

Level 2 Certificate in Housing (NVQ) (6207-02)

Qualification handbook for centres
500/9140/2



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1 Introduction to the qualification

This document contains the information that centres need to offer the following qualification:

Qualification title and level	Level 2 Certificate in Housing (NVQ)
City & Guilds qualification number	(6207-02)
Qualification accreditation number	500/9140/2
Last registration date	31/08/2013
Last certification date	31/08/2015

The Level 2 Certificate in Housing is a competence based qualification designed to assess the ability of learners in the workplace. This qualification addresses the particular requirements of the housing sector for respecting the rights and diversity of people, developing knowledge and understanding of housing initiatives and relevant housing legislation. It is also about ensuring that effective communication is used throughout.

The qualification has several themes of units but candidates can take units from any theme. The themes are administration and customer service, managing housing and assets, advice and guidance and developing and involving individuals and communities. The qualification covers areas which allows the learner to explore how to work with colleagues and customers in a way that promotes equality and diversity whilst developing and maintaining ethical, safe and sustainable working practices; set personal work objectives for their professional development and formulate a plan to deal with gaps in knowledge, understanding and skills, which takes account of an organisations vision and objectives; work with customers and colleagues (internal and external) to apply organisational policies and procedures relating to customer services.

This qualification offers a Certificate on the Qualification Credit Framework. The qualification forms part of the Level 2 Apprenticeship in Housing.

The review of the National Occupational standards (NOS) in Housing was undertaken by Asset Skills.

1.1 Qualification structure

To achieve the Level 2 Certificate in Housing, learners must achieve **10** credits from the mandatory units and a minimum of **6** credits from the optional units available.

The diagram below illustrates the unit titles, the credit value of each unit and the title of the qualification which will be awarded to candidates successfully completing the required combination of units and/or credits.

Unit accreditation number	City & Guilds unit number	Unit title	Mandatory/ optional for full qualification	Credit value
R/601/0450	Unit 201	Develop and maintain relationships with stakeholders in a housing context	Mandatory	4
K/601/0454	Unit 202	Maintain professional behaviour and working relationships in a housing context	Mandatory	4
M/601/0455	Unit 203	Maintain the health, safety and security of self and others	Mandatory	2
Administration and customer service				
F/601/0461	Unit 204	Process documentation relating to housing activities	Optional	2
Y/601/0465	Unit 205	Undertake promotional activity within the housing sector	Optional	4
K/601/0471	Unit 206	Advertise and market properties	Optional	2
F/601/0475	Unit 207	Use organisational ICT systems in a housing context	Optional	2
L/601/0933	Unit 219	Give customers a positive impression of yourself and your organisation	Optional	5
M/601/1508	Unit 220	Recognise and deal with customer queries, request and problems	Optional	5
A/601/1530	Unit 221	Support customer service improvement	Optional	5
Managing housing and assets				

L/601/0480	Unit 208	Assess housing need	Optional	4
K/601/0485	Unit 209	Match the needs of individuals with available accommodation	Optional	3
A/601/0488	Unit 210	Support individuals through the process of signing occupancy agreements	Optional	4
J/600/3205	Unit 304 *	Respond to customer request for repairs	Optional	2
T/601/0490	Unit 211	Organise the maintenance and repair of property	Optional	2
A/601/0507	Unit 212	Check and record the condition of property	Optional	3

Advice and guidance

J/601/0509	Unit 213	Support clients to make use of the housing advice and guidance service	Optional	3
H/601/0517	Unit 214	Enable housing clients to access referral opportunities	Optional	4
T/601/0523	Unit 215	Provide and maintain information materials for use in the housing organisation	Optional	2

Developing and involving individuals and communities

L/601/0530	Unit 216	Help to develop individuals to contribute to decision making	Optional	4
H/601/0534	Unit 217	Help to develop individuals' involvement in the local community	Optional	3
J/601/0543	Unit 218	Support the rights of individuals in the community	Optional	4

* Please note this unit also appears in 'Level 3 Certificate in housing'.

1.2 Opportunities for progression

On completion of this qualification candidates may progress into employment or to the following City & Guilds qualification:

- Level 3 Certificate in Housing

1.3 Qualification support materials

City & Guilds also provides the following publications and resources specifically for this qualification:

Description	How to access
Qualification handbook	www.cityandguilds.com
Recording forms	www.cityandguilds.com

2 Centre requirements

This section outlines the approval processes for Centres to offer this qualification and any resources that Centres will need in place to offer the qualifications including qualification-specific requirements for Centre staff.

Centres already offering City & Guilds qualifications in this subject area

Centres approved to offer the qualification 6203-02 Level 2 NVQ in Housing (100/1458/5) have automatic approval to offer this qualification.

2.1 Resource requirements

Human resources

Employers and training providers are increasingly working in partnership or with assessment taking place across several sites. Centres must ensure that all assessment sites clearly understand their roles, responsibilities, authorities and accountabilities. It would therefore be advisable for centres to have documented and signed (partnership) agreements with all assessment sites. The content of such agreements must be devised on an individual centre basis but consideration should be given to the inclusion of the following areas.

- Commitment to centre policies and practices eg policy for candidate appeals/complaints and access to fair assessment.
- Responsibilities for ensuring that candidates are operating in a work place where the standards of practice fully support candidates to demonstrate their competence.
- Responsibilities for establishing and communicating any issues concerning 'fit person' checks as required by the relevant regulator.
- Access to the workplace and protocols for peripatetic assessors.
- Participation in assessment activities including attending standardisation meetings.
- Actions to be taken if partnership agreement not met.

This list is not exhaustive but may assist centres in identifying areas which need an explicit statement of commitment from member assessment sites/satellites in order to avoid future problems.

Staff delivering this qualification must be able to demonstrate that they meet the following occupational expertise requirements. They should:

- be technically competent in the areas for which they are delivering training and/or have experience of providing training. This knowledge must be at least to the same level as the training being delivered
- have recent relevant experience in the specific area they will be assessing
- be occupationally knowledgeable in the areas for which they are delivering training. This knowledge must be at least to the same level as the training being delivered
- have credible experience of providing training.

Centre staff may undertake more than one role, eg tutor and assessor or internal verifier, but must never internally verify their own assessments.

Assessors

Assessors delivering this qualification must be able to demonstrate that they meet the following occupational expertise requirements.

- Hold D32 and/or D33 or A1 and or A2 or be working towards A1 and/or A2 Assessor Awards or whatever qualifications are currently identified by the regulator.
- Currently new assessors must achieve unit A1 or A2 within 18 months of beginning assessment activities and have assessment decisions checked and countersigned by a qualified assessor until such time that they are certificated.
- Have verifiable relevant industry experience and knowledge of the occupational working area at or above the level being assessed. This experience and knowledge must be of sufficient depth to be effective and reliable when judging candidates competence. Assessors must have knowledge of all key housing legislation for the area(s) they will be assessing. Assessors experience and knowledge could be verified by a curriculum vitae and references, possession of a relevant NVQ/SVQ and/or corporate membership of a relevant professional institution.
- Have sufficient occupational expertise so they have up to date knowledge and experience of the particular aspects of work they are assessing. This could be verified by records of continuing professional development achievements.
- Have a sound in-depth knowledge of, and uphold the integrity of the sector's National Occupational Standards and the Assessment Strategy.
- Be prepared to participate in training activities for their continued professional development as identified by the centre.
- Have an appropriate induction to the Housing qualification and National Occupational Standards that they are assessing.

Coordinating assessor requirements

The requirements for occupational competence may mean that in certain cases some candidates will have more than one assessor. Where this is the case a qualified assessor should be identified to take the overall responsibility for the candidate's assessment.

Centre staff may undertake more than one role, eg tutor and assessor or internal verifier, but must never internally verify their own assessments.

Internal verifiers

Internal verifiers for this qualification must be able to demonstrate that they meet the following occupational expertise requirements.

- Have verifiable relevant experience and current knowledge of the occupational working area at or above the level being verified. This experience and knowledge must be of sufficient depth to be effective and reliable when verifying assessor judgements internal verifiers' experience and knowledge could be verified by, curriculum vitae and references, possession of a relevant NVQ/SVQ and/or corporate membership of a relevant professional institution.
- Have up to date knowledge of the particular activities in the units they are verifying.
- Have a sound in-depth knowledge of, and uphold the integrity of the National Occupational Standards and this Assessment Strategy.
- Participate in Continued Professional Development training activities.
- Have knowledge and understanding of the application of regulatory authorities' codes of practice.

Continuing professional development (CPD)

Centres are expected to support their staff in ensuring that their knowledge remains current of the occupational area and of best practice in delivery, mentoring, training, assessment and verification, and that it takes account of any national or legislative developments.

