

# **Propertymark Qualifications: Level 4 Certificate in Sale of Residential Property (England, Wales & Northern Ireland)**

## **Qualification Specification**

## ABOUT PROPERTYMARK QUALIFICATIONS

Propertymark Qualifications (formerly NFoPP Awarding Body) is the UK's specialist awarding organisation offering industry recognised qualifications in property and property affiliated disciplines. We draw our expertise from an array of experienced property industry practitioners and academics from relevant fields including property, law, surveying and finance.

Propertymark Qualifications is an independent organisation and is recognised by the national qualification regulators in England, Wales and Northern Ireland; namely the Office of the Qualifications and Examinations Regulator (Ofqual), Qualifications Wales and the Council for Curriculum, Assessment and Examinations (CCEA Regulation) respectively. We also offer accredited qualifications in Scotland, credit and level rated in the Scottish Credit and Qualifications Framework (SCQF). This means we follow strict guidelines and maintain quality standards in the provision of all our qualifications.

Propertymark Qualifications has been operating as a recognised and regulated awarding body since March 2002 with our first qualifications being awarded to candidates in 2003. We work in association with professional membership bodies which allows us to collaborate with them and draw on their expertise and experience to ensure the design and development of our qualifications is at pace with changes in the industry at large.

All of this puts us in a unique position to provide tailored and industry specific qualifications that meet industry requirements, reinforce industry standards and afford individuals the opportunity to progress.

All information on this document is correct at the time of publication.

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## QUALIFICATION PURPOSE

The Level 4 Certificate in Sale of Residential Property is an advanced qualification, ideal for candidates wanting to gain further recognition of knowledge attained within the sector and is recognised in England, Wales and Northern Ireland.

The entry requirement for the Level 4 Certificate in Sale of Residential Property is the Level 3 Technical Award in The Sale of Residential Property.

## STRUCTURE

This qualification comprises of 6 units:

- Unit 3: Legal Aspects Relating to Residential Estate Agency (LAREA)
- Unit 4: Practice Relating to Residential Estate Agency (PREA)
- Unit 5: Market Appraisal & Valuation Relating to Residential Estate Agency (MAVREA)
- Unit 6: Building Design & Defects for Residential Estate Agency (BDDREA)
- Unit 7: Introduction to Office Management (IOM)
- Unit 8: Advanced Office Management (AOM)

## ASSESSMENT GUIDANCE

Assessment Guidance is provided to amplify the learning objective and/or assessment criterion as relevant and enable national or industry specific information and requirements to be noted.

## OTHER INFORMATION

This qualification is accepted for Fellow membership by NAEA (National Association of Estate Agents) PropertyMark. If you have any queries regarding NAEA PropertyMark membership, then please contact them directly.

## QUALIFICATION PURPOSE AND STRUCTURE

The Level 4 Certificate in the Sale of Residential Property is an advanced qualification ideal for candidates wanting to gain further recognition for knowledge attained within the sector.

## QUALIFICATION SUMMARY AND KEY INFORMATION

Qualification title	Level 4 Certificate in Sale of Residential Property (England, Wales and Northern Ireland)
QCF Qualification Number (QAN)	601/2164/6
Accreditation start date	02/12/2013
Approved age ranges	18+
Credit value	26
Assessment	Individual Learners only: Onscreen assessment
Guided learning hours	260
Grading information	Fail, Pass or Distinction
Entry requirements	Level 3 Technical Award in The Sale of Residential Property

## QUALIFICATION UNITS

The unit titles and unit codes will appear at examination booking stage and on certification.

Propertymark Qualifications requires any candidate wishing to complete the Level 4 Certificate in Sale of Residential Property (England, Wales and Northern Ireland) to complete the 6 units listed below. Once all 6 units have been successfully achieved, Propertymark Qualifications will provide certification for the full qualification.

