

Conveyancing Technician Apprenticeship Approach to Assessment: Summary

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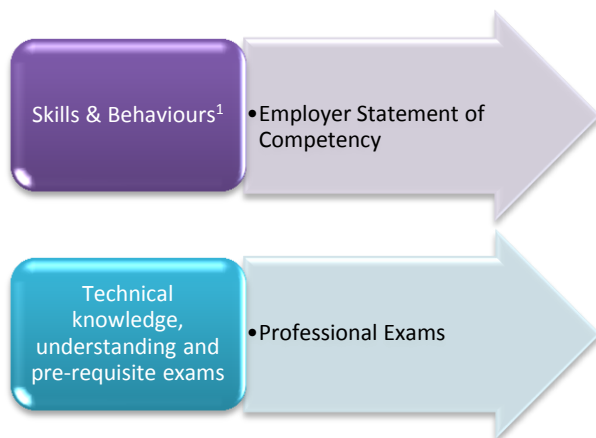
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Gateway: Apprentice deemed to be ready for end-point assessment

Learning, on-programme and pre-requisite assessment

Apprentice: carries out work as defined by their employer maintaining a reflective practice recordings, selects evidence for their showcase from work carried out in the last six months after they have successfully completed the Knowledge Modules.



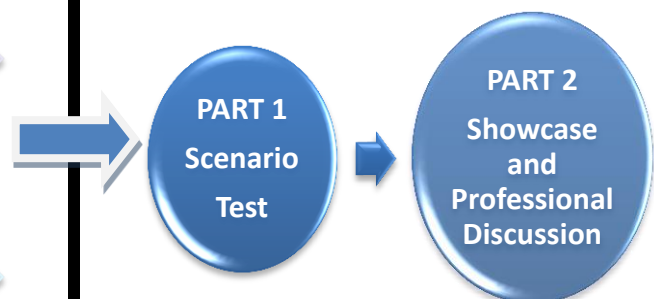
Internal Assessment – Employer Statement of Competency: creates opportunities for the apprentice to carry out work and produce outcomes; confirms that apprentice is ready for end-point assessment.

Internal Assessment - Training Provider: maps and assesses work against the Standard, provides guidance to enable the apprentice to select evidence for the summative showcase, confirms readiness for end-point assessment.

End-point Assessment

Apprentice: takes the scenario test; submits showcase and participates in a Professional Discussion.

- If the Scenario and Showcase combined with the Professional Discussion do not meet criteria for a PASS the whole End-point Assessment will be deemed a FAIL.



Independent Assessor (provided by the Assessment Organisation): delivers the end point assessment, assesses and passes or fails the apprentice on the basis of the scenario and Showcase and concluding Professional Discussion.

Internal Quality Assurance: Assessment Organisations provide this service in the form of employing Independent assessors and verifiers. A minimum of 35% will be moderated across a representative sample of employers/apprenticeships.

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Assessment Organisations and training providers: set and mark the professional exams.

Introduction and Overview

The apprenticeship Standard for Conveyancing Technician was designed by the industry for apprentices employed in a wide variety of different organisations in the conveyancing, legal, banking, building society and wider conveyancing fields. It is likely that 200-250 people will enrol on apprenticeship in this role in the first two years, reaching around 250-300 each year thereafter.

Our approach to assessment has been designed to be:

- Appropriate, relevant and feasible in a wide range of contexts;
- Consistent across these contexts;
- Affordable and manageable based on the number of potential learners.

Employers have adopted the following broad principles to inform the approach:-

- Assessment should motivate apprentices to do their very best, not just do enough to satisfy a minimum standard – for example, by using a ‘high stakes’ portfolio showcase apprentices can be given a clear performance goal to aim at.
- Assessment process should add value to both the apprentice and the employer, by complementing and building on normal performance management and development tools.
- It should enable and encourage progression and continuous professional development by being linked to professional exams and recognition.
- It should position the apprenticeship not just as a job, but as the starting point for a career in Conveyancing – assessment at the end marks a clear recognition of achievements, on which the individual can build.
- Assessment methods chosen should ensure relevance and consistency, irrespective of the specific job role of the apprentice.
- Costs and practicalities should be appropriate and proportionate to employers with small numbers of apprentices.
- Assessment should be driven by the Standard and should cover full competence in the occupation of a Conveyancing Technician.

