is important to follow manufacturer's instructions for the safe use of equipment materials and products
2. Know how to identify the hazards in the workplace	2.1 Define the term 'hazard'
	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
	2.3 Give reasons why it is important to remain alert to the presence of hazards in the whole workplace
	2.4 Describe why personal presentation and behaviour is important in maintaining health and safety in the workplace
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



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	3.4 Describe the risks to the environment which may be present in the workplace and their own job
4. Be able to identify the hazards and risks in the workplace	4.1 Select the workplace instructions 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
5. Be able to reduce the risks to health and safety in the workplace	5.1 Perform duties in accordance with workplace instructions, manufacturer's instructions and legal requirements
	5.2 Use equipment materials and products safely and in accordance with instructions
	5.3 Use relevant equipment to control risks to health and safety
	5.4 Make suggestions on how to reduce risks to health and safety in the workplace to the relevant person
	5.5 Describe any differences between workplace instructions and manufacturer's instructions and report these to the relevant person
	5.6 Describe how their personal presentation and behaviour at work could cause risks to the health and safety of him/herself and others



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## Unit 2: Understanding professional conduct in a property environment

Unit Reference Number: T/601/2949

Level: 2

Credit: 1

### 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 Guidance

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

- Portfolio of evidence

<b>Learning Outcome The learner will:</b>	<b>Assessment Criterion The learner can:</b>
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



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### Unit 3: Understanding legislation, guidelines, codes of practice, contractual arrangements and statutory information in residential lettings

Unit Reference Number: R/601/2960

Level: 3

Credit: 6

#### Unit Summary

This unit is about the legislation, guidelines, codes of practice and statutory information requirements which need to be adhered to in a lettings environment. It also includes knowledge of the contractual arrangements in terms of tenancy agreements and terms of business for lettings.

#### Assessment Guidance

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

- Portfolio of evidence

<b>Learning Outcome The learner will:</b>	<b>Assessment Criterion The learner can:</b>
1. Understand legislation, guidelines and codes of practice in residential lettings	1.1 List the legislation, guidelines and codes of practice relevant to the: <ul style="list-style-type: none"><li>• security of individuals</li><li>• security of property</li><li>• providing information to tenants and landlords</li><li>• production of marketing materials for residential properties to let</li><li>• erection of boards</li><li>• undertaking market appraisals</li><li>• advising landlords on the presentation of properties</li><li>• obtaining instructions and agreeing marketing plans</li><li>• preparing properties for marketing</li><li>• contacting prospective tenants</li><li>• describing properties</li><li>• organising viewings of properties</li><li>• progressing viewings of properties</li><li>• conducting viewings of properties to let</li><li>• progressing applications to rent properties</li><li>• negotiating tenancies</li><li>• preparing inventories</li><li>• handing over residential property to tenants</li><li>• tenant deposits</li><li>• tenancy agreements</li><li>• rent reviews</li><li>• ending tenancies</li><li>• check-out procedures</li></ul>



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	<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 tenants and landlords</li> <li>• the display of marketing materials for residential properties to let</li> <li>• the erection of boards</li> <li>• undertaking market appraisals</li> <li>• advising landlords on the presentation of properties</li> <li>• obtaining instructions</li> <li>• agreeing marketing plans</li> <li>• preparing properties for marketing</li> <li>• contacting prospective tenants</li> <li>• describing properties</li> <li>• organising viewings of properties</li> <li>• progressing viewings of properties</li> <li>• conducting viewings of properties to let</li> <li>• negotiating tenancies</li> <li>• preparing inventories</li> <li>• handing over residential property to tenants</li> <li>• tenant deposits</li> <li>• tenancy agreements</li> <li>• rent reviews</li> <li>• ending tenancies</li> <li>• check-out procedures</li> </ul>
<p>2. Understand statutory information in residential lettings</p>	<p>2.1 List the typical range of statutory documents required for properties to let</p> <p>2.2 Explain the purpose of statutory information for property to let</p> <p>2.3 Explain why it is important to comply with statutory information requirements for property to let</p> <p>2.4 Explain why it is important to ensure that all statutory information for property to let is in place in line with legal requirements</p>
<p>3. Understand tenancy agreements and terms of appointment</p>	<p>3.1 List types of tenancy agreements</p> <p>3.2 Describe the terms associated with different types of tenancy agreements</p> <p>3.3 List the types of special terms or conditions which may be requested for tenancy agreements</p> <p>3.4 List the types of conditions which can legally be included in tenancy agreements</p> <p>3.5 Explain the difference between:</p> <ul style="list-style-type: none"> <li>• landlords special terms</li> <li>• restrictive covenants</li> </ul> <p>3.6 Describe the general terms of appointment for own organisation</p> <p>3.7 Explain how the general terms of appointment can vary</p>



## Unit 4: Maintain the security of individuals and property in a property environment

Unit Reference Number: J/601/2972

Level: 2

Credit: 2

### 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 Guidance

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

- Portfolio of evidence

<b>Learning Outcome The learner will:</b>	<b>Assessment Criterion The learner can:</b>
1. Know how to maintain the security of self and others	1.1 State the main types of risks: <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>
	1.2 Describe the organisational procedures for minimising the risks to individuals
	1.3 State the importance of monitoring the whereabouts of colleagues
	1.4 Describe what constitutes: <ul style="list-style-type: none"><li>• unexpected circumstances</li><li>• absences</li><li>• departures from agreed schedules</li></ul>
	1.5 Describe the procedures which should be followed in the event of an emergency
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