2.2 Candidate entry requirements

Candidates should not be entered for a qualification of the same type, content and level as that of a qualification they already hold.

There are no formal entry requirements for candidates undertaking this qualification. However, centres must ensure that candidates have the potential and opportunity to gain the qualification successfully.

Age restrictions

This qualification is not approved for use by candidates under the age of 16, and City & Guilds cannot accept any registrations for candidates in this age group.

Other legal considerations

Candidates entering the housing workforce may be legally required to undergo criminal record checks prior to taking up employment/work placement. Centres, employers and placement providers will need to liaise closely with one another to ensure that any requirements for a particular area of work are fully met. As the requirements may vary between work areas and countries, a check should be made with the appropriate regulatory and/or government departments, if the employer or placement provider is uncertain of the requirements.

3 Course design and delivery

3.1 Initial assessment and induction

Centres will need to make an initial assessment of each candidate prior to the start of their programme to ensure they are entered for an appropriate type and level of qualification.

The initial assessment should identify:

- any specific training needs the candidate has, and the support and guidance they may require when working towards their qualification. This is sometimes referred to as diagnostic testing.
- any units the candidate has already completed, or credit they have accumulated which is relevant to the qualification they are about to begin.

City & Guilds recommends that centres provide an induction programme to ensure the candidate fully understands the requirements of the qualification they will work towards, their responsibilities as a candidate, and the responsibilities of the centre. It may be helpful to record the information on a learning contract.

3.2 Recommended delivery strategies

Centre staff should familiarise themselves with the structure, content and assessment requirements of the qualification before designing a course programme.

Centres may design course programmes of study in any way which:

- best meets the needs and capabilities of their candidates
- satisfies the requirements of the qualification.

When designing and delivering the course programme, centres might wish to incorporate other teaching and learning that is not assessed as part of the qualification. This might include the following:

- literacy, language and/or numeracy
- personal learning and thinking
- personal and social development
- employability

Where applicable, this could involve enabling the candidate to access relevant qualifications covering these skills.

4 Assessment

4.1 Summary of assessment methods

For this qualification, candidates will be required to complete the following assessments:

- a portfolio of evidence for **each** unit.

This competence based qualification is designed to be assessed in the candidates workplace as they undertake their normal work role. All the identified assessment criteria must be evidenced and a holistic approach to assessment is encouraged.

The evidence must at all times reflect the policies and procedures of the workplace as informed by current legislation, the relevant service standards and codes of practice for the sector.

Observation requirements

The prime source of evidence for all units within this qualification is assessor observation. Where assessor observation would be difficult because of intrusion into areas of privacy and/or because activities occur rarely expert witnesses may provide testimony for the occupationally specific units.

Additional assessment methods or evidence sources

In addition to observation, assessors should identify an appropriate mix of other assessment methods from the list below, to ensure that all the assessment criteria are sufficiently evidenced to allow them to establish the consistency of the candidate's practice for each unit.

- **Expert witnesses** may observe candidate practice and provide testimony for the occupationally specific units which will have parity with assessor observation for the optional units. If an assessor is unable to observe their candidate she/he will identify an expert witness in the workplace, who will provide testimony of the candidates work based performance.
- **Work products** can be any relevant products of candidates' own work, or to which they have made a significant contribution, which demonstrate use and application within their practice.
- **Professional discussion** should be in the form of a planned and structured review of candidates' practice, based on evidence and with outcomes captured by means of audio/visual or written records. The recorded outcomes are particularly useful as evidence that candidates' can evaluate their knowledge and practice across the qualification.
- **Candidate/reflective accounts** describe candidates' actions in particular situations and/or reflect on the reasons for practising in the ways selected. Reflective accounts also provide evidence that candidates' can evaluate their knowledge and practice across the activities embedded in this qualification.
- **Questions** asked by assessors and answered by candidates' to supplement evidence generated by observations and any other evidence type used. Assessors may be able to infer some knowledge and understanding from observing candidate practice. They may ask questions to confirm understanding and/or cover any outstanding areas. Questions may be asked orally or in writing but, in both cases, a record must be kept of the questions and responses.
- **Witness testimonies** these should be from people who are in a position to provide evidence of candidate competence. Where testimony is sought from individuals who are service users, care should be taken to ensure the purpose of the testimony is understood and no pressure is felt to provide it.
- **Projects/Assignments** candidates may have already completed a relevant project or assignment which can be mapped to the relevant standards and therefore provide evidence.

Evidence from previous training courses and/or learning programmes which they have completed and which demonstrate their professional development may also be used

- **Case studies** must be based on real work practice and experiences and will need to be authenticated by an assessor if used as evidence of a competent performance. Theoretical or simulated exercises would only be admissible as evidence of knowledge and understanding.

NB Confidential records must not be included in candidates' portfolios but must be referred to in the assessment records.

4.2 Evidence requirements

Simulation

The overarching principle to be applied when considering the use of simulation is that it should only be used in exceptional circumstances when one or more of the following conditions apply

- health and safety considerations
- emergency or crisis management
- activities that would cause serious inconvenience or loss to an employer if there was an undue delay in their being carried out
- infrequently occurring activities
- equality of access
- issues of confidentiality
- dealing with distressed people and difficult situations.

Where simulation is used simulated working environment conditions should replicate the working environment as closely as possible.

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

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

NB External verifiers will check to ensure that simulation is only used infrequently and where the above conditions apply.

Imported Unit

Requirements specific to Unit 219, 220 and 221 can be located in section 5. The summary of assessment methods in 4.1 apply, however, no simulation is allowed.

Recognition of prior learning and achievement

Evidence from past achievement may be included as permissible evidence within competence based assessment methods.

Evidence of knowledge and understanding can be offered as supplementary evidence as long as it is a measurable assessed outcome of learning which links to aspects of knowledge and understanding detailed in the National Occupational Standards and confirms current competence.

Assessors should make best use of all the assessment methods available to them in ensuring the most reliable and effective use is made of claims of prior learning and experience which relate to the individual circumstances.

All candidates must demonstrate current competence with respect to accreditation of prior learning (APL).

4.3 Recording forms

Candidates and centres may decide to use a paper-based or electronic method of recording evidence.

City & Guilds endorses several ePortfolio systems. Further details are available at: www.cityandguilds.com/eportfolios.

City & Guilds has developed a set of *Recording forms*, for new and existing centres to use as appropriate.

Recording forms are available on the City & Guilds website.

Although it is expected that new centres will use these forms, centres may devise or customise alternative forms, which must be approved for use by the external verifier, before they are used by candidates and assessors at the centre.

Amendable (MS Word) versions of the forms are available on the City & Guilds website.

- **Candidate and centre details (Form 1)**

Form used to record candidate and centre details, and the units/qualification being assessed and details and signatures of assessor(s) and internal verifier(s).

This should be the first page of the candidate portfolio.

- **Candidate skill scan (Form 2)**

Form used to record the candidate's existing skills and knowledge.

- **Expert/witness status list (Form 3)***

Form used to record the details of all those who have witnessed candidate evidence.

- **Assessment plan, review and feedback (Form 4)***

Form used to record unit assessment plans, reviews and feedback to the candidate. The form allows for a dated, ongoing record to be developed.

- **Performance evidence record (Form 5)***

Form used to record details of activities observed, witnessed or for which a reflective or self account has been produced. For some, a customised alternative record may be provided in the qualification handbook.

- **Questioning evidence record (Form 6)***

Form used to record the focus of, and responses to, assessor devised questions. (For qualifications which use question banks or online testing, the location of this evidence should be recorded on Form 9, Evidence location sheet.)

- **Professional discussion evidence record (Form 8)**

Form used to record the scope and outcome of professional discussion if it is used

- **Evidence location sheet (Form 9)***

Form used to identify what requirements each piece of evidence covers and where it is located, including questioning records which are held elsewhere (for example, because they were conducted online).

This form is available in portrait (9A) and landscape (9B) format

- **Unit assessment and verification declaration (Form 10)***

Form used on completion of each unit to meet the QCA requirement for a statement on authenticity. If this form is not used, there must be a written declaration, at unit level, signed by

the assessor and the candidate, that the evidence is authentic and that the assessment was conducted under the specified conditions or context. (See Ensuring Quality, ref 5.4, page 28.)

- **Summary of unit and qualification achievement (Form 11)***

Form used to record the candidate's on-going completion of units and progress to final achievement of the complete unit and/or qualification.

This form is available in portrait (11A) and landscape (11B) format

5 Units

Availability of units

The units for this qualification follow.