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The approach is based on employers' requirements that apprentices, a) are able to perform their role to a demonstrably high standard on completion; and b) make good progress towards this goal throughout the apprenticeship.

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Overview of Assessment

The assessment is based on learning from continual on-programme assessment (in the form of professional examinations, and modules, which may be graded) which when successfully completed, culminates in a two-part 'end-point' assessment combining a showcase of evidence supported by a Professional Discussion and scenario tests. The end-point assessment and overall apprenticeship is not graded; apprentices will either PASS or FAIL. Grading has deliberately not been applied to the apprenticeship for the following reasons:

- Following successful completion (PASS) of the end-point assessment, apprentices will become eligible to apply to the Council for Licensed Conveyancers (CLC) for professional registration on the CLC's Register for Conveyancing Technicians;
- The register recognises the required level of professional competence expected of Conveyancing Technicians, awarding a 'Distinction' to the end point assessment implies a level of competence beyond the minimum level necessary to be eligible to apply for registration;
- Grading does not align with current CLC end-point assessment policy and is not common to other professional legal qualifications; lastly,
- There is no appetite from employers of Conveyancing Technicians for grading.

Continual on-programme assessment:

A modular series of knowledge assessments that can be achieved via CLC professional qualifications developed specifically for the apprenticeship at Level 4 standard:

- **Conveyancing Law and Practice Diploma Level 4:**
 UNIT 1: The English legal System
 UNIT 2: Law of Contract
 UNIT 3: Land Law
 UNIT 4: Standard Conveyancing Transactions
 UNIT 5: Understanding accounting issues for transactions

All professional exams must be passed so that the apprentice has acquired the knowledge commensurate with the Standard that is required to begin compiling evidence for the final end-point assessment.

The Employer Statement of Competency – is the employer voice that summarises the on-programme assessment made by the employer.

End-point assessment:

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The end point assessment will be conducted by Assessment Organisations. The candidate will undertake a final two-part end-point assessment combining three-methods of assessment, which should commence approximately six months before the end of the apprenticeship.

Part 1

A Scenario test– conducted as an online test taking up to two hours and consisting of two conveyancing scenarios in order to accommodate variable expense or scope of tasks. Assessment Organisations must provide a bank of scenarios. The apprentices should be able to demonstrate the practical application of their competence to a specific issue or task relevant to the role of a Conveyancing Technician. Sample criteria can be found in appendix 2.

It can also be used to show the theoretical application of knowledge into practice in circumstance when the apprentice has not been commonly exposed to the area of work; such as some leasehold matters.

Part 2

A Showcase and Professional Discussion – containing evidence collected near the end of the apprenticeship. Evidence may include: client case files, dead files, workplace research projects and any investigative actions recorded in due course of satisfactorily concluding a conveyancing matter; and which, taken together (with supporting documentation such as compliance checks, record of internal audit, manager/client feedback, log book of activity), cover the totality of the standard.

The Showcase will be sent to the assessor to ensure that it meets the Standard. It also forms the basis of the Professional Discussion between the apprentice and the Assessment Organisation. The Professional Discussion will take up to one hour, it can be conducted face to face or using an electronic platform, or any other digital means. It explores with the apprentice what has been produced in the showcase, how it has been produced; and how they have performed to provide satisfactory conclusions on a range of standard freehold and leasehold conveyancing matters in their role as a Conveyancing Technician during the apprenticeship.

The employer may be present, but will not be permitted to contribute to the discussion proceedings or the assessment outcome.

The Professional Discussion should be recorded for purposes of quality assurance.

Independent Assessors appointed by the Awarding Organisation will assess Parts 1 and 2 (scenarios, showcase and professional discussion) to determine whether the apprentice meets the Standard and

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demonstrates a level of knowledge and professional competence commensurate with the responsibilities and accountability of their role; in order to award apprentices with a PASS or FAIL.

