

Curriculum Document				
Curriculum Code	Curriculum Title			
333402	Occupational Certificate: Real Estate Agent			
	Name	Email	Phone	Logo
<b>Development Quality Partner</b>	Services SETA	Ms Nozipho Zondo NoziZ@services eta.org.za	(011) 276-9754	

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Learner QDF Signature



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Date

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QDF Signature

11 December 2020  
Date

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DQP Representative Signature



11 December 2020  
Date

## **SECTION 1: CURRICULUM SUMMARY**

### **1. Occupational Information**

#### **1.1 Associated Occupation**

333402: Real Estate Agent

#### **1.2 Occupation or Specialisation Addressed by this Curriculum**

**333402000-00-00: Real Estate Agent**

#### **1.3 Alternative Titles used by Industry**

##### **Specialisations:**

Property Analyst / Consultant / Dealer / Developer / Planner

Rental Agent

Leasing Consultant

Real Estate Consultant

Rental Property Consultant

Real Estate Referral Coordinator

Leasing Agent (Buildings)

##### **Alternative Titles:**

Rental Broker

Commercial Leasing Broker

Agricultural Consultant

Sales Consultant

Commercial Sales Agent

Rental Consultant

Commercial Sales Broker

Commercial and Industrial Leasing Agent

Leasing Consultant

Agricultural Agent

Commercial Sales Consultant

Agricultural Broker

Rental Agent

Leasing Agent

Leasing Broker

Sales Agent

Real Estate Practitioner

Sales Broker  
Commercial Leasing Consultant  
Property Practitioner  
Property Auctioneer  
Property Manager  
Property Administrator  
Business Broker  
Managing Agent  
Real Estate Franchisor  
Time Share Practitioner  
Share Block Practitioner  
Fractional Ownership Practitioner  
Development Practitioner  
Managing Agent: Community Schemes  
Bridging Financer  
Bond Broker

## **2.1 Curriculum Structure**

This qualification is made up of the following compulsory Knowledge and Practical Skill Modules:

### **Knowledge Modules:**

333402000-00-00-KM-01, Legislative and regulatory framework, Level 4, Credits: 7  
333402000-00-00-KM-02, Ethical business principles, NQF Level 5, Credits 8  
333402000-00-00-KM-03, Developing relationships, NQF Level 4, Credits:7  
333402000-00-00-KM-04, Brand reputation, NQF Level 4, Credits 3  
333402000-00-00-KM-05, Property and real estate services, NQF Level 4, Credits 8  
333402000-00-00-KM-06, Financial business principles, NQF Level 4, Credits:5

**Total number of credits for Knowledge Modules: 38**

### **Practical Skill Modules:**

333402000-00-00-PM-01, Employ macro trends to develop contracts in line with client needs  
and comply with legislation, NQF Level 4, Credits 7  
333402000-00-00-PM-02, Apply ethical principles in the interest of all stakeholders, NQF Level  
5, Credits 8  
333402000-00-00-PM-03, Build proficient and sustainable client relationships, NQF Level 4,  
Credits 6

333402000-00-00-PM-04, Develop and maintain a personal and professional brand through innovation and continuous improvement, NQF Level 4, Credits 3

333402000-00-00-PM-05, Perform property and real estate duties resulting in successful transactions, NQF Level 4, Credits 8

333402000-00-00-PM-06, Implement sound financial practices to achieve personal and business objectives, NQF Level 4, Credits 5

**Total number of credits for Practical Skill Modules: 37**

**Work Experience Modules:**

333402000-00-00-WM-01, Procedures to identify the property and real estate environment and comply with legislative and regulatory framework, NQF Level 4, Credits 13

333402000-00-00-WM-02, Processes and procedures for applying the Code of Conduct and adhering to ethical business principles, NQF Level 5, Credits 15

333402000-00-00-WM-03, Process to build internal and /or external client relationships and databases, NQF Level 4, Credits 12

333402000-00-00-WM-04, Procedures to build a brand reputation and develop a target market, NQF Level 4, Credits 9

333402000-00-00-WM-05, Practices to manage the property and real estate function, NQF Level 4, Credits 15

333402000-00-00-WM-06, Process to apply financial business principles, NQF Level 4, Credits 11

**Total number of credits for Work Experience Modules: 75**

**2.2 Entry Requirements**

- Must be in possession of an NQF Level 3 or equivalent qualification to enrol for this qualification.

**3. Assessment Quality Partner Information**

Name of body: Estate Agency Affairs Board

Address of body: 63 Wierda Road East (cnr Johan)

Wierda Valley

Sandton

JHB

Contact person name: Nomsa Mokoena

Contact person work telephone number: +011 731 5652

**4. Part Qualification Curriculum Structure**

None

## **5. Articulation Possibilities:**

### **Horizontal**

This qualification articulates horizontally with the following qualification:

- National Certificate: Generic Management, NQF Level 4
- National Certificate: Commercial Property and Facilities Management, NQF Level 4
- National Certificate: Auctioneering Support Services, NQF Level 4

### **Vertical**

This qualification articulates vertically with the following qualification:

- National Certificate: Generic Management, NQF Level 5
- National Certificate: Real Estate, NQF Level 5
- National Certificate: Auctioneering Practices, NQF Level 5

## **6. INTERNATIONAL COMPARABILITY**

This qualification was compared with equivalent qualifications from New Zealand and Australia. The countries were selected because they contain indications of best practices that could be used for comparison in the development of the Real Estate Agent qualification to be submitted for registration to the QCTO.

### **New Zealand**

Open Polytechnic of New Zealand Ltd is a subsidiary of New Zealand Institute of Skills and Technology and is government owned. All their qualifications are registered on the New Zealand Qualifications Framework Levels 1-7 and accredited by the New Zealand Qualifications Authority (NZQA). This includes the New Zealand Certificate in Real Estate (Sales Person) at an NQF Level 4 which attracts 50 credits. Once learners have completed this qualification, they may apply to the Real Estate Authority to obtain a licence which is similar to the process in South Africa. This programme is a standalone but many of the units are common to more than one qualification which means they are transferable.

A comparison of this qualification to New Zealand Unit Standards at Level 4 indicates that they cover the following areas:

- Work as a real estate salesperson with knowledge of land ownership, land issues, building structures and council compliance

- Build and manage a database of contacts to establish and maintain presence in the market place
- Conduct property inspections and appraisals
- Facilitate real estate transactions through settlement using appropriate methods of sale
- Comply with New Zealand law and standards relevant to the real estate industry.

### **Australia**

The Australian College of Professions (ACP) is a fully accredited educational institution where qualifications are delivered through an interactive classroom environment. The ACP is registered with the Australian Skills Quality Authority and with qualifications recognised under the Australian Qualifications Framework. The qualification of CPP41419 Certificate IV in Real Estate Practice refers to 18 Units of study which covers the following modules:

- Certificate of Registration
- Property Sales
- Property Management
- Trust Accounting
- Property Business Development Management
- Auctioneering
- Commercial Sales and Leasing
- Business Broking
- Stock and Agency Station Practices

### **Conclusion**

This qualification and its component unit standards compare well with their international counterparts with a variation in the structure and format. The qualification from New Zealand is found to be most comparable to this qualification at an NQF Level 4. The standards are equal to other countries having similar education and training systems to South Africa.

### **7. RATIONALE**

The Property and Real Estate Industry is a multi-billion-rand sector which requires professionals who are well-trained and knowledgeable to meet the property and real estate needs of both the residential and non-residential sectors. This qualification strives to equip learners to be able to operate effectively and efficiently in the Property and Real Estate sector. The qualification is a pre-requisite for the admission to the professional designation examination to be conducted by the regulatory authority.

The Property and Real Estate sector is a well-established industry and thus has many learners that would benefit from qualifications aligned to career paths. This means there is a need to

develop career paths in this sub-field, as an industry constantly in need of skilled people. The scope of Property and Real Estate is changing and evolving all the time, with opportunities for learners in this arena to get involved in a wide variety of areas within the industry.

This qualification supports the objectives of the National Qualification Framework in that it gives the learner access to a qualification registered on the NQF. It will therefore ensure the quality of education and training in the industry is enhanced and of a comparable standard to qualifications in other sectors in South Africa and comparable and similar to other qualifications internationally.

Entrants for the qualification would be persons already employed in the industry and new learners entering the labour market. The qualification will provide an opportunity for persons already in the industry to acquire formal recognition for the competencies that they have acquired and enhance their range of skills and knowledge of the industry so that they can become competent practitioners in the property and real estate sector.

## **SECTION 2: OCCUPATIONAL PROFILE**

### **1. Occupational Purpose**

The Real Estate Agent guides and facilitates the general public in buying, selling, letting, financing and managing of immovable property and businesses in the best interest of all parties.

## **2. Occupational Tasks**

- Employ macro trends to develop contracts in line with client needs and comply with legislation (NQF Level 4)
- Apply ethical principles in the interest of all stakeholders (NQF Level 5)
- Build proficient and sustainable client relationships (NQF Level 4)
- Develop and maintain a personal and professional brand through innovation and continuous improvement (NQF Level 4)
- Perform property and real estate duties resulting in successful transactions services (NQF Level 4)
- Implement sound financial practices to achieve personal and business objectives (NQF Level 4)

## **3. Occupational Task Details**

### **3.1. Employ macro trends to develop contracts in line with client needs and comply with legislation (NQF Level 4)**

#### **Unique Product or Service:**

Environment is understood and legislation and regulatory requirements are met.

#### **Occupational Responsibilities:**

- Determine current property and real estate trends based on industry supply and demand
- Apply market knowledge and trend analysis to relevant property and real estate practices
- Adhere to relevant legal and regulatory requirements
- Establish contracts required for various property and real estate transactions
- Identify and explain the legislation and regulations impacting upon the industry

#### **Occupational Contexts:**

- The Estate Agency Affairs Act, 112 of 1976
- Property Practitioners Act 22 of 2019
- The Financial Intelligence Centre Act, 38 of 2001
- Protection of Personal Information Act, 4 of 2013
- Sectional Titles Act, 95 of 1986
- Sectional Title Schemes Management Act, 8 of 2011
- The National Credit Act, 35 of 2005
- The Consumer Protection Act, 68 of 2008
- Financial Sector Regulation Act, 9 of 2017



- Matrimonial Property Act, 88 of 1984
- Alienation of Land Act, 68 of 1991
- Deeds Registry Act, 47 of 1937
- Income Tax Act 58 of 1962
- Administration of Deceased Estates Act 66 of 1965
- Companies Act 71 of 2008
- Rental Housing Act 50 of 1999 as amended
- The Municipal Property Rates Act, No 6 of 2004 and its related Regulations
- The Share Blocks Control Act, No 59 of 1980
- The Housing Development Scheme for Retired Persons Act, No 65 of 1988
- Property Timesharing Control Act, No 75 of 1983
- Spatial Planning Land Use Management Act, No 16 of 2013
- National Environmental Management Act, No 107 of 1998
- Transfer Duty Act No, 40 of 1949
- Standard operating procedures
- Code of Conduct

### **3.2 Apply ethical principles in the interest of all stakeholders (NQF Level 5)**

#### **Unique Product or Service:**

Sound and ethical business practices.

#### **Occupational Responsibilities:**

- Comply with applicable legislation and regulations
- Maintain ethical property and real estate practices aligned with regulatory requirements and industry standards
- Apply the Code of Conduct
- 

#### **Occupational Contexts:**

- The Estate Agency Affairs Act, 112 of 1976
- Property Practitioners Act 22 of 2019
- The Financial Intelligence Centre Act, 38 of 2001
- Protection of Personal Information Act, 4 of 2013
- The National Credit Act, 35 of 2005
- The Consumer Protection Act, 68 of 2008
- Standard operating procedures
- Code of Conduct

### **3.3 Build proficient and sustainable relationships (NQF Level 4)**

#### **Unique Product or Service:**

Client database and relationships maintained and evolved.

#### **Occupational Responsibilities:**

- Gain an in-depth understanding of clients' needs
- Develop consultative working relationships with clients
- Negotiate and consult on service level agreements/contracts
- Evaluate, update and maintain database integrity

#### **Occupational Contexts:**

- Protection of Personal Information Act, 4 of 2013
- Property Practitioners Act 22 of 2019
- The Estate Agency Affairs Act, 112 of 1976
- The Consumer Protection Act, 68 of 2008
- Standard operating procedures
- Code of Conduct

### **3.4 Develop and maintain a personal and professional brand through innovation and continuous improvement (NQF Level 4)**

#### **Unique Product or Service:**

Business continuity ensured.

#### **Occupational Responsibilities:**

- Identify strengths and areas for improvement to define personal brand
- Obtain and analyse continuous feedback from clients, service providers, peers and other stakeholders
- Implement areas of improvement and innovation
- Measure performance against previously set targets
- Analyse time management practices

#### **Occupational Contexts:**

- Property Practitioners Act 22 of 2019
- The Financial Intelligence Centre Act, 38 of 2001
- Protection of Personal Information Act, 4 of 2013

- The Consumer Protection Act, 68 of 2008
- Companies Act 71 of 2008
- Standard operating procedures
- Code of Conduct

### **3.5 Perform property and real estate duties resulting in successful transactions (NQF Level 4)**

#### **Unique Product or Service:**

Effective and efficient service provided.

#### **Occupational Responsibilities:**

- Market property and real estate within all sectors
- Buy and sell property and real estate within all sectors
- Let and rent property and real estate within all sectors
- Manage property and real estate including Community Schemes
- Provide after-sales service

#### **Occupational Contexts:**

- The Estate Agency Affairs Act, 112 of 1976
- Property Practitioners Act 22 of 2019
- The Financial Intelligence Centre Act, 38 of 2001
- Protection of Personal Information Act, 4 of 2013
- Sectional Titles Act, 95 of 1986
- Sectional Title Schemes Management Act, 8 of 2011
- The National Credit Act, 35 of 2005
- The Consumer Protection Act, 68 of 2008
- Financial Sector Regulation Act, 9 of 2017
- Matrimonial Property Act, 88 of 1984
- Deeds Registry Act, 47 of 1937
- Companies Act 71 of 2008
- Rental Housing Act 50 of 1999 as amended
- The Municipal Property Rates Act, No 6 of 2004
- The Share Blocks Control Act, No 59 of 1980
- The Housing Development Scheme for Retired Persons Act, No 65 of 1988
- Property Timesharing Control Act, No 75 of 1983
- Spatial Planning Land Use Management Act, No 16 of 2013
- Transfer Duty Act No, 40 of 1949

- Standard operating procedures
- The Property Charter
- Code of Conduct

### **3.6 Implement sound financial practices to achieve personal and business objectives (NQF Level 4)**

#### **Unique Product or Service:**

Sound financial business.