They may also be obtained from the centre resources section of the City & Guilds website

The learning outcomes and assessment criteria are also viewable on the National Database of Accredited Qualifications (NDAQ) www.accreditedqualifications.org.uk

Structure of units

The units in this qualification are written in a standard format and comprise the following:

- City & Guilds reference number
- unit accreditation number
- title
- level
- credit value
- unit aim
- relationship to NOS, other qualifications and frameworks
- endorsement by a sector or other appropriate body
- information on assessment
- learning outcomes which are comprised of a number of assessment criteria
- notes for guidance.

Summary of units

City & Guilds unit number	Title	QCF unit number	Credits
201	Develop and maintain relationships with stakeholders in a housing context	R/601/0450	4
202	Maintain professional behaviour and working relationship in a housing context	K/601/0454	4
203	Maintain the health, safety and security of self and others	M/601/0455	2
204	Process documents relating to housing activities	M/601/0461	2
205	Undertake promotional activity within the housing sector	Y/601/0465	4
206	Advertise and market properties	K/601/0471	2
207	Use organisational ICT systems in a housing context	F/601/0475	2
208	Assess housing need	L/601/0480	4
209	Match the needs of individuals with available accommodation	K/601/0485	3
210	Support individuals through the process of signing occupancy agreements	A/601/0488	4
211	Organise the maintenance and repair of property	T/601/0490	2

212	Check and record the condition of property	A/601/0507	3
213	Support clients to make use of the housing advice and guidance service	J/601/0509	3
214	Enable housing clients to access referral opportunities	H/601/0517	4
215	Provide and maintain information materials for use in the housing organisation	T/601/0523	2
216	Help to develop individuals to contribute to decision making	L/601/0530	4
217	Help to develop individuals' involvement in the local community	H/601/0534	3
218	Support the rights of individuals in the community	J/601/0543	4
219	Give customers a positive impression of yourself and your organisation	L/601/0933	5
220	Recognise and deal with customer queries, requests and problems	M/601/1508	5
221	Support customer service improvements	A/601/1530	2
304	Respond to customer request for repair	J/600/3205	2

Unit 201

Develop and maintain relationships with stakeholders in a housing context

Level: 2

Credit value: 4

NDAQ number: R/601/0450

Unit aim

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

Learning outcomes

There are **three** learning outcomes to this unit. The learner will be able to:

1. Respect the individual beliefs, expectations and needs of individuals, groups and other stakeholders
2. Develop and maintain relationships with individuals, colleagues, groups and other stakeholders
3. Meet the needs of individuals, colleagues, groups and other stakeholders

Guided learning hours

It is recommended that **30** hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national standards

This unit is linked to 'Develop and maintain relationships with stakeholders in a housing context' H2 01.

Assessment

This unit will be assessed by:

- Assessor observation of practice and/or expert witness testimony and an appropriate mix of other assessment methods to ensure all the assessment criteria are sufficiently evidenced to allow the assessor to make a judgement of consistent practice.

Unit 201

Develop and maintain relationships with stakeholders in a housing context

Outcome 1

Respect the individual beliefs, expectations and needs of individuals, groups and other stakeholders

Assessment Criteria

The learner can:

1. explain the importance of recognising diversity as defined in anti-discriminatory legislation+
2. give examples of how diversity and inclusion issues affect customer service and relationships with groups and other stakeholders
3. perform housing activities in a manner that treats individuals fairly and does not discriminate against or disadvantage them in any way
4. follow organisational guidelines to make customer service is inclusive of diverse groups of customers and other stakeholder.

Unit 201

Develop and maintain relationships with stakeholders in a housing context

Outcome 2

Develop and maintain relationships with individuals, colleagues, groups and other stakeholders

Assessment Criteria

The learner can:

1. deal courteously, sensitively and fairly with individuals
2. establish appropriate boundaries when working with others
3. describe how the views of customers, groups and other stakeholders can affect the level of their trust in the organisation
4. describe what can be done to build and maintain trust
5. describe the ways the organisation works with tenants and community groups to support effective collaborative working
6. engage with individuals, groups and other stakeholders in ways that help them to influence the way in which the service is provided
7. balance the need for contact with customers, groups and other stakeholders with being able to work efficiently, safely and securely
8. set an example of positive behaviour for others
9. maintain customer, group and other stakeholder confidentiality according to organisational policy.

Unit 201

Develop and maintain relationships with stakeholders in a housing context

Outcome 3

Meet the needs of individuals, colleagues, groups and other stakeholders

Assessment Criteria

The learner can:

1. support individuals to communicate their needs and preferences about how they wish to engage with the organisation
2. give a positive image of the organisation to customers, groups and other stakeholders
3. explain the importance of finding positive solutions to problems
4. support individuals, groups and others in making choices
5. explain how to deal with difficult situations within own level of responsibility and when difficult situations should be handled by someone else.

Unit 202

Maintain professional behaviour and working relationships in a housing context

Level: 2

Credit value: 4

NDAQ number: K/601/0454

Unit aim

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

Learning outcomes

There are **two** learning outcomes to this unit. The learner will be able to:

1. Establish and maintain effective working relationships with colleagues and other stakeholders in a housing context
2. Operate within agreed procedures when working with others in a housing context

Guided learning hours

It is recommended that **30** hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national standards

This unit is linked to 'Maintain effective working relationships with housing colleagues and other stakeholders' H2 02.

Assessment

This unit will be assessed by:

- Assessor observation of practice and/or expert witness testimony and an appropriate mix of other assessment methods to ensure all the assessment criteria are sufficiently evidenced to allow the assessor to make a judgement of consistent practice.

Unit 202

Maintain professional behaviour and working relationships in a housing context

Outcome 1

Establish and maintain effective working relationships with colleagues and other stakeholders in a housing context

Assessment Criteria

The learner can:

1. deal courteously, sensitively and fairly with individuals
2. describe the values and principles of the organisation in the delivery of housing services
3. explain how own role relates to the work of others in the organisation and to the wider stakeholder network including, communities
4. explain how to co-operate with colleagues and other teams or agencies in order to achieve agreed outcomes
5. identify the effects of poor teamwork
6. communicate with colleagues and other stakeholders in a way that encourages effective team working
7. identify ways of working with individuals, colleagues, teams and other agencies which support good working relationships.

Unit 202

Maintain professional behaviour and working relationships in a housing context

Outcome 2

Operate within agreed procedures when working with others in a housing context

Assessment Criteria

The learner can:

1. explain the organisational requirements to be followed within own work role
2. explain the legal framework in which housing functions are performed
3. describe the line management procedures to be followed when carrying out housing functions
4. describe the sources of advice available when performing housing functions
5. explain how advice and line management systems are used when carrying out housing functions
6. operate within professional codes of conduct
7. maintain client and other stakeholder confidentiality
8. meet obligations agreed with individuals, colleagues and other stakeholders
9. operate within the limits of own responsibility and refer issues to others when required
10. review own personal performance with regard to working to targets, completing specific tasks and the quality of work.

Unit 203

Maintain the health, safety and security of self and others

Level: 2

Credit value: 2

NDAQ number: M/601/0455

Unit aim

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

Learning outcomes

There are **two** learning outcomes to this unit. The learner will be able to:

1. Contribute to health and safety in the workplace
2. Maintain the safety and security of customers, others and self

Guided learning hours

It is recommended that **10** hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national standards

This unit is linked to 'Monitor and maintain health, safety and security of self and others' H2 03.

Assessment

This unit will be assessed by:

- Assessor observation of practice and/or expert witness testimony and an appropriate mix of other assessment methods to ensure all the assessment criteria are sufficiently evidenced to allow the assessor to make a judgement of consistent practice..

Unit 203

Maintain the health, safety and security of self and others

Outcome 1

Contribute to health and safety in the workplace

Assessment Criteria

The learner can:

1. deal courteously, sensitively and fairly with individuals
2. describe the legal responsibilities of your organisation and yourself in relation to health and safety in the workplace
3. identify risks and hazards to people and property in the immediate workplace and report them to the appropriate person
4. follow agreed health and safety procedures to minimise risks to people and property
5. provide health and safety information to individuals and others
6. explain agreed procedures in the event of an incident or emergency
7. maintain the security of own immediate workplace following agreed procedures.

Unit 203

Maintain the health, safety and security of self and others

Outcome 2

Maintain the safety and security of customers, others and self

Assessment Criteria

The learner can:

1. take appropriate action to work safely with aggressive or difficult individuals
2. explain how to identify the signs and symptoms that individuals are at risk from harm or abuse and how to report concerns to appropriate individuals for further action
3. explain how to work safely with individuals in heightened states of emotion
4. describe agreed procedures when working with individuals and others in isolation.

Unit 204

Process documents relating to housing activities

Level: 2

Credit value: 2

NDAQ number: F/601/0461

Unit aim

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

Learning outcomes

There are **two** learning outcomes to this unit. The learner will be able to:

1. Select information for documents relevant to housing
2. Produce and circulate housing documents

Guided learning hours

It is recommended that **10** hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national standards

This unit is linked to 'Process documents relating to housing services' H2 04.