1. Recommended on-programme assessment

This is a minimum one-year apprenticeship, but an apprentice is likely to take up to three-years to ensure they have had the opportunity to develop all areas of the Standard. A robust process of on-programme assessment will ensure that apprentices make good progress towards the final end-point assessment, which itself will be of sufficient quality to attest to the level of skills, knowledge and behaviours.

The purpose of the on-programme assessment is to focus the performance areas that add value to the employer and the apprentice becoming work ready and must centre on real conveyancing competencies demonstrated in a real legal service environment. Assessment should be based upon employers using their normal performance management processes to monitor the progress of the apprentice to provide feedback and guide development in the on-programme stage.

Training providers will need to work closely with the employer to plan and deliver support, training and continuous on-programme assessment appropriately. Training providers will support this by ensuring that the requirements of the apprenticeship are reflected in these processes, and by filling any gaps through their work with apprentices. This will include:

1. Employers and training providers carrying out joint reviews of progress at regular intervals, involving apprentices, line managers and others directly involved, e.g. mentors, workplace coaches etc. They will agree how any issues are to be resolved.
2. Apprentices carrying out knowledge assessments, via approved professional exam(s) and/or modular knowledge assessments, at appropriate points as agreed by the employer and the training provider to assess the apprentice's readiness to undertake the end-point assessment.
3. Apprentices being encouraged to develop and maintain examples of their work throughout their apprenticeship, however, evidence forming as elements of the Showcase should be taken from work carried out near the last six months of the apprenticeship.

Gateway to End Point Assessment

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The decision as to when the apprentices are ready to pass through the **Gateway** from learning and on-programme assessment into the end-point assessment phase will be made by the employer and the training provider based on their monitoring of apprentices' progress.

The Employer Statement of Competency –should form an element of the on-programme assessment around professional behaviours and conduct to establish if the apprentice is ready to move through the **Gateway**. A template covering competency statements for professional behaviours is provided for employers in appendix 1.

To move through the **Gateway** apprentices must have:

- A. Successfully achieved all of the recommend on programme assessments, and
- B. If appropriate to the apprentice, also successfully achieved English and Math functional skills at level 2; and
- C. Provide a verified Employer Statement of Competency.

2. Professional Exams

Professional exams allow the apprentice to acquire the technical knowledge and understanding as set out in the Standard to ensure the apprentice has acquired the right level of knowledge to move into the end-point assessment. In their totality, these exams and modules will cover the full range of the required legal knowledge and technical understanding. The knowledge modules will be developed against the Standard, and will take the form of professional exams recognised by CLC. Exemption from some modular elements can be mapped against these to ensure the widest choice of delivery to fit with current business practice. This will enable:

1. A range of professional exams and technical modules to give exemption from the CLC professional qualifications/modules. An example of what this may look like is illustrated in Appendix 3.

In practice it means that:

1. Employers can work with the training provider to develop learning programmes based on their current chosen use of professional exams (as exemptions against the CLC qualifications) if they wish; and
2. Apprentices do not have to be assessed more than once in specific knowledge areas.

The professional exams and technical modules can be taken at any time during the apprenticeship (prior to the end point assessment phase) to ensure relevance to the job role of a Conveyancing Technician and to maximise the impact of learning. The training provider and employer will agree

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when the professional exams and modules will be taken and the schedule for these assessments to be completed before the end-point assessment takes place.

Re-Takes for professional exams

The Assessment Organisations rules apply.

3. Final end-point assessment

The purpose of the end-point assessment is threefold.

It should assess the apprentice has gained an understanding of the factual and theoretical knowledge of the procedures to complete well-defined tasks under supervision in order to carry out non-complex freehold and leasehold conveyancing matters; and should assess their ability to address straight forward problems encountered in the course of satisfactorily concluding non-complex freehold and leasehold conveyancing matters.

Together the components of the end-point assessment should test the apprentice's ability to interpret relevant information and ideas associated with conducting, under supervision, non-complex freehold and leasehold conveyancing matters.

