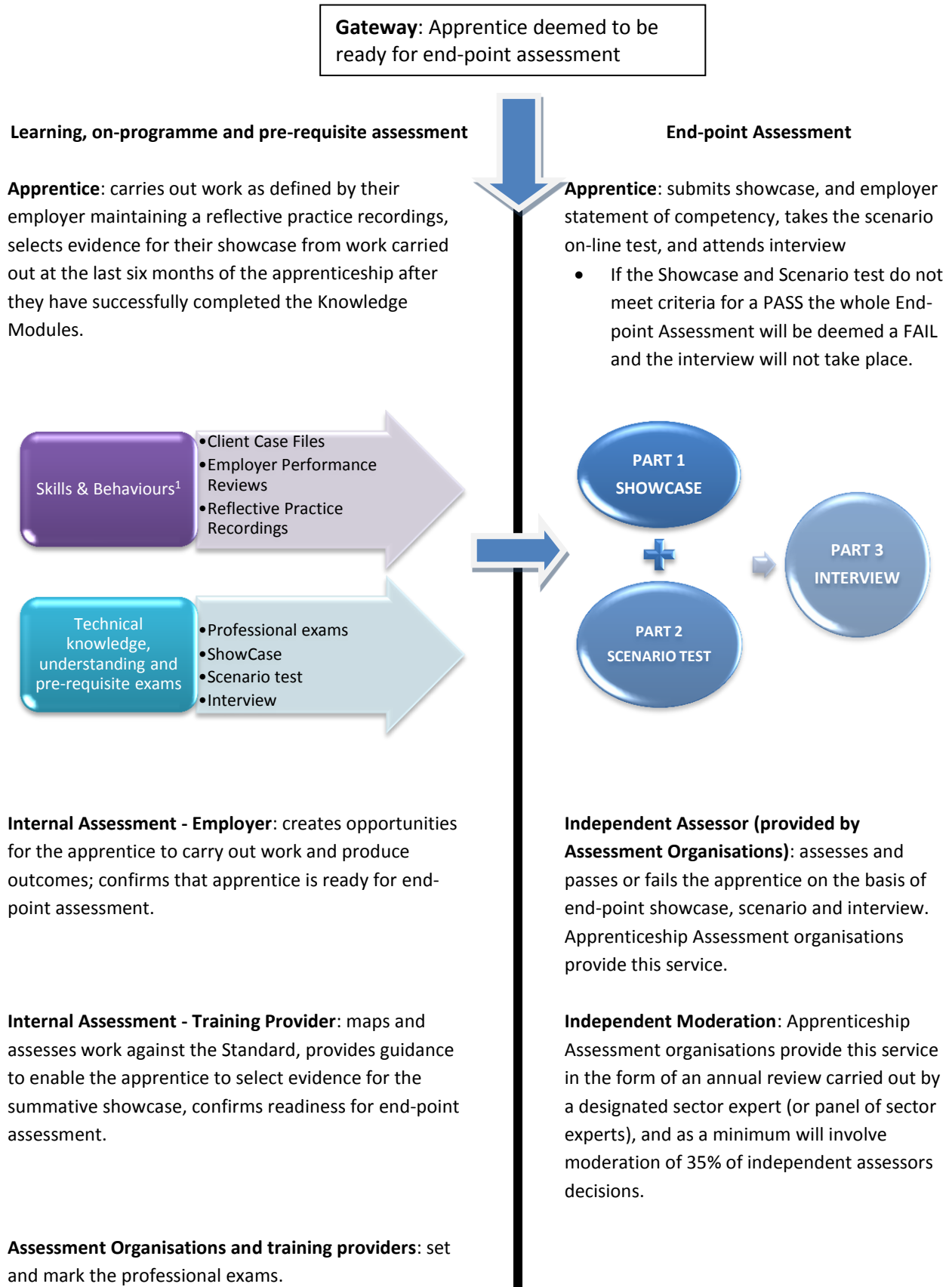


Conveyancing Technician Apprenticeship Approach to Assessment: Summary

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1. Introduction and Overview

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Conveyancing Technician Apprenticeship: Summary of Approach to Assessment

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 unlikely that large numbers of people will enrol on apprenticeship in this role, with an expectation of 100 to 150 in the first two years reaching around 150 each year thereafter.

Our approach to assessment, therefore, 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* coupled with an interview, 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.