Assessment

This unit will be assessed by:

- Assessor observation of practice and/or expert witness testimony and an appropriate mix of other assessment methods to ensure all the assessment criteria are sufficiently evidenced to allow the assessor to make a judgement of consistent practice.

Unit 204

Process documents relating to housing activities

Outcome 1

Select information for documents relevant to housing

Assessment Criteria

The learner can:

1. describe the legislative requirements relevant to the security and confidentiality of information
2. identify the different types of documentation and associated information which applies to the job role
3. identify the purpose of and intended audience for documents
4. identify and locate the required information
5. describe the course of action to take when information is incomplete
6. collate information and obtain any additional required information
7. check the validity and accuracy of the information
8. maintain the security and confidentiality of appropriate information.

Unit 204

Process documents relating to housing activities

Outcome 2

Produce and circulate housing documents

Assessment Criteria

The learner can:

1. deal courteously, sensitively and fairly with individuals
2. apply organisational procedures for processing information
3. collate and present documents in an agreed format which is fit for the intended purpose
4. produce accurate, legible and complete documents
5. circulate documents to the correct people within agreed timescales
6. archive documents following agreed procedures.

Unit 205

Undertake promotional activity within the housing sector

Level: 2

Credit value: 4

NDAQ number: Y/601/0465

Unit aim

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

Learning outcomes

There are **four** learning outcomes to this unit. The learner will be able to:

1. Know the role of promotional activity within housing organisations
2. Know the stakeholders the organisation works with for promotional activity
3. Plan promotional events
4. Carry out promotional events

Guided learning hours

It is recommended that **30** hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national standards

This unit is linked to 'Undertake promotional activity within the housing sector' H2 05.

Assessment

This unit will be assessed by:

- Assessor observation of practice and/or expert witness testimony and an appropriate mix of other assessment methods to ensure all the assessment criteria are sufficiently evidenced to allow the assessor to make a judgement of consistent practice.

Unit 205

Undertake promotional activity within the housing sector

Outcome 1

Know the role of promotional activity within housing organisations

Assessment Criteria

The learner can:

1. state the positive benefits of promotional activity in relation to the objectives of the organisation
2. identify the range of promotional activities within your organisation.

Unit 205

Undertake promotional activity within the housing sector

Outcome 2

Know the stakeholders the organisation works with for promotional activity

Assessment Criteria

The learner can:

1. deal courteously, sensitively and fairly with individuals
2. identify the main stakeholders the housing organisation works with
3. describe which promotional activities are linked to different types of stakeholder.

Unit 205

Undertake promotional activity within the housing sector

Outcome 3

Plan promotional events

Assessment Criteria

The learner can:

1. describe own role and that of stakeholders within the promotional activity
2. identify sources of information about the issues to be promoted
3. identify activities best suited to audience and purpose of the promotional event
4. describe how to present a positive image of the organisation when carrying out promotional events
5. conduct risk assessments of venues and activities as required
6. identify suitable and accessible venues and method of transporting materials and equipment to site.

Unit 205

Undertake promotional activity within the housing sector

Outcome 4

Carry out promotional events

Assessment Criteria

The learner can:

1. identify and collate materials and equipment
2. set up and dismantle equipment and materials on site safely
3. make use of appropriate non-discriminatory prepared materials and scripts when talking to individuals
4. describe how to follow up on interest and commitment after promotional events
5. contribute to the evaluation of the effectiveness of promotional activity.

Level: 2

Credit value: 2

NDAQ number: K/601/0471

Unit aim

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

Learning outcomes

There are **four** learning outcomes to this unit. The learner will be able to:

1. Understand how to market properties
2. Gather and collate accurate information about properties
3. Market the property to potential applicants
4. Monitor the marketing process

Guided learning hours

It is recommended that **10** hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national standards

This unit is linked to 'Advertise and market properties' H2 06.

Assessment

This unit will be assessed by:

- Assessor observation of practice and/or expert witness testimony and an appropriate mix of other assessment methods to ensure all the assessment criteria are sufficiently evidenced to allow the assessor to make a judgement of consistent practice.

Unit 206

Outcome 1

Advertise and market properties

Understand how to market properties

Assessment Criteria

The learner can:

1. explain the range of methods used by the organisation for marketing properties
2. explain the benefits of each method and when it is used.

Unit 206

Outcome 2

Advertise and market properties

Gather and collate accurate information about properties

Assessment Criteria

The learner can:

1. locate and collate all relevant information about a given property
2. check that the information is accurate and up to date
3. provide a description of the property.

Unit 206

Outcome 3

Advertise and market properties

Market the property to potential applicants

Assessment Criteria

The learner can:

1. prepare and proof read details of the property for inclusion in marketing materials
2. deal courteously, sensitively and fairly with individuals
3. liaise with media contacts during the marketing of properties
4. maintain a stock of marketing materials.

Unit 206

Outcome 4

Advertise and market properties

Monitor the marketing process

Assessment Criteria

The learner can:

1. deal courteously, sensitively and fairly with individuals
2. maintain records of interest in properties from individuals
3. track progress and success rates in placing applicants
4. collate and present statistics and reports on advertising and marketing activities
5. contribute to the evaluation of the marketing of properties.

Unit 207

Use organisational ICT systems in a housing context

Level: 2

Credit value: 2

NDAQ number: F/601/0475

Unit aim

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

Learning outcomes

There are **four** learning outcomes to this unit. The learner will be able to:

1. Know the types of ICT software packages and systems used within own housing organisation
2. Access, input and modify data and close down IT systems correctly
3. Understand the importance of maintaining confidentiality and security of electronic data
4. Know the limits of own competence and authority and where to seek help

Guided learning hours

It is recommended that **10** hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national standards

This unit is linked to 'Use organisational IT systems in a housing context' H2 07.

Assessment

This unit will be assessed by:

- Assessor observation of practice and/or expert witness testimony and an appropriate mix of other assessment methods to ensure all the assessment criteria are sufficiently evidenced to allow the assessor to make a judgement of consistent practice.

Unit 207

Use organisational ICT systems in a housing context

Outcome 1

Know the types of ICT software packages and systems used within own housing organisation

Assessment Criteria

The learner can:

1. identify the generic software packages used within the organisation and describe how they are operated
2. describe the role of housing specific software packages and their function.

Unit 207

Use organisational ICT systems in a housing context

Outcome 2

Access, input and modify data and close down IT systems correctly

Assessment Criteria

The learner can:

1. demonstrate the correct sequence for opening and closing common software packages in use within the organisation
2. demonstrate how to input and manage data in commonly used software packages.

Unit 207

Use organisational ICT systems in a housing context

Outcome 3

Understand the importance of maintaining confidentiality and security of electronic data

Assessment Criteria

The learner can:

1. explain why it is important to protect information about individuals
2. describe how the organisation complies with data protection legislation in its ICT systems and procedures
3. explain how data is protected and kept secure
4. describe the procedure for reporting any breaches of data security.

Unit 207

Use organisational ICT systems in a housing context

Outcome 4

Know the limits of own competence and authority and where to seek help

Assessment Criteria

The learner can:

1. deal courteously, sensitively and fairly with individuals
2. identify which activities are outside own competence, area of responsibility and authority
3. identify sources of support if there are problems with the hardware or software
4. describe the training and support available in the use of IT systems.

Level: 3

Credit value: 4

NDAQ number: L/601/0480

Unit aim

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

Learning outcomes

There are **four** learning outcomes to this unit. The learner will be able to:

1. Know the range of the housing services and the types of support provided by the organisation
2. Establish and maintain effective communication with individuals
3. Establish the housing needs of individuals
4. Agree actions with individuals to meet their housing needs

Guided learning hours

It is recommended that **30** hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national standards

This unit is linked to 'Assess housing need' H2 08.

Assessment

This unit will be assessed by:

- Assessor observation of practice and/or expert witness testimony and an appropriate mix of other assessment methods to ensure all the assessment criteria are sufficiently evidenced to allow the assessor to make a judgement of consistent practice.

Unit 208

Outcome 1

Assess housing need

Know the range of the housing services and the types of support provided by the organisation

Assessment Criteria

The learner can:

1. identify the role of assessment and its contribution to meeting individual needs
2. define what the organisation can provide to prospective users of the service and what it cannot
3. describe the types of housing need individuals bring to the organisation
4. explain the perceptions which individuals have of the organisation and how this affects trust
5. explain how the sources of housing support available in the organisation can be accessed
6. describe alternative sources of support for individuals and how to refer clients to them.