Lastly, it should assess the breadth of the apprentice's knowledge and awareness of types of information that are relevant to carry out and provide simple remedies for non-complex freehold and leasehold conveyancing matters; and that they understand when it is appropriate to escalate a matter when it becomes complex.

The end-point assessment will take place in the last six months of the apprenticeship, using two assessment methods: - Parts 1, and 2.

Part 1: Scenario test

Part 2: Showcase and Professional Discussion

The process

Part 1 must be achieved before Part 2 is submitted. A successful result in Part 1 is not a mandatory requirement for Part 2 to be *started*. The candidate could start preparing their showcase in advance of receiving results but the showcase should not be submitted until the candidate has passed Part 1. The Professional Discussion must take place at the same time as the assessment of the Showcase. If Parts 1 and 2 do not meet the respective minimum criteria for each Part for a PASS; the end-point assessment overall is a FAIL.

When the Apprentice FAILS either Part 1 or 2

Apprentices should be given two opportunities in total to pass Part 1 and two opportunities in total to pass Part 2.

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Extension timescales

The extension timetable for retakes should be by agreement between the Apprentice, Training Provider, and Employer and must be built into the overall programme, and comply with any relevant guidance set by the overseeing Assessment Organisation.

End Point Assessment Part 1 - Scenario test

The purpose of the Scenario test is to assess whether the apprentice is able to demonstrate a practical application of their competence to a specific issue or task relevant to the role of a Conveyancing Technician.

It will be assessed by an Independent Assessor who makes a judgement on the quality of the work on which make a final decisions; for awarding a PASS or FAIL for Part 1.

Assessment Organisations will develop scenarios that elicit that proper legal outcomes have been evidenced. They will also develop guidance covering the use of scenarios to inform Part 1 so that the Independent Assessor is fully appraised to determine what meets the Standards. External Quality Assurance will ensure standardisation across all Assessment Organisations and judge that consistent approaches are taken.

If Part 1 (Scenario test) does not meet assessment requirements for a PASS Mark, set by the Assessment Organisation, apprentices should be given two opportunities in total to pass Part 1. If they do not pass at their first attempt, they may retake Part 1 using a different scenario.

End Point Assessment Part 2 – Showcase and Professional Discussion

The Showcase:

The purpose of the showcase is for apprentices to present evidence from real-work product that is likely to have been completed towards the end of the apprenticeship, illustrating the application of knowledge, skills and behaviours.

The completed showcase will be assessed by an Assessment Organisation's Independent Assessor who makes a judgement on whether the apprentice has met the standard and awards a PASS or FAIL.

The evidence contained in the showcase will comprise of material obtained from client files, reflective practice recordings, research projects, employer performance reviews (if appropriate to the employers standard systems) that demonstrate the apprentices carrying out conveyancing matters which, together, cover the totality of the Standard. Where appropriate and absolutely

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necessary (i.e. it is impossible to gather evidence from a real-life situation) the completion of structured scenario exercises provided by the employer could be used to complete the evidence.

These pieces of work will be produced by the apprentice having first learned and then applied the relevant knowledge skills/competencies and behaviours. It will align with the minimum requirements of the Standard, enabling the apprentice to demonstrate how they have applied their knowledge and understanding in a real conveyancing environment to achieve satisfactory outcomes for the conveyancing matters commensurate to their role.

The Professional Discussion:

The purpose of the Professional Discussion is to provide additional rigour to the end-point assessment process by putting in a third and final mechanism to demonstrate the apprentice's occupational readiness by testing their ability to defend and explain the validity of courses of action.

It will show how an apprentice has demonstrated the behaviours, especially around contact with others, team work and areas where they meet the threshold requirements of the role;

- What the apprentice has shown they can do against the requirements of their job role;
- How the apprentice has approached and the way they have completed the task(s); and
- Who the apprentice has worked with demonstrating personal and interpersonal qualities they have brought to all their work relationships.

Employers and training providers will assist the apprentice to develop their showcase to ensure that the summative showcase reflects genuine work-place evidence that covers the totality of the Conveyancing Technician Apprenticeship Standard. However, electronic platforms, including online e-learning tools, e-portfolios, skype, face-time and video are encouraged to increase accessibility.