#### **Occupational Responsibilities:**

- Manage budget and financial controls
- Develop a personal financial plan to enhance alignment of business objectives
- Review taxation and the impact on personal income in relation to property and real estate transactions
- Produce a business plan for an area of operation to support a property and real estate business

#### **Occupational Contexts:**

- The Estate Agency Affairs Act, 112 of 1976
- Property Practitioners Act 22 of 2019
- The National Credit Act, 35 of 2005
- Financial Sector Regulation Act, 9 of 2017
- Companies Act 71 of 2008
- Income Tax Act 58 of 1962
- Standard operating procedures
- Code of Conduct

### SECTION 3: CURRICULUM COMPONENT SPECIFICATIONS

#### SECTION 3A: KNOWLEDGE MODULE SPECIFICATIONS

COMPONENT	ID	MODULE TITLE	NQF LEVEL	CREDITS
Knowledge	333402000-00-KM-01	Legislative and regulatory framework	4	7
Knowledge	333402000-00-KM-02	Ethical business principles	5	8
Knowledge	333402000-00-KM-03	Developing relationships	4	7
Knowledge	333402000-00-KM-04	Brand reputation	4	3
Knowledge	333402000-00-KM-05	Property and real estate services	4	8
Knowledge	333402000-00-KM-06	Financial business principles	4	5

**1. 333402000-00-KM-01: Legislative and Regulatory Framework, NQF Level 4,  
Credits: 7 (Learning contract time 5.5 Days)**

**1.1 Purpose of the Knowledge Modules**

The main focus of the learning in this knowledge subject is to equip qualifying learners with knowledge and understanding of the basic concepts of applying legislative and regulatory framework within the property and real estate environment.

The learning will enable learners to demonstrate an understanding of:

KM-01-KT01: Fundamentals of the macro environment impacting on the property and real estate sector (25%)

KM-01-KT02: Principles of relevant legislation and contract law (30%)

KM-01-KT03: Specific contracts relevant to transactions (30%)

KM-01-KT04: Regulations impacting upon the industry (15%)

## **1.2 Guidelines for Topics**

### **1.2.1 KM-01-KT01: Fundamentals of the macro environment impacting on the property and real estate sector (25%)**

***Topic elements to be covered include:***

KT0101	Demographic environment
KT0102	Socio-economic environment
KT0103	Political environment
KT0104	Technological environment
KT0105	Competitive environment

#### ***Internal Assessment Criteria***

1. Explain the concept of cultural diversity with examples in relation to property and real estate developments and trends.
2. Identify the demographic trends of the country versus own area of operation.
3. Identify and explain the trends, developments and statistical information that affect property and real estate market.
4. Discuss sources of economic related information that can be used to determine economic climate affecting property and real estate environment.
5. Describe the concepts of supply and demand and the buyer versus seller markets.
6. Explain the property and real estate economics in relation to interest rates and inflation.
7. Discuss the concepts of scarcity and choice.
8. Describe the socio-economic factors that impact the property and real estate environment.
9. Discuss the political environment and how it affects the success of the property and real estate function.
10. Explain the technological environment and its related trends.
11. Describe the competitive environment and how it affects the property and real estate context.

***(Weight: 25%)***

### **1.2.2 KM-01-KT02: Principles of relevant legislation and contract law (30%)**

***Topic elements to be covered include:***

KT0201	The Estate Agency Affairs Act, 112 of 1976
KT0202	Property Practitioners Act 22 of 2019
KT0203	The Financial Intelligence Centre Act, 38 of 2001
KT0204	Protection of Personal Information Act, 4 of 2013
KT0205	Sectional Titles Act, 95 of 1986
KT0206	Sectional Title Schemes Management Act, 8 of 2011
KT0207	The National Credit Act, 35 of 2005
KT0208	The Consumer Protection Act, 68 of 2008
KT0209	Financial Sector Regulation Act, 9 of 2017
KT0210	Matrimonial Property Act, 88 of 1984
KT0211	Alienation of Land Act, 68 of 1991
KT0212	Deeds Registry Act, 47 of 1937
KT0213	Income Tax Act 58 of 1962
KT0214	Administration of Deceased Estates Act 66 of 1965
KT0215	Companies Act 71 of 2008
KT0216	Rental Housing Act 50 of 1999 as amended
KT0217	The Municipal Property Rates Act, No 6 of 2004 and its related Regulations
KT0218	The Share Blocks Control Act, No 59 of 1980
KT0219	The Housing Development Scheme for Retired Persons Act, No 65 of 1988
KT0220	Property Timesharing Control Act, No 75 of 1983
KT0221	Spatial Planning Land Use Management Act, No 16 of 2013
KT0222	National Environmental Management Act, No 107 of 1998
KT0223	Transfer Duty Act No, 40 of 1949

### ***Internal Assessment Criteria***

1. Describe the various legislation and regulations that affect the property and real estate function.
2. Explain the Estate Agency Affairs Act and its relevance to the property and real estate industry.
3. Define the main provisions of the Estate Agency Affairs Act and their functions
4. Describe the duties and obligations imposed on property and real estate agents/practitioners by the Act.
5. Outline all rules and regulations relating to trust monies and fidelity fund certificates



6. Discuss the regulations pertaining to land use controls.
7. Describe the legal implications to property ownership.
8. Outline the shared-listing systems available and their functions.
9. Explain referral networks and the opportunities they can create.
10. Discuss the Deeds Office and its functions.
11. Discuss the key elements of contracts.
12. Describe the contracts of sale, lease and management specific to property and real estate transactions.
13. Explain the impact of electronic communication and transactions on property and real estate transactions.

**(Weight: 30%)**

### **1.2.3 KM-01-KT03: Specific contracts relevant to transactions (30%)**

***Topic elements to be covered include:***

- |        |   |
|--------|---|
| KT0301 | Fundamentals of Contracts                                   |
| KT0302 | Contracts relevant to property and real estate transactions |
| KT0303 | Legislation for Immovable property transactions             |
| KT0304 | General Principles of Contract Law                          |
| KT0305 | Contracts of Sale, Lease and Management                     |
| KT0306 | Electronic Communication and Transactions Act, 25 of 2000   |

#### ***Internal Assessment Criteria***

1. Define a contract and its legal requirements (This includes but is not limited to immovable property).
2. Explain contract law concepts.
3. Describe the circumstances under which contracts can be terminated.
4. Discuss the following concepts:
  - a. Breach of contract
  - b. Damages
  - c. Specific performance
5. Define and explain contracts relevant to property and real estate transactions.
6. Explain the essential and material terms of the following contracts for immovable property:
  - a. agency and mandate

- b. purchase and sales
  - c. letting and renting
  - d. management
- 7. Outline legislation and regulations for immovable property transactions.
- 8. Explain the legislative and regulatory provisions affecting rights in immovable property.
- 9. Discuss the legislative and regulatory provisions affecting the competencies of natural persons dealing with immovable property.
- 10. Describe the legislative provisions relating to immovable property titles and their registration.
- 11. Discuss the legislative provisions affecting the competencies of legal entities dealing with immovable property.
- 12. Discuss the key elements of contracts.
- 13. Describe the contracts of sale, lease and management specific to property and real estate transactions.
- 14. Explain the impact of electronic communication and transactions on property and real estate transactions.

**(Weight: 30%)**

#### **1.2.4 KM-01-KT04: Regulations impacting upon the industry (15%)**

***Topic elements to be covered include:***

- KT0401 Money laundering legislation
- KT0402 Requirements for accountable institutions
- KT0403 Record keeping
- KT0404 Consequences of non-compliance

#### ***Internal Assessment Criteria***

- 1. Explain the purpose of the various money laundering legislation.
- 2. Discuss the concepts of money laundering and unlawful activities.
- 3. Describe the purpose of the The Financial Intelligence Centre Act (FICA), 38 of 2001 and how it contributes to the prevention of money laundering.
- 4. Identify the statutory bodies who support the money laundering legislation.
- 5. Outline the concept of an accountable institution with reference to their duties under the The Financial Intelligence Centre Act, 38 of 2001.

6. Explain the role and functions of the FICA Compliance Officer.
7. Identify the categories of clients and documents required in the money laundering legislation.
8. Explain the concepts of identification and verification with reference to a business relationship or one that requires indication.
9. Discuss the circumstances or products exempt from the The Financial Intelligence Centre Act, 38 of 2001.
10. List the records required by the money laundering legislation along with the timeframes for storage.
11. Describe the requirements of accessibility of information.
12. Explain the process to be followed when reporting different types of transactions.
13. Discuss the possible indicators that could infer a transaction is suspicious.
14. Describe the penalties for non-compliance with reference to:
  - a. Personal liability
  - b. Liability of the organisation
16. Outline the risk management and compliance programme (RMCP) of an organization to ensure compliance with the The Financial Intelligence Centre Act, 38 of 2001.
17. Discuss the possible defenses of accountable institutions in the event of prosecution against personal liability for not reporting suspicious transactions available to:
  - a. Employees
  - b. Employers
18. Explain the impact of non-compliance on the economy with reference to foreign investment.
19. Describe the consequences of whistle blowing for an individual in respect of appropriate legislation.

**(Weight: 15%)**

### **1.3 Provider Accreditation Requirements for the Subject**

#### *Physical Requirements:*

- Classroom furniture (chairs and tables, audio & visual equipment and all other equipment conducive to a learning environment)
- Handouts and stationery (electronic consumables, pencils/paper)

- Learning material
- Computer/laptop
- Virtual technical requirements

*Human Resource Requirements:*

- Facilitator/learner ratio 1 to 15
- Relevant qualifications/experience
- Achieved accreditation for both facilitators and courseware from QCTO

*Legal Requirements:*

- Accredited with the Estate Agency Affairs Board
- Accredited as per QCTO requirements

**1.4 Critical Topics to be Assessed Externally for the Knowledge Module**

None

**1.5 Exemptions**

None

**2. 333402000-00-KM-02: Ethical Business Principles, NQF Level 5, Credits: 8  
(Learning contract time 10 Days)**

**2.1 Purpose of the Knowledge Modules**

The main focus of the learning in this knowledge subject is to equip qualifying learners with knowledge and understanding of the ethical principles and codes of ethics relevant to the property and real estate environment to his/her own context.

The learning will enable learners to demonstrate an understanding of:

KM-02-KT01: Elements of developing a Code of Ethics (10%)

KM-02-KT02: Concepts of a Code of Conduct (15%)

KM-02-KT03: Implications of a Code of Conduct within the industry (15%)

KM-02-KT04: Ethical best practices (20%)

KM-02-KT05: Application of the Code of Conduct (40%)

## **2.2 Guidelines for Topics**

### **2.2.1 KM-02-KT01: Elements of developing a Code of Conduct (10%)**

#### ***Topic elements to be covered include:***

KT0101	Various Codes of Ethics
KT0102	Ethical and Moral Responsibility
KT0103	The role of Ethics
KT0104	Ethical Self -evaluation

#### ***Internal Assessment Criteria***

1. Identify the key elements of at least three different types of Codes of Ethics.
2. Explain the rationale for ethical codes within professions with reference to internal and external relations and moral responsibility.
3. Describe the role ethics play in the formation of a Code of Ethics.
4. Outline the key influences in the formation of a Code of Ethics.
5. Discuss own perspectives of ethical actions against a specified professional code.

***(Weight:10 %)***

### **2.2.2 KM-02-KT02: Concepts of a Code of Conduct (15%)**

#### ***Topic elements to be covered include:***

KT0201	Context of property and real estate profession relating to the Code of Conduct
KT0202	Principles of the Code of Conduct
KT0203	Contents of the Code of Conduct

#### ***Internal Assessment Criteria***

1. Explain the role the Estate Agency Affairs Act or relevant legislation has in governing the Code of Conduct.
2. Compare at least two Codes of Conduct and check for similarities.
3. Establish the main principles of Code of Conduct.

***(Weight:15 %)***

### **2.2.3 KM-02-KT03: Implications of a Code of Conduct within the industry (15%)**

#### ***Topic elements to be covered include:***

- KT0301      The importance of the Code of Conduct
- KT0302      Consequences of non-compliance
- KT0303      Costs of non-compliance

#### ***Internal Assessment Criteria***

1.      Discuss the importance of the Code of Conduct.
2.      Discuss the consequences and implications of non-compliance with the Code of Conduct.
3.      Outline the implications of the Code of Conduct for a property or real estate profession.
4.      Describe the implications of the Code of Conduct for other parties within the industry.
5.      Explain the consequences of non-compliance and the benefits of compliance to an individual.

***(Weight:15 %)***

### **2.2.4 KM-02-KT04: Ethical Best Practices (20%)**

#### ***Topic elements to be covered include:***

- KT0401      Principles of ethics
- KT0402      Ethical dilemmas and conflicts
- KT0403      The importance of ethics

#### ***Internal Assessment Criteria***

1.      Discuss the concept of ethics in relation to other rules of conduct.
2.      Compare ethical best practices against other industries.
3.      Explain typical core ethical values and standards applicable within the property and real estate industry.
4.      Discuss the importance of ethical values and standards within the property and real estate sector.

***(Weight:20 %)***

### **2.2.5 KM-02-KT05: Application of the Code of Conduct within a work context (40%)**

***Topic elements to be covered include:***

KT0501	Code of Conduct
KT0502	Self- evaluation of conduct
KT0503	Methods of integration

***Internal Assessment Criteria***

1. Describe the Code of Conduct in relation to workplace duties.
2. Identify individual conduct evaluated against the Code of Conduct.
3. Discuss methods of integrating the Code of Conduct and ethical requirements within the work context and alignment to mission and values.
4. Identify and align duties to principles of work ethic.

***(Weight:40 %)***

**2.3 Provider Accreditation Requirements for the Subject**

*Physical Requirements:*

- Classroom furniture (chairs and tables, audio & visual equipment and all other equipment conducive to a learning environment)
- Handouts and stationery (electronic consumables, pencils/paper)
- Learning material
- Computer/laptop
- Virtual technical requirements

*Human Resource Requirements:*

- Facilitator/learner ratio 1 to 15
- Relevant qualifications/experience
- Achieved accreditation for both facilitators and courseware from QCTO

*Legal Requirements:*

- Accredited with the Estate Agency Affairs Board
- Accredited as per QCTO requirements

**2.4 Critical Topics to be Assessed Externally for the Knowledge Module**



None

## **2.5 Exemptions**

None

**3. 333402000-00-KM-03: Developing Relationships, NQF Level 4, Credits: 7  
(Learning contract time 5 Days)**

**3.1 Purpose of the Knowledge Modules**

The main focus of the learning in this knowledge subject is to equip qualifying learners with knowledge and understanding of delivering on service expectations with internal and external stakeholders in order to ensure that expectations are managed.

The learning will enable learners to demonstrate an understanding of:

KM-03-KT01: Elements of client engagement in a client-centric manner (15%)

KM-03-KT02: Concepts of researching the client database in your area (15%)

KM-03-KT03: Fundamentals of verbal and non-verbal communication (30%)

KM-03-KT04: Basic principles of negotiation (20%)

KM-03-KT05: Dynamics of innovative problem-solving (15%)

KM-03-KT06: Principles of conflict resolution (5%)

## **3.2 Guidelines for Topics**

### **3.2.1 KM-03-KT01: Elements of Client Engagement in a Client-centric Manner (15%)**

#### ***Topic elements to be covered include:***

KT0101	Ongoing contact with designated clients
KT0102	New clients to introduce to the client base
KT0103	Client contact programme
KT0104	Secure visits and new mandates
KT0105	Terms of business
KT0106	Qualify mandates and resources.

#### ***Internal Assessment Criteria***

1. Maintain ongoing contact with designated clients.
2. Developing new clients to introduce to the client base
3. Explain the importance of client management systems for sustainability
4. Develop a client contact programme.
5. Contact clients to secure Visits and new mandates.
6. Ensure that terms of business have been completed.
7. Allocate resources aligned to mandate requirements.

***(Weight:15 %)***

### **3.2.2 KM-03-KT02: Concepts of Researching the Client Base in your Area (15%)**

#### ***Topic elements to be covered include:***

KT0201	Prospective clients
KT0202	Client needs analysis
KT0203	Client base

#### ***Internal Assessment Criteria***

1. Develop contacts and networks in terms of providing information for the identification of prospective clients.
2. Identify clients using established methods.
3. Establish a consultation method to identify clients.