**Please Note: Units can be completed in any order**

Unit Number	Unit Title	Unit Reference
3	Legal Aspects Relating to Residential Estate Agency (LAREA)	Y/505/8019
<p><b>About this unit</b> This unit builds on the legal aspects units covered in the technical award, taking a selection of the concepts introduced there and expanding on these and including case law to illustrate various points. It begins again with some general legal concepts, and looks at contract, tort basic property law and estate agency law is explored in greater depth. The unit concludes with a consideration of financial service requirements, consumer legislation and the legal aspects of the buying and selling process.</p>		
Syllabus Letter	Learning Outcome <i>The Candidate should be able to:</i>	Assessment Criteria <i>The candidate must:</i>
A, F	1. Demonstrate an understanding of the value of a contract and the legal obligations of the parties.	1.1 Examine the function and content of a contract 1.2 Outline the remedies available for breach 1.3 Explain the special contract law rules relating to the sale of an estate or interest in land
B, D, G	2. Demonstrate an understanding of how legislation influences the estate agency business.	2.1 Explain the key elements of the Estate Agents Act 1979 2.2 Explain the key elements of the Consumer Protection from Unfair Trading Regulations 2008 2.3 Explain the key elements of the Business Protection from Misleading Advertising Regulations 2008 2.4 Apply with examples relevant subordinate legislation 2.5 Apply legislation on cooling off periods to a range of situations 2.6 Recognise when a contract term could be unfair
A	3. Demonstrate an understanding of the nature of the law of tort and its impact on land and property.	3.1 Identify the range of torts that impact on the use, occupation and transfer of interests in land 3.2 Explain the nature of negligence using relevant examples 3.3 Explain vicarious liability 3.4 Discuss the various remedies and defences in the law of negligence
F, A	4. Demonstrate an understanding of the legal nature of landed property and the estates and interests that exist.	4.1 Explain the distinction between freehold, leasehold and commonhold estates 4.2 Discuss using examples, the nature of easements and restrictive covenants 4.3 Summarise the nature of the conveyancing process
B, C	5. Demonstrate an understanding of the different methods available for handling complaints, conflicts of interest and dispute resolution	5.1 Explain how disputes may arise 5.2 Describe the processes involved in dealing with complaints 5.3 Explain the different methods of dispute resolution 5.4 Explain how a conflict of interest may arise and how these can be resolved
E	6. Demonstrate an understanding of the financial regulations that apply to the business of residential estate agency	6.1 Explain the role of the Financial Conduct Authority 6.2 Summarise the financial regulations that apply
<b>Assessment Guidance</b>		

Unit 3 Syllabus Items (elements A – G)		Number of Scenarios 5
A	<p><b>General legal concepts</b></p> <p><b>Contract</b></p> <ol style="list-style-type: none"> <li>1. Formation and privity</li> <li>2. Terms and exclusion clauses</li> <li>3. Misrepresentation</li> <li>4. Termination</li> <li>5. Conditional contracts</li> <li>6. Option agreements</li> <li>7. Overage agreements and lockouts</li> </ol> <p><b>Tort</b></p> <ol style="list-style-type: none"> <li>8. Negligence</li> <li>9. Vicarious liability</li> </ol> <p><b>Property law</b></p> <ol style="list-style-type: none"> <li>10. Freehold, leasehold, commonhold</li> <li>11. Covenants</li> <li>12. Easements</li> </ol>	1
B	<p><b>Estate agency law</b></p> <ol style="list-style-type: none"> <li>1. The Estate Agents Act 1979 and subordinate legislation</li> <li>2. Conflict of interests</li> </ol>	2
C	<b>Dispute resolution and redress schemes</b>	
E	<p><b>Provision of financial services</b></p> <ol style="list-style-type: none"> <li>1. Licences and supervision of organisations</li> </ol>	
D	<p><b>Consumer protection</b></p> <ol style="list-style-type: none"> <li>1. Consumer Protection from Unfair Trading Regulations 2008</li> <li>2. Business Protection from Misleading Marketing Regulations 2008</li> </ol>	1
G	<p><b>Other consumer legislation</b></p> <ol style="list-style-type: none"> <li>1. Consumer Contracts (Information, Cancellation and Additional Charges) Regulations 2013</li> <li>2. Unfair terms: Part 2 Consumer Rights Act 2015</li> </ol>	
F	<p><b>Contracts for the sale of land</b></p> <ol style="list-style-type: none"> <li>1. The conveyancing process</li> <li>2. e-conveyancing</li> </ol>	1