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3. Know how to maintain the security of property	3.1 State the main types of risks to: <ul style="list-style-type: none"> <li>• personal property</li> <li>• residential properties</li> </ul>
	3.2 Describe the actions and organisational procedures appropriate to minimising the risks to: <ul style="list-style-type: none"> <li>• personal property</li> <li>• residential properties</li> </ul>
	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
4. Be able to maintain the security of self and others	4.1 Identify risks: <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>
	4.2 Apply relevant security procedures and guidelines for addressing risks to: <ul style="list-style-type: none"> <li>• self</li> <li>• colleagues</li> <li>• others</li> </ul>
	4.3 Provide clear and accurate information to relevant colleagues regarding own travelling arrangements and schedules when visiting properties and sites
	4.4 Follow the organisational procedures for monitoring the whereabouts of colleagues
	4.5 Respond appropriately to any unexpected circumstances, absences and departures from agreed schedules
	4.6 Follow organisational procedures in the event of an emergency
5. Be able to maintain the security of property, personal belongings and information	5.1 Identify the security risks affecting: <ul style="list-style-type: none"> <li>• properties</li> <li>• personal belongings</li> </ul>
	5.2 Apply the relevant security procedures and guidelines for protecting: <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>
	5.3 Follow organisational procedures for reporting any security equipment which is not functioning properly



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	5.4 Follow organisational procedures for the security of information including the disposal of information which is no longer required
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## Unit 5: Obtain instructions and agree marketing activities for properties

Unit Reference Number: Y/601/3107

Level: 3

Credit: 5

### 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 Guidance

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

- Portfolio of evidence

<b>Learning Outcome The learner will:</b>	<b>Assessment Criterion The learner can:</b>
1. Know how to obtain instructions	1.1 Describe the organisational procedures for: <ul style="list-style-type: none"><li>• obtaining instructions</li><li>• agreeing marketing activities</li><li>• progressing marketing activities</li></ul>
	1.2 State the importance of obtaining all relevant information prior to seeking to obtain an instruction for a particular property
	1.3 Describe how to conduct and structure a sales presentation when seeking to obtain instructions
	1.4 Describe the difference between the features and benefits of the organisations services
	1.5 List typical buying signals that customers might provide: <ul style="list-style-type: none"><li>• verbal</li><li>• non-verbal</li></ul>
2. Know how to agree planned marketing activities	2.1 State the advantages and disadvantages of using the following types of marketing activities: <ul style="list-style-type: none"><li>• newspaper advertising</li><li>• web-based media</li><li>• mail-shots</li><li>• boards</li></ul>
	2.2 List the main types of buyers/tenants of residential properties
	2.3 Identify factors that influence prospective buyers/tenants decisions
	2.4 Identify changes occurring in the local property market that will impact on the selection of marketing activities



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	2.5 List typical questions asked about marketing properties
	2.6 State how typical questions about marketing properties should be addressed
	2.7 Describe how conflicts of interest: <ul style="list-style-type: none"> <li>• can arise when marketing properties</li> <li>• should be addressed</li> </ul>
3. Be able to obtain instructions	3.1 Review all information relevant to: <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>
	3.2 Discuss with the customer: <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 and relating these clearly to the customer's circumstances and the property</li> </ul>
	3.3 Identify any features of the organisations services which do not meet the customer's requirements and address these
	3.4 Identify buying signals given by the customer and act upon them: <ul style="list-style-type: none"> <li>• verbal</li> <li>• non-verbal</li> </ul>
	3.5 Prioritise any concerns the customer has about making the instruction
	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
4. Be able to agree marketing plans	4.1 Confirm all relevant information about the property including the main selling features
	4.2 Review the outcomes of marketing activities used for similar properties
	4.3 Discuss with the customer marketing activities which are likely to be the most effective
	4.4 Agree with the customer: <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>



	4.5 Confirm the customer's acceptance of the agreed marketing activities
	4.6 Maintain records of the agreed marketing activities in line with organisational procedures
	4.7 Ensure that marketing activities are progressed in line with organisational procedures



## Unit 6: Progress applications to rent property

Unit Reference Number: L/601/3122

Level: 3

Credit: 3

### Unit Summary

This unit is about obtaining information regarding prospective tenants relevant to assessing their suitability towards the property.

It includes arranging checks and undertaking referencing. During this process it is important to take into account legislation e.g. the Data Protection Act.

### Assessment Guidance

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

- Portfolio of evidence

<b>Learning Outcome The learner will:</b>	<b>Assessment Criterion The learner can:</b>
1. Understand organisational procedures for progressing applications to rent property	1.1 State what information can be provided to prospective tenants
	1.2 State who should be consulted internally about the suitability of prospective tenants
	1.3 Describe the organisational procedures for recording information about qualifying tenants
	1.4 State the limits of own responsibility and authority for progressing applications to rent property
	1.5 State the organisational procedures for reporting issues that are outside own responsibility and authority when progressing applications to rent property
2. Know how to qualify prospective tenants	2.1 Explain the importance of gaining the consent of the prospective tenant to seek further information about them
	2.2 Describe factors that may affect prospective tenants: <ul style="list-style-type: none"><li>• ability to rent property</li><li>• acceptability to landlords</li></ul>
	2.3 State what information is needed to determine tenants' circumstances
	2.4 State the importance of explaining to the tenant why information about them is required
	2.5 State what information must be obtained from other organisations
	2.6 State the importance of maintaining confidentiality when obtaining information from other organisations