Together, the showcase and professional discussion will provide evidence on what the apprentice has done, and how they have approached the work in order to provide satisfactory outcomes pertinent to the conveyancing transaction. This enables the assessment to cover a broad range of knowledge and understanding, skills and behaviours such as:

- Thinking and problem-solving skills used to obtain satisfactory conclusions on conveyancing matters;
- Ability to form client, colleague and other professional relationships; to obtain outcomes in the best interest of the client and the business;
- Communication skills to ensure effective professional relationships; and
- Business and commercial understanding in the context in which the conveyancing service is being provided.
- Clarify any questions the independent assessor has from their assessment of the

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summative showcase;

- Confirm and validate judgements about the quality and appropriateness of work;
- Explore aspects of the work, including how it was carried out and why a course of action was taken in more detail;
- Provide a basis for the independent assessor to make a holistic decision on whether a PASS or FAIL is awarded on the whole apprenticeship.

If Part 2 (Showcase and Professional Discussion) in its entirety does not meet the standard set by Awarding Organisation, then it will be deemed to be a FAIL. **The apprentice will then have one further opportunity to re-submit the showcase using feedback and comments from the independent assessor on areas needing remediation.**

4. Ensuring independence

Independence and impartiality are achieved through the final end-point assessment being assessed by Independent Assessors who are employed by organisations that have been approved on the SFA Register of Apprentice Assessment Organisations. The Independent Assessor will make a holistic judgement of each apprentice's work, including the PASS or FAIL grade to be awarded, on the basis of evidence supplied in Parts 1 and 2; the scenario, showcase and professional discussion.

Employers are not expected to be an element of this process for their own apprentices and will not be required to make any assessment judgement. All Independent Assessors should be managed by Assessment Organisations who will develop assessment materials.

5. Delivering consistent, reliable judgements

External Quality Assurance should ensure that all assessment methods are designed to produce assessment outcomes that are consistent and reliable, allowing fair and proper comparison between apprentices employed in different types and sizes of organisation and assessed by different Independent Assessors

All professional exams should be recognised and quality assured by one of the following bodies: CLC, Ofqual, QAA or a Higher Education Institution with awarding powers. This will optimise the number of qualification components that can be used to meet the Standard.

All work-place assessment forming any element of the end-point assessment, should be an accredited process that is recognised and quality assured by one of the following bodies: CLC, Ofqual and QAA or and Higher Education Institution with awarding powers.

Internal Quality Assurance

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Assessment Organisations involved in delivering the entire assessment of the apprenticeship must be able to create the tools and materials to deliver the assessment and have:

- Expertise in quality assuring assessment;
- Sector knowledge and understanding and have credibility with employers;
- Capability to recruit external assessors from sector experience of their staff
- Experience of quality assure Internal Verification processes
- Robust third party arrangements with training providers with expertise in developing training and development plans;
- Have regulated quality assurance and quality control procedures;
- Robust governance, including leadership and management arrangements; and
- Provide an established assessment infrastructure with the ability to extend into a wide geographical coverage; and
- Commit to resource annual standardisation meetings.

This approach puts the Standard at the heart of the assessment process, ensuring that judgments on occupational competence are consistent and that there is standardisation and comparability between employers.

Assessment Organisations will need to develop the tools, materials and techniques (e.g. pass/fail criteria, marking schemes, etc) to be used in making assessment judgements. Where there is more than one Assessment Organisation, these tools/materials/techniques will be standardised using cross assessment organisation liaison meetings before being approved by Assessment Organisations for implementation. The tools/materials/techniques will be kept under review to ensure that they are applied consistently and produce comparable results. The tools/materials/techniques will be quality assured by the external quality assurance organisation - Ofqual - as part of the external quality assurance of the end-point assessment.

Assessment Organisations should work with training providers and employers to establish the legal skills and conveyancing knowledge required by Independent Assessors and set benchmark for quality as appropriate. Assessment Organisations will then be responsible for having robust Internal Quality Assurance and Verification processes to ensure that the quality, consistency and validity of assessments are maintained within their organisations.