Unit Number	Unit Title	Unit Reference
4	Practice relating to Residential Estate Agency (PRREA)	R/505/8021
<b>About this unit</b>		
This unit develops some of the principles introduced in the legal units focusing on the practice of residential estate agency.		
Syllabus Letter	Learning Outcome <i>The Candidate should be able to:</i>	Assessment Criteria <i>The candidate must:</i>
A	1. Demonstrate an understanding of professional ethics, codes of practice and rules of conduct.	1.1 Summarise the definition and meaning of ethics 1.2 Explain how conflicts of interest arise 1.3 Identify and apply professional bodies' rules of conduct and codes of practice
B, C, D	2. Demonstrate an understanding of the market appraisal and instruction process.	2.1 Distinguish the different types of agency and alternative methods of sale 2.2 Summarise the issues involved in market appraisal 2.3 Explain the process of winning instructions 2.4 Explain how the seller's instructions are agreed 2.5 Clarify how the commission or fee is to be agreed 2.6 Summarise the key legislative provisions that affect the creation of the agency contract
F, G	3. Demonstrate an understanding of the principles and factors that influence the preparation of property particulars.	3.1 Explain the relevant marketing principles 3.2 Explain how particulars must comply with relevant legislation 3.3 Clarify the methods for properly recording measurements 3.4 Summarise the information which needs to be given on energy performance 3.5 Describe the way in which particulars should be prepared
E, H, I	4. Demonstrate an understanding of the duties of a residential estate agent in the context of marketing and negotiating a residential sale.	4.1 Explain the importance of correspondence and follow up after the market appraisal 4.2 Explain the importance of conforming to the agreed marketing plan 4.3 Explain the procedures to be observed in conducting viewings 4.4 Clarify how to seek offers and identify prospective buyers 4.5 Summarise selling techniques to negotiate terms agreeable to the client and the applicant
J, K	5. Demonstrate an understanding of the main factors that may influence the progression of the sale.	5.1 Summarise the proper procedures once terms of sale have been agreed 5.2 Identify common problems in progression of a sale 5.3 Summarise the rights and obligations of each party 5.4 Explain what is meant by a mortgage 5.5 Summarise what is meant by negative equity and the issues which might arise
<b>Assessment Guidance</b>		

Unit 4 Syllabus Items (elements A – K)		Number of Scenarios 5
A	<b>Responsibilities of an estate agent</b> <ol style="list-style-type: none"> <li>Professional ethics and codes of practice</li> <li>To: the client; applicants; the firm and colleagues</li> </ol>	1
C	<b>Legislation to be followed at instruction stage</b> <ol style="list-style-type: none"> <li>Consumer Contracts (Information, Cancellation and Additional Charges) Regulations 2013</li> <li>Consumer Protection from Unfair Trading Regulations 2008</li> <li>Part 2 Consumer Rights Act 2015</li> <li>Money Laundering Regulations 2007 and Proceeds of Crime Act 2002</li> <li>EPC regulations</li> </ol>	
B	<b>Instructions</b> <ol style="list-style-type: none"> <li>Sources of instructions</li> <li>Initial response</li> <li>Negotiation of the type of agency</li> <li>Alternative methods of sale: auction, private treaty, tender</li> <li>Advice on methods of sale to the seller</li> </ol>	1
D	<b>The market appraisal process</b> <ol style="list-style-type: none"> <li>Preparation for the market appraisal</li> <li>Structure of a market appraisal appointment: the nature of the property, client requirements, winning instructions</li> </ol>	1
E	<b>After the Market appraisal</b> <ol style="list-style-type: none"> <li>Correspondence and follow-up</li> </ol>	
H	<b>Dealing with applicants</b> <ol style="list-style-type: none"> <li>Qualification</li> <li>Cross selling</li> </ol>	
F	<b>Preparing property particulars</b> <ol style="list-style-type: none"> <li>Consumer Protection from Unfair Trading Regulations 2008</li> <li>Measurement of land and property</li> <li>Inclusion of energy performance certificate</li> <li>Marketing strategy</li> </ol>	1
G	<b>Marketing properties</b> <ol style="list-style-type: none"> <li>SWOT</li> <li>AIDA</li> <li>Use of technology and the media</li> </ol>	
I	<b>The agent's duties and the procedures to be followed following receipt of instructions</b> <ol style="list-style-type: none"> <li>Customer contact</li> <li>Working to a marketing plan, marketing updates and price adjustments</li> <li>Selling techniques, methods and approaches</li> <li>Arranging and conducting viewings</li> <li>Viewing feedback</li> <li>Dealing with and negotiating offers</li> <li>Agreeing a sale</li> <li>Instructing solicitors</li> </ol>	1
J	<b>Progressing sales</b> <ol style="list-style-type: none"> <li>Dealing with common problems</li> <li>Chains</li> <li>Surveys</li> <li>Mortgages</li> </ol>	



	5. Leasehold property	
K	<b>Mortgages</b> 1. Council of Mortgage Lenders Declaration 2. Mortgage arrears 3. Negative equity and dealing with repossessions	

Unit Number	Unit Title	Unit Reference
5	Market Appraisal & Valuation Relating to Residential Estate Agency (MAVREA)	K/505/8025

**About this unit**

The unit starts by looking at aspects of market forces and the valuation process. It explores the use of comparables and the process of appraisal including a consideration of the range of factors that you need to know in order to appraise residential property, and advise customers. It examines the three principle methods of valuation and their application concluding with an overview of some aspects of leasehold enfranchisement and compulsory purchase.