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	2.7 List issues that can arise when seeking information
	2.8 Describe how to address any issues that can arise when seeking information
3. Be able to obtain information to qualify prospective tenants	3.1 Confirm information about prospective tenants to establish their circumstances relevant to renting a property
	3.2 Obtain permission from the prospective tenant to seek further information from other organisations where relevant
	3.3 Follow organisational procedures to obtain information regarding prospective tenants from other organisations
	3.4 Gather relevant information from prospective tenants, including preferred timescales for moving in
	3.5 Explain to prospective tenants any administration fees charged by the organisation including: <ul style="list-style-type: none"> <li>• purpose of the fees</li> <li>• times when fees are charged</li> <li>• potential refunds</li> </ul>
4. Be able to progress applications to rent property	4.1 Identify any problems with obtaining the required information
	4.2 Follow organisational procedures to undertake referencing
	4.3 Report the results of the referencing process to relevant people within the organisation
	4.4 Check that prospective tenants have understood the information and encourage questions
	4.5 Maintain up-to-date records in line with organisational procedures
	4.6 Comply with all relevant legislation, guidelines and codes of practice when progressing applications to rent property



## Unit 7: Negotiate tenancies

Unit Reference Number: R/601/3123

Level: 3

Credit: 4

### Unit Summary

This unit is about taking instructions regarding the let of a property and progressing applications to rent with all relevant parties to a successful conclusion. It includes addressing any factors which impact upon the progress of the application such as changes to circumstances or the outcomes of reports in line with your responsibility and authority.

### Assessment Guidance

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

- Portfolio of evidence

<b>Learning Outcome The learner will:</b>	<b>Assessment Criterion The learner can:</b>
1. Understand the procedures for negotiating tenancies	1.1 Describe the organisational procedures for drawing up tenancy agreements
	1.2 List the documents which should be signed and dated by all parties including where relevant any guarantor
	1.3 Explain the organisational procedures for dealing with inventories
	1.4 List methods of payment which are acceptable to own organisation
	1.5 Explain the organisational procedures for registering tenant deposits where applicable
2. Be able to negotiate tenancies	2.1 Negotiate and agree rent subject to the approval of the landlord
	2.2 Provisionally agree with the tenant: <ul style="list-style-type: none"><li>• date for moving in</li><li>• duration of the tenancy</li></ul>
	2.3 Provisionally agree any special terms which may need to be included in the tenancy agreement
	2.4 Ensure the landlord is kept fully informed of negotiations and agrees with provisional terms for the tenancy agreement
	2.5 Agree the type and terms of the tenancy with all relevant parties
	2.6 Ensure prospective tenants are aware of their rights and responsibilities in respect of the tenancy agreement
	2.7 Ensure tenants are aware of: <ul style="list-style-type: none"><li>• initial amounts payable on signing the agreement</li><li>• forms of payment accepted by the organisation</li></ul>
	2.8 Draw up tenancy agreements in line with organisational procedures



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## Unit 8: Monitor changes and assess their impact in the local property market

Unit Reference Number: J/601/3068

Level: 3

Credit: 5

### 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 Guidance

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

- Portfolio of evidence

<b>Learning Outcome The learner will:</b>	<b>Assessment Criterion The learner can:</b>
1. Understand how to monitor changes in the local property market	1.1 Explain why it is important to monitor changes in the local property market
	1.2 Describe the importance of determining a meaningful time-span over which changes can be monitored
	1.3 Describe how to determine the length of a "meaningful" time-span
	1.4 List sources of information which can be used to monitor changes in the local property market
	1.5 Describe how to access information about the local property market
	1.6 Explain why it is important to check that information is accurate, complete and current before use
	1.7 List local and national factors which can cause changes in the local property market
	1.8 List the typical types of changes which can occur in the local property market
2. Know how to assess the impact of changes in the local property market	2.1 Describe how changes in the local property market can impact on: <ul style="list-style-type: none"><li>• the market as a whole</li><li>• particular types of property</li></ul>
	2.2 Explain why it is important to assess the relative impact of changes identified in the local property market
	2.3 Explain how the marketing of different types of properties can address changes in the local property market



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	2.4 Describe the organisational procedures for reporting the outcomes of monitoring
	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
	2.6 Describe the importance of communicating the level of confidence that can be placed in the assessment of the local property market
3. Be able to monitor changes in the local property market	3.1 Determine the following: <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>
	3.2 Identify and review information about the local property market including: <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>
4. Be able to assess the impact of changes in the local property market	4.1 Analyse all relevant information to identify: <ul style="list-style-type: none"> <li>• factors affecting the local property market</li> <li>• consequent changes</li> </ul>
	4.2 Assess which local and national factors are likely to impact on the local property market in the future
	4.3 Assess the impact of changes in the local property market on different types of property
	4.4 Justify own assessment of the likely impact of changes in the local property market
	4.5 Make reasoned recommendations about how different types of property should be marketed as a result of findings