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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*This is a key element of the end assessment that should demonstrate application of knowledge and be supported by other material as required to show full coverage of the Standard

Overview of Assessment

The assessment is based on continual on-programme assessment (in the form of professional examinations, and modules, which may be graded) which when successfully completed, culminates in a three part 'end-point' assessment combining a showcase of evidence, scenario tests and a one-to-one Interview. 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 CLCs 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 covering:

1. The CLCs Foundation Conveyancing
2. Law and Legal Method
3. Law of Contract
4. Land Law
5. Landlord and Tenant
6. CLC Conveyancing Accounts Module (managing client monies)

Exams and assignments but must be passed so that apprentice has acquired the knowledge commensurate with the Standard that is required to begin compiling evidence for the final end-point assessment.

End-point assessment:

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A final three Part end-point assessment, compiled in the last six months from evidence collected near the end of the apprenticeship – undertaken by Assessment Organisations;

Part 1

A summative Showcase – containing evidence from 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. In addition the showcase should be supported by the inclusion of:

- a. **The Employer Statement of Competency** – is the employer voice that summarises the on-programme assessment made by the employer. It should form an element of the summative evidence around professional behaviours and conduct against the Standard in its entirety. A template covering competency statements for professional behaviours is provided for employers and can be found in appendix 1.

Part 2

A Scenario test– conducted as an online test taking up to two hours and consisting of up to three 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.

Once both Parts 1 and 2 have been assessed and each graded with a PASS the apprentice can proceed to:-

Part 3

A one-to- one Interview – between the apprentice and the assessment organisation taking up to one hour; exploring what has been produced in the showcase, how it has been produced; and how they have performed to provide satisfactory

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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 interview proceedings.

Independent Assessors will assess Parts 1 and 2 (showcase and scenarios) and elicit evidence from the two sources to inform in parallel Part 3 (the interview); to determine whether apprentices meet the Standard and demonstrate 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.

Assessment Organisations must put all moderators and external verifiers through a training process to ensure consistent approach to making judgements. The Moderation process may incorporate a panel consisting of representatives from employers and professional associations to further ensure reliable and consistent judgements are made. Assessment Organisations must ensure all moderators are industry appropriate by way of professional legal or educational qualification.

Assessment Organisations wishing to deliver the Licensed Conveyancer Standard will agree to make available to CLC any information that will enable the CLC 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.

2. On-programme and pre-requisite 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.

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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 phase Parts 1 to 3.
3. Apprentices being encouraged to develop and maintain examples of their work throughout their apprenticeship, however, evidence forming as elements of the Summative Showcase must be taken from work carried out in the last six months of the apprenticeship.

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. In order to move into the end-point phase, apprentices will need to have completed all of the knowledge modules.

3. Professional Exams

Professional (on programme) 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. This will enable:

4. 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.

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In practice it means that:

5. 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
6. Apprentices do not have to be assessed more than once in specific knowledge areas.

Assessment Organisations will periodically review alternative legal qualification against the CLCs 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.

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 when the professional exams and modules will be taken and the schedule for these assessments to be completed before the end-point assessment phase Parts 1 to 3 take place.

Re-Takes for professional exams

The Assessment Organisations rules apply.

4. 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.

Each component 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

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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 three assessment methods: - Parts 1, 2 and 3.

Part 1: A Summative showcase- including the Employer Statement of Competency

Part 2: A Scenario test

Part 3: A one-to-one Interview

The process

Parts 1 and 2 must be assessed before Part 3 takes place to inform the questioning that will form the body of the interview. Parts 1, 2 and 3 are marked with a PASS or FAIL. 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 are limited to one opportunity to PASS Part 1 (Showcase) and three opportunities to PASS Part 2 (Scenario Test).

When the apprentice PASSES Stage 1 and 2 and FAILS Part 3?

Apprentices are limited to two opportunities to PASS Part 3. PASS marks awarded for Parts 1 and 2 remain valid PASS marks for the second attempt at Part 3. *Note extension timetable below.*

Extension timescales

All end-point assessment re-takes must be completed within three calendar months of the original scheduled Part 3 (interview) assessment date.

4.1 Part 1 - Summative showcase

The purpose of the summative 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 evidence contained in the showcase will comprise of material obtained from client files, reflective practice recordings, research projects, employer performance reviews and where appropriate as absolutely necessary, the completion of structured scenario exercises; that demonstrate the apprentices carrying out conveyancing matters which, together, cover the totality of the Standard.

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These pieces of work will be produced by the apprentice having first learned and 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.

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; can be in the form of manager's report, emails, client feedback, peer review, etc. Including:

7. what the apprentice has shown they can do against the requirements of their job role;
8. how the apprentice has approached and the way they have completed the task(s); and
9. 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 reflect genuine work-place evidence that covers the totality of the Conveyancing Technician Apprenticeship Standard. The mechanisms for collating the showcase are best determined by the employer and training provider. However, electronic platforms, including online e-learning tools, e-portfolios, skype, face-time and video are encouraged to increase accessibility.