Syllabus Letter	Learning Outcome <i>The Candidate should be able to:</i>	Assessment Criteria <i>The candidate must:</i>
<b>A, C</b>	1. Demonstrate an understanding of market principles and how these interact to produce price and value.	1.1 Apply the theory of supply and demand to determine price in markets in general 1.2 Show how supply and demand interact to determine price and value in the property markets 1.3 Explain the factors that affect property value
<b>B</b>	2. Demonstrate an understanding of the importance and application of key valuation bases taken from the RICS Valuation – Professional Standards (Red Book).	2.1 Define market value 2.2 Identify the key terms used in the definition of market value 2.3 Distinguish price, value and worth 2.4 Identify the differences between a valuation and an appraisal 2.5 Identify how and when the market value definition is used for different valuation purposes
<b>C</b>	3. Demonstrate an understanding of the range and variety of factors affecting the value of residential property.	3.1 Identify the range of factors that impact on residential property value 3.2 Distinguish factors having major and minor impact on value 3.3 Compare market trends in the residential property markets 3.4 Identify the influence of government policy on residential property values 3.5 Distinguish the definitions and use of different notions of floor area
<b>D</b>	4. Demonstrate an understanding of the five conventional methods of valuation and the circumstances in which each one is used	4.1 Distinguish between the five conventional methods of valuation 4.2 Identify the three methods used in the valuation of residential property 4.3 Identify when to use each of the three main methods 4.4 Construct valuations using each of the three main methods
<b>E</b>	5. Demonstrate an understanding of the application of valuation techniques in the context of common residential property situations.	5.1 Identify the valuation role of the estate agent 5.2 Carry out valuation of specified property types 5.3 Undertake valuations for specific purposes
<b>E</b>	6. Demonstrate an understanding of situations where the valuer is required to take into account the legal and statutory requirements where valuations have to be carried out subject to special assumptions	6.1 Identify the key elements of the legal framework covering compulsory purchase 6.2 Identify valuation approaches used to determine compensation to those affected by compulsory purchase 6.3 Identify the circumstances in which certain properties and tenants are able to exercise leasehold enfranchisement 6.4 Distinguish the valuation assumptions required for enfranchisement and lease extension 6.5 Identify how to value short leasehold interests
<b>G</b>	7. Demonstrate an understanding of how to carry out market appraisals	7.1 Identify the elements of the sales process 7.2 Demonstrate how to maximise value in different situations 7.3 Show how to take account of client needs and expectations

**Assessment Guidance**

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Unit 5 Syllabus Items (elements A – G)		Number of Scenarios 5
A	<b>Valuation</b> 1. Supply and demand theory	1
B	2. Valuation Bases - market value and projected market value 3. Valuation approaches	
G	<b>Market appraisal</b> 1. The process 2. Maximising value in the sales process and managing client expectations	2
C	<b>Property Characteristics</b> 1. Location 2. Situation 3. Type of property 4. Style of property 5. Construction method 6. Age of property 7. Size of property 8. Area of land 9. Planning and building regulation approvals 10. Tenure 11. Occupancy 12. Time of transaction 13. External and internal condition 14. Energy efficiency and sustainability 15. Environmental issues	
D	<b>Valuation methodology</b> 1. Comparative 2. Investment 3. Residual methods	1
E	<b>Application of valuation techniques</b> 1. Valuation role of the estate agent 2. Market research and information 3. Methods in specific situations 4. Formal valuations – divorce, insurance, taxation, leasehold enfranchisement, compulsory purchase and blight 5. Automated valuation models (AVM's) 6. Valuations for investment and development	1