## Unit 9: Undertaking market appraisals and advising on the presentation of properties

Unit Reference Number: J/601/3071

Level: 3

Credit: 5

### Unit Summary

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

### Assessment Guidance

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

- Portfolio of evidence

<b>Learning Outcome The learner will:</b>	<b>Assessment Criterion The learner can:</b>
1. Understand organisational procedures for undertaking market appraisals and advising on the presentation of properties	1.1 Describe how health, safety and security issues should be addressed when visiting a property to undertake market appraisals
	1.2 Describe: <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>
2. Know how to undertake market appraisals	2.1 List factors that affect the sale/rental value and saleability of individual properties
	2.2 State the importance of obtaining all relevant information prior to undertaking an appraisal
	2.3 List what information is required prior to undertaking an appraisal
	2.4 Describe how to obtain relevant information prior to undertaking an appraisal
	2.5 List types of change that can affect the local property market
	2.6 Describe how changes to the local property market can have an impact on properties being appraised
	2.7 Describe how to inspect properties to the standard required by own organisation
	2.8 State the importance of inspecting properties to the standard required by own organisation
	2.9 List types of documents that may be required for the appraisal



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	2.10 Describe the circumstances when documents are required for appraisals
	2.11 Describe how to obtain documents required for appraisals
3. Know how to develop relationships with customers	3.1 List the main types of buyers/tenants of residential properties
	3.2 Identify factors that influence prospective buyers/tenants decisions
	3.3 Describe the importance of: <ul style="list-style-type: none"> <li>• checking customer understanding of market appraisals</li> <li>• providing advice to customers</li> </ul>
	3.4 State methods used for checking customer understanding and providing advice
	3.5 Give examples of typical questions asked by customers about market appraisals
	3.6 State how typical questions from customers should be addressed
	3.7 List ways of presenting properties
	3.8 Give examples of the aspects of properties that can create a positive or negative impression
4. Be able to prepare for appraisals of properties	4.1 Obtain information relevant to: <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>
	4.2 Identify changes occurring in the local property market
	4.3 Assess the impact that changes to the market may have on the property to be appraised
	4.4 Confirm with the customer: <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>
5. Be able to appraise properties	5.1 Undertake the market appraisal at the agreed time
	5.2 Carry out an inspection covering: <ul style="list-style-type: none"> <li>• the property internally and externally</li> <li>• dimensions</li> <li>• factors relevant to the property</li> </ul>
	5.3 Identify and confirm any work which is claimed to have been carried out to the property
	5.4 Obtain documents relevant to the property



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	5.5 Identify the property's main selling features and other factors that may impact upon its sale/rental value
	5.6 Agree the property's main selling features and other factors with the customer
	5.7 Complete the market appraisal following organisational procedures
	5.8 Confirm the next steps with the customer following the market appraisal
	5.9 Maintain clear and accurate records of market appraisals



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## Unit 10: Prepare inventories for properties to let

Unit Reference Number: Y/601/3124

Level: 3

Credit: 3

### Unit Summary

This unit is about creating inventories for properties to let. An inventory describes the condition of all the fixtures and fittings of a property as well as any furnishings and other items which might be provided with the property.

### Assessment Guidance

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

- Portfolio of evidence

<b>Learning Outcome The learner will:</b>	<b>Assessment Criterion The learner can:</b>
1. Understand organisational procedures for preparing inventories for properties to let	1.1 Explain the purpose of inventories for residential property
	1.2 Explain the organisational procedures for ensuring that a consistent approach for recording inventories is followed
	1.3 State where inventories should be stored
	1.4 State how to access inventories
	1.5 Describe the organisations responsibility to the landlord and tenant regarding the inventory
2. Know how to prepare an inventory for properties to let	2.1 Explain why timing is important when preparing an inventory
	2.2 State why it is important to ensure own health and safety when recording an inventory
	2.3 State what should be recorded in an inventory
	2.4 Explain the level of detail required when recording an inventory
	2.5 Describe additional factors that should be taken into account with fitted appliances
3. Be able to prepare inventories for properties to let	3.1 Ensure that appropriate arrangements have been made for access to the property requiring an inventory
	3.2 Ensure that the locations of meters at the property have been identified prior to the visit
	3.3 Ensure that appropriate arrangements for own safety and security at the time of the inventory have been made
	3.4 Follow a methodical approach to prepare the inventory
	3.5 Ensure that meter readings for utilities are taken at the time of the inventory



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	3.6 Follow a consistent approach for detailing the condition of furniture, fixtures, fittings and decoration
	3.7 Use appropriate, time referenced photographs to support inventory comments
	3.8 Secure the property on departure
	3.9 Prepare inventory documentation in line with organisational procedures
	3.10 Request agreement to the inventory from the landlord in line with organisational procedures



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## Unit 11: Visit tenanted properties

Unit Reference Number: T/601/3129

Level: 3

Credit: 3

### Unit Summary

This unit is about performing routine visits of let properties. During visits there may be maintenance issues which come to light. It is important to ensure that visits are well planned and that consent is gained to enter the property.