4. Establish opportunities for buying, selling, letting, renting and managing processes.
5. Identify prospecting methods to establish and build a client base.
6. Establish information needs with current and prospective client base.
7. Establish processes for recording and assessing customer information.
8. Establish and maintain the client database to integrate customer information.
9. Assess client profiles to identify factors in relation to the client's market.

**(Weight: 15%)**

### **3.2.3 KM-03-KT03: Fundamentals of Verbal and Non-verbal Communication (30%)**

***Topic elements to be covered include:***

- |        |   |
|--------|---|
| KT0301 | Verbal and non-verbal communication defined                             |
| KT0302 | Characteristics of verbal communication                                 |
| KT0303 | The Impact of non-verbal communication                                  |
| KT0304 | The Impact of communication during the property and real estate process |

#### ***Internal Assessment Criteria***

1. Explain verbal and non-verbal communication.
2. Discuss the impact of cultural diversity in verbal and non-verbal communication.
3. Describe, explain and analyse the impact of verbal communication (clarity of purpose, speaker's capability).
4. Identify techniques used by speakers to evade or dissipate responsibility for an issue and where the interpretations of the text reflect this insight.
5. Analyse the impact of non-verbal cues / body language and signals during the property and real estate process.
6. Describe, explain and assess the impact of the speaker in terms of clarity of purpose and their capability.
7. Identify and discuss the purpose of various types of texts within each medium in the context of property and real estate services.
8. Connect the target audience and text purpose to various types of activities required to deliver end-to-end property and real estate services.
9. Collate a presentation on the surface understanding and the embedded meaning in various texts.

10. Identify values and views in selected texts and explain it in terms of the impact on meaning and the target audience.
11. Evaluate the effects of content, language and style on readers'/viewers' responses in specific communication.
12. Analyse the influence of bias on specific language structures and features used during the property and real estate process.
13. Collate, understand and communicate workplace data.
14. Use a basic graph to analyse and communicate information relating to the end-to-end property and real estate service, strategic impact and market trends.
15. Accept and record client terms and conditions verbally and in writing.
16. Complete and administer contract procedures and documentation.
17. Confirm and distribute signed documentation.
18. Define communication strategies and explain their importance.
19. Identify and define the various forms of marketing and the relevant application within the various stages of the property and real estate processes.
20. Explain the importance of having knowledge and understanding of property and real estate and the supporting processes required to successfully conclude a transaction and ensure business continuity.

**(Weight:30 %)**

### **3.2.4 KM-03-KT04: Basic Principles of Negotiation (15%)**

***Topic elements to be covered include:***

- |        |   |
|--------|---|
| KT0401 | Definitions of Negotiation                                      |
| KT0402 | The Role of Negotiation in the property and real estate process |
| KT0403 | Strategies used in negotiation                                  |

#### ***Internal Assessment Criteria***

1. Define negotiation.
2. Explain the need for negotiation in the property and real estate sector.
3. Identify the kind of outcomes that property and real estate professionals may be required to negotiate in various scenarios.
4. Name and explain the steps in negotiation with reference to various clients.

5. Identify the abilities needed by skilled negotiators and indicate how each ability can contribute to the success or failure of a negotiation.
6. Analyse the demands of all parties and propose a concession for a selected scenario.
7. Identify tactics and methods that could be used in negotiation to facilitate a mutually satisfactory solution.
8. Identify different types of closure and indicate when each is suitable.

**(Weight:15 %)**

### **3.2.5 KM-03-KT05: Dynamics of Innovative Problem-solving (15%)**

***Topic elements to be covered include:***

- |        |   |
|--------|---|
| KT0501 | Innovative problem-solving defined                            |
| KT0502 | Innovative problem-solving techniques                         |
| KT0503 | Types of Innovation within property and real estate practices |
| KT0504 | Methods to innovative problem-solving                         |
| KT0505 | Problem-solving and decision-making                           |

#### ***Internal Assessment Criteria***

1. Discuss strategic methodology for defining the problem.
2. Define the problem according to verified information.
3. Explain the rationale for consulting with stakeholders to ensure that they contribute to the solution.
4. Explore and explain techniques in the formulation of the problem definition.
5. Explain the methods of innovative problem-solving.
6. Use problem-solving techniques to generate possible solutions.
7. Communicate final decision to affected stakeholders.

**(Weight:15 %)**

### **3.2.6 KM-03-KT06: Principles of Conflict Resolution (5%)**

***Topic elements to be covered include:***

- |        |                                   |
|--------|-----------------------------------|
| KT0601 | Main sources of conflict          |
| KT0602 | Conflict management techniques    |
| KT0603 | Strategies to manage conflict     |
| KT0604 | Attributes of conflict management |

### ***Internal Assessment Criteria***

1. List the possible causes of conflict.
2. Discuss the positive and negative characteristics of conflict.
3. Explain the organizational and various business conflict modes
4. Describe conflict arising from personality types using transactional analysis.
5. Outline appropriate techniques in conflict management.
6. Describe the personal attributes of an effective conflict manager and how each relates to conflict resolution.
7. Conduct a personal skills audit and identify areas of development for an effective conflict manager.

***(Weight: 5%)***

### **3.3 Provider Accreditation Requirements for the Subject**

#### *Physical Requirements:*

- Classroom furniture (chairs and tables, audio & visual equipment and all other equipment conducive to a learning environment)
- Handouts and stationery (electronic consumables, pencils/paper)
- Learning material
- Computer/laptop
- Virtual technical requirements

#### *Human Resource Requirements:*

- Facilitator/learner ratio 1 to 15
- Relevant qualifications/experience
- Achieved accreditation for both facilitators and courseware from QCTO

#### *Legal Requirements:*

- Accredited with the Estate Agency Affairs Board
- Accredited as per QCTO requirements

### **3.4 Critical Topics to be Assessed Externally for the Knowledge Module**

None

### **3.5 Exemptions**

None



**4. 333402000-00-KM-04: Brand Reputation, NQF Level 4, Credits: 3  
(Learning contract time 2 Days)**

**4.1 Purpose of the Knowledge Modules**

The main focus of the learning in this knowledge subject is to equip qualifying learners with knowledge and understanding of the basic concepts of personal and professional branding and thereby building a long-lasting positive brand reputation.

The learning will enable learners to demonstrate an understanding of:

KM-04-KT01: Fundamentals of personal branding (30%)

KM-04-KT02: Elements of professional branding (30%)

KM-04-KT03: Dynamics of performance management (20%)

KM-04-KT04: Fundamentals of time management (20%)

## **4.2 Guidelines for Topics**

### **4.2.1 KM-04-KT01: Fundamentals of Personal Branding (30%)**

#### ***Topic elements to be covered include:***

KT0101	Definition of personal brand
KT0102	Know yourself
KT0103	Know your audience
KT0104	Research desired industry and experts
KT0105	Customer feedback
KT0106	Network and request recommendations
KT0107	Create and instil online/virtual presence
KT0108	Align online/virtual presence to your personal brand

#### ***Internal Assessment Criteria***

1. Discuss in your own words what is meant by a personal brand.
2. Identify your own strengths and weaknesses.
3. Perform a PESTLE–R and needs analysis on your own target market (audience).
4. Discuss the importance of customer engagement and feedback to improve service delivery.
5. Explain the relevance of networking and requesting recommendations in the property and real estate industry.
6. Define your online/virtual brand and ensure that it aligns to who you are as a person.

***(Weight: 30%)***

### **4.2.2 KM-04-KT02: Elements of Professional Branding (30%)**

#### ***Topic elements to be covered include:***

KT0201	Professional brand identity
KT0202	Principles and components of a professional brand statement
KT0203	Components of brand promises
KT0204	Communicate your promises
KT0205	Elements of consistency

### ***Internal Assessment Criteria***

1. Identify and define what professional brand identity is.
2. Define the principles and components of a professional brand statement.
3. Write a professional brand statement.
4. Identify and specify communicate medium of the promises of your professional brand.
5. Discuss the importance of consistency in your commitment to the brand promise.
6. Identify and explain the role of digital communication in brand awareness.

***(Weight:30%)***

### **4.2.3 KM-04-KT03: Dynamics of Performance Management (20%)**

#### ***Topic elements to be covered include:***

- |        |                                    |
|--------|------------------------------------|
| KT0301 | Marketing objectives               |
| KT0302 | Marketing performance standards    |
| KT0303 | Performance management action plan |
| KT0304 | Marketing reporting framework      |

### ***Internal Assessment Criteria***

1. Define marketing performance standards in relation to targets.
2. Explain its relevance to property and real estate practices.
3. Develop an action plan against marketing performance standards in order to enhance personal and professional brand.
4. Write a feedback report against identified performance standards.
5. Recommend corrective action, where necessary.

***(Weight: 20%)***

### **4.2.4 KM-04-KT04: Fundamentals of Time Management (20%)**

#### ***Topic elements to be covered include:***

- |        |                               |
|--------|-------------------------------|
| KT0401 | Time management profiles      |
| KT0402 | Principles of time management |
| KT0403 | Time efficient work plans     |
| KT0404 | Implementation of work plans  |

### ***Internal Assessment Criteria***

1. Describe various time management profiles.
2. Outline the benefits of time management.
3. Identify time management disruptors.
4. Discuss time management principles and techniques.
5. Explain how to draw up a time-efficient work plan.
6. Describe the methods of implementing a successful time-efficient plan.
7. Define the monitoring and evaluation of work plans with review and revisions.

***(Weight:20 %)***

### **4.3 Provider Accreditation Requirements for the Subject**

#### *Physical Requirements:*

- Classroom furniture (chairs and tables, audio & visual equipment and all other equipment conducive to a learning environment)
- Handouts and stationery (electronic consumables, pencils/paper)
- Learning material
- Computer/laptop
- Virtual technical requirements

#### *Human Resource Requirements:*

- Facilitator/learner ratio 1 to 15
- Relevant qualifications/experience
- Achieved accreditation for both facilitators and courseware from QCTO

#### *Legal Requirements:*

- Accredited with the Estate Agency Affairs Board
- Accredited as per QCTO requirements

### **4.4 Critical Topics to be Assessed Externally for the Knowledge Module**

None

### **4.5 Exemptions**

None

**5. 333402000-00-KM-05: Property and real estate services, NQF Level 4,  
Credits: 8 (Learning contract time 3Days)**

**5.1 Purpose of the Knowledge Modules**

The main focus of the learning in this knowledge subject is to equip qualifying learners with knowledge and understanding of the basic concepts of property and real estate service and its impact on the organisation.

The learning will enable learners to demonstrate an understanding of:

KM-05-KT01: Elements of marketing a property and real estate (20%)

KM-05-KT02: Fundamentals of buying and selling a property and real estate (25%)

KM-05-KT03: Principles of letting and renting (25%)

KM-05-KT04: Concepts of Community Scheme management (25%)

KM-05-KT05: The importance of after-sales services (5%)

## **5.2 Guidelines for Topics**

### **5.2.1 KM-05-KT01: Elements of Marketing Property and Real Estate (20%)**

#### ***Topic elements to be covered include:***

KT0101	Marketing context and mix
KT0102	Elements of products and services
KT0103	Consumer behaviour
KT0104	Marketing processes
KT0105	Market analysis and assessment
KT0106	Sales and leasing analysis

#### ***Internal Assessment Criteria***

1. Explain the property and real estate marketing context and mix.
2. Discuss the products and services of property and real estate.
3. Describe consumer behaviour.
4. Outline all marketing processes.
5. Compile a marketing and advertising plan.
6. Conduct a comparative market analysis and assessment in relation to personal targets and business context.
7. Discuss results of sales and leasing analysis to determine future sales opportunities.

***(Weight: 20%)***

### **5.2.2 KM-05-KT02: Fundamentals of Buying and Selling a Property and Real Estate (25%)**

#### ***Topic elements to be covered include:***

KT0201	Concepts of buying a property and real estate
KT0202	Financial sources
KT0203	Methodologies of selling a property and real estate
KT0204	Shared-listing systems
KT0205	Valuation of property and real estate
KT0206	Cost-based and value-based pricing
KT0207	Procedure for Offers to Purchase

***Internal Assessment Criteria***

1. Discuss the concepts for buying a property and real estate.
2. Identify the entities in which the property or real estate can be bought.
3. Discuss the tax implications of buying a property or real estate.
4. Describe the costing when buying a property or real estate.
5. Outline the various sources of securing finance.
6. Explain the techniques and methods for selling a property in various property and real estate contexts.
7. Describe property owner's conduct and the impact on the transaction.
8. Outline the various types of selling mandates (This includes but is not limited to; residential, commercial, industrial, business undertaking, agricultural, auctioneer, leisure).
9. Describe various listing and shared-listing systems.
10. Discuss the valuation of the property and real estate to determine selling price.
11. Explain the purpose of listing of property and securing of a mandate.
12. Define the principles of cost-based and value-based pricing to determine viable purchase prices.
13. Describe the methods of presenting the property.
14. Explain the procedure for making the Offer to Purchase and accepting thereof.
15. Discuss the process of closing the sale.

***((Weight: 25%))***

**5.2.3 KM-05-KT03: Principles of Letting and Renting a Property (25%)**

***Topic elements to be covered include:***

- |        |  |
|--------|--|
| KT0301 | Procedures for letting and renting                   |
| KT0302 | Qualification of tenants                             |
| KT0303 | Key elements of data quality                         |
| KT0304 | Principles of cost-based and value-based estimations |
| KT0305 | Letting and renting documentation                    |
| KT0306 | Procurement and administration functions             |



***Internal Assessment Criteria***

1. Explain the procedure for letting and renting
2. Discuss the qualification criteria for tenants.
3. Define the principals of cost-based and value-based pricing to determine market related rentals.
4. Identify all required documentation relating to letting and renting of a property and real estate.
5. Explain the administration and management of rental properties.
6. Describe the difference between procurement and managed leases.
7. Explain the process of inspections of property and real estate.

***(Weight: 25%)***

**5.2.4 KM-05-KT04: Concepts of Community Scheme Management (25%)*****Topic elements to be covered include:***

- |        |   |
|--------|---|
| KT0401 | Distinctions of ownership                 |
| KT0402 | Sectional Titles Management Act 8 of 2011 |
| KT0403 | Community Schemes and administration      |
| KT0404 | Home Owners' Associations                 |
| KT0405 | Regulatory bodies                         |
| KT0406 | Documentation requirements                |

***Internal Assessment Criteria***

1. Explain the distinctions between ownership as per Community Schemes Ombud Service Act 9 of 2011.
2. Explain the management of Sectional Titles.
3. Describe the actions and activities required for sectionalising of buildings
4. Discuss the duties and functions of trustees.
5. Describe the authority to enforce rules by the Home Owners' Association.
6. Explain the role of the Ombud within the Community Scheme environment.
7. Identify the legislative, management and administrative requirements within a Community Schemes.

***(Weight: 25%)***

### **5.2.5 KM-05-KT05: The Importance of After-sales Services (5%)**

#### ***Topic elements to be covered include:***

- KT0501 Importance of documentation submission
- KT0502 Benefits of sales, renting and marketing
- KT0503 Stakeholder communication

#### ***Internal Assessment Criteria***

1. Define the importance of timeous submission of after-sale documentation.
2. Discuss the benefits of sales, renting and marketing of the following:
  - a. Management of suspensive or resolute contractual conditions.
  - b. Assisting parties in understanding and complying with legal and financial obligations.
  - c. Explaining the conveyancing process, special clauses and addenda to stakeholders.
  - d. Administration of the process of early rental cancelations.
3. Explain the value of managing communication between all stakeholders.
4. Discuss the benefits of a well-managed Community Scheme.