Unit Number	Unit Title	Unit Reference
6	Building Design & Defects for Residential Estate Agency (BDDREA)	T/505/8025
<b>About this unit</b> This unit covers buildings, their design, construction and sustainability; together with common defects, building and planning control and energy/environmental issues.		
Syllabus Letter	Learning Outcome <i>The Candidate should be able to:</i>	Assessment Criteria <i>The candidate must:</i>
A	1. Demonstrate an understanding of the age, style and design of buildings	1.1 Identify the property styles for various periods 1.2 Recognise the principles relating to structural stability and protection from weather 1.3 Identify the design issues relating to the environment and economics
C	2. Demonstrate an understanding of the basic construction of foundations, floors, walls and roofs	2.1 Recognise the different types of foundations and how ground conditions affect their design and construction 2.2 Identify the function of floors, walls, windows and roofs 2.3 Recognise the construction methods and materials used in relation to floors, walls, windows and roofs
D	3. Demonstrate an understanding of the design and construction of drainage, water and heating systems and the services of gas and electricity supply and distribution	3.1 Recognise the issues relating to water supply and sanitary fittings and the materials used 3.2 Identify the methods of above and below ground waste disposal and the design of and materials used in drainage systems 3.3 Identify the types of heating and hot water systems 3.4 Recognise the functions of electricity and gas supplies and describe the distribution of these services 3.5 Identify the methods of microgeneration of energy
A, B	4. Demonstrate an understanding of the common causes of defects in property and services together with the appropriate remedies.	4.1 Identify the three causes of dampness in buildings, the resulting defects and their remedy 4.2 Highlight the defects associated with roofs, including chimneys, and identify the resulting problems and their remedy 4.3 Recognise the defects associated with foundations, walls and floors and their remedy 4.4 Highlight the causes of decay and deterioration of timber and the appropriate treatments 4.5 Identify the defects associated with below ground drainage and their remedy 4.6 Identify the defects associated with water, electricity and gas services and the appropriate remedial action
C, D	5. Demonstrate an understanding of the effect of design and materials in thermal and sound insulation, energy efficiency, fire resistance and means of escape in buildings.	5.1 Identify the causes of heat loss from buildings and the actions available to reduce such losses 5.2 Recognise the types of sound transmission and the materials and design principles to be used to reduce the problem 5.3 Identify the principles relating to energy rating, energy performance certificates, and energy efficiency 5.4 Summarise the principles relating to sustainability and renewable energy and the technologies available 5.5 Identify the requirements for fire resistance and means of escape and the implications of building design and the materials and fittings used 5.6 Recognise the importance of energy efficiency and sustainability in buildings 5.7 Identify the methods of microgeneration of energy
E, F	6. Demonstrate an understanding of town and country planning legislation, and building control regulation and environmental issues relating to residential buildings.	6.1 State the definition of development and identify when planning approval is required 6.2 Recognise the scope of building regulations and identify operations requiring building regulation approval 6.3 Highlight the consequences of non-compliance with planning and building regulation requirements 6.4 Identify the impact of conservation areas and listed buildings on residential developments 6.5 Recognise examples of factors that could produce contamination and pollution and identify the related legislation and remedial action 6.6 Identify the impact of invasive plants and other environmental issues

Syllabus Content (elements A – F)		Number of Scenarios 5
<b>A</b>	<b>Causes and remedies of common defects in property</b> <ol style="list-style-type: none"> <li>1. Structural problems: settlement, subsidence, slippage, heave, wall tie failure, roof spread</li> <li>2. Timber defects: dry rot, wet rot and woodworm Damp: rising, penetrating and condensation</li> </ol>	<b>2</b>
<b>B</b>	<b>Causes and remedies of common defects in services</b>	
<b>C</b>	<b>The effect of design and materials</b> <ol style="list-style-type: none"> <li>1. Thermal and sound insulation performance</li> <li>2. Fire resistance</li> <li>3. Means of escape</li> </ol>	<b>1</b>
<b>D</b>	<b>Energy efficiency in buildings</b> <ol style="list-style-type: none"> <li>1. Sustainability</li> <li>2. Renewable energy</li> </ol>	
<b>E</b>	<b>Town and country planning and building regulation control</b> <ol style="list-style-type: none"> <li>1. Planning consent</li> <li>2. Change of use</li> <li>3. Alterations and extensions</li> <li>4. Conservation areas and listed buildings</li> </ol>	<b>2</b>
<b>F</b>	<b>Environmental issues</b> <ol style="list-style-type: none"> <li>1. Contamination and pollution</li> <li>2. Flooding</li> <li>3. Hazardous materials</li> <li>4. Invasive plants and other environmental issues</li> </ol>	

Unit Number	Unit Title	Unit Reference
7	Introduction to Office Management (IOM)	H/505/8007

#### About this unit

This unit introduces concept of business management and mainly considers the management function of the new manager.

Syllabus Letter	Learning Outcome <i>The Candidate should be able to:</i>	Assessment Criteria <i>The candidate must:</i>
<b>A</b>	1. Demonstrate an understanding of what managers and leaders do and the core functions of management.	1.1 Explain the role of management in a changeable work environment 1.2 Explain the differences between what managers do and what leaders do 1.3 Summarise the core functions of management in the context of Agency work
<b>B</b>	2. Demonstrate an understanding of how to build and lead a team and how motivation, delegation and formal and informal communication is important.	2.1 Specify the aspects of successful team leadership 2.2 Explain how to build a team and the various roles that make up a successful team 2.3 Explain how good communication practices affect team effectiveness 2.4 Assess and explain the role of motivation and delegation in successful team leadership 2.5 Describe the barriers to delegation and how to delegate effectively
<b>C</b>	3. Demonstrate an understanding of how to plan and manage people, time and activities to ensure an effective business.	3.1 Explain how an office diary system can be utilised to manage personal and team tasks 3.2 Identify and explain ways to control absence to minimise impact on the business 3.3 Define crisis management and risk management and explain how both operate in the workplace
<b>D</b>	4. Demonstrate an understanding of the importance of the safety and security of both the employees and the premises	4.1 Explain how to keep the premises secure including exteriors, access, property, equipment and money 4.2 Explain how to deal with anger, abuse, threats and violence both in and outside the workplace with employees, clients, customers and contractors 4.3 Identify the issues of personal, security and safety when carrying out the work of an estate agent
<b>E</b>	5. Demonstrate an understanding of the importance and impact of attitudes, image and office presentation	5.1 Explain how staff attitudes and corporate image affects the business, and what can be done to improve them 5.2 Outline routine and non-routine maintenance to keep office presentation and standards high 5.3 Identify best practices for office presentation
<b>F</b>	6. Demonstrate an understanding of information technology risk and security and the importance of data access, control and maintenance of hardware and software	6.1 Write the key components of an IT policy including social media 6.2 Explain how to carry out an IT risk assessment and how to deal with key IT security issues 6.3 Summarise the key principles and practices for protecting personal data and how to prevent unauthorised system and data access 6.4 Explain how to manage software and hardware