Unit 208

Outcome 2

Assess housing need

Establish and maintain effective communication with individuals

Assessment Criteria

The learner can:

1. deal courteously, sensitively and fairly with individuals
2. greet individuals in a friendly, welcoming and non-judgmental manner
3. show respect for individual beliefs, expectations and needs
4. listen, ask questions and check understanding of individual needs
5. establish the customers' reasons for approaching the organisation and their expectations
6. maintain the confidentiality and privacy of individuals
7. assess the likely level of distress or concern that individuals may feel at the time of initial contact.

Unit 208
Outcome 3

Assess housing need
Establish the housing needs of individuals

Assessment Criteria

The learner can:

1. gather essential information from individuals in a sensitive and respectful manner
2. describe with sensitivity what the organisation can and cannot provide without alienating individuals
3. differentiate between housing needs and other types of support being sought
4. identify initial and ongoing housing needs
5. review any changes of circumstance with returning individuals and conduct a further assessment of need if appropriate
6. record relevant information and actions using agreed procedures and ensure that colleagues and others are informed.

Unit 208

Outcome 4

Assess housing need

Agree actions with individuals to meet their housing needs

Assessment Criteria

The learner can:

1. identify and agree with individuals the appropriate housing support that the organisation can provide
2. explain the next steps in the support process and gain individual agreement
3. refer individuals to other colleagues, services or organisations as required in a respectful and professional manner which minimises a sense of rejection.

Unit 209

Match the needs of individuals with available accommodation

Level: 3

Credit value: 3

NDAQ number: K/601/0485

Unit aim

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

Learning outcomes

There are **two** learning outcomes to this unit. The learner will be able to:

1. Support individuals to make applications for housing
2. Process housing applications

Guided learning hours

It is recommended that **20** hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national standards

This unit is linked to 'Match the needs of customers with available accommodation' H2 09.

Assessment

This unit will be assessed by:

- Assessor observation of practice and/or expert witness testimony and an appropriate mix of other assessment methods to ensure all the assessment criteria are sufficiently evidenced to allow the assessor to make a judgement of consistent practice.

Unit 209

Match the needs of individuals with available accommodation

Outcome 1

Support individuals to make applications for housing

Assessment Criteria

The learner can:

1. deal courteously, sensitively and fairly with individuals seeking housing
2. take full account of individual preferences and needs
3. explain the ways in which the organisation meets the diverse needs of individuals
4. explain the extent of and limitations on individual choice in the matching process
5. refer individuals with accommodation or other needs, that cannot be met, to the appropriate person or organisation
6. explain the full range of options and choices available to best meet individual housing need
7. give individuals a clear and honest description of the available accommodation
8. check with them their reactions and wishes.

Unit 209

Match the needs of individuals with available accommodation

Outcome 2

Process housing applications

Assessment Criteria

The learner can:

1. contact individuals and offer them accommodation in accordance with organisational procedures
2. explain the application process and relevant documentation to customers responding to any queries and concerns
3. check on the availability of properties and their type, size, location and condition
4. follow organisational procedures for processing applications following regulatory requirements
5. assist individuals to complete the application process
6. follow organisational policy on refusals, appeals or complaints and pass on issues to the appropriate person in the organisation.

Unit 210

Support individuals through the process of signing occupancy agreements

Level: 2

Credit value: 4

NDAQ number: A/601/0488

Unit aim

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

Learning outcomes

There are **two** learning outcomes to this unit. The learner will be able to:

1. Support individuals to complete occupancy agreements
2. Process occupancy agreements

Guided learning hours

It is recommended that **30** hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national standards

This unit is linked to 'Support the management of housing agreements' H2 10.

Assessment

This unit will be assessed by:

- Assessor observation of practice and/or expert witness testimony and an appropriate mix of other assessment methods to ensure all the assessment criteria are sufficiently evidenced to allow the assessor to make a judgement of consistent practice.

Unit 210

Support individuals through the process of signing occupancy agreements

Outcome 1

Support individuals to complete occupancy agreements

Assessment Criteria

The learner can:

1. deal courteously, sensitively and fairly with individuals completing tenancy agreements
2. make clear the legal nature of the agreement being set up and the rights and responsibilities of each party
3. explain the content and legal rights and responsibilities of both parties to the agreement and the related documentation
4. respond to customer queries and concerns
5. identify customer needs for further information and support and refer them to others as required
6. ensure that customers understand and are satisfied with the services being provided to them under the agreement
7. explain the appeals and/or complaints procedures clearly and accurately to customers.

Unit 210

Support individuals through the process of signing occupancy agreements

Outcome 2

Process occupancy agreements

Assessment Criteria

The learner can:

1. identify and use the correct documentation for the type of occupancy being proposed
2. complete all agreement documentation fully and accurately following organisational procedures including maintaining customer confidentiality
3. verify the accuracy of the information provided by customers
4. pass documentation for entry into the organisation's management information system
5. carry out the necessary follow up actions following organisational procedures
6. follow agreed quality assurance procedures for tenancy agreements.

Unit 211

Organise the maintenance and repair of property

Level: 2

Credit value: 2

NDAQ number: T/601/0490

Unit aim

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

Learning outcomes

There are **two** learning outcomes to this unit. The learner will be able to:

1. Plan the maintenance and repair of property
2. Arrange and monitor the maintenance and repair of property

Guided learning hours

It is recommended that **10** hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national standards

This unit is linked to 'Organise the maintenance and repair of property' H2 11.

Assessment

This unit will be assessed by:

- Assessor observation of practice and/or expert witness testimony and an appropriate mix of other assessment methods to ensure all the assessment criteria are sufficiently evidenced to allow the assessor to make a judgement of consistent practice.

Unit 211

Organise the maintenance and repair of property

Outcome 1

Plan the maintenance and repair of property

Assessment Criteria

The learner can:

1. obtain all necessary background information
2. establish the responsibilities of the relevant parties with respect to the condition of the property
3. identify the nature and scale of the work to be done
4. operate within own level of responsibility and authority and refer to others as required
5. prioritise urgent repairs to avoid health, safety and security risks or those caused by service failure
6. identify who has responsibility for carrying out the work
7. contact the relevant person when required action is outside own area of responsibility or authority
8. identify any health, safety and security issues involved and liaise with relevant people to ensure they are addressed.

Unit 211

Organise the maintenance and repair of property

Outcome 2

Arrange and monitor the maintenance and repair of property

Assessment Criteria

The learner can:

1. deal courteously, sensitively and fairly with individuals
2. authorise maintenance and repair work within the limits of own authority
3. communicate the programme of work to the work team clearly and within appropriate timescales
4. make the necessary arrangements for the work to take place
5. explain how to check progress at intervals, identify delays and deviations and the appropriate action to take
6. explain the organisation's methods for checking that work has been completed according to the specification and that any problems with the completed work have been rectified
7. ensure that all records are up to date with actions taken or required clearly specified.

Level: 2

Credit value: 3

NDAQ number: A/601/0507

Unit aim

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

Learning outcomes

There are **two** learning outcomes to this unit. The learner will be able to:

1. Plan checks on the condition of property
2. Carry out checks on the condition of property

Guided learning hours

It is recommended that **20** hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national standards

This unit is linked to 'Check and record the condition of property' H2 12.

Assessment

This unit will be assessed by:

- Assessor observation of practice and/or expert witness testimony and an appropriate mix of other assessment methods to ensure all the assessment criteria are sufficiently evidenced to allow the assessor to make a judgement of consistent practice.

Assessment Criteria

The learner can:

1. establish the previous history of the property and access relevant information
2. obtain necessary paperwork for checks
3. confirm the type of property, its general layout and common types of problems that may occur
4. assess the health, safety and security of self and others and explain how to minimise personal risk
5. identify the limits of own responsibility, authority and capability prior to checking property and refer to others as required
6. identify the legal responsibilities of the organisation in relation to the condition of property

Unit 212
Outcome 2

Check and record the condition of property
Carry out checks on the condition of property

Assessment Criteria

The learner can:

1. deal courteously, sensitively and fairly with individuals
2. confirm the date and time of the inspection with individuals and other relevant parties as required
3. carry out checks safely and correctly following organisational and legal requirements
4. record results of checks accurately following organisation's procedures
5. identify any problems with the condition of the property and take appropriate action to rectify them
6. update records on condition of property accurately
7. refer problems and issues regarding the condition of the property to others as required

Unit 213

Support clients to make use of the housing advice and guidance service

Level: 2

Credit value: 3

NDAQ number: J/601/0509

Unit aim

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

Learning outcomes

There are **four** learning outcomes to this unit. The learner will be able to:

1. Know the techniques for enabling clients to communicate their needs
2. Know what services and information is available to support clients to make use of housing services
3. Support clients to make use of the housing advice and guidance service
4. Agree with clients their use of the housing advice and guidance service

Guided learning hours

It is recommended that **20** hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national standards

This unit is linked to 'Support clients to make use of the advice and guidance service' H2 18.