The completed showcase will be assessed by an Assessments Organisations independent assessor who makes their own judgement on the quality of the work and this will inform Part 3. The independent assessor may also note particular aspects of the work that they wish to discuss with the apprentice during the interview, either to confirm their judgement and/or provide further information on which to base their final decisions; for awarding a PASS or FAIL for Part 1.

If Part 1 (the Summative Showcase) in its entirety does not contain sufficient evidence to meet the Standard then it will be deemed to be a FAIL and the Part 3 will not take place. As Part 3 (the interview) outlined in 4.3 will be based upon the Parts 1 and 2, this allows a safeguard to ensure that the work is that of the Apprentice.

4.2 Part 2 - Scenario test

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The purpose of the Scenario test is to assess 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 their own judgement on the quality of the work and this will inform Part 3. The independent assessor may also note particular aspects of the work that they wish to discuss with the apprentice during the interview, either to confirm their judgement and/or provide further information on which to base their final decisions; for awarding a PASS or FAIL for Part 2.

Assessment Organisations will develop a suite of scenarios that elicit that proper legal outcomes have been evidenced. They will also develop guidance covering the use of scenarios to inform Part 3, so that the independent assessor is fully appraised to determine what meets the Standards. Regular cross Assessment Organisation standardisation meetings will ensure consistent approaches are taken and that all key areas are appropriately explored.

If Part 2 (summative Scenario test) does not contain sufficient evidence to meet the requirements for a PASS Mark, apprentices should be given the opportunity to re-take Part 2; however this should be limited to three opportunities in all. At which point if the apprentice has still not meet the minimum requirements of a PASS mark the end-point assessment will be deemed to be a FAIL and the Interview will not take place. As Part 3 (the interview) outlined in 4.3 will be based upon an apprentice gaining a PASS in both Parts 1 and 2, this allows a safeguard to ensure that the work is that of the Apprentice.

4.3 Part 3 – One-to-one Interview

The purpose of the interview is provide additional rigour to Parts 1 and 2 of the end-point assessment process by putting in a third and final mechanism to prove the apprentice's occupational readiness by testing they ability to defend, explain the validity of courses of action .

The interview is a structured discussion between the apprentice and their independent assessor, focusing on a combination of evidenced assessed in Parts 1 and 2, and how they have performed conveyancing matters during the apprenticeship. Where it covers both what the apprentice has done, and the standard of their work, and also 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:

10. thinking and problem-solving skills used to obtain satisfactory conclusions on

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conveyancing matters;

11. ability to form client, colleague and other professional relationships; to obtain outcomes in the best interest of the client and the business;
12. communication skills to ensure effective professional relationships; and
13. business and commercial understanding in the context in which the conveyancing service is being provided.
14. clarify any questions the independent assessor has from their assessment of the summative showcase;
15. confirm and validate judgements about the quality and appropriateness of work;
16. explore aspects of the work, including how it was carried out and why a course of action was taken in more detail;
17. Provide a basis for the independent assessor to make a holistic decision on whether a PASS or FAIL is awarded on the whole apprenticeship.

5. Ensuring independence

Independence and impartiality are achieved through the final end-point assessment being undertaken 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 assessment of each apprentice's work, including the PASS or FAIL grade to be awarded, on the basis of evidence supplied in Parts 1 to 3; the end-point showcase, scenario and in the interview.

Employers are not expected to be an element of this process for their own apprentices and will not be required to make any grading judgement. Some employers may wish to volunteer staff to be Independent Assessors, who will undertake assessment of apprentices in other organisations. All independent assessors should be managed by Assessment Organisations who will should provide assessment materials, or approve employer-based or training provider-based materials.

6. Delivering consistent, reliable judgements

Assessment Organisations 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 Assessment Organisations?.

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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.

Assessment Organisations involved in delivering the entire assessment of the apprenticeship must:

18. be able to create the tools and materials to deliver the assessment;
19. have expertise in quality assuring assessment;
20. have sector knowledge and understanding and be credibility with employers;
21. have capability to recruit external assessors from sector experience of their staff
22. have experience of quality assure Internal verification processes
23. have robust third party arrangements with training providers with expertise in developing training and development plans;
24. have robust governance, including leadership and management arrangements;
25. provide an established assessment infrastructure with the ability to extend into a wide geographical coverage;
26. have regulated quality assurance and quality control procedures;
27. commit to resource annual standardisation meetings; including but not limited to collaboration with other Assessment Organisations and Sector Experts.