#### Assessment Guidance

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Unit 7 Syllabus Content (elements A – F)		Number of Scenarios 5
A	<b>Role of the manager</b> <ol style="list-style-type: none"> <li>1. Leader/manager</li> <li>2. Organising and planning</li> <li>3. Delegation</li> </ol>	1
B	<b>Responsibilities of the manager</b> <ol style="list-style-type: none"> <li>1. Leadership and team building, team competition (team dynamics)</li> <li>2. Motivation</li> <li>3. Communication: informal, formal, meetings</li> </ol>	2
C	<b>Planning</b> <ol style="list-style-type: none"> <li>1. Office diary management</li> <li>2. Managing workloads and tasks</li> <li>3. Holiday sickness and absence</li> <li>4. Crisis management and disaster recovery</li> </ol>	
D	<b>Staff safety and security procedures</b> <ol style="list-style-type: none"> <li>1. Premises and staff security</li> <li>2. Implementing and monitoring procedures</li> <li>3. Dealing with difficult people</li> </ol>	2
E	<b>Office and staff presentation</b> <ol style="list-style-type: none"> <li>1. Attitudes and image (office, staff, vehicles)</li> <li>2. Maintenance and décor</li> <li>3. Quality and currency of display</li> </ol>	
F	<b>Information Technology</b> <ol style="list-style-type: none"> <li>1. Policies and procedures including internet, email and social media</li> <li>2. Appropriate use</li> <li>3. Data protection</li> <li>4. Security and back-up procedures</li> <li>5. Hardware, software and maintenance</li> </ol>	

Unit Number	Unit Title	Unit Reference
8	Advanced Office Management (AOM)	F/505/9004

#### About this unit

This unit builds on Unit 7 and considers matters that the more established manager is likely to have to deal with.

Syllabus Letter	Learning Outcome <i>The Candidate should be able to:</i>	Assessment Criteria <i>The candidate must:</i>
<b>A</b>	1. Demonstrate an understanding of budgeting, including profit, loss and cash flow forecasting, working within regulatory frameworks for organisations, and be able to use them to improve financial performance.	1.1 Assess the budgeting process within the organisation 1.2 Research the main types of accounts available and analyse the benefits across them 1.3 Identify the statutory framework for financial accounting needs 1.4 Develop financial accounts and ratios to improve financial performance
<b>B</b>	2. Demonstrate an understanding of the key principles of reporting and record keeping and the importance of these areas.	2.1 Evaluate the critical key concepts in organisational record keeping 2.2 Research and transcribe the key features of various business record keeping systems 2.3 Apply the main principles of record management 2.4 Analyse the differences between records and reports and highlight the attributes of both 2.5 Explain key performance indicators in the context of agency
<b>C</b>	3. Demonstrate an understanding of the importance of human resource management for optimising the performance and commitment of an organisation's employees.	3.1 Explain the importance of people as a key corporate resource 3.2 Conduct critical analysis around the processes and importance of human resource planning 3.3 Outline the provisions of the equality legislation and how it applies to agency 3.4 Describe the recruitment, selection and employment procedures governed under employment law 3.5 Evaluate these processes and effectively communicate these principles
<b>D</b>	4. Demonstrate an understanding of the role appraisals play in measuring and improving individual performance and how to correctly work within a disciplinary process.	4.1 Communicate the components of an organisations appraisal process 4.2 Effectively communicate how to feedback performance and provide appropriate suggestions on improvement guidance 4.3 Outline the discipline and grievance process 4.4 Initiate the dismissal process and analyse the differences between termination and dismissal and effectively deploy key techniques
<b>E</b>	5. Demonstrate an understanding of how to recognise and manage conflict in the workplace and deal with customer complaints	5.1 Summarise the different types and causes of conflict at work 5.2 Examine the different approaches to dealing with conflict at work 5.3 Effectively manage and instigate conflict resolution programmes 5.4 Have a systematic understanding of how to deal with customer complaints 5.5 Instigate change management to address customers' needs appropriately to effectively benefit the customer and the organisation
<b>F</b>	6. Demonstrate an understanding of how to recognise, manage and resolve conflict within the workplace and deal with internal and external conflicts.	6.1 Analyse the benefits of time management 6.2 Summarise the various time management techniques to help the manager and the team and apply them consistently 6.3 Develop ways to aid your own personal stress and the teams coping techniques
<b>G</b>	7. Demonstrate an understanding of how to assess, plan and implement continuous personal development for self and relevant others.	7.1 Develop a business case to secure the resources to support personal development plans 7.2 Explain the concept of personal development and continuing professional development (CPD) 7.3 Evaluate the impact of personal development plan on the achievement of defined role requirements and organisational objectives