Assessment

This unit will be assessed by:

- Assessor observation of practice and/or expert witness testimony and an appropriate mix of other assessment methods to ensure all the assessment criteria are sufficiently evidenced to allow the assessor to make a judgement of consistent practice.

Unit 213

Support clients to make use of the housing advice and guidance service

Outcome 1

Know the techniques for enabling clients to communicate their needs

Assessment Criteria

The learner can:

1. describe techniques for encouraging clients to communicate their needs
2. state why clients might find it difficult to communicate their needs
3. describe techniques for confirming and clarifying clients needs
4. list the different methods of providing information
5. describe how information can be formatted to suit the needs of different clients
6. state the types of difficulties that may be encountered.

Unit 213

Support clients to make use of the housing advice and guidance service

Outcome 2

Know what services and information is available to support clients to make use of housing services

Assessment Criteria

The learner can:

1. state what services are available to clients
2. state what services are offered by external agencies
3. describe the procedures for accessing internal and external services
4. state what information is available for internal and external services and how to retrieve
5. state why it is important to have accurate and up to date information
6. state why it is important to check that clients have received the information.

Unit 213

Support clients to make use of the housing advice and guidance service

Outcome 3

Support clients to make use of the housing advice and guidance service

Assessment Criteria

The learner can:

1. deal courteously, sensitively and fairly with individuals seeking housing
2. show respect for individual beliefs, expectations and needs
3. encourage clients to clarify their requirements and circumstances
4. identify and provide the client with appropriate and accurate information about the service
5. use the information provided to assist clients to decide whether their requirements could be met by the service
6. clarify clients' expectations and understanding of the service and its policies
7. provide clients' with information on the advantages and disadvantages of using the service.

Unit 213

Support clients to make use of the housing advice and guidance service

Outcome 4

Agree with clients their use of the housing advice and guidance service

Assessment Criteria

The learner can:

1. clarify and confirm the client's requirements and how these will be met by the service
2. agree the way the service will be used
3. record contacts and agreements with clients using the appropriate systems.

Unit 214

Enable housing clients to access referral opportunities

Level: 2

Credit value: 4

NDAQ number: H/601/0517

Unit aim

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

Learning outcomes

There are **three** learning outcomes to this unit. The learner will be able to:

1. Know the range of services, external to the organisation, which are available to housing customers
2. Identify options for referral to external services
3. Assist client with the take up of the referral opportunity

Guided learning hours

It is recommended that **30** hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national standards

This unit is linked to 'Enable advice and guidance clients to access referral opportunities' H2 20.

Assessment

This unit will be assessed by:

- Assessor observation of practice and/or expert witness testimony and an appropriate mix of other assessment methods to ensure all the assessment criteria are sufficiently evidenced to allow the assessor to make a judgement of consistent practice.

Unit 214

Enable housing clients to access referral opportunities

Outcome 1

Know the range of services, external to the organisation, which are available to housing customers

Assessment Criteria

The learner can:

1. list the types of services which are offered by external agencies relevant to housing customers
2. obtain information on these services including procedures for referral, eligibility and acceptance criteria
3. describe the procedures for checking the services' capacity and resources
4. list the objections customers might have in using these external services
5. state why it is important to have relevant and up to date information on services.

Unit 214

Enable housing clients to access referral opportunities

Outcome 2

Identify options for referral to external services

Assessment Criteria

The learner can:

1. deal courteously, sensitively and fairly with individuals seeking housing
2. show respect for individual beliefs, expectations and needs
3. obtain information from clients on their requirements
4. assess the suitability of other services for meeting clients' requirements
5. clarify with clients the appropriateness of the service
6. confirm the acceptance criteria and procedures of the service
7. review the requirements of clients and check them against the acceptance criteria of the service
8. check the service has the capacity and resources to deal with additional clients
9. maintain the confidentiality and privacy of the client
10. comply with organisational procedures, legal requirements, codes of practice and guidelines.

Unit 214

Enable housing clients to access referral opportunities

Outcome 3

Assist client with the take up of the referral opportunity

Assessment Criteria

The learner can:

1. review the referral options with clients
2. identify the advantages and disadvantages of the referral options for clients
3. provide clients with information using a suitable communication format to enable the client to make an informed decision
4. establish the acceptability of the referral with clients
5. inform the client of what information has to be passed between the relevant services
6. plan the effective implementation of the referral with the client
7. ensure that all referral procedures are completed correctly
8. state the procedures for additional support and information.

Unit 215

Provide and maintain information materials for use in the housing organisation

Level: 2

Credit value: 2

NDAQ number: T/601/0523

Unit aim

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

Learning outcomes

There are **three** learning outcomes to this unit. The learner will be able to:

1. Obtain information materials
2. Maintain the use of information materials
3. Improve the use of information materials

Guided learning hours

It is recommended that **10** hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national standards

This unit is linked to 'Provide and maintain information materials for use in the service' H2 21.

Assessment

This unit will be assessed by:

- Assessor observation of practice and/or expert witness testimony and an appropriate mix of other assessment methods to ensure all the assessment criteria are sufficiently evidenced to allow the assessor to make a judgement of consistent practice.

Unit 215

Provide and maintain information materials for use in the housing organisation

Outcome 1

Obtain information materials

Assessment Criteria

The learner can:

1. identify appropriate sources of information
2. obtain information materials in accordance with organisational procedures
3. agree realistic timescales and resources for obtaining the materials
4. check the materials against the organisation's agreed evaluation criteria or codes of practice and ethical requirements
5. record and store the materials according to organisational procedures
6. identify problems with obtaining the information materials
7. list the information materials that should be in stock.

Unit 215

Provide and maintain information materials for use in the housing organisation

Outcome 2

Maintain the use of information materials

Assessment Criteria

The learner can:

1. maintain sufficient sources of freely available information materials to meet the requirements of clients
2. protect information sources from damage and inappropriate use and alteration.

Unit 215

Provide and maintain information materials for use in the housing organisation

Outcome 3

Improve the use of information materials

Assessment Criteria

The learner can:

1. consult with others in the organisation the effectiveness of the materials in use
2. review the information obtained on the effectiveness
3. identify the way materials are used
4. identify improvements in the way materials can be disseminated
5. identify the most appropriate methods for improving the materials
6. identify the resources required to implement the improvements
7. consult with all relevant people on the proposed improvements.

Unit 216

Help to develop individuals to contribute to decision making

Level: 2

Credit value: 4

NDAQ number: L/601/0530

Unit aim

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

Learning outcomes

There are **four** learning outcomes to this unit. The learner will be able to:

1. Know and understand the importance of encouraging customers to contribute to decision making
2. Establish customer views and needs in relation to contributing to decision making
3. Support customers to contribute to decision making
4. Evaluate the provision of opportunities for individuals to participate in decision making

Guided learning hours

It is recommended that **30** hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national standards

This unit is linked to 'Help to develop customers to contribute to decision making' H2 24.

Assessment

This unit will be assessed by:

- Assessor observation of practice and/or expert witness testimony and an appropriate mix of other assessment methods to ensure all the assessment criteria are sufficiently evidenced to allow the assessor to make a judgement of consistent practice.

Unit 216

Help to develop individuals to contribute to decision making

Outcome 1

Know and understand the importance of encouraging customers to contribute to decision making

Assessment Criteria

The learner can:

1. describe own role in helping customers to contribute to the decision making process
2. explain the benefits of encouraging customer involvement in decision making.

Unit 216

Help to develop individuals to contribute to decision making

Outcome 2

Establish customer views and needs in relation to contributing to decision making

Assessment Criteria

The learner can:

1. deal courteously, sensitively and fairly with individuals
2. obtain individual views about what they need to enable them to participate in decision making
3. encourage individuals to express their preferences about how they wish to engage in decision making
4. identify any barriers to individuals contributing to decision making
5. work with individuals to identify ways of overcoming the barriers to participation in decision making
6. agree individual needs and next steps in supporting individuals to engage in decision making.

Unit 216

Help to develop individuals to contribute to decision making

Outcome 3

Support customers to contribute to decision making

Assessment Criteria

The learner can:

1. identify opportunities for people to contribute to decision-making which meets their needs
2. identify opportunities for individuals to contribute to decision making and explore them with individuals
3. take appropriate action to implement opportunities for individuals
4. check and discuss progress with individuals
5. review opportunities and use this to improve future practice.