6. Internal Quality Assurance

Each Assessment Organisation will need to set up and operate Internal Quality Assurance processes (as detailed below), that will monitor and control the Independent Assessment function of their organisation.

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In order to do this each Assessment Organisation will be required to put in place one or more Sector Experts (or panel of Sector Experts) to verify the conveyancing related judgements made by the Independent Assessors at the end-point assessment. The number of sector experts should increase in line with the numbers of apprentices. An effective and viable sector expert/apprentice ratio should be determined by the Assessment Organisation (the findings of sector experts should be reviewed at the annual standardisation meetings). This will be a proportionate quality assurance measure and will ensure Independent Assessors deliver consistent and reliable judgements that reflect conveyancing industry standards.

Assessment Organisations must put all Independent Assessors through a training process to ensure consistent approach to making judgements. Assessment Organisations must ensure all Independent Assessors are industry appropriate by way of professional legal or educational qualification.

Assessment Organisations will periodically review alternative legal qualification against the CLC's recognised published list of exemptions to ensure that these continue to be the most relevant and any significant changes must be brought for review by the CLC. Lists of professional exams (and recognised exemptions) will be maintained by Assessment Organisations and must consist of established widely recognised and highly valued professional exams.

Criteria for Sector Experts

Sector Experts must be either; Authorised Persons or Legally Qualified Persons and must be an independent individual without previous involvement in the end-point assessment Parts 1 to 2.

The purpose of Sector Experts

Each Assessment Organisation's Sector Experts verify that industry standards have been met based on the representative sample chosen for moderation, and will check that end-point assessments are robust, that they assess fully against the Standard, that they are undertaken consistently and to the same standard, and assessors are making consistent and reliable judgements founded on proper legal outcomes.

Some employers may wish to volunteer staff to be Independent Assessors and they will need to work directly with Assessment Organisations to satisfy any requirements under general terms of recognition or other appropriate Internal Quality Assurance arrangements. Assessment Organisations will internally quality assure the assessments and the grades awarded by different assessors to ensure that these are fair and comparable. In the event of an appeal against the grade awarded, Assessment Organisations will carry out an independent review of the evidence to confirm or modify the grade.

External Quality Assurance

External Quality Assurance will be carried out by Ofqual.

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Assessment Organisations wishing to deliver the Licensed Conveyancer Standard will agree to make available to Ofqual on behalf of CLC, any information that will enable the oversight regulator to carry out a periodic review of the approaches taken in the apprentice programme. This is to enable the CLC to be assured of the appropriate standards of delivery.

7. Delivering accurate, valid judgements

The assessment process has been developed specifically for the Standard and is designed to test the totality of the Standard. The combination of three assessment methods in the final end-point assessment ensures that the assessment of each apprentice is based on their performance and reflects accurately the quality of their work and the application of skills; knowledge and behaviours specified in the Standard, to build a cumulative picture of performance against the Standard.

The Scenario enables theoretical application of knowledge into practice in circumstance when the apprentice has not been directly exposed to the area of work; such as leasehold matters. The assessment of scenarios should allow the apprentice to show their ability to problem solve and use their critical thinking skills to resolve issues that are relevant to the role of a Conveyancing Technician, but not necessarily common to their role in the business.

The Showcase is based on real-work products which, taken together, cover the totality of the Standard, and provides a demonstration of the application of knowledge and competence in the work environment. This increases accuracy and validity by providing the assessor with an opportunity to assess depth and breadth in the application of underlying knowledge, skills and behaviours combined to bring about satisfactory conclusion, under supervision for a range of standard conveyancing matters.

The Professional helps clarify any questions the independent assessor has from their assessment of the summative showcase. It will confirm and validate judgements about the quality and appropriateness of work and will enable the assessor to explore aspects of the work, including how it was carried out and why a course of action was taken in more detail, if appropriate.

The role of the Internal Quality Assurance organisation is critical, ensuring that assessments are only assessed by suitably qualified and trained assessors, using approved tools and materials, with documented criteria, as well as robust internal verification and quality control processes.