***(Weight: 5%)***

### **5.3 Provider Accreditation Requirements for the Subject**

#### ***Physical Requirements:***

- Classroom furniture (chairs and tables, audio & visual equipment and all other equipment conducive to a learning environment)
- Handouts and stationery (electronic consumables, pencils/paper)
- Learning material
- Computer/laptop
- Virtual technical requirements

#### ***Human Resource Requirements:***

- Facilitator/learner ratio 1 to 15
- Relevant qualifications/experience
- Achieved accreditation for both facilitators and courseware from QCTO

#### ***Legal Requirements:***

- Accredited with the Estate Agency Affairs Board
- Accredited as per QCTO requirements

#### **5.4 Critical Topics to be Assessed Externally for the Knowledge Module**

None

#### **5.5 Exemptions**

None

**6. 333402000-00-KM-06: Financial Business Principles, NQF Level 4,  
Credits: 7 (Learning contract time 3 Days)**

**6.1 Purpose of the Knowledge Modules**

The main focus of the learning in this knowledge subject is to equip qualifying learners with knowledge and understanding of the basic concepts of business principles to property and real estate transactions to achieve their own personal targets.

The learning will enable learners to demonstrate an understanding of:

KM-06-KT01: Principles of budgeting (25%)

KM-06-KT02: Personal financial planning (25%)

KM-06-KT03: Concepts of taxation (25%)

KM-06-KT04: Fundamentals of business planning (25%)

## **6.2 Guidelines for Topics**

### **6.2.1 KM-06-KT01: Principles of Budgeting (25%)**

***Topic elements to be covered include:***

KT0101	Theory of budgeting
KT0102	Income budget
KT0103	Expenditure budget
KT0104	Cashflow forecast
KT0105	Statement of profit and loss

#### ***Internal Assessment Criteria***

1. Explain the concept of budgeting and cash flow forecasting in the property and real estate context.
2. Define an income budget based on a personal budget based on earnings.
3. Draw up an expenditure budget to determine profit, loss and break-even points.
4. Compile a cashflow forecast based on expected income dates.
5. Compile statement of profit and loss.

***(Weight: 25%)***

### **6.2.2 KM-06-KT02: Personal Financial Planning (25%)**

***Topic elements to be covered include:***

KT0201	Risk assessment
KT0202	Financial consulting
KT0203	Personal budget
KT0204	Company budget

#### ***Internal Assessment Criteria***

1. Discuss the financial risks in property and real estate in relation to own goals and personal plans.
2. Draw up own personal plans to provide for effective financial planning.
3. Explain the need to consult with a financial/insurance broker to determine retirement needs.
4. Discuss the adjustment of personal budgets to accommodate long-term needs.

5. Describe the alignment of business budgets to own personal budgets for short, medium and long term.

**(Weight: 25%)**

### **6.2.3 KM-06-KT03: Concepts of Taxation (25%)**

***Topic elements to be covered include:***

KT0301	Principles of personal taxation
KT0302	Value added taxation
KT0303	Fundamentals of property taxation
KT0304	Theory of income taxation
KT0305	Capital gains taxation

#### ***Internal Assessment Criteria***

1. Discuss the principles of personal taxation in relation to own income structures within the property and real estate environment.
2. Explain value added taxation in the property and real estate context.
3. Define taxation on property dealings for buyers, sellers and agents.
4. Describe income taxation on revenue earned.
5. Define the procedure for obtaining a personal assessment and a directive from SARS.
6. Explain the concept of capital gains taxation in the property and real estate context.

**(Weight: 25%)**

### **6.2.4 KM-06-KT04: Fundamentals of Business Planning (25%)**

***Topic elements to be covered include:***

KT0401	Business plan methodology
KT0402	Concepts of market research
KT0403	Financial forecasts
KT0404	Marketing plans
KT0405	Monitoring and evaluation

#### ***Internal Assessment Criteria***

1. Explain the identified business case within an area of operation.

2. Identify the steps required for drawing up a business plan within an area of operation.
3. Conduct market research in order to compile a business plan.
4. Compile a marketing plan.
5. Discuss the extraction of financial forecasts from the marketing plan.
6. Describe the methods for monitoring and evaluating the business plan.
7. Draw up the business plan within an area of operation.
8. Explain the implementation, monitoring and adjustments required for the business plan.

**(Weight: 25%)**

### **6.3 Provider Accreditation Requirements for the Subject**

#### *Physical Requirements:*

- Classroom furniture (chairs and tables, audio & visual equipment and all other equipment conducive to a learning environment)
- Handouts and stationery (electronic consumables, pencils/paper)
- Learning material
- Computer/laptop
- Virtual technical requirements

#### *Human Resource Requirements:*

- Facilitator/learner ratio 1 to 15
- Relevant qualifications/experience
- Achieved accreditation for both facilitators and courseware from QCTO

#### *Legal Requirements:*

- Accredited with the Estate Agency Affairs Board
- Accredited as per QCTO requirements

### **6.4 Critical Topics to be Assessed Externally for the Knowledge Module**

None

### **6.5 Exemptions**



None

## SECTION 3B: PRACTICAL SKILL MODULE SPECIFICATIONS

### List of Practical Skill Module Specifications

COMPONENT	ID	MODULE TITLE	NQF LEVEL	CREDITS
Practical	333402-000-00-PM-01	Employ macro trends to develop contracts in line with client needs and comply with legislation	4	7
Practical	333402-000-00-PM-02	Apply ethical principles in the interest of all stakeholders	5	8
Practical	333402-000-00-PM-03	Build proficient and sustainable client relationships	4	6
Practical	333402-000-00-PM-04	Develop and maintain a personal and professional brand through innovation and continuous improvement	4	3
Practical	333402-000-00-PM-05	Perform property and real estate duties resulting in successful transactions	4	8
Practical	333402-000-00-PM-06	Implement sound financial practices to achieve personal and business objectives	4	5

**Total number of credits for Practical Skills Modules: 37**

## **1. 333402-000-00-PM-01, Employ macro trends to develop contracts in line with client needs and comply with legislation, NQF Level 4, Cr 7**

### **1.1 Purpose of the Practical Skill Modules**

The focus of the learning in this module is on providing the learner an opportunity to employ macro trends to develop contracts in line with client needs and comply with legislation.

The learner will be required to:

- PM-01-PS01: Determine current property and real estate trends based on industry supply and demand
- PM-01-PS02: Apply market knowledge and trend analysis to relevant property and real estate practices
- PM-01-PS03: Adhere to relevant legal and regulatory requirements
- PM-01-PS04: Establish contracts required for various property and real estate transactions
- PM-01-PS05: Identify and explain the legislation and regulations impacting the industry

### **1.2 Guidelines for Practical Skills**

#### **1.2.1 PM-01-PS01: Determine current property and real estate trends based on industry supply and demand**

##### ***Scope of Practical Skill***

*Given work instructions, checklists, work area, case study, activity documents, any templates, forms, safety and quality principles and standard operating procedures procedure information available, the learner must be able to:*

- PA0101 Demonstrate an understanding of the property and real estate market supply and demand (including scarcity and choice in all sectors of property and real estate)
- PA0102 Explain the impact of the shortfall or oversupply on property and real estate practices
- PA0103 Identify and engage relevant parties to address specific supply and demand needs
- PA0104 Demonstrate an understanding of the impact of new technologies on the current supply and demand
- PA0105 Determine the impact of the sectors at risk as a result of property and real estate trends

##### ***Applied Knowledge***

- AK0101 Information gathering techniques
- AK0102 Attention to detail
- AK0103 Analysis and interpretation skills
- AK0104 Real estate and property sector understanding

**Internal Assessment Criteria**

- IAC0101 An understanding of the property and real estate market supply and demand is demonstrated (including scarcity and choice in all sectors of property and real estate)
- IAC0102 The impact of the shortfall or oversupply on property and real estate practices is explained.
- IAC0103 Relevant parties are identified and engaged to address specific supply and demand needs.
- IAC0104 An understanding of the impact of new technologies on the current supply and demand is demonstrated.
- IAC0105 The impact of the sectors at risk on property and real estate trends is determined.

**1.2.2 PM-01-PS02: Apply market knowledge and trend analysis to relevant property and real estate practices****Scope of Practical Skill**

*Given work instructions, checklists, work area, case study, activity documents, any templates, forms, safety and quality principles and standard operating procedures procedure information available, the learner must be able to:*

- PA0201 Determine a strategy based on analysis and understanding of the relevant market
- PA0202 Classify and apply various sourcing opportunities and techniques
- PA0203 Identify and apply various sourcing avenues and techniques in conjunction with internal and external stakeholders
- PA0204 Devise interventions in consultation with stakeholders

**Applied Knowledge**

- AK0201 Information gathering techniques
- AK0202 Attention to detail
- AK0203 Analysis and interpretation skills
- AK0204 Property and real estate sector understanding
- AK0205 Research techniques
- AK0206 Strategic thinking skills

**Internal Assessment Criteria**

- IAC0201 A strategy is determined based on analysis and understanding of the relevant market.
- IAC0202 The various sourcing opportunities and techniques are classified and applied.
- IAC0203 Sourcing avenues and techniques are identified and applied in conjunction with internal and external stakeholders.
- IAC0204 Interventions are devised in consultation with stakeholders.

### 1.2.3 PM-01-PS03: Adhere to relevant legal and regulatory requirements

#### **Scope of Practical Skill**

*Given work instructions, checklists, work area, case study, activity documents, any templates, forms, safety and quality principles and standard operating procedures procedure information available, the learner must be able to:*

- PA0301 Name the legislation and regulations that have an impact on property and real estate practices
- PA0302 Explain the application of legislation and regulations on property and real estate practices
- PA0303 Clarify the application of legislation and regulations on property and real estate contracts
- PA0304 Demonstrate, with examples, dealing with requests falling outside of the legislative and regulatory framework

#### **Applied Knowledge**

- AK0301 The Estate Agency Affairs Act, 112 of 1976
- AK0302 Property Practitioners Act 22 of 2019
- AK0303 The Financial Intelligence Centre Act, 38 of 2001
- AK0304 Protection of Personal Information Act, 4 of 2013
- AK0305 Sectional Titles Act, 95 of 1986
- AK0306 Sectional Title Schemes Management Act, 8 of 2011
- AK0307 The National Credit Act, 35 of 2005
- AK0308 The Consumer Protection Act, 68 of 2008
- AK0309 Financial Sector Regulation Act, 9 of 2017
- AK0310 Matrimonial Property Act, 88 of 1984
- AK0311 Alienation of Land Act, 68 of 1991
- AK0312 Deeds Registry Act, 47 of 1937
- AK0313 Income Tax Act 58 of 1962
- AK0314 Administration of Deceased Estates Act 66 of 1965
- AK0315 Companies Act 71 of 2008
- AK0316 Rental Housing Act 50 of 1999 as amended
- AK0317 The Municipal Property Rates Act, No 6 of 2004 and its related Regulations
- AK0318 The Share Blocks Control Act, No 59 of 1980
- AK0319 The Housing Development Scheme for Retired Persons Act, No 65 of 1988
- AK0320 Property Timesharing Control Act, No 75 of 1983
- AK0321 Spatial Planning Land Use Management Act, No 16 of 2013
- AK0322 National Environmental Management Act, No 107 of 1998
- AK0323 Transfer Duty Act No, 40 of 1949

#### **Internal Assessment Criteria**

- IAC0301 The legislation and regulations are listed and their impact on property and real estate practices is discussed.
- IAC0302 The application of legislation and regulations on property and real estate practices is explained.

- IAC0203 The application of legislation and regulations on property and real estate contracts are classified.
- IAC0304 Examples are provided to demonstrate dealing with requests falling outside the legislative and regulatory framework.

#### **1.2.4 PM-01-PS04: Establish contracts required for various property and real estate transactions**

##### ***Scope of Practical Skill***

*Given work instructions, checklists, work area, case study, activity documents, any templates, forms, safety and quality principles and standard operating procedures procedure information available, the learner must be able to:*

- PA0401 Identify and explain, with examples, the relevant documentation required
- PA0402 Select the appropriate contracts for the relevant property and real estate transactions
- PA0403 Complete and explain all required documentation
- PA0404 Obtain all signatures and acceptance
- PA0405 Submit and lodge required documents to relevant stakeholders
- PA0406 Communicate and update stakeholders throughout the process

##### ***Applied Knowledge***

- AK0401 The Estate Agency Affairs Act, 112 of 1976
- AK0402 Property Practitioners Act 22 of 2019
- AK0403 The Financial Intelligence Centre Act, 38 of 2001
- AK0404 Protection of Personal Information Act, 4 of 2013
- AK0405 Sectional Titles Act, 95 of 1986
- AK0406 Sectional Title Schemes Management Act, 8 of 2011
- AK0407 The National Credit Act, 35 of 2005
- AK0408 The Consumer Protection Act, 68 of 2008
- AK0409 Financial Sector Regulation Act, 9 of 2017
- AK0408 Matrimonial Property Act, 88 of 1984
- AK0409 Alienation of Land Act, 68 of 1991
- AK0410 Deeds Registry Act, 47 of 1937
- AK0411 Income Tax Act 58 of 1962
- AK0412 Administration of Deceased Estates Act 66 of 1965
- AK0413 Companies Act 71 of 2008
- AK0414 Rental Housing Act 50 of 1999 as amended
- AK0415 The Municipal Property Rates Act, No 6 of 2004 and its related regulations
- AK0416 The Share Blocks Control Act, No 59 of 1980
- AK0417 The Housing Development Scheme for Retired Persons Act, No 65 of 1988
- AK0418 Property Timesharing Control Act, No 75 of 1983
- AK0419 Spatial Planning Land Use Management Act, No 16 of 2013
- AK0420 National Environmental Management Act, No 107 of 1998
- AK0421 Transfer Duty Act No, 40 of 1949

### ***Internal Assessment Criteria***

- IAC0401 Relevant required documentation is identified and explained.
- IAC0402 Appropriate contracts for relevant property and real estate transactions are selected.
- IAC0403 All documentation is explained and completed.
- IAC0404 Signatures and acceptance is obtained.
- IAC0405 Required documents are submitted and lodged to relevant stakeholders.
- IAC0406 Stakeholders are communicated with and updated throughout the process.

## **1.2.5 PM-01-PS05: Identify and explain the legislation and regulations impacting the industry**

### ***Scope of Practical Skill***

*Given work instructions, checklists, work area, case study, activity documents, any templates, forms, safety and quality principles and standard operating procedures procedure information available, the learner must be able to:*

- PA0501 Monitor client transactions and activities to identify suspicious events
- PA0502 Identify transactions that exceed the monetary thresholds
- PA0503 Register and report unusual transactions to the relevant body

### ***Applied Knowledge***

- AK0501 The Financial Intelligence Centre Act, 38 of 2001
- AK0502 The Estate Agency Affairs Act, 112 of 1976
- AK0503 Property Practitioners Act 22 of 2019
- AK0504 Attention to detail
- AK0505 Information gathering techniques
- AK0506 Effective communication skills, verbal and written

### ***Internal Assessment Criteria***

- IAC0301 Clients transactions and activities are monitored to identify suspicious events.
- IAC0502 Transactions that exceed the monetary thresholds are looked for.
- IAC0503 Unusual transactions are registered and reported to the relevant body.