Unit 216

Help to develop individuals to contribute to decision making

Outcome 4

Evaluate the provision of opportunities for individuals to participate in decision making

Assessment Criteria

The learner can:

1. identify methods of evaluating the provision of opportunities to participate
2. obtain feedback from individuals of their experience of participating in decision making and the improvements they would wish to see
3. identify where individual participation has been effective and where it has been ineffective
4. review how the process could be improved in the future
5. make recommendations for changes in the process for both self and the organisation to encourage greater individual participation on decision making.

Unit 217

Help to develop individuals' involvement in the local community

Level: 2

Credit value: 3

NDAQ number: H/601/0534

Unit aim

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

Learning outcomes

There are **three** learning outcomes to this unit. The learner will be able to:

1. Recognise individuals' aspirations and needs
2. Identify opportunities for individual involvement in the local community
3. Support residents to engage with the local community

Guided learning hours

It is recommended that **20** hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national standards

This unit is linked to 'How to develop residents involvement in the local community' H2 25.

Assessment

This unit will be assessed by:

- Assessor observation of practice and/or expert witness testimony and an appropriate mix of other assessment methods to ensure all the assessment criteria are sufficiently evidenced to allow the assessor to make a judgement of consistent practice.

Unit 217

Help to develop individuals' involvement in the local community

Outcome 1

Recognise individuals' aspirations and needs

Assessment Criteria

The learner can:

1. deal courteously, sensitively and fairly with individuals
2. identify individuals' aspirations and self defined needs in relation to involvement
3. identify opportunities for consulting with residents on ways of becoming involved in the local community which respects individual and group needs and wishes
4. engage with residents in a positive and non-judgmental way.

Unit 217

Help to develop individuals' involvement in the local community

Outcome 2

Identify opportunities for individual involvement in the local community

Assessment Criteria

The learner can:

1. identify the range of options and opportunities for involvement available to individuals
2. establish and maintain contact with resident associations and other networks which provide opportunities for individual involvement
3. contribute to local information and support events which assist individuals to participate in local community
4. provide information, advice and guidance to individuals on the range of opportunities available
5. signpost individuals to other organisations who can support them.

Unit 217

Help to develop individuals' involvement in the local community

Outcome 3

Support residents to engage with the local community

Assessment Criteria

The learner can:

1. present accurate, accessible and honest information about opportunities to become involved in the local community
2. present opportunities to individuals in a positive and non-judgmental way
3. identify opportunities for individuals to build their confidence
4. encourage individuals to engage with existing associations and networks
5. assist residents in setting up their own groups
6. encourage individuals to participate in decision making processes within own organisation.

Unit 218

Support the rights of individuals in the community

Level: 2

Credit value: 4

NDAQ number: J/601/0543

Unit aim

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

Learning outcomes

There are **two** learning outcomes to this unit. The learner will be able to:

1. Understand how individuals can exercise their rights in the community
2. Support individuals to exercise their rights in the community

Guided learning hours

It is recommended that **30** hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national standards

This unit is linked to 'Support the rights of customers in the community' H2 26.

Assessment

This unit will be assessed by:

- Assessor observation of practice and/or expert witness testimony and an appropriate mix of other assessment methods to ensure all the assessment criteria are sufficiently evidenced to allow the assessor to make a judgement of consistent practice.

Unit 218

Support the rights of individuals in the community

Outcome 1

Understand how individuals can exercise their rights in the community

Assessment Criteria

The learner can:

1. deal courteously, sensitively and fairly with individuals
2. describe the needs and expectations of individuals in relation to the wider community
3. identify the legal and organisational requirements in relation to support and representation
4. explain how barriers such as discrimination, stereotyping, prejudice and disadvantage can undermine and exclude people from exercising their rights and responsibilities
5. illustrate potential conflicts between the rights and responsibilities of individuals and those of others in the wider community
6. explain how to challenge discrimination, disadvantage and exclusion
7. identify and access sources of information, advice and support on rights and how your organisation and individuals can make use of them
8. establish the limits of own authority and responsibility in helping individuals to represent and assert their rights and when to pass customers onto other advocates or representatives
9. identify the other organisations that provide information, advice and support on rights and how to use them to support individuals.

Unit 218

Support the rights of individuals in the community

Outcome 2

Support individuals to exercise their rights in the community

Assessment Criteria

The learner can:

1. support the rights of individuals in accordance with legal and organisational requirements within the limits of own authority and responsibility
2. adopt methods that are legal and effective and do not adversely affect others in the community
3. make individuals aware of their rights and how they can be represented
4. identify sources of support and advice in relation to individual needs and access them on behalf of the individual as required
5. provide support which is based on clearly identified individual need
6. provide individuals with information which will help them to represent their own interests
7. support individuals to express their needs clearly.

Unit 219

Give customers a positive impression of yourself and your organisation

Level: 2

Credit value: 5

NDAQ number: L/601/0933

Unit aim

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

Learning outcomes

There are **four** learning outcomes to this unit. The learner will be able to:

1. Establish rapport with customers
2. Respond appropriately to customers
3. Communicate information to customers
4. Understand how to give customers a positive impression of themselves and the organisation they must know and understand

Guided learning hours

It is recommended that **33** hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national standards

This unit directly relates to Unit A4 of the Customer Service NOS 2010.

Assessment

This unit will be assessed by:

- A portfolio of evidence.

Unit 219

Give customers a positive impression of yourself and your organisation

Outcome 1

Establish rapport with customers

Assessment Criteria

The learner can:

1. meet their organisation's standards of appearance and behaviour
2. greet their customer respectfully and in a friendly manner
3. communicate with their customer in a way that makes them feel valued and respected
4. identify and confirm their customer's expectations
5. treat their customer courteously and helpfully at all times
6. keep their customer informed and reassured
7. adapt their behaviour to respond to different customer behaviour.

Unit 219

Give customers a positive impression of yourself and your organisation

Outcome 2

Respond appropriately to customers

Assessment Criteria

The learner can:

1. respond promptly to a customer seeking help
2. choose the most appropriate way to communicate with their customer
3. check with their customer that they have fully understood their expectations
4. respond promptly and positively to their customer's questions and comments
5. allow their customer time to consider their response and give further explanation when appropriate.

Unit 219

Give customers a positive impression of yourself and your organisation

Outcome 3

Communicate information to customers

Assessment Criteria

The learner can:

1. quickly find information that will help their customer
2. give their customer information they need about the services or products offered by their organisation
3. recognise information that their customer might find complicated and check whether they fully understand
4. explain clearly to their customers any reasons why their expectations cannot be met.

Unit 219

Give customers a positive impression of yourself and your organisation

Outcome 4

Understand how to give customers a positive impression of themselves and the organisation they must know and understand

Assessment Criteria

The learner can:

1. describe their organisation's standards for appearance and behaviour
2. explain their organisation's guidelines for how to recognise what their customer wants and respond appropriately
3. identify their organisation's rules and procedures regarding the methods of communication they use
4. explain how to recognise when a customer is angry or confused
5. identify their organisation's standards for timeliness in responding to customer questions and requests for information.

Unit 220

Recognise and deal with customer queries, requests and problems

Level: 1

Credit value: 5

NDAQ number: M/601/1508

Unit aim

No matter how good the learner is at providing consistent and reliable customer service, some of their customers will from time to time expect more. They can signal this in various ways and when they do the learner must know how to handle it. Sometimes customers ask different questions and request special treatment. The learner may be able to help them and they certainly need to know who to ask for help if necessary. Some customers may be dissatisfied with the service and may present a problem. The learner's job is to recognise that there is a problem and make sure that the appropriate person deals with it.

Learning outcomes

There are **three** learning outcomes to this unit. The learner will be able to:

1. Recognise and deal with customer queries and requests
2. Recognise and deal with customer problems
3. Know how to recognise and deal with customer queries, requests and problems

Guided learning hours

It is recommended that **33** hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national standards

This unit directly relates to Unit C1 of the Customer Service NOS 2010

Support of the unit by a sector or other appropriate body

This unit has been submitted on behalf of the Institute of Customer Service

Assessment

This unit will be assessed by:

- A portfolio of evidence.

Unit 220

Recognise and deal with customer queries, requests and problems

Outcome 1

Recognise and deal with customer queries and requests

Assessment Criteria

The learner can:

1. deal with queries and requests from customers in a positive and professional way
2. seek information or help from a colleague if they cannot answer their customer's query or request
3. obtain help from a colleague if they are not able to deal with their customer's request
4. always tell their customer what is happening.

Unit 220

Recognise and deal with customer queries, requests and problems

Outcome 2

Recognise and deal with customer problems

Assessment Criteria

The learner can:

1. recognise when something is a problem from the customer's point of view
2. avoid saying or doing anything which may make the problem worse
3. deal with a difficult customer calmly and confidently
4. recognise when to pass a problem on to an appropriate colleague
5. pass the problem on to their colleague with the appropriate information
6. check that the customer knows what is happening.