### Assessment Guidance

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

- Portfolio of evidence

<b>Learning Outcome The learner will:</b>	<b>Assessment Criterion The learner can:</b>
1. Understand organisational procedures for arranging visits of tenanted properties	1.1 Describe the organisational procedures for organising visits to tenanted properties
	1.2 Describe the organisational procedures for agreeing the acceptable length of time between visits with landlords and tenants
2. Know how to prepare to visit tenanted properties	2.1 List the main types of risk to: <ul style="list-style-type: none"><li>• self</li><li>• colleagues</li><li>• others</li></ul> when visiting: <ul style="list-style-type: none"><li>• vacant properties</li><li>• occupied properties</li></ul>
	2.2 Explain the organisational procedures for minimising risks when visiting properties
	2.3 Describe the actions that should be taken to reduce risks when visiting properties
	2.4 Explain the responsibilities of the landlord and tenant according to the tenancy agreement and relevant legislation
	2.5 State how to make arrangements for access to properties
	2.6 Describe the organisational procedures in place if access is denied to properties
	2.7 Describe the arrangements in place for reporting any issues which arise following a visit
3. Be able to visit tenanted properties	3.1 Check the terms of the tenancy agreement for: <ul style="list-style-type: none"><li>• period of notice to be given to tenants</li><li>• other relevant information</li></ul>
	3.2 Ensure that visits are undertaken following the terms of business agreed with the landlord
	3.3 Contact the tenant to arrange a visit in line with organisational procedures



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	3.4 Review the general condition of the property at the last visit including the broad contents of the inventory
	3.5 Ensure that formal identification is provided on arrival at the property
	3.6 Gather information about problems the tenant has with the property
	3.7 Advise the tenant of the actions that will be taken to resolve problems identified
	3.8 Check the general condition of the property regarding: <ul style="list-style-type: none"> <li>• on-going routine maintenance</li> <li>• neglect or abuse by the tenant</li> <li>• illegal use</li> </ul>
	3.9 Ensure that outstanding issues have been dealt with appropriately
	3.10 Confirm the results of the visit to both the tenant and the landlord
	3.11 Complete documentation outlining the results of the visit in line with organisational procedures



## Unit 12: Facilitate the maintenance of managed properties

Unit Reference Number: K/601/3130

Level: 3

Credit: 3

### Unit Summary

This unit is about facilitating the maintenance of managed properties. You will be required to deal with a number of people as part of the process including the landlord, tenant and any maintenance contractor.

### Assessment Guidance

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

- Portfolio of evidence

<b>Learning Outcome The learner will:</b>	<b>Assessment Criterion The learner can:</b>
1. Know the organisational procedures for facilitating the maintenance of managed properties	1.1 Identify sources of requests for repairs or maintenance
	1.2 Explain when it is appropriate to make contact with other parties according to: <ul style="list-style-type: none"><li>• type of property</li><li>• agreement between the organisation and landlord</li></ul>
	1.3 State the obligations the organisation has in relation to the tenancy agreement
	1.4 Describe the organisational procedures and best practice to follow when: <ul style="list-style-type: none"><li>• approving contractors</li><li>• instructing and appointing approved contractors</li><li>• dealing with contractors in emergencies</li><li>• recording information relating to repairs</li><li>• gaining access to properties to complete repairs</li><li>• contractors are denied access to properties</li><li>• dealing with complaints about repairs</li></ul>
2. Know how to facilitate the maintenance of managed properties	2.1 Explain how to check whether there are any warranties in place which may affect the method of dealing with the issue
	2.2 Describe what to do when the problem originates from an adjoining property
	2.3 State the obligations the landlord has in relation to the property
	2.4 State the obligations the tenant has for reporting maintenance issues
	2.5 List types of people that should be kept informed at all stages in the process



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3. Be able to carry out administrative tasks regarding the maintenance of managed properties	3.1 Gather information about the requirements for maintenance of a property
	3.2 Follow organisational procedures for logging requests for repairs and maintenance
	3.3 Ensure that requests for repairs and maintenance are dealt with in a timely manner following organisational procedures
	3.4 Check that requested maintenance is own organisation's responsibility to organise
	3.5 Check that payment arrangements are agreed and in place prior to work commencing
	3.6 Check that adequate funds are available prior to work commencing
4. Be able to facilitate the maintenance of managed properties	4.1 Contact all relevant parties to ensure they are aware of the issue that has been reported
	4.2 Contact the landlord to gain their approval for work in line with own organisation's terms of business
	4.3 Contact relevant contractors to get quotations for requested repairs and maintenance
	4.4 Appoint a contractor to carry out the work in line with organisational procedures
	4.5 Ensure that access arrangements for properties are agreed before contractors arrive
	4.6 Ensure that all relevant parties are kept informed of progress



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## Unit 13: Renew and extend tenancy agreements and review rents

Unit Reference Number: M/601/3131

Level: 3

Credit: 3

### Unit Summary

This unit is about negotiating renewals, extensions and rent reviews for existing tenancy agreements. Renewals can take place because the tenancy has come to the end of its period or because of a change of tenants in multiple occupancy tenancies.

### Assessment Guidance

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

- Portfolio of evidence

<b>Learning Outcome The learner will:</b>	<b>Assessment Criterion The learner can:</b>
1. Understand the procedures for renewing tenancy agreements	1.1 Explain how market conditions can influence the terms of the tenancy agreement
	1.2 Describe the advantages and disadvantages of different approaches to ensuring the tenancy continues for: <ul style="list-style-type: none"><li>• tenants</li><li>• landlords</li></ul>
	1.3 Describe the organisational procedures for renewing tenancy agreements
	1.4 Explain why it is important to review all relevant information before negotiating tenancy renewals
	1.5 Describe the organisational procedures for drawing up tenancy agreements
	1.6 List the documents which should be signed and dated by all parties including where relevant any guarantor for renewals
	1.7 Describe potential problems that might occur when renewing tenancies and how to address them
	1.8 State the limits of own responsibility and authority for renewing tenancies
	1.9 State the organisational procedures for reporting issues that are outside own responsibility and authority when renewing tenancies
2. Understand the procedures for review rents	2.1 Describe how appropriate notices for rent reviews should be used
	2.2 Explain how prescribed rent review forms relate to different tenancy agreements
	2.3 Describe why it is important to implement the rent review procedures in line with organisational and legal requirements
	2.4 Explain why it is important to review all relevant information before negotiating rent reviews