## **1.3 Provider Accreditation Requirements for the Practical Skill Module**

### ***Physical Requirements:***

- Classroom furniture (chairs and tables, audio & visual equipment and all other equipment conducive to a learning environment)
- Hand-outs and stationery (electronic consumables, pencils/paper)
- Learning material
- Simulation models and equipment as described
- Computer/laptop
- Virtual technical requirements

*Human Resource Requirements:*

- Facilitator/learner ratio 1 to 15
- Relevant qualifications/experience
- Accredited facilitators and assessors

*Legal Requirements:*

- Accredited as per QCTO requirements

**1.4 Critical Topics to be Assessed Externally for the Practical Skill Module**

- None

**1.5 Exemptions**

- None



## **2. 333402-000-00-PM-02, Apply ethical principles in the interest of all stakeholders, NQF Level 5, Cr 8**

### **2.1 Purpose of the Practical Skill Modules**

The focus of the learning in this module is on providing the learner an opportunity to apply ethical principles in the interest of all stakeholders.

The learner will be required to:

PM-02-PS01: Comply with applicable legislation and regulations

PM-02-PS02: Maintain ethical property and real estate practices aligned with regulatory requirements and industry standards

PM-02-PS03: Apply the Code of Conduct

### **2.2 Guidelines for Practical Skills**

#### **2.2.1 PM-01-PS01: Comply with applicable legislation and regulations**

##### ***Scope of Practical Skill***

*Given work instructions, checklists, work area, case study, activity documents, any templates, forms, safety and quality principles and standard operating procedures procedure information available, the learner must be able to:*

PA0101 Identify applicable legislation, regulations and codes impacting ethics

PA0102 Examine the principles that underpin ethics, professionalism and code of conduct

PA0103 Explain with examples, implications and costs of non-compliance to legislation and regulations to an individual

##### ***Applied Knowledge***

AK0101 The Estate Agency Affairs Act, 112 of 1976

AK0102 Property Practitioners Act 22 of 2019

AK0103 The Financial Intelligence Centre Act, 38 of 2001

AK0104 Protection of Personal Information Act, 4 of 2013

AK0105 Information gathering techniques

AK0106 Property and real estate ethical best practices

AK0107 Code of Conduct

##### ***Internal Assessment Criteria***

IAC0101 Applicable legislation, regulations and codes impacting ethics are identified.

IAC0102 The principles that underpin ethics, professionalism and code of conduct are examined.

IAC0103 Examples are provided to explain the implications and costs of non-compliance to legislation and regulations for an individual.

#### **2.2.2 PM-02-PS02: Maintain ethical property and real estate practices aligned with regulatory requirements and industry standards**

### **Scope of Practical Skill**

*Given work instructions, checklists, work area, case study, activity documents, any templates, forms, safety and quality principles and standard operating procedures procedure information available, the learner must be able to:*

- PA0201 Identify and explain the rights of all stakeholders in property and real estate transactions
- PA0202 Examine real estate transactions, with examples for alignment with the code of conduct
- PA0203 Assess, with examples, the implications of non-compliance of ethical practices for an organisation

### **Applied Knowledge**

- AK0201 The Estate Agency Affairs Act, 112 of 1976
- AK0202 Property Practitioners Act 22 of 2019
- AK0203 The Financial Intelligence Centre Act, 38 of 2001
- AK0204 Protection of Personal Information Act, 4 of 2013
- AK0205 Code of conduct
- AK0206 Property and real estate ethical best practices
- AK0207 Information gathering techniques
- AK0208 Methods of analysis and assessment
- AK0209 Self-assessment techniques

### **Internal Assessment Criteria**

- IAC0201 Organisation code of conduct is reviewed in relation to property and real estate code of conduct.
- IAC0202 The rights of all stakeholders in property and real estate transactions are identified and explained.
- IAC0203 Examples are provided to show the examination of property and real estate transactions against the code of conduct for alignment.
- IAC0204 Examples are given to demonstrate the assessment of the implications of non-compliance of ethical practices for an organisation.

## **2.2.3 PM-02-PS03: Apply the Code of Conduct**

### **Scope of Practical Skill**

*Given work instructions, checklists, work area, case study, activity documents, any templates, forms, safety and quality principles and standard operating procedures procedure information available, the learner must be able to:*

- PA0301 Review organisation code of conduct in relation to property and real estate code of conduct
- PA0302 Evaluate own ethical actions against the Code of Conduct
- PA0303 Examine duties in relation to work ethic
- PA0304 Draw up an action plan to integrate the Code of Conduct with ethical requirements and alignment to mission and values of an organisation

***Applied Knowledge***

- AK0301 The Estate Agency Affairs Act, 112 of 1976
- AK0302 Property Practitioners Act 22 of 2019
- AK0303 The Financial Intelligence Centre Act, 38 of 2001
- AK0304 Protection of Personal Information Act, 4 of 2013
- AK0305 Code of Conduct
- AK0306 Property and real estate ethical best practices
- AK0307 Information gathering techniques
- AK0308 Methods of self-assessment

***Internal Assessment Criteria***

- IAC0301 Organisation's code of conduct reviewed in relation to the property and real estate code of conduct.
- IAC0302 Own ethical actions are evaluated against the code of conduct.
- IAC0203 Duties are examined in relation to work ethic
- IAC0304 An action plan is drawn up to integrate the Code of Conduct with ethical requirements and alignment to the mission and values of an organisation.

**2.3 Provider Accreditation Requirements for the Practical Skill Module*****Physical Requirements:***

- Classroom furniture (chairs and tables, audio & visual equipment and all other equipment conducive to a learning environment)
- Hand-outs and stationery (electronic consumables, pencils/paper)
- Learning material
- Simulation models and equipment as described
- Computer/laptop
- Virtual technical requirements

***Human Resource Requirements:***

- Facilitator/learner ratio 1 to 15
- Relevant qualifications/experience
- Accredited facilitators and assessors

***Legal Requirements:***

- Accredited as per QCTO requirements

**2.4 Critical Topics to be Assessed Externally for the Practical Skill Module**

- None

**2.5 Exemptions**

- None

### **3. 333402-000-00-PM-03, Build proficient and sustainable client relationships, NQF Level 4, Cr 6**

#### **3.1 Purpose of the Practical Skill Modules**

The focus of the learning in this module is on providing the learner an opportunity to build proficient and sustainable client relationships

The learner will be required to:

PM-03-PS01: Gain an in-depth understanding of clients' needs

PM-03-PS02: Develop consultative working relationship with clients

PM-03-PS03: Negotiate and consult on service level agreements/contracts

PM-03-PS04: Evaluate, update and maintain database integrity

#### **3.2 Guidelines for Practical Skills**

##### **3.2.1 PM-03-PS01: Gain an in-depth understanding of clients and their needs**

##### ***Scope of Practical Skill***

*Given work instructions, checklists, work area, case study, activity documents, any templates, forms, safety and quality principles and standard operating procedures procedure information available, the learner must be able to:*

PA0101 Identify potential clients

PA0102 Compile client profiles

PA0103 Research target market

PA0104 Identify relevant property and real estate related transactions

PA0105 Compile property and real estate profile or service offering

##### ***Applied Knowledge***

AK0101 Essentials of stakeholder engagement in a stakeholder centric manner

AK0102 Essentials of data collection and analysis

AK0103 Verbal and non-verbal communication

AK0104 Principles of negotiation

AK0105 Record-keeping

AK0106 Elements of problem-solving

AK0107 Diversity and cultural sensitivity

##### ***Internal Assessment Criteria***

IAC0101 Potential clients are identified.

IAC0102 Client profiles are compiled.

IAC0103 Target market is researched.

IAC0104 Relevant property and real estate related transactions are identified.

IAC0105 Property and real estate profile or service offering is compiled.

### 3.2.2 PM-03-PS02: Develop consultative working relationships with clients

#### **Scope of Practical Skill**

*Given work instructions, checklists, work area, case study, activity documents, any templates, forms, safety and quality principles and standard operating procedures procedure information available, the learner must be able to:*

- PA0201 Determine areas of credibility and differentiation
- PA0202 Develop an engagement plan
- PA0203 Communicate with potential, new and existing clients
- PA0204 Update records and databases
- PA0205 Maintain ongoing client relationship

#### **Applied Knowledge**

- AK0201 Protection of Personal Information Act, 4 of 2013
- AK0202 Essentials of stakeholder engagement in a stakeholder-centric manner
- AK0203 Essentials of data collection and analysis
- AK0204 Verbal and non-verbal communication
- AK0205 Principles of negotiation
- AK0206 Record-keeping
- AK0207 Elements of problem-solving
- AK0208 Diversity and cultural sensitivity

#### **Internal Assessment Criteria**

- IAC0201 Areas of credibility and differentiation are determined.
- IAC0202 An engagement plan is developed.
- IAC0203 Potential, new and existing clients are communicated with.
- IAC0204 Records and databases are updated.
- IAC0205 Ongoing client relationship is maintained.

### 3.2.3 PM-03-PS03: Negotiate and consult on service level agreements/contracts

#### **Scope of Practical Skill**

*Given work instructions, checklists, work area, case study, activity documents, any templates, forms, safety and quality principles and standard operating procedures procedure information available, the learner must be able to:*

- PA0301 Identify areas that might be open for negotiation (These include, but are not limited to mandates, fees, commissions, rental or sale agreements, mortgages).
- PA0302 Propose win-win solutions to clients
- PA0303 Obtain agreement from all relevant parties and record

#### **Applied Knowledge**

- AK0301 Empathy
- AK0302 Interpersonal skills
- AK0303 Verbal and non-verbal communication skills

- AK0304 Principles of negotiation
- AK0305 Elements of problem-solving
- AK0306 Diversity and cultural sensitivity
- AK0307 Conflict resolution
- AK0308 Emotional intelligence

#### ***Internal Assessment Criteria***

- IAC0301 Areas that might be open for negotiation are identified (These include, but are not limited to mandates, fees, commissions, rental or sale agreements, mortgages).
- IAC0302 Win-win solutions are proposed to clients.
- IAC0203 Agreement from all relevant parties is obtained and recorded.

### **3.2.4 PM-03-PS04: Evaluate, update and maintain database integrity**

#### ***Scope of Practical Skill***

*Given work instructions, checklists, work area, case study, activity documents, any templates, forms, safety and quality principles and standard operating procedures procedure information available, the learner must be able to:*

- PA0401 Evaluate data to determine fitness-for-purpose
- PA0402 Comply with legislative requirements (POPIA)
- PA0403 Update data
- PA0404 Maintain data integrity

#### ***Applied Knowledge***

- AK0401 Protection of Personal Information Act, 4 of 2013
- AK0402 Elements of data collection and analysis
- AK0403 Digital intelligence (input, save, filter, source, find and use information correctly)
- AK0404 Record-keeping

#### ***Internal Assessment Criteria***

- IAC0401 Data is evaluated to determine fitness -for-purpose.
- IAC0402 Data is updated.
- IAC0403 Data integrity is maintained.

### **3.3 Provider Accreditation Requirements for the Practical Skill Module**

#### ***Physical Requirements:***

- Classroom furniture (chairs and tables, audio & visual equipment and all other equipment conducive to a learning environment)
- Hand-outs and stationery (electronic consumables, pencils/paper)
- Learning material
- Simulation models and equipment as described

- Computer/laptop
- Virtual technical requirements

*Human Resource Requirements:*

- Facilitator/learner ratio 1 to 15
- Relevant qualifications/experience
- Accredited facilitators and assessors

*Legal Requirements:*

- Accredited as per QCTO requirements

**3.4 Critical Topics to be Assessed Externally for the Practical Skill Module**

- None

**3.5 Exemptions**

- None

#### **4. 333402-000-00-PM-04, Develop and maintain a personal and professional brand through innovation and continuous improvement, NQF Level 4, Cr 3**

##### **4.1 Purpose of the Practical Skill Modules**

The focus of the learning in this module is on providing the learner an opportunity to develop and maintain a personal and professional brand through innovation and continuous improvement.

The learner will be required to:

- PM-04-PS01: Identify strengths and areas for improvement to define personal brand
- PM-04-PS02: Obtain and analyse continuous feedback from clients, service providers, peers and other stakeholders
- PM-04-PS03: Implement areas of improvement and innovation
- PM-04-PS04: Measure performance against previously set targets
- PM-04-PS05: Analyse time management practices

##### **4.2 Guidelines for Practical Skills**

###### **4.2.1 PM-04-PS01: Identify strengths and areas of improvement to define personal brand**

###### ***Scope of Practical Skill***

*Given work instructions, checklists, work area, case study, activity documents, any templates, forms, safety and quality principles and standard operating procedures procedure information available, the learner must be able to:*

- PA0101 Conduct a personal SWOT analysis
- PA0102 Identify areas of growth
- PA0103 Indicate alignment to organisational values and goals
- PA0104 Build personal brand on social media
- PA0105 Align personal brand to professional brand
- PA0106 Assess personal brand against competitors

###### ***Applied Knowledge***

- AK0101 Personal Branding
- AK0102 Professional Branding
- AK0103 Conducting a SWOT analysis
- AK0104 Fundamentals of social media
- AK0105 Competitor analysis

###### ***Internal Assessment Criteria***

- IAC0101 A personal SWOT analysis is conducted.
- IAC0102 Areas of growth are identified.
- IAC0103 Alignment to organisational values and goals is indicated.
- IAC0104 A personal brand s build on social media.
- IAC0105 Personal brand is aligned to professional brand.



IAC0106 Personal brand is assessed against competitors.

#### **4.2.2 PM-04-PS02: Obtain and analyse continuous feedback from clients, peers, and other stakeholders**

##### ***Scope of Practical Skill***

*Given work instructions, checklists, work area, case study, activity documents, any templates, forms, safety and quality principles and standard operating procedures procedure information available, the learner must be able to:*

- PA0201 Contribute to a SWOT analysis for your organisation
- PA0202 Provide input into a PESTLE-R review
- PA0203 Compile a competitor analysis
- PA0204 Obtain feedback from stakeholders for continuous improvement
- PA0205 Use marketing messages to enhance professional brand
- PA0206 Provide input to an authentic view of professional culture
- PA0207 Ask stakeholders to communicate, endorse and support professional brand
- PA0208 Assess professional brand against competitors

##### ***Applied Knowledge***

- AK0201 SWOT Analysis
- AK0202 Professional branding
- AK0203 Environmental scanning
- AK0204 Verbal and non-verbal communication
- AK0205 Marketing principles
- AK0206 Reputational risk
- AK0207 Networking skills
- AK0208 Interpersonal skills
- AK0209 Customer relations

##### ***Internal Assessment Criteria***

- IAC0201 A contribution is made to a SWOT analysis for the organisation.
- IAC0202 Input into a PESTLE – R review is provided.
- IAC0203 A competitor analysis is compiled.
- IAC0204 Feedback is obtained from stakeholders for continuous improvement.
- IAC0205 Marketing messages are used to enhance professional brand.
- IAC0206 Input is provided into an authentic view of a professional culture.
- IAC0207 Stakeholders are asked to communicate, endorse and support the professional brand.
- IAC0208 Professional brand is assessed against competitors.