Unit 220

Recognise and deal with customer queries, requests and problems

Outcome 3

Know how to recognise and deal with customer queries, requests and problems

Assessment Criteria

1. list who in the organisation is able to give help and information
2. state the limits of what they are allowed to do
3. identify what professional behaviour is
4. describe how to speak to people who are dissatisfied
5. describe how to deal with difficult people
6. state what customers normally expect
7. identify how to recognise a problem from what a customer says or does
8. describe what kinds of behaviours/actions would make situations worse
9. list the organisational procedures they must follow when they deal with problems or complaints
10. identify the types of behaviour that may make a problem worse.

Level: 2

Credit value: 5

NDAQ number: A/601/1530

Unit aim

Organisations change the way they deliver service to their customers because customer expectations rise and because other organisations improve the services they offer. Often the most important ideas about how to improve customer service come from people dealing directly with customers. The learner's job involves delivering customer service. If the organisation has decided to make changes, it is the learner's job to support them and to present them positively to customers. Also, by listening to customer comments the learner may have their own ideas about how the service they deliver could be improved. This unit is about how the learner provides support for changes that their organisation has introduced. In addition, it covers how the learner presents their own ideas for improvements to someone in their organisation who can authorise trying out the change.

Learning outcomes

There are **four** learning outcomes to this unit. The learner will be able to:

1. Use feedback to identify potential customer service improvements
2. Implement changes in customer service
3. Assist with the evaluation of changes in customer service
4. Know how to support customer service improvements

Guided learning hours

It is recommended that **33** hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national standards

This unit directly relates to Unit D2 of the Customer Service NOS 2010.

Assessment

This unit will be assessed by:

- A portfolio of evidence.

Unit 221

Support customer service improvements

Outcome 1

Use feedback to identify potential customer service improvements

Assessment Criteria

The learner can:

1. gather informal feedback from their customers
2. use their organisation's procedures to collect feedback from their customers
3. use the information from their customers to develop a better understanding of their customer service experience
4. identify ways the service they give could be improved based on information they have gathered
5. share their ideas for improving customer service with colleagues.

Unit 221

Outcome 2

Support customer service improvements

Implement changes in customer service

Assessment Criteria

The learner can:

1. identify a possible change that could be made to improve customer service
2. present their idea for improving customer service to a colleague with the appropriate authority to approve the change
3. carry out changes to customer service procedures based on their own idea or proposed by their organisation
4. keep their customers informed of changes to customer service
5. give customers a positive impression of changes that have been made
6. work positively with others to support customer service changes

Unit 221

Outcome 3

Support customer service improvements

Assist with the evaluation of changes in customer service

Assessment Criteria

The learner can:

1. discuss with others how changes to customer service are working work with others to identify any negative effects of changes and how these can be avoided.

Unit 221

Outcome 4

Support customer service improvements

Know how to support customer service improvements

Assessment Criteria

The learner can:

1. explain how customer experience is influenced by the way service is delivered
2. identify how customer feedback is obtained
3. explain how to work with others to identify and support change in the way service is delivered
4. describe why it is important to give a positive impression to their customer about the changes made by the organisation even if the learner disagrees with them.

Level: 3
Credit value: 2
NDAQ: J/600/3205

Unit aim

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

Learning outcomes

There are **three** learning outcomes to this unit. The learner will be able to:

1. Know the organisation's housing stock and possible defects which require repair
2. Know organisational policies and procedures relating to requests
3. Establish and respond to customer requests for repairs

Guided learning hours

It is recommended that **10** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Details of the relationship between the unit and relevant national occupational standards

This unit is linked to respond to customer request for repairs H3 04.

Endorsement of the unit by a sector or other appropriate body

This unit is endorsed by Asset Skills.

Assessment and grading

This unit will be assessed by:

- Assessor observation of practice and/or expert witness testimony and an appropriate mix of other assessment methods to ensure all the assessment criteria are sufficiently evidenced to allow the assessor to make a judgement of consistent practice.

Unit 304

Outcome 1

Respond to Customer Requests for Repairs

Know the organisation's housing stock and possible defects which require repair

Assessment Criteria

The learner can:

1. describe the types of properties which your organisation manages
2. identify using the appropriate terminology, the types of faults which can occur in these properties.

Unit 304

Outcome 2

Respond to Customer Requests for Repairs

Know organisational policies and procedures relating to requests

Assessment Criteria

The learner can:

1. describe the types of service agreements with customers
2. identify the organisational policies and procedures relating to repair requests
3. identify repairs which require emergency action.

Unit 304

Outcome 3

Respond to Customer Requests for Repairs

Establish and respond to customer requests for repairs

Assessment Criteria

The learner can:

1. clarify requests from customers to determine the exact nature of what is required
2. accurately record the details of customers and their requests
3. state the other parties involved in the maintenance and repair of the organisation's properties and whether there are any associated charges
4. identify requests which are outside the organisation's responsibilities
5. describe how to refer customers to other organisations and individuals
6. arrange inspection visits and repair work according to organisational policies and procedures
7. prioritise urgent repairs.

Appendix 1 Sources of general information

The following documents contain essential information for centres delivering City & Guilds qualifications. They should be referred to in conjunction with this handbook. To download the documents and to find other useful documents, go to the **Centres and Training Providers homepage** on www.cityandguilds.com.

Centre Guide – Delivering International Qualifications contains detailed information about the processes which must be followed and requirements which must be met for a centre to achieve ‘approved centre’ status, or to offer a particular qualification. Specifically, the document includes sections on:

- The centre and qualification approval process and forms
- Assessment, verification and examination roles at the centre
- Registration and certification of candidates
- Non-compliance
- Complaints and appeals
- Equal opportunities
- Data protection
- Frequently asked questions.

Providing City & Guilds qualifications – a guide to centre and qualification approval contains detailed information about the processes which must be followed and requirements which must be met for a centre to achieve ‘approved centre’ status, or to offer a particular qualification. Specifically, the document includes sections on:

- The centre and qualification approval process and forms
- Assessment, verification and examination roles at the centre
- Registration and certification of candidates
- Non-compliance
- Complaints and appeals
- Equal opportunities
- Data protection
- Frequently asked questions.

Ensuring quality contains updates and good practice exemplars for City & Guilds assessment and policy issues. Specifically, the document contains information on:

- Management systems
- Maintaining records
- Assessment
- Internal verification and quality assurance
- External verification.

Access to Assessment & Qualifications provides full details of the arrangements that may be made to facilitate access to assessments and qualifications for candidates who are eligible for adjustments in assessment.

The **centre homepage** section of the City & Guilds website also contains useful information such on such things as:

- **Walled Garden**

Find out how to register and certificate candidates on line

- **Qualifications and Credit Framework (QCF)**

Contains general guidance about the QCF and how qualifications will change, as well as information on the IT systems needed and FAQs

- **Events**

Contains dates and information on the latest Centre events

- **Online assessment**

Contains information on how to register for GOLLA assessments.

Useful contacts

UK learners

General qualification information

T: +44 (0)844 543 0033

E: learnersupport@cityandguilds.com

International learners

General qualification information

T: +44 (0)844 543 0033

F: +44 (0)20 7294 2413

E: intcg@cityandguilds.com

Centres

Exam entries, Registrations/enrolment, Certificates, Invoices, Missing or late exam materials, Nominal roll reports, Results

T: +44 (0)844 543 0000

F: +44 (0)20 7294 2413

E: centresupport@cityandguilds.com

Single subject qualifications

Exam entries, Results, Certification, Missing or late exam materials, Incorrect exam papers, Forms request (BB, results entry), Exam date and time change

T: +44 (0)844 543 0000

F: +44 (0)20 7294 2413

F: +44 (0)20 7294 2404 (BB forms)

E: singlesubjects@cityandguilds.com

International awards

Results, Entries, Enrolments, Invoices, Missing or late exam materials, Nominal roll reports

T: +44 (0)844 543 0000

F: +44 (0)20 7294 2413

E: intops@cityandguilds.com

Walled Garden

Re-issue of password or username, Technical problems, Entries, Results, GOLLA, Navigation, User/menu option, Problems

T: +44 (0)844 543 0000

F: +44 (0)20 7294 2413

E: walledgarden@cityandguilds.com

Employer

Employer solutions, Mapping, Accreditation, Development Skills, Consultancy

T: +44 (0)121 503 8993

E: business_unit@cityandguilds.com

Publications

Logbooks, Centre documents, Forms, Free literature

T: +44 (0)844 543 0000

F: +44 (0)20 7294 2413

If you have a complaint, or any suggestions for improvement about any of the services that City & Guilds provides, email: feedbackandcomplaints@cityandguilds.com

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