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	2.5 List the documents which should be signed and dated by all parties including where relevant any guarantor for rent reviews
	2.6 Describe why it is important to record the dates for future rent reviews in line with the terms of the agreement and legislation
	2.7 Describe potential problems that might occur when reviewing rents and how to address them
	2.8 State the limits of own responsibility and authority for reviewing rents
	2.9 State the organisational procedures for reporting issues that are outside own responsibility and authority when reviewing rents
3. Be able to renew tenancy agreements	3.1 Review the terms of the original tenancy agreement
	3.2 Gather information from the landlord and tenant regarding revisions requested to the terms of the tenancy agreement
	3.3 Provisionally agree any amendments to the tenancy agreement required by the tenant
	3.4 Ensure the landlord is kept fully informed of negotiations and is in agreement with any revised terms provisionally agreed with the tenant
	3.5 Draw up renewal documentation in line with organisational procedures
	3.6 Gain signatures from all relevant parties and execute renewal documentation
4. Be able to review rents	4.1 Review the terms of the original tenancy agreement to determine the type of agreement in place
	4.2 Determine the appropriate notice, timing and service of the rent increase
	4.3 Review all relevant information and negotiate the revised rent with all relevant parties
	4.4 Implement the rent increase following organisational procedures
	4.5 Serve the appropriate documentation to all relevant parties
	4.6 Maintain up-to-date records of rent reviews
	4.7 Inform relevant colleagues of rent reviews and their outcomes
	4.8 Ensure that the revised rent is implemented at the correct time
	4.9 Refer issues outside own responsibility and authority to other individuals within the organisation as appropriate
	4.10 Ensure that future rent review dates are recorded in line with organisational procedures
	4.11 Ensure that future rent review dates are recorded for action when due within appropriate timescales



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## Unit 14: Bring tenancy agreements to an end

Unit Reference Number: Y/601/3141

Level: 3

Credit: 3

### Unit Summary

This unit is about ending existing tenancies. Tenancy agreements can end for a number of reasons e.g. because the tenancy has come to the end of its period, non-payment of rent and landlord's own circumstances. There may be notices to be served to tenants or the tenant may be giving notice themselves.

### Assessment Guidance

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

- Portfolio of evidence

<b>Learning Outcome The learner will:</b>	<b>Assessment Criterion The learner can:</b>
1. Understand the procedures for ending tenancy agreements and serving notices	1.1 Give examples of the reasons why a tenancy could be terminated
	1.2 List types of notices that can be served to tenants specifying: <ul style="list-style-type: none"><li>• the timescales for serving the notice</li><li>• who is able to serve the notice</li></ul>
	1.3 Describe the organisation's procedures for serving notices to tenants
	1.4 Describe the organisation's procedures for dealing with properties which have been abandoned during the period of the tenancy agreement
2. Be able to end tenancy agreements and serve notices	2.1 Review the terms of the tenancy agreement
	2.2 Serve and receive notices and deal with them following organisational and legal requirements: <ul style="list-style-type: none"><li>• from tenants</li><li>• from landlords</li></ul>
	2.3 Establish the reason for the tenancy coming to an end
	2.4 Advise landlords when there is reason to give notice to tenants
	2.5 Serve relevant notices to tenants following organisational and legal requirements
	2.6 Ensure that the landlord and tenants are kept fully informed throughout the process



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## Unit 15: Implement check-out procedures and dispersals in a letting environment

Unit Reference Number: K/601/3144

Level: 3

Credit: 4

### Unit Summary

This unit is about following the correct procedures for checking-out tenants from residential properties. It includes calculating any deductions and dispersing deposits in line with organisational and legal requirements.

### Assessment Guidance

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

- Portfolio of evidence

<b>Learning Outcome The learner will:</b>	<b>Assessment Criterion The learner can:</b>
1. Understand how to complete check-out procedures	1.1 Describe the reasons why a tenancy might be terminated
	1.2 Describe the organisational procedures for completing a check-out
	1.3 State how to access inventories
	1.4 Explain why it is important to check the condition of properties against inventories
	1.5 State the importance of checking-in keys
	1.6 Explain why it is important to take full meter readings at the time of the check-out
2. Understand how to calculate deductions and disperse deposits	2.1 Explain the procedure for the dispersal of deposits to tenants
	2.2 List the types of deductions which can legally be made from deposits
	2.3 Describe how to calculate the amount of the deposit to be dispersed to the tenant
	2.4 Describe the organisational procedures for dispersals of deposits to tenants including the usual timescale
	2.5 Explain the organisational procedures and legal requirements for dealing with disputes regarding deposits
3. Be able to complete check-out procedures	3.1 Confirm the reason for the tenancy coming to an end
	3.2 Follow the organisational procedures for checking out tenants
	3.3 Perform a check-out inspection using the inventory
	3.4 Take full meter readings for utilities