#### **4.2.3 PM-04-PS03: Implement areas of improvement and innovation**

##### ***Scope of Practical Skill***

*Given work instructions, checklists, work area, case study, activity documents, any templates, forms, safety and quality principles and standard operating procedures*

*procedure information available, the learner must be able to:*

- PA0301 Agree on performance indicators
- PA0302 Identify personal growth areas
- PA0303 Attend training opportunities
- PA0304 Identify organisational growth opportunities
- PA0305 Submit a proposal on how to make your own property and real estate practices more responsive to market needs
- PA0306 Consider the importance of dynamic property and real estate practices to ensure seamless service delivery and enhance positive professional branding

### ***Applied Knowledge***

- AK0301 Values and goals of the organisation
- AK0302 Principles of innovation
- AK0303 Importance of personal and professional growth and development
- AK0304 Business writing skills
- AK0305 Market trend analysis and recommendation
- AK0306 Business trend assessment
- AK0307 Change management

### ***Internal Assessment Criteria***

- IAC0301 Performance indicators are agreed upon.
- IAC0302 Personal growth areas are identified.
- IAC0203 Training opportunities are attended.
- IAC0304 Organisational growth opportunities are identified.
- IAC0305 A proposal is submitted on how to make own property and real estate practices more responsive to market needs.
- IAC0306 The importance of dynamic property and real estate practices is considered to ensure seamless service delivery and enhancement of positive professional branding.

## **4.2.4 PM-04-PS04: Measure performance against previously set targets**

### ***Scope of Practical Skill***

*Given work instructions, checklists, work area, case study, activity documents, any templates, forms, safety and quality principles and standard operating procedures procedure information available, the learner must be able to:*

- PA0401 Determine the performance measures of successful property and real estate practices
- PA0402 Discuss what measures/metrics could be used to measure success
- PA0403 Record targeted activities
- PA0404 Analyse own performance against set targets during property and real estate transaction/process
- PA0405 Identify areas of improvement
- PA0406 Implement an action plan

**Applied Knowledge**

- AK0401 Personal branding
- AK0402 Professional branding
- AK0403 Performance management
- AK0404 Dynamic real estate practices
- AK0405 Continuous improvement plan
- AK0406 Change management principles

**Internal Assessment Criteria**

- IAC0401 The performance measures of successful property and real estate practices are discussed.
- IAC0402 Measures/metrics are discussed that could be utilised to measure success.
- IAC0403 Targeted activities are recorded.
- IAC0404 Own performance is analysed against set targets during real estate transaction/process.
- IAC0405 Areas of improvement are identified.
- IAC0406 An action plan is implemented.

**4.2.5 PM-04-PS05: Analyse time management practices****Scope of Practical Skill**

*Given work instructions, checklists, work area, case study, activity documents, any templates, forms, safety and quality principles and standard operating procedures procedure information available, the learner must be able to:*

- PA0501 Examine own time management profile
- PA0502 Analyse own time management disruptors
- PA0503 Link time management profile to time management technique
- PA0504 Draw up a time-efficient work plan
- PA0505 Monitor and evaluate time management plan
- PA0506 Update time-efficient work plan as required

**Applied Knowledge**

- AK0501 Emotional intelligence
- AK0502 Fundamentals of time management
- AK0503 Monitoring and evaluation
- AK0504 Self-reflection skills

**Internal Assessment Criteria**

- IAC0301 Own time management profile is examined.
- IAC0502 Own time management disruptors analysed.
- IAC0503 Time management profile is linked to time management technique.
- IAC0504 A time-efficient plan is drawn up.
- IAC0505 Time management plan is monitored and evaluated.
- IAC0506 Time-efficient plan is updated as required.

### **4.3 Provider Accreditation Requirements for the Practical Skill Module**

#### *Physical Requirements:*

- Classroom furniture (chairs and tables, audio & visual equipment and all other equipment conducive to a learning environment)
- Hand-outs and stationery (electronic consumables, pencils/paper)
- Learning material
- Simulation models and equipment as described
- Computer/laptop
- Virtual technical requirements

#### *Human Resource Requirements:*

- Facilitator/learner ratio 1 to 15
- Relevant qualifications/experience
- Accredited facilitators and assessors

#### *Legal Requirements:*

- Accredited as per QCTO requirements

### **4.4 Critical Topics to be Assessed Externally for the Practical Skill Module**

- None

### **4.5 Exemptions**

- None

## **5. 333402-000-00-PM-05, Perform Property and Real Estate duties resulting in successful transactions, NQF Level 4, Cr 8**

### **5.1 Purpose of the Practical Skill Modules**

The focus of the learning in this module is on providing the learner an opportunity to perform property and real estate duties resulting in successful transactions.

The learner will be required to:

- PM-05-PS01: Market property and real estate within all sectors
- PM-05-PS02: Buy and sell property and real estate within all sectors
- PM-05-PS03: Let and rent property and real estate within all sectors
- PM-05-PS04: Manage property and real estate including Community Schemes
- PM-05-PS05: Provide after-sales service

### **5.2 Guidelines for Practical Skills**

#### **5.2.1 PM-05-PS01: Market property and real estate within all sectors**

##### ***Scope of Practical Skill***

*Given work instructions, checklists, work area, case study, activity documents, any templates, forms, safety and quality principles and standard operating procedures procedure information available, the learner must be able to:*

- PA0101 Analyse sales and leasing environment
- PA0102 Identify and explain products and services
- PA0103 Draw up a marketing proposal for self or organisation
- PA0104 Determine current consumer behaviour
- PA0105 Develop a marketing plan using market analysis and assessment
- PA0106 Draw up relevant marketing material
- PA0107 Place adverts in various newspapers and social media
- PA0108 Conduct interviews with relevant parties
- PA0109 Manage show houses and viewings

##### ***Applied Knowledge***

- AK0101 The Estate Agency Affairs Act, 112 of 1976
- AK0102 Property Practitioners Act, 22 of 2019
- AK0103 Protection of Personal Information Act, 4 of 2013
- AK0104 Sectional Titles Act, 95 of 1986
- AK0105 Sectional Title Schemes Management Act, 8 of 2011
- AK0106 The Consumer Protection Act, 68 of 2008
- AK0107 Value Added Tax Act, 89 of 1991
- AK0108 Transfer Duty Act, 40 of 1949
- AK0109 Application of marketing principles
- AK0110 Standard operating procedures
- AK0111 Code of Conduct

### **Internal Assessment Criteria**

- IAC0101 Sales and leasing environment is analysed
- IAC0102 Products and services are identified and explained.
- IAC0103 A marketing proposal for self or organisation is drawn up.
- IAC0104 Current consumer behaviour is determined.
- IAC0105 A marketing plan using market analysis and assessment is developed
- IAC0106 Marketing material is drawn up.
- IAC0107 Adverts are placed in various media.
- IAC0108 Interviews with relevant parties are conducted.
- IAC0109 Show houses and viewings are managed.

### **5.2.2 PM-05-PS02: Buy and sell property and real estate**

#### **Scope of Practical Skill**

*Given work instructions, checklists, work area, case study, activity documents, any templates, forms, safety and quality principles and standard operating procedures procedure information available, the learner must be able to:*

- PA0201 Qualify the buyer
- PA0202 Identify and explain process for showing properties and real estate
- PA0203 Introduce selected properties to the buyer
- PA0204 Identify and explain with examples methods of selling a property and real estate
- PA0205 Distinguish, with examples, shared-listing systems
- PA0206 Conduct an estimation of property and real estate market-related value
- PA0207 Qualify potential seller
- PA0208 Explain the relevant documentation and terms to the buyer and seller
- PA0209 Negotiate and complete an offer to purchase for buying and selling

#### **Applied Knowledge**

- AK0201 The Estate Agency Affairs Act, 112 of 1976
- AK0202 Property Practitioners Act, 22 of 2019
- AK0203 The Financial Intelligence Centre Act, 38 of 2001
- AK0204 Protection of Personal Information Act, 4 of 2013
- AK0205 Sectional Titles Act, 95 of 1986
- AK0206 Sectional Title Schemes Management Act, 8 of 2011
- AK0207 The National Credit Act, 35 of 2005
- AK0208 The Consumer Protection Act, 68 of 2008
- AK0209 Financial Sector Regulation Act, 9 of 2017
- AK0210 Matrimonial Property Act, 88 of 1984
- AK0211 Alienation of Land Act, 68 of 1991
- AK0212 Deeds Registry Act, 47 of 1937
- AK0213 Income Tax Act, 58 of 1962
- AK0214 Value Added Tax Act, 89 of 1991
- AK0215 Transfer Duty Act, 40 of 1949

- AK0216 Administration of Deceased Estates Act, 66 of 1965
- AK0217 Companies Act, 71 of 2008
- AK0218 Rental Housing Act, 50 of 1999 as amended
- AK0219 The Municipal Property Rates Act, 6 of 2004 and its related Regulations
- AK0220 The Share Blocks Control Act, 59 of 1980
- AK0221 The Housing Development Scheme for Retired Persons Act, 65 of 1988
- AK0222 Property Timesharing Control Act, 75 of 1983
- AK0223 Spatial Planning Land Use Management Act, 16 of 2013
- AK0224 National Environmental Management Act, 107 of 1998
- AK0225 Methods and techniques for gathering information
- AK0226 Principles and techniques for communicating
- AK0227 Cross cultural sensitivity
- AK0228 Methods of presenting
- AK0229 Negotiation skills

### ***Internal Assessment Criteria***

- IAC0201 The buyer is qualified.
- IAC0202 The process for showing property and real estate is identified and explained.
- IAC0203 Selected properties are introduced to the buyer
- IAC0204 Methods of selling a property and real estate are identified and explained with examples.
- IAC0205 Shared-listing systems with examples are distinguished.
- IAC0206 Estimation of property and real estate market value is conducted.
- IAC0207 Potential seller is qualified.
- IAC0208 The relevant documentation and terms is explained to the buyer and seller
  
- IAC0209 Offer to purchase is negotiated and completed for buying and selling

## **5.2.3 PM-05-PS03: Let and rent property and real estate**

### ***Scope of Practical Skill***

*Given work instructions, checklists, work area, case study, activity documents, any templates, forms, safety and quality principles and standard operating procedures procedure information available, the learner must be able to:*

- PA0301 Identify and explain procedures to be used for letting and renting
- PA0302 Qualify the tenant
- PA0303 Evaluate, update and maintain data integrity
- PA0304 Perform cost-based and value-based estimations
- PA0305 Complete letting and renting documentation using procurement and management
- PA0306 Draw up inspection lists for property and real estate

### ***Applied Knowledge***

- AK0301 The Estate Agency Affairs Act, 112 of 1976
- AK0302 Property Practitioners Act, 22 of 2019

- AK0303 The Financial Intelligence Centre Act, 38 of 2001
- AK0304 Protection of Personal Information Act, 4 of 2013
- AK0305 Sectional Titles Act, 95 of 1986
- AK0306 Sectional Title Schemes Management Act, 8 of 2011
- AK0307 The National Credit Act, 35 of 2005
- AK0308 The Consumer Protection Act, 68 of 2008
- AK0309 Financial Sector Regulation Act, 9 of 2017
- AK0103 Matrimonial Property Act, 88 of 1984
- AK0104 Income Tax Act, 58 of 1962
- AK0105 Value Added Tax Act, 89 of 1991
- AK0106 Administration of Deceased Estates Act, 66 of 1965
- AK0107 Companies Act, 71 of 2008
- AK0108 Rental Housing Act, 50 of 1999 as amended
- AK0109 The Municipal Property Rates Act, 6 of 2004 and its related Regulations
- AK0108 The Share Blocks Control Act, 59 of 1980
- AK0111 The Housing Development Scheme for Retired Persons Act, 65 of 1988
- AK0112 Property Timesharing Control Act, 75 of 1983
- AK0115 Data gathering techniques
- AK0116 Effective communication both verbal and written

#### ***Internal Assessment Criteria***

- IAC0301 Procedures for letting and renting are identified and explained.
- IAC0302 Qualification of lessees is conducted.
- IAC0203 Data evaluated, updated and integrity maintained.
- IAC0304 Cost-based and value-based estimations performed.
- IAC0305 Letting and renting documents completing using procurement and administrative processes.

#### **5.2.4 PM-05-PS04: Manage a Community Scheme**

##### ***Scope of Practical Skill***

*Given work instructions, checklists, work area, case study, activity documents, any templates, forms, safety and quality principles and standard operating procedures procedure information available, the learner must be able to:*

- PA0401 Distinguish types of ownership
- PA0402 Demonstrate the relevant elements which verify the legality, use and restrictions for a property and real estate transaction
- PA0403 Explain, with examples, actions and activities required in the sectionalising of buildings
- PA0404 Apply management and conduct rules for Community Schemes
- PA0405 Complete legally compliant documents for Community Schemes
- PA0406 Draw up and execute agenda, minutes and budgets within the Community Scheme regulations

##### ***Applied Knowledge***



- AK0401 The Estate Agency Affairs Act, 112 of 1976
- AK0402 Property Practitioners Act, 22 of 2019
- AK0403 The Financial Intelligence Centre Act, 38 of 2001
- AK0404 Protection of Personal Information Act, 4 of 2013
- AK0405 Sectional Titles Act, 95 of 1986
- AK0406 Sectional Title Schemes Management Act, 8 of 2011
- AK0407 The National Credit Act, 35 of 2005
- AK0408 The Consumer Protection Act, 68 of 2008
- AK0409 Financial Sector Regulation Act, 9 of 2017
- AK0410 Matrimonial Property Act, 88 of 1984
- AK0411 Income Tax Act, 58 of 1962
- AK0412 Value Added Tax Act, 89 of 1991
- AK0413 Companies Act, 71 of 2008
- AK0414 Rental Housing Act, 50 of 1999 as amended
- AK0415 The Municipal Property Rates Act, 6 of 2004 and its related Regulations
- AK0416 The Share Blocks Control Act, 59 of 1980
- AK0417 The Housing Development Scheme for Retired Persons Act, 65 of 1988
- AK0418 Property Timesharing Control Act, 75 of 1983
- AK0419 Community Schemes Ombud Service Act, 9 of 2011.
- AK0420 Effective verbal and written communication skills
- AK0421 Cross cultural sensitivity
- AK0422 Code of Conduct
- AK0423 Standard operating procedures

### ***Internal Assessment Criteria***

- IAC0401 Types of ownership are distinguished.
- IAC0402 Actions and activities required in the sectionalising of buildings are explained with examples.
- IAC0403 Management and conduct rules for Community Schemes are applied.
- IAC0404 Legally compliant documents for community schemes are completed.
- IAC0405 Agenda, minutes and budgets are drawn up and executed within the Community Scheme regulations.

## **5.2.5 PM-05-PS05: Provide after-sale service**

### ***Scope of Practical Skill***

*Given work instructions, checklists, work area, case study, activity documents, any templates, forms, safety and quality principles and standard operating procedures procedure information available, the learner must be able to:*

- PA0501 Determine timeline for the submission of documentation
- PA0502 Manage suspensive or resolutive conditions in contracts
- PA0503 Educate parties on compliance of legal and financial obligations
- PA0504 Communicate conveyancing process to all parties
- PA0505 Administer early rental cancelations
- PA0506 Provide feedback to all stakeholders

PA0507 Provide follow-up support to all stakeholders

### ***Applied Knowledge***

- AK0501 Protection of Personal Information Act, 4 of 2013
- AK0502 The Consumer Protection Act, 68 of 2008
- AK0503 Code of Conduct
- AK0502 Cross cultural sensitivity
- AK0503 Effective communication
- AK0504 Interpersonal skills

### ***Internal Assessment Criteria***

- IAC0301 Timeline for the submission of documentation is determined.
- IAC0502 Suspensive or resolute conditions in contracts are managed.
- IAC0503 Parties are educated on the compliance of legal and financial obligations.
- IAC0504 Conveyancing process is communicated to all parties.
- IAC0505 Early rental cancellations are administered.
- IAC0506 Feedback is provided to all stakeholders.
- IAC0507 Follow-up support is provided to all stakeholders.