#### Assessment Guidance



Syllabus Content (elements A – G)		Number of Scenarios 5
A	<b>Budgeting</b> <ol style="list-style-type: none"> <li>1. Understanding profit and loss and management accounts</li> <li>2. Fixed and variable costs</li> <li>3. Cash flow forecasting</li> </ol>	2
B	<b>Principles of reporting and record keeping</b> <ol style="list-style-type: none"> <li>1. Key performance indicators</li> <li>2. Collecting, collating, analysing and utilising (and creating audit trails)</li> </ol>	
C	<b>Recruitment</b> <ol style="list-style-type: none"> <li>1. Resource planning, reviewing staff needs</li> <li>2. Getting applicants, job description, person specification</li> <li>3. Short listing</li> <li>4. Interview: preparing for interview, interviewing against person specification</li> <li>5. Interviewing skills</li> <li>6. References and use of terms and conditions of employment</li> <li>7. Induction: policies and procedures, expectations, probation, feedback</li> <li>8. Discrimination and harassment in employment</li> <li>9. Redundancy</li> </ol>	1
D	<b>Managing performance</b> <ol style="list-style-type: none"> <li>1. Appraisals: feedback, communication, setting objectives and KPI's</li> <li>2. Dealing with changing and unsatisfactory performance</li> <li>3. Grievance procedures</li> <li>4. Disciplinary procedures</li> <li>5. Dismissal</li> </ol>	2
E	<b>Conflict Management and Complaints</b> <ol style="list-style-type: none"> <li>1. Conflict with customers - complaints</li> <li>2. Conflict with staff</li> <li>3. Conflict between staff</li> </ol>	
F	<b>Self-management (for the manager and the staff)</b> <ol style="list-style-type: none"> <li>1. Time management</li> <li>2. Stress management</li> </ol>	
G	<b>Training and development</b> <ol style="list-style-type: none"> <li>1. Analysing training needs, having a training plan, evaluating training</li> <li>2. Learning cycle, one-to-one training, coaching, delegation (as a training tool)</li> <li>3. Personal (self) development and CPD</li> </ol>	

## ASSESSMENT

Propertymark Qualifications currently offers one method of delivery for the assessment for the Level 4 Certificate in Sale and Residential Property.

- Onscreen\*

**\*Disclaimer – Subject to the availability of the test centre**

## SCHEDULING AN EXAMINATION

Level 4 Certificate examinations are scheduled at set times throughout the year as two-week examination sittings across all examinations. For more information on our examination schedules, please visit the Propertymark Qualifications website.

To book a Level 4 Certificate examination, a booking window must be open and is dependent on availability within the test centre of your choice. A booking window opens four weeks prior to each examination sitting.

Unit 3: Legal Aspects Relating to Residential Estate Agency (LAREA)	
Assessment Details	Short Essay exam. 5 scenarios, with 2 linked questions per scenario. 10 questions in total. Length of exam: 2 hours
Number of marks	100
Assessment availability	5 exam sittings per year
First assessment availability	January 2014
Pass Mark	45%

Unit 4: Practice Relating to Residential Property Sales (PREA)	
Assessment Details	Short Essay exam. 5 scenarios, with 2 linked questions per scenario. 10 questions in total. Length of exam: 2 hours
Number of marks	100
Assessment availability	5 exam sittings per year
First assessment availability	January 2014
Pass Mark	45%

Unit 5: Market Appraisal & Valuation Relating to Residential Estate Agency (MAVREA)	
Assessment Details	Multiple Choice Exam. 5 scenarios, with 5 linked questions per scenario. 25 questions in total. Length of exam: 1 hour 30 minutes
Number of marks	100
Assessment availability	5 exam sittings per year
First assessment availability	January 2014
Pass Mark	70%