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4. Be able to calculate deductions and disperse deposits	4.1 Evaluate any damage which has occurred to: <ul style="list-style-type: none"> <li>• the property</li> <li>• fixtures and fittings</li> <li>• furniture</li> </ul>
	4.2 Calculate the amount of the deposit which should be returned to the tenant taking into account any deductions
	4.3 Report the results of the check-out inspection to: <ul style="list-style-type: none"> <li>• the landlord</li> <li>• the tenant</li> <li>• appropriate colleagues</li> </ul>
	4.4 Deal with disputes according to organisational procedures and legal requirements



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## Unit 16: Prepare for the marketing of properties to let

Unit Reference Number: D/601/3108

Level: 2

Credit: 2

### Unit Summary

This unit is about preparing properties for marketing within a lettings environment. It includes the administration involved in gathering information and producing documents in line with the marketing activities planned for a property. It includes liaising with the landlord and those involved in producing the required documents to ensure that the finished products are correct and available on time. It is important to follow your organisation's procedures.

### Assessment Guidance

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

- Portfolio of evidence

<b>Learning Outcome The learner will:</b>	<b>Assessment Criterion The learner can:</b>
1. Know how to prepare for the marketing of properties to let	1.1 Describe the organisational procedures for preparing and producing documents for residential properties to let
	1.2 State the typical costs and timescales for the production of different types of documents for residential properties to let
	1.3 State the importance of planning marketing activities for individual residential properties
	1.4 Describe why it is important to review all relevant information before preparing documents
	1.5 List the main types of tenants of residential property
	1.6 State the information which is of importance to different types of tenants
	1.7 State the importance of gaining the approval of the landlord to produce documentation about a property
2. Know how to arrange for the production of final documentation for residential property to let	2.1 Explain why it is important to ensure that all people involved in the production of documents are fully briefed
	2.2 Give examples of problems that can occur when preparing final documentation for marketing properties to let
	2.3 Describe how to overcome problems which occur when preparing final documentation for marketing properties to let
	2.4 State who final marketing materials should be made available to
3. Be able to prepare for the marketing of properties to let	3.1 Review all available information regarding the let relevant to the agreed marketing activities
	3.2 Identify: <ul style="list-style-type: none"><li>• marketing activities proposed for the property</li><li>• associated timescales</li></ul>



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	3.3 Identify the information to be conveyed to all relevant parties, including details of the property and its main features
	3.4 Prepare marketing materials in line with planned marketing activities and organisational procedures
	3.5 Check marketing materials are accurate and contain all relevant information in line with organisational procedures
	3.6 Present marketing materials to the landlord in line with organisational procedures
	3.7 Ensure that the landlord is advised of his/her responsibility for providing information regarding any subsequent changes to the property
	3.8 Check that documentation complies with all relevant legislation, guidelines and codes of practice relevant to preparing properties for marketing



## Unit 17: Match and promote properties to individuals

Unit Reference Number: Y/601/3110

Level: 3

Credit: 2

### 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 Guidance

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

- Portfolio of evidence

<b>Learning Outcome The learner will:</b>	<b>Assessment Criterion The learner can:</b>
1. Know how to match properties to individuals	1.1 List the main types of tenants/buyers of residential property
	1.2 Identify factors which influence individual's decisions about properties
	1.3 Explain how to access information about properties available through the organisation to match to individuals
	1.4 State what information is required from individuals to be able to match them to available properties
	1.5 Describe the organisational procedures for recording information regarding contacts made and the outcomes
2. Know how to promote properties to individuals	2.1 Describe the organisational procedures for contacting individuals about properties
	2.2 Outline what information can be provided about properties
	2.3 State what actions should be taken when interest is expressed in a property
3. Be able to match properties to individuals	3.1 Identify properties which are available through the organisation
	3.2 Assess the types of individuals who are likely to have an interest in the properties
	3.3 Identify the requirements of individuals
	3.4 Match identified requirements with relevant features of properties
	3.5 Provide details of properties to interested parties
	3.6 Ensure that colleagues are informed about information given to individuals



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4. Be able to promote properties to individuals	4.1 Contact individuals using appropriate methods in line with organisational procedures
	4.2 Explain to individuals: <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>
	4.3 Establish whether individuals are interested in particular properties
	4.4 Agree relevant actions towards assisting individuals to review further properties of interest
	4.5 Maintain records of contacts made in line with organisational procedures
	4.6 Ensure that relevant colleagues are informed of possible interest in particular properties
	4.7 Comply with all relevant legislation, guidelines and codes of practice when promoting properties



## Unit 18: Conduct accompanied viewings of properties

Unit Reference Number: J/601/3121

Level: 3

Credit: 2

### Unit Summary

This unit is about accompanying prospective buyers/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 Guidance

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

- Portfolio of evidence

<b>Learning Outcome The learner will:</b>	<b>Assessment Criterion The learner can:</b>
1. Know how to prepare for viewings	1.1 List the key features of the local property area which are of interest to prospective buyers/tenants
	1.2 List the types of marketing materials regarding the organisation's properties and how to access them
	1.3 State how to obtain information about any fixtures and fittings which are included in a property
	1.4 Describe how the following are identified: <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	2.1 List the main types of buyers/tenants of residential properties
	2.2 Identify factors that influence individual's decisions
	2.3 Outline what information can be provided to individuals about properties
	2.4 Describe types of visiting conditions and restrictions that may apply to different properties
	2.5 Give examples of typical questions asked about properties
	2.6 State how questions about properties should be addressed
	2.7 State what actions should be taken when interest is expressed in a property
3. Be able to prepare to conduct accompanied viewings	3.1 Confirm the property is still available
	3.2 Confirm arrangements for the viewing with all relevant parties
	3.3 Obtain current marketing materials for the property to be viewed