## **5.3 Provider Accreditation Requirements for the Practical Skill Module**

### ***Physical Requirements:***

- Classroom furniture (chairs and tables, audio & visual equipment and all other equipment conducive to a learning environment)
- Hand-outs and stationery (electronic consumables, pencils/paper)
- Learning material
- Simulation models and equipment as described
- Computer/laptop
- Virtual technical requirements

### ***Human Resource Requirements:***

- Facilitator/learner ratio 1 to 15
- Relevant qualifications/experience
- Accredited facilitators and assessors

### ***Legal Requirements:***

- Accredited as per QCTO requirements

## **5.4 Critical Topics to be Assessed Externally for the Practical Skill Module**

- None

## **5.5 Exemptions**

- None

## **6. 333402-000-00-PM-06, Implement sound financial practices to achieve personal and business objectives, L4, Cr 5**

### **6.1 Purpose of the Practical Skill Modules**

The focus of the learning in this module is on providing the learner an opportunity to implement sound financial practices to achieve personal and business objectives.

The learner will be required to:

PM-06-PS01: Manage budget and financial controls

PM-06-PS02: Develop a personal financial plan to enhance alignment of business objectives

PM-06-PS03: Review taxation and the impact on personal income and real estate transactions

PM-06-PS04: Produce a business plan in an area of operation to support a property and real estate business

### **6.2 Guidelines for Practical Skills**

#### **6.2.1 PM-06-PS01: Manage budget and financial controls**

##### ***Scope of Practical Skill***

*Given work instructions, checklists, work area, case study, activity documents, any templates, forms, safety and quality principles and standard operating procedures procedure information available, the learner must be able to:*

PA0101 Review budgets within the property and real estate environment

PA0102 Determine viability of cash flow forecasts in relation to projected income

PA0103 Evaluate income budget against personal earnings

PA0104 Examine profit and loss statements

##### ***Applied Knowledge***

AK0101 Basic financial concepts

AK0102 Financial objectives of the individual business

AK0103 Types and frequencies of financial forecasts

AK0104 Measurement of costs and benefits of financial activities

AK0105 Information gathering techniques

##### ***Internal Assessment Criteria***

IAC0101 Budgets within the property and real estate environment are reviewed.

IAC0102 Viability of cash flow forecasts in relation to projected income is determined.

IAC0103 Income budget is evaluated against personal earnings.

IAC0104 Profit and loss statements are examined.

|

#### **6.2.2 PM-06-PS02: Develop a personal financial plan to enhance alignment of business objectives**

**Scope of Practical Skill**

*Given work instructions, checklists, work area, case study, activity documents, any templates, forms, safety and quality principles and standard operating procedures information available, the learner must be able to:*

- PA0201 Assess potential financial risks in respect of personal plans and goals
- PA0202 Evaluate personal financial plans
- PA0203 Research financial/insurance brokers for assistance in retirement planning
- PA0204 Review personal budgets and adjustments for long term requirements
- PA0205 Analyse business budgets/targets to personal budgets for short, medium and long term

**Applied Knowledge**

- AK0201 Types of risk
- AK0202 The implications of relevant legislation, regulations and statutory requirements
- AK0203 Basic financial concepts
- AK0204 Information gathering techniques
- AK0205 Methods of analysis and interpretation

**Internal Assessment Criteria**

- IAC0201 Potential financial risks are assessed in respect to personal plans and goals.
- IAC0202 Personal financial plans are evaluated.
- IAC0203 Financial/insurance brokers are researched for assistance in retirement planning.
- IAC0204 Personal budgets are reviewed and adjustments made for long term requirements.
- IAC0205 Business budgets/targets are analysed to personal budgets for short, medium and long term.

**6.2.3 PM-06-PS03: Review taxation and the impact on personal income and real estate transactions****Scope of Practical Skill**

*Given work instructions, checklists, work area, case study, activity documents, any templates, forms, safety and quality principles and standard operating procedures procedure information available, the learner must be able to:*

- PA0301 Assess the impact of personal taxation on income sources
- PA0302 Evaluate Value Added Tax on real estate transactions
- PA0303 Review taxation on real estate transactions for buyers, sellers and agents
- PA0304 Evaluate income tax on revenue earned
- PA0305 Gather relevant documentation required for SARS assessment and tax directive
- PA0306 Identify the real estate transaction which would attract capital gains tax

**Applied Knowledge**

- AK0301 Concepts of taxation
- AK0302 The implications of relevant legislation, regulations and statutory requirements
- AK0303 Documentation requirements for submission
- AK0304 Methods of information gathering
- AK0305 Analysis and interpretation techniques

**Internal Assessment Criteria**

- IAC0301 The impact of personal taxation on income sources is assessed.
- IAC0302 Value Added Tax on real estate transactions is evaluated.
- IAC0203 Taxation on real estate transactions for buyers, seller and agents is reviewed.
- IAC0304 Income tax on revenue earned is evaluated.
- IAC0305 Documentation for SARS assessment and tax directive is gathered.
- IAC0306 Capital Gains tax on a real estate transaction is analysed.

**6.2.4 PM-06-PS04: Produce a business plan in an area of operation to support a property and real estate business****Scope of Practical Skill**

*Given work instructions, checklists, work area, case study, activity documents, any templates, forms, safety and quality principles and standard operating procedures procedure information available, the learner must be able to:*

- PA0401 Define the opportunity
- PA0402 Identify stakeholders (internal and external) and appropriate networks
- PA0403 Appraise the target audience
- PA0404 Assess the competition
- PA0405 Analyse the marketing plan
- PA0406 Review the financial plan
- PA0407 Evaluate the business plan
- PA0408 Outline the execution of the plan
- PA0409 Monitor and adjust plan where required

**Applied Knowledge**

- AK0401 Stakeholder analysis
- AK0402 Marketing concepts
- AK0403 Basic financial concepts
- AK0404 Effective communication
- AK0405 Record-keeping

**Internal Assessment Criteria**

- IAC0401 The opportunity is defined.
- IAC0402 Stakeholders (internal and external) and appropriate networks are identified.
- IAC0403 The target audience is appraised.

- IAC0404 The competition is assessed.
- IAC0405 The marketing plan is analysed.
- IAC0406 The financial plan is reviewed.
- IAC0407 The business plan is evaluated.
- IAC0408 The execution of the plan is outlined.
- IAC0409 The plan is monitored and adjusted where required.

### **6.3 Provider Accreditation Requirements for the Practical Skill Module**

#### *Physical Requirements:*

- Classroom furniture (chairs and tables, audio & visual equipment and all other equipment conducive to a learning environment)
- Hand-outs and stationery (electronic consumables, pencils/paper)
- Learning material
- Simulation models and equipment as described
- Computer/laptop
- Virtual technical requirements

#### *Human Resource Requirements:*

- Facilitator/learner ratio 1 to 15
- Relevant qualifications/experience
- Accredited facilitators and assessors

#### *Legal Requirements:*

- Accredited as per QCTO requirements

### **6.4 Critical Topics to be Assessed Externally for the Practical Skill Module**

- None

### **6.5 Exemptions**

- None

## 1. SECTION 3C: WORK EXPERIENCE MODULE SPECIFICATIONS

### List of Work Experience Module Specifications

COMPONENT	ID	MODULE TITLE	NQF LEVEL	CREDITS
Work Experience	333402000-00-WM-01	Procedures to identify the property and real estate environment and comply with legislative and regulatory framework	4	13
Work Experience	333402000-00-WM-02	Processes and procedures for applying the Code of Conduct and adhering to ethical business principles	5	15
Work Experience	333402000-00-WM-03	Procedures to build internal and / or external client relationships and databases	4	12
Work Experience	333402000-00-WM-04	Procedures to build a brand reputation and develop a target market	4	9
Work Experience	333402000-00-WM-05	Practices to manage the property and real estate function	4	15
Work Experience	333402000-00-WM-06	Process to apply financial business principles	4	11

**Total number of credits for Work Experience Modules: 75**

**1. 333402000-00-WM-01: Procedures to identify the property and real estate environment and comply with legislative and regulatory framework, NQF level 4, Learning Contract Time: 10days (Credits: 13)**

**1.1 Purpose of the Work Experience Module**

The focus of the work experience is on providing the learner an opportunity to gain exposure to systematic practical training and experience on procedures for identify the property and real estate environment and comply with legislative and regulatory framework which is closely supervised and monitored by qualified property practitioners and adequately documented in an approved logbook.

The learner will be required to be exposed to:

- |            |   |
|------------|---|
| WM-01-WE01 | Observe and assist a qualified person with the identification of the property and real estate environment in respect to trends, industry supply and demand and market knowledge |
| WM-01-WE02 | Prepare and complete various contracts aligned to legislative and regulatory requirements under the supervision of a qualified person   |
| WM-01-WE03 | Apply rules and techniques to interpret appropriate legislative provisions affecting property real estate transactions  |

**1.2 Guidelines for Work Experiences**

**1.2.1 WM-01-WE01: Observe and assist a qualified person with the identification of the property and real estate environment in respect to trends, industry supply and demand and market knowledge**

***Scope of Work Experience***

The person will be expected to engage in the following work activities:

- |        |  |
|--------|--|
| WA0101 | Gather and analyse current property and real estate trends information |
| WA0102 | Collect industry supply and demand statistics                          |
| WA0103 | Review the market and investigate trends                               |
| WA0104 | Prepare and submit your findings to your mentor                        |



### ***Supporting evidence***

- SE0101 Signed documentary evidence from supervisor / mentor for all required work activities such as logbooks and job instructions

## **1.2.2 WM-01-WE02: Prepare and complete various contracts aligned to legislative and regulatory requirements under the supervision of a qualified person**

### ***Scope of Work Experience***

The person will be expected to engage in the following work activities:

- WA0201 Prepare draft contracts for the following:
- i. Sole and exclusive mandates
  - ii. Lease agreement
  - iii. Offer to purchase
  - iv. Sectional Title sale agreement
- WA0202 Verify Protection of Personal Information Act, 4 of 2013 requirements for a client in a property and real estate transaction
- WA0203 Determine the Financial Intelligence Centre Act, 38 of 2001 requirements of a client
- WA0204 Establish the tax implications on a property and real estate transaction

### ***Supporting Evidence***

- SE0201 Signed documentary evidence from supervisor / mentor for all required work activities such as logbooks and job instructions

## **1.2.3 WM-01-WE03: Apply rules and techniques to interpret appropriate legislative provisions affecting property and real estate transactions**

### ***Scope of Work Experience***

The person will be expected to engage in the following work activities:

- WA0301 Communicate the legal requirements for the formation of a contract
- WA0302 Agree on the relevant type of agreement
- WA0303 Discuss the consequences of an illegal and unlawful contract

- WA0304 Explain the nature of and process involved in the acceptance of the contract
- WA0305 Discuss the importance of timing of submission of documentation and the impact on the property and real estate transaction
- WA0306 Discuss the importance of applicable legislation and the implications within the property and real estate industry
- WA0307 Describe the consequences of fraudulent activities during the property and real estate process

### ***Supporting Evidence***

- SE0301 Signed documentary evidence from supervisor / mentor for all required work activities such as logbooks and job instructions

### **1.3 Contextualised Workplace Knowledge**

1. Property and real estate legislation and regulations
2. Effective verbal and written communication skills
3. Cross cultural sensitivity
4. Code of Conduct
5. Standard operating procedures
6. Contract management

### **1.4 Criteria for Workplace Approval**

#### *Physical Requirements:*

- Access to all unrestricted areas in an organisation in order for learner to have exposure to all aspects of occupational tasks
- Tools and equipment to conduct occupational tasks
- The physical resources in terms of tools, equipment, systems, conditions and interfaces that the workplace must have to ensure that learners can participate in all work activities.

#### *Human Resource Requirements:*

- Support from Supervisor / Manager
- Workplace coach/mentor: learner ratio 1 to 5

*Legal Requirements:*

- Compliant to all relevant legislation and Regulations
- Accredited with relevant authority

**1.5 Assignments to be Assessed Externally**

Assignment description:

None

Elements to be assessed:

None

Evaluation criteria:

None

## **2. 333402000-00-WM-02: Processes and procedures for applying the Code of Conduct and adhering to ethical business principles, NQF level 5, Learning Contract Time: 12 days (Credits: 15)**

### **2.1 Purpose of the Work Experience Module**

The focus of the work experience is on providing the learner an opportunity to gain exposure to systematic practical training and experience on processes and procedures for applying the Code of Conduct and adhering to ethical business principles which is closely supervised and monitored by qualified property practitioners and adequately documented in an approved logbook.

The learner will be required to be exposed to:

- |            |  |
|------------|--|
| WM-02-WE01 | Gather and interpret information relating to the Code of Conduct       |
| WM-02-WE02 | Conduct all property and real estate matters in an ethical manner      |
| WM-02-WE03 | Follow the Code of Conduct within the property and real estate context |

Use professional and ethical methods ensuring personal performance is consistent and aligned to customer needs

### **2.2 Guidelines for Work Experiences**

#### **2.2.1 WM-02-WE01: Gather and interpret information relating to the Code of Conduct**

##### ***Scope of Work Experience***

The person will be expected to engage in the following work activities:

- |        |   |
|--------|---|
| WA0101 | Examine the principles that underpin the Code of Conduct, business ethics and professionalism                                 |
| WA0102 | Identify strengths and weaknesses when comparing organisation Code of Conduct to the property and real estate Code of Conduct |
| WA0103 | Scrutinise and explain the impact of the implementation of the business' value system   |
| WA0104 | Draw up a plan to improve the commitment and compliance to the Code of Conduct in the organisation                            |

##### ***Supporting evidence***

SE0101 Signed documentary evidence from supervisor / mentor for all required work activities such as logbooks and job instructions

### **2.2.2 WM-02-WE02: Conduct all property and real estate matters in an ethical manner**

#### ***Scope of Work Experience***

The person will be expected to engage in the following work activities:

- WA0201 Use professional and ethical methods ensuring personal performance is consistent and aligned to customer needs
- WA0202 Create openness and transparency in all relationships and communication
- WA0203 Act with honest and integrity in all interactions

#### ***Supporting evidence***

SE0201 Signed documentary evidence from supervisor / mentor for all required work activities such as logbooks and job instructions

### **2.2.3 WM-02-WE03: Follow the Code of Conduct within the property and real estate context**

#### ***Scope of Work Experience***

The person will be expected to engage in the following work activities:

- WA0301 Protect the public's interest
- WA0302 Act only with a sole or open mandate
- WA0303 Duty to disclose
- WA0304 Make honest representation, statements and use unharmful marketing techniques
- WA0305 Practice integrity in duties relating to offers and contracts
- WA0306 Exercise uprightness in remuneration including trust monies and interest as legislated
- WA0307 Respect confidentiality
- WA0308 Prevent contravention of the Code of Conduct in all capacities within property and real estate transactions

## **Supporting Evidence**

SE0301 Signed documentary evidence from supervisor / mentor for all required work activities such as logbooks and job instructions

### **2.3 Contextualised Workplace Knowledge**

1. Property and real estate legislation and regulations
2. Standard operating procedures
3. Code of Conduct
4. Business values and ethical conduct
5. Change management procedures
6. Impact of group dynamics

### **2.4 Criteria for Workplace Approval**

#### *Physical Requirements:*

- Access to electronic, electrical and control system areas in order for learner to have exposure to all aspects of occupational tasks
- All equipment relevant to engineering systems to conduct occupational tasks
- The physical resources in terms of equipment, systems, conditions and interfaces that the vessel may have to ensure that learners can participate in all work activities.