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 specifications for the tools, materials and techniques to be used in assessment. These tools will be standardised using cross assessment organisation liaison meetings before being trialled and tested and approved by Assessment Organisations for implementation. Particular attention will be paid to ensure that the tools are consistent and produce comparable results.

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.

Assessment Organisations wishing to deliver the Licensed Conveyancers Apprentice Standard will agree to make available to CLC any information that will enable the CLC to carry out a periodic

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review of the approaches taken in the apprentice programme. This is to enable the CLC to be assured of appropriate standards of delivery.

Moderation within assessment organisations

Each Assessment Organisation will need to set up and operate quality assurance processes (as detailed below), that will monitor and control the independent assessment function of their organisation.

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 carry out an annual review (on a sample basis) of 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 external assessors deliver consistent and reliable judgements that reflect conveyancing industry standards.

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 3.

The purpose of Sector Experts

Each Assessment Organisations Sector Experts will ensure industry standards for moderation have been met by all apprentices 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 that the people undertaking the assessments make consistent and reliable judgements founded on proper legal outcomes.

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 summative 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 is a key factor for employers in the validity of the final assessment decision.

The Employer Statement of Competency enables the employer to summarise the formative growth of the apprentice and performance judgements made by the employer and forms an element of the end-point evidence against the Standard in its entirety.

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The summative 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 One-to-one Interview with an independent assessor allows apprentices to demonstrate how they have carried out their work. This again 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 role of the independent assessor is critical, ensuring that **assessments are only undertaken 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. Assessments

Independent assessors will PASS or FAIL apprentices using all the information gained in the final three 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 criteria. Grading will only be applicable to the professional qualifications needed to meet the Standards.

Some employers may wish to volunteer staff to be Independent Assessors and they will need to work directly with Assessment Organisations and Training Providers to satisfy any requirements under general terms of recognition or other appropriate quality assurance arrangements. Assessment Organisations will moderate, validate and verify 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.

9. Affordability

This apprentice standard is a new scheme and therefore we have no direct comparison to review when considering costs. The group of employers has, however, considered costs and the most appropriate form of assessment in great detail. A key driver for our assessment model has been to ensure our approach is consistent and directly linked to our standards. Our assessment process is robust and will ensure the best use of management time. The costs and practicality of assessment have been an important consideration in the development of this approach and at this stage we do

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not anticipate high numbers, this has resulted in an approach which will be very easy to manage in all firms regardless of size or numbers of apprenticeships.

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

28. a modular approach, which is flexible and recognises knowledge assessed through vendor and professional qualifications;
29. the pragmatic combination of assessment methods ensures breadth, validity and reliability to satisfy the assessment requirements whilst minimising additional, non-value adding assessment costs;
30. the removal of the current requirements for the collection of unnecessary evidence throughout the duration of the apprenticeship by focusing on end-point assessment;
31. the involvement of the employer in defining the work projects reduces the need for multiple visits by assessors;
32. 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.
33. 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. It is anticipated that the end point assessment will be around 10% of the total costs.

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

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 – Guidelines

Design by employers for employers to help maintain consistent judgements of employability skills set out in the Standard.

The employability skills are assessed informally by the employer through the apprenticeship.

An end-point assessment of skills 1 to 5 is made the employer in the last six months of the apprenticeship and forms the Employer Competency Statement and is a component of Part 1 of the end-point assessment process.

Employability Skill	Employer Performance Statement	Statement Evidence Benchmark
<p>1. Professional Conduct</p>	<p>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.</p>	<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.
<p>2. Commercial Awareness</p>	<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 care and knowledge of the</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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	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 management conventions.	<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 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: An end-point Scenario test.

Conducted as an online test taking up to two hours and consisting of up to three scenarios in order to accommodate variable expense or scope of tasks. 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.

Professional Qualification at Level 4	Possible Equivalents	Partial Exemption
CLC Foundation Conveyancing	None	
CLC Law and Legal Method (The English Legal System)	Foundation Units on LLB (L.4)	Equivalent units from the Legal Practice Conveyancing (LPC) or Legal Practice Course Property Law and Practice ('LPC PLP') or Law Degree modules. 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, Plus practice Unit 10 Conveyancing and Unit 19 Residential and Commercial Leasehold Conveyancing.
CLC Land Law	LLB/LLB in Legal Practice Land Law (L.5)	
CLC Law of Contract	LLB/LLP in Legal Practice Law of Contract (Level 5)	
CLC Landlord and Tenant	TBC	
CLC Conveyancing Accounts (Managing Client Monies)	Units form the LPC Accounts (L.6) Units from the Legal Practice Conveyancing (LPC)	