Unit 6: Building Design & Defects for Residential Estate Agency (BDDREA)	
Assessment Details	Multiple Choice Exam. 5 scenarios, 5 linked questions per scenario. 25 questions in total. Length of exam: 1 hour 30 minutes
Number of marks	100
Assessment availability	5 exam sittings per year
First assessment availability	January 2014
Pass Mark	70%

Unit 7: Introduction to Office Management (IOM)	
Assessment Details	Short Essay exam. 5 scenarios, with 2 linked questions per scenario. 10 questions in total. Length of exam: 2 hours
Number of marks	100
Assessment availability	5 exam sittings per year
First assessment availability	January 2014
Pass Mark	45%

Unit 8: Advanced Office Management (AOM)	
Assessment Details	Short Essay exam. 5 scenarios, with 2 linked questions per scenario. 10 questions in total. Length of exam: 2 hours
Number of marks	100
Assessment availability	5 exam sittings per year
First assessment availability	January 2014
Pass Mark	45%

### Individual Learners - Onscreen assessment (external assessment)

Individual candidates are required to complete all examinations at approved test centres. Each centre is fully compliant with the Propertymark Qualifications policies and procedures.

The onscreen test can only be booked in accordance with the examination schedules during an open booking window by arrangement with the test centres.

All test centres offering onscreen assessment must comply with the Joint Council for Qualifications (JCQ) document Instruction's for the Conduct of Examinations (ICE).

Propertymark Qualifications offer over 150 test centre locations throughout the United Kingdom. To view the list of test centres available, please visit the Propertymark Qualifications website.

## REGISTRATION AND CERTIFICATION

### Individual Candidates

#### Registration

Candidates are required to register for the qualification and unit examinations by completing the online registration form on the Propertymark Qualifications website. Candidates will then receive a unique candidate number prefixed with a 'Q' and a password via email. This will enable the candidate to log into the Propertymark Qualifications website to view their profile and book examinations.

Candidates registering for a Level 4 Certificate will be required to pay a registration fee before their registration will become live and be able to book. Candidates will then have 3 years in which to achieve this qualification from payment of registration fees.

#### Results

Candidates who have taken a multiple-choice examination will:

- receive a provisional result slip from the test centre on the day of their examination confirming a mark and breakdown of how this has been achieved
- a formal result letter will be issued by Propertymark Qualifications the following Monday after completing your examination

Candidates who have taken a short essay examination will:

- receive an acknowledgement letter informing them their script has been received and will be marked no later than 7 weeks from receipt of their script the following Monday after completing your examination
- a formal results letter will be issue no later than 7 weeks after the examination sitting window closes

Candidates will not be able to book again for this unit until a result has been entered into the system.

The successful achievement of all units will result in either a final certificate showing a Pass or Distinction Grade; in order to obtain an overall grade of Distinction you need to achieve 4 out the 6 units with individual marks Distinction grade or higher and obtained during the first sitting. Exemptions and 2<sup>nd</sup>/3<sup>rd</sup> attempts will only result in a final overall grade of Pass.

### **Certification**

Candidates who achieve all six units for the full qualification will receive:

- a qualification pass letter informing the candidate of the dates they have achieved each unit within the qualification and percentage scored within 7 working days.
- a certificate giving the full qualification title and all units achieved within 20 working days.

### **Recognised Centres**

Separate arrangements exist for candidate registration and certification for Recognised Centres.

Centre Administrators should refer to the Centre Guidance document for further information.

Candidates who are being entered for this qualification by a Propertymark Qualifications Recognised Centre should refer to their centre for guidance on registration and certification procedures.

## **REPLACEMENT CERTIFICATES**

If a certificate of achievement is misplaced, lost or stolen and a replacement is required then the candidate will need to complete a Replacement Certificate Request form.

To complete the form, please visit the Propertymark Qualifications website.

## **ENQUIRIES AND APPEALS POLICY**

The examination regulations of the Propertymark Qualifications make provision for Propertymark Qualifications learners to be enabled to make an enquiry and/or to appeal against a decision. The facility by which to do so is outlined in this procedure and it is important the procedure is followed in all situations.

To find out more, please visit the Propertymark Qualifications website.

## **EXEMPTION POLICY**

Propertymark Qualifications recognises prior certificated qualifications equivalent to Propertymark qualifications units for the Level 4 Certificates only. Propertymark Qualifications operates an equality and diversity exemption policy and welcomes applicants for exemption on the basis of comparable qualifications from recognised institutions which satisfy the Propertymark Qualifications criteria for awarding exemptions.

To find out more, please visit the Propertymark Qualifications website.

## **LEARNING MATERIAL**

Learning materials are available to support those preparing for Propertymark Qualifications.

For further Information about learning material, please visit the Propertymark Qualifications website.