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	3.4 Identify all relevant: <ul style="list-style-type: none"> <li>• specifications for the property</li> <li>• details of fixture and fittings available</li> </ul>
	3.5 Obtain current marketing materials for the property to be viewed
	3.6 Ensure that individuals have accurate and clear directions for the property to be viewed
	3.7 Check that access to the property is available at the time of the proposed viewing
	3.8 Take action to address any problems with the viewing
4. Be able to conduct viewings of properties	4.1 Attend appointments at the agreed time and place
	4.2 Confirm with the prospective buyer/tenant: <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>
	4.3 Promote the key selling points of the property
	4.4 Provide accurate information about local services and amenities
	4.5 Check that individuals have understood information and answer questions asked if any
	4.6 Record significant comments regarding properties of interest in line with organisational procedures
	4.7 Identify properties of interest and agree actions to progress interest
	4.8 Carry out viewings in accordance with any conditions and restrictions
	4.9 Take steps to maintain health, safety and security for all parties
	4.10 Ensure that the property is secure on departure
	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



## Unit 19: Implement pre-entry and hand-over procedures for property to let

Unit Reference Number: K/601/3127

Level: 2

Credit: 2

### Unit Summary

This unit is about gathering and providing information and relevant paperwork for handing over property to tenants. It includes getting the final documents signed and dated and the administration which needs to be completed following sign up.

### Assessment Guidance

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

- Portfolio of evidence

<b>Learning Outcome The learner will:</b>	<b>Assessment Criterion The learner can:</b>
1. Understand organisational pre-entry procedures	1.1 Explain the organisational procedures for dealing with sign up monies
	1.2 Describe the security arrangements for handling sign up monies
	1.3 List the types of payment which are accepted by own organisation
	1.4 Explain the organisational procedures for setting up future rent payments
	1.5 State the circumstances when setting up future rent payments apply
	1.6 List all documents which should be signed and dated by all parties including where relevant any guarantor
	1.7 Identify the relevant people that documentation should be given to
	1.8 Explain the organisational procedures for registering tenant deposits
	1.9 State the circumstances in which tenant deposits are registered
2. Understand organisational procedures for the hand-over of property	2.1 Describe the organisational procedures for handing over property to tenants
	2.2 Describe the organisational procedures for dealing with keys for tenanted properties
	2.3 Describe the organisational procedures for dealing with inventories
	2.4 Explain why it is important to gain accurate meter readings when a property is handed over
	2.5 Describe the organisational procedures for recording meter readings



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3. Be able to implement pre-entry procedures	3.1 Provide the tenant with relevant documentation in line with legislation
	3.2 Follow organisational procedures to receive payments of sign up monies
	3.3 Gain signatures from all parties on relevant documents including dates and where relevant any guarantor
	3.4 Give copies of documents to relevant parties following organisational procedures
	3.5 Set up future rent payments according to the service type and organisational procedures
	3.6 Register the tenant's deposit in line with legislation where applicable
4. Be able to implement hand-over procedures	4.1 Ensure that the tenant is given keys to the property
	4.2 Record the tenant receiving keys following organisational procedures
	4.3 Follow organisational procedures to ensure that there is agreement with the inventory provided for the property
	4.4 Ensure that meter readings are recorded on entry
	4.5 Forward the meter reading information on following organisational procedures



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## Unit 20: Develop yourself in the job role

Unit Reference Number: R/600/6351

Level: 2

Credit: 2

### 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 Guidance

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

- Portfolio of evidence

<b>Learning Outcome The learner will:</b>	<b>Assessment Criterion The learner can:</b>
1. Know how to develop him/herself 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 against targets
	1.7 Describe the procedures for reviewing and updating progress
	1.8 List the benefits of discussing progress with others
2. Be able to develop him/herself 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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## Unit 21: Employment rights and responsibilities in the facilities management, housing and property sectors

Unit Reference Number: A/502/7524

Level: 2

Credit: 2

### Unit Summary

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

### Assessment Guidance

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

- Portfolio of evidence

<b>Learning Outcome The learner will:</b>	<b>Assessment Criterion The learner can:</b>
1. Know employer and employee rights, responsibilities and own organisational procedures	1.1 State employer and employee rights and responsibilities under employment law, including the Equality Act, Health & Safety and other relevant legislation
	1.2 State importance of having employment rights and responsibilities
	1.3 Describe organisational procedures for health & safety, including documentation
	1.4 Describe organisational procedures for equality & diversity, including documentation
	1.5 Identify sources of information and advice on employment rights and responsibilities
2. Know factors that affect own organisation and occupation	2.1 Describe the role played by own occupation within organisation and industry
	2.2 Describe career pathways available to them
	2.3 State types of representative body related to the industry, their main roles and responsibilities and their relevance to the industry
	2.4 Identify sources of information and advice on own industry, occupation, training and career
	2.5 Describe principles, policies and codes of practice used by own organisation and industry
	2.6 Describe issues of public concern that affect own organisation and industry

**\*NB: Some of the units above may also appear in the Level 3 Diploma in Property: Sale of Residential Property**



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