8. Grading

Independent Assessors will PASS or FAIL apprentices using all the information gained in the final two Part end-point assessment against defined criteria. The criteria and exemplars for assessing PASS and FAIL will be developed by Assessment Organisations working in partnership with employers, training providers and in liaison with the CLC to ensure consistent interpretation of these high-level

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criteria. Grading will only be applicable to the professional qualifications needed to meet the Standards.

9. Affordability

This apprentice standard is a new scheme and therefore we have no direct comparison to review when considering costs. The costs and practicality of assessment have been an important consideration in the development of this approach, this has resulted in an approach which will be very easy to manage in all firms regardless of size of firm or numbers of apprenticeships.

Cost effectiveness has been increased in a number of ways, including:

- A modular approach, which is flexible and recognises knowledge assessed through vendor and professional qualifications;
- The pragmatic combination of assessment methods ensures breadth, validity and reliability to satisfy the assessment requirements whilst minimising additional, non-value adding assessment costs;
- The removal of the current requirements for the collection of unnecessary evidence throughout the duration of the apprenticeship by focusing on end-point assessment;
- The involvement of the employer in defining the work projects reduces the need for multiple visits by assessors;
- A wish to make use of modern technology to allow the maximum flexibility for undertaking the interview and the scenario, as well as storing and maintaining the showcase portfolio.
- The training costs will build in 20% of the overall apprenticeship being delivered off-site of the employers premises. It is anticipated that the end point assessment will be around 10% of the total costs.

The training costs will build in 20% of the overall apprenticeship being delivered off-site of the employers premises.

10. Manageability/Feasibility

The use of technology is key to the delivery of the apprenticeship to allow for real time progression monitoring and allow for learner development through reflective log book that can be reviewed on-line. Interviews can also be conducted using any live feed video technology to optimise geographical accesses and time and cost efficiencies.

11. Professional Body Registrations

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The CLC is the professional regulatory body representing this standard. They have worked alongside the employer group to develop the Standard and also the assessment approach. The apprentice standard will be recognised by the CLC, allowing them to maintain a register of Conveyancing Technicians. The CLC will provide a letter of support in the final admission of the assessment plan.

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12. Appendix 1: The Employer Competency Statement

<p>Design by employers for employers to help maintain consistent judgements of employability skills set out in in the on-programme elements of the Standard.</p> <p>The employability skills are assessed informally by the employer through the on programme part the apprenticeship.</p>		
Employability Skill	Employer Performance Statement	Statement Evidence Benchmark
1. Professional Conduct	1.a Takes appropriate steps under supervision to move non-complex freehold and leasehold matters forward in compliance with regulatory, accounting and consumer protection arrangements.	<ul style="list-style-type: none"> i. Uses practical, theoretical or technical understanding of conveyancing matters to engage with, and secure the confidence of clients and other professionals. ii. Takes appropriate steps to build and maintain client relationships underpinned by professional ethics including trust, respect, honesty, reliability, transparency. iii. Collates and records information in line with the CLC Transaction Files Code & Guidance.
2. Commercial Awareness	<p>2.a Demonstrates an interest in business and an understanding of the wider environment in which an organisation operates including its customers, competitors and suppliers.</p> <p>2.b Shows an awareness of the need for efficiency, cost-effectiveness, customer</p>	<ul style="list-style-type: none"> i. Clearly communicates the service offered and associated charges enabling clients to make informed decisions. ii. Plans and prioritises work on a range of standard freehold and leasehold matters; including accessing and utilising resources effectively. iii. Able to calculate accurate billing figures based upon the service provided to satisfactorily conclude a transaction.

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	care and knowledge of the market place in which the company operates (current economic climate and major competitors).	
3. Critical Thinking	3.a Understands the principles of regulation and consumer protection and understands how Conveyancing Practices apply these substantive concepts of Law in an analytical and equitable manner.	<ul style="list-style-type: none"> i. Has an informed awareness of the scope of conveyancing matters, however, recognises limits of ability and when to seek advice. ii. Identifies mistakes, misinterpretations, or breaches and takes appropriate steps to address common well-defined problems. iii. Analyses, interprets and evaluates relevant information to identify when a matter has become complex or beyond own accountability, or knowledge; and takes appropriate steps to refer to a supervisor.
4. Customer Service	4.a Maintains successful empathic client relationships using tact and diplomacy and uses the appropriate level and style of communication to suit a variety of audiences; and manages this across the broad spectrum of clients and professional parties.	<ul style="list-style-type: none"> i. Takes appropriate steps to work within the Practice Customer Complaints procedure and deals with relevant types of complaints promptly and efficiently, using prompt and empathetic phone etiquette. ii. Takes appropriate steps to understand the client needs; compiles accurate recordings of the client(s) requirements and then plans how they intend to meet them. iii. Uses a range of strategies to manage client(s) expectations; including communicating key decision points, implications of actions and decisions, and associated transaction.
5. IT Skills	5.a Uses a range of strategies to manage client records using employer's client	<ul style="list-style-type: none"> i. Accesses/utilises on-line legal research websites and standard Land Registry and HMRC sites to find, complete, investigate and submit

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	management conventions.	forms to progress a standard matter forward. ii. Accesses/utilises regulators on-line document and policy repositories as a source of procedural and ethical guidance.
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13. Appendix 2: Scenario test.

Conducted as an online test taking up to two hours. The apprentices should be able to demonstrate the practical application of their competence to a specific issue or task relevant to the role of a Conveyancing Technician.

1. Providing adequate advice to a client in line with the CLCs Code of Conduct and any other relevant rules and regulations.
2. Ability to raise relevant issues when looking at a property title; such as third party interests, encumbrances on title and defects in title etc.
3. Identify issues on adverse search results and display an understanding of how to resolve such issues.
4. Drafting letters to clients and other third parties involved in a conveyancing transaction.
5. Preparation of financial statements and bills of cost.
6. Drafting special conditions needed in a contract; taking into account the current edition of the Law Society's Standard Conditions of Sale.
7. Be able to identify which Land Registry Forms to use in specific instances and be able to draft the same.
8. Identify when a transaction is unusual or complex and when to escalate; including being able to identify in what instances the firm would need to cease to act e.g. where a conflict of interest arises.
9. Demonstrate the ability to identify when issues contained in relevant law, such as; Anti-Money Laundering Regulations, Public Law and any other relevant legislation that a Conveyancing Technician should know (which is relevant to their role) should be dealt with and in what way.
10. Understand and identify obligations where acting for a mortgage lender.

Conveyancing Technician Apprenticeship: Summary of Approach to Assessment

14. Appendix 3: Professional exams.

Professional exams allow the apprentice to acquire the technical knowledge and understanding as set out in the Standard to ensure the apprentice has acquired the right level of knowledge to move into the end-point assessment. In totality, these exams and modules will cover the full range of the required legal knowledge and technical understanding. The knowledge modules will be developed against the Standard, and will take the form of professional exams recognised by CLC. Exemption from some modular elements can be mapped against these to ensure the widest choice of delivery to fit with current business practice.

CLC (SQA) Conveyancing Law and Practice Diploma Level 4	Possible Equivalents	Partial Exemption
Unit 1: The English Legal System	Foundation Units on LLB (L.4)	
Unit 2: Standard Conveyancing Transactions	NONE	Equivalent units from the Legal Practice Conveyancing (LPC) or Legal Practice Course Property Law and Practice ('LPC PLP') or Law Degree modules.
Unit 3: Land Law	LLB/LLB in Legal Practice Land Law (L.5)	CILEx Level 3 Diploma in Law and Practice; must include seven mandatory units which cover the key 'Foundation' subjects of: Introduction to Law and Practice, Law of Tort, Land Law, Client Care Skills, Legal Research Skills, Criminal Law, Contract Law, <u>Plus practice Unit 10 Conveyancing and Unit 19 Residential and Commercial Leasehold Conveyancing.</u>
Unit 4: Law of Contract	LLB/LLP in Legal Practice Law of Contract (Level 5)	
Unit 5: Understanding Accounting Issues for Transactions	None	