#### *Human Resource Requirements:*

- Support from Supervisor / Manager
- Workplace coach/mentor: learner ratio 1 to 5

#### *Legal Requirements:*

- Compliant to all relevant legislation and regulations
- Accredited with relevant authority

### **2.5 Additional Assignments to be Assessed Externally**

Assignment description:

None

Elements to be assessed:

None

Evaluation criteria:

None

**3. 333402000-00-WM-03: Procedures to build internal and / or external client relationships and databases, NQF level 4, Learning Contract Time: 10 days (Credits: 12)**

**3.1 Purpose of the Work Experience Module**

The focus of the work experience is on providing the learner an opportunity to gain exposure to systematic practical training and experience on procedures to build internal and / or external client relationships and databases which is closely supervised and monitored by qualified property practitioners and adequately documented in an approved logbook.

The learner will be required to be exposed to:

WM-03-WE01	Engage with relevant stakeholders
WM-03-WE02	Involve all social partners in monitoring of compliance
WM-03-WE03	Identify and manage areas of customer service impact
WM-03-WE04	Identify advocacy opportunities in property and real estate

**3.2 Guidelines for Work Experiences**

**3.2.1 WM-03-WE01: Engage with relevant stakeholders**

***Scope of Work Experience***

The person will be expected to engage in the following work activities:

WA0101	Conduct a comprehensive stakeholder analysis
WA0102	Draw up an engagement plan
WA0103	Set up a meeting schedule
WA0104	Initiate and maintain a consultative approach throughout engagement with relevant stakeholders
WA0105	Contribute to a culture of seamless service standards
WA0106	Display an understanding of cultural diversity in property practices
WA0107	Provide accurate information about legislation and the impact on the client
WA0108	Display openness and transparency during engagement opportunities
WA0109	Initiate remedial action when required

***Supporting evidence***



SE0101 Signed documentary evidence from supervisor / mentor for all required work activities such as logbooks and job instructions

### **3.2.2 WM-03-WE02: Involve all social partners in monitoring of compliance**

#### ***Scope of Work Experience***

The person will be expected to engage in the following work activities:

- WA0201 Maintain strong reporting systems
- WA0202 Utilise viable and uniform reporting systems
- WA0203 Share individual experiences for best practice guidelines
- WA0204 Collaborate to simplify service delivery to clients

#### ***Supporting evidence***

SE0201 Submission of completed training record book

### **3.2.3 WM-03-WE03: Identify and manage areas of customer service impact**

#### ***Scope of Work Experience***

The person will be expected to engage in the following work activities:

- WA0301 Identify the various ways in which customers interaction can take place
- WA0302 Determine solutions in areas of customer service
- WA0303 Action changes or improve areas of customer service

#### ***Supporting Evidence***

SE0301 Signed documentary evidence from supervisor / mentor for all required work activities such as logbooks and job instructions

### **3.2.4 WM-03-WE04: Identify advocacy opportunities available within the property and real estate environment**

#### ***Scope of Work Experience***

The person will be expected to engage in the following work activities:

- WA0401 Based on research, identify the primary means of intervention within own area of work
- WA0402 Provide structured information and advice on the best opportunities for complying within own area of work

- WA0403 Provide clear, written instructions on how to comply and in what timeframe to do so
- WA0404 Explain the impact of the opportunities on individuals and groups in the workplace
- WA0405 Reflect on the implications for the property and real estate practice environment
- WA0406 Report loopholes in application of legislation and regulations

### ***Supporting Evidence***

- SE0401 Signed documentary evidence from supervisor / mentor for all required work activities such as logbooks and job instructions

### **3.3 Contextualised Workplace Knowledge**

1. Property and real estate market principles, policies and economics
2. Property and real estate legislation and regulations
3. Contract management
4. Termination of the contract
5. Code of Conduct

### **3.4 Criteria for Workplace Approval**

#### *Physical Requirements:*

- Access to electronic, electrical and control system areas in order for learner to have exposure to all aspects of occupational tasks
- All equipment relevant to engineering systems to conduct occupational tasks
- The physical resources in terms of equipment, systems, conditions and interfaces that the vessel may have to ensure that learners can participate in all work activities.

#### *Human Resource Requirements:*

- Support from Supervisor / Manager
- Workplace coach/mentor: learner ratio 1 to 5

#### *Legal Requirements:*

- Compliant to all relevant national legislation and regulations

- Accredited with relevant authority

### **3.5 Additional Assignments to be Assessed Externally**

Assignment description:

None

Elements to be assessed:

None

Evaluation criteria:

None

**4. 333402000-00-WM-04: Procedures to build a brand reputation and develop a target market, NQF level 4, Learning Contract Time: 7 days (Credits: 9)**

**4.1 Purpose of the Work Experience Module**

The focus of the work experience is on providing the learner an opportunity to gain exposure to systematic practical training and experience on procedures to build a brand reputation and develop a target market which is closely supervised and monitored by qualified property practitioners and adequately documented in an approved logbook.

The learner will be required to be exposed to:

WM-04-WE01 Promote sufficient brand reputation to ensure business continuity

WM-04-WE02 Develop a target market to ensure sustainability

WM-04-WE03 Promote and contribute to training and education initiatives

WM-04-WE-04 Develop time management strategies

**4.2 Guidelines for Work Experiences**

**4.2.1 WM-04-WE01: Promote sufficient brand reputation to ensure business continuity**

***Scope of Work Experience***

The person will be expected to engage in the following work activities:

WA0101 Conduct a survey to determine current professional brand reputation under supervision

WA0102 Contribute to initiatives to improve brand reputation

WA0103 Act as a brand ambassador

***Supporting Evidence***

SE0101 Signed documentary evidence from supervisor / mentor for all required work activities such as logbooks and job instructions

**4.2.2 WM-04-WE02: Develop a target market to ensure sustainability**

***Scope of Work Experience***

The person will be expected to engage in the following work activities:

- WA0201 Conduct a comprehensive market analysis under supervision in your particular work area
- WA0202 Make recommendations to include or draw clients to the business
- WA0203 Follow up continuously
- WA0204 Maintain records of engagements for current and future property and real estate interventions

### ***Supporting Evidence***

- SE0201 Signed documentary evidence from supervisor / mentor for all required work activities such as logbooks and job instructions

## **4.2.3 WM-04-WE03: Promote and contribute to training and education initiatives**

### ***Scope of Work Experience***

The person will be expected to engage in the following work activities:

- WA0301 Discuss the benefits of lifelong learning and career advancement to positive property and real estate relations
- WA0302 Engage in discussions to improve brand position within the property and real estate environment, improve practices and services delivery

### ***Supporting Evidence***

- SE0301 Signed documentary evidence from supervisor / mentor for all required work activities such as logbooks and job instructions

## **4.2.4 WM-04-WE04: Develop time management strategies**

### ***Scope of Work Experience***

The person will be expected to engage in the following work activities:

- WA0401 Determine deadlines required in the job
- WA0402 Establish client's requirements essential for property and real estate transactions with time frames
- WA0403 Identify and reduce time wasters
- WA0404 Manage time efficient work plans to meet deadlines

### ***Supporting evidence***

SE0401 Signed documentary evidence from supervisor / mentor for all required work activities such as logbooks and job instructions

### ***Supporting evidence***

SE0401 Signed documentary evidence from supervisor / mentor for all required work activities such as logbooks and job instructions

## **4.3 Contextualised Workplace Knowledge**

1. Property and real estate legislation and regulations
2. Market analysis methodology
3. Forecasting and business continuity
4. Own area of expertise / specialisation
5. Time management strategies
6. Standard operating procedures
7. Code of Conduct

## **4.4 Criteria for Workplace Approval**

### ***Physical Requirements:***

- Access to all unrestricted areas in an organisation in order for learner to have exposure to all aspects of occupational tasks
- Equipment to conduct occupational tasks
- The physical resources in terms of equipment, systems, conditions and interfaces that the workplace must have to ensure that learners can participate in all work activities.

### ***Human Resource Requirements:***

- Support from Supervisor / Manager
- Workplace coach/mentor: learner ratio 1 to 5

### ***Legal Requirements:***

- Compliant to all relevant I legislation and regulations
- Accredited with relevant authority

#### **4.5 Additional Assignments to be Assessed Externally**

Assignment description:

None

Elements to be assessed:

None

Evaluation criteria:

None

**5. 333402000-00-WM-05: Practices to manage the property and real estate function, NQF level 4, Learning Contract Time: 12 days (Credits: 15)**

**5.1 Purpose of the Work Experience Module**

The focus of the work experience is on providing the learner an opportunity to gain exposure to systematic practical training and experience on practices to manage the property and real estate function which is closely supervised and monitored by qualified property practitioners and adequately documented in an approved logbook.

The learner will be required to be exposed to:

- |            |   |
|------------|---|
| WM-05-WE01 | Identify and analyse the clients buying and selling needs                           |
| WM-05-WE02 | Identify and analyse the clients letting and renting needs                          |
| WM-05-WE03 | Prepare for the marketing of properties under the supervision of a qualified person |
| WM-05-WE04 | Plan and prepare for the managing of properties including Community Schemes         |
| WM-05-WE05 | Manage after-sales service  |

**5.2 Guidelines for Work Experiences**

**5.2.1 WM-05-WE01: Identify and analyse the clients buying and selling needs**

***Scope of Work Experience***

- |        |   |
|--------|---|
| WA0101 | Prepare for clients' meeting  |
| WA0102 | Introduce yourself  |
| WA0103 | Establish the clients buying/selling needs                            |
| WA0104 | Perform an estimation of market value of the property and real estate |
| WA0105 | Qualify the clients   |
| WA0106 | Obtain mandate and list the property                                  |
| WA0107 | Introduce the property and real estate options to the clients         |
| WA0108 | Explain the next steps  |
| WA0109 | Clarify the necessary documents to the client                         |



- WA01010 Report any high-risk clients
- WA01011 Prepare the sale agreement
- WA01012 Submit documentation and close the deal within required timeframes
- WA01013 Record and store all documentation

### ***Supporting evidence***

- SE0101 Signed documentary evidence from supervisor / mentor for all required work activities such as logbooks and job instructions

## **5.2.2 WM-05-WE02: Identify and analyse the clients letting and renting needs**

### ***Scope of Work Experience***

The person will be expected to engage in the following work activities:

- WA0201 Prepare for the client meeting
- WA0202 Introduce yourself
- WA0203 Establish clients letting /renting needs
- WA0204 Qualify the clients
- WA0205 Obtain a mandate from the client
- WA0206 Inspect and list the property
- WA0207 Present property and real estate letting/ renting options to the client
- WA0208 Discuss the documentation required with the client for letting/renting
- WA0209 Prepare the lease/rental agreement
- WA02010 Present the agreement to the client
- WA02011 Obtain signature and file with necessary parties

### ***Supporting Evidence***

- SE0201 Signed documentary evidence from supervisor / mentor for all required work activities such as logbooks and job instructions

## **5.2.3 WM-05-WE03: Prepare for the marketing of properties under the supervision of a qualified person**

### ***Scope of Work Experience***

The person will be expected to engage in the following work activities:

WA0301	Evaluate market condition and competitive pricing
WA0302	Conduct a market analysis
WA0303	Determine the type of pricing for property and real estate transactions
WA0304	Identify evidence to collect during the visit
WA0305	Prepare materials for marketing
WA0306	Place marketing materials on various advertising platforms and at strategic positions as per legislation
WA0307	Conduct a show house with viewings

### ***Supporting Evidence***

SE0301	Signed documentary evidence from a supervisor/mentor for all required activities such as logbooks and job instructions
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## **5.2.4 WM-05-WE04: Plan and prepare for the managing of properties including Community Schemes**

### ***Scope of Work Experience***

The person will be expected to engage in the following work activities:

WA0401	Establish ownership
WA0402	Verify legality of property and its use
WA0403	Prepare all legal documentation to ensure compliance
WA0404	Collect rent and other fees from tenants
WA0405	Pay property and real estate expenses
WA0406	Maintain property by settling tenants' complaints, enforcing rules of management and occupancy and inspecting vacant units
WA0407	Maintains building systems by contracting maintenance service providers and supervising repairs
WA0408	Report the property's financial status and occupancy to property owners

### ***Supporting Evidence***

SE0401	Signed documentary evidence from supervisor / mentor for all required work activities such as logbooks and job instructions
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## **5.2.5 WM-05-WE05: Manage after-sales service**

### ***Scope of Work Experience***

The person will be expected to engage in the following work activities:

- WA0501 Follow up on all documentation submitted
- WA0502 Check on suspensive and resolute conditions
- WA0503 Ensure all financial aspects of the property and real estate transaction are complied with
- WA0504 Confirm all obligatory certificates have been passed onto the relevant authorities

### ***Supporting Evidence***

- SE0501 Signed documentary evidence from supervisor / mentor for all required work activities such as logbooks and job instructions

## **5.3 Contextualised Workplace Knowledge**

1. Property and real estate legislation and regulations
2. Rules, functions, powers and duties of organisations
3. Deadlines requirements for statutory submission of documentation
4. Contract requirements
5. Levels of authority
6. Code of Conduct

## **5.4 Criteria for Workplace Approval**

*Physical Requirements:*

- Access to all unrestricted areas in an organisation in order for learner to have exposure to all aspects of occupational tasks
- Equipment to conduct occupational tasks
- The physical resources in terms of equipment, systems, conditions and interfaces that the workplace must have to ensure that learners can participate in all work activities.

*Human Resource Requirements:*

- Support from Supervisor / Manager
- Workplace coach/mentor: learner ratio 1 to 5

*Legal Requirements:*

- Compliant to all relevant legislation and regulations
- Accredited with relevant authority

**5.5 Additional Assignments to be Assessed Externally**

Assignment description:

None

Elements to be assessed:

None

Evaluation criteria:

None

## **6. 333402000-00-WM-06: Process to apply financial business principles, NQF level 4, Learning Contract Time: 4 days (Credits: 11)**

### **6.1 Purpose of the Work Experience Module**

The focus of the work experience is on providing the learner an opportunity to gain exposure to systematic practical training and experience on applying financial business principles which is closely supervised and monitored by qualified property practitioners and adequately documented in an approved logbook.

The learner will be required to be exposed to:

WM-06-WE01	Establish the cycles within the property and real estate industry
WM-06-WE02	Create a personal and business budget
WM-06-WE03	Calculate the taxation on a property and real estate transaction
WM-06-WE04	Draw up a business plan for an area of operation

### **6.2 Guidelines for Work Experiences**

#### **6.2.1 WM-06-WE01: Establish the cycles within the property and real estate industry**

##### ***Scope of Work Experience***

The person will be expected to engage in the following work activities:

WA0101	Identify and analyse the cycles within the property and real estate industry
WA0102	Plot yourself in the current cycle
WA0103	Draw up cash flow forecast on anticipated income
WA0104	Review income against earnings
WA0105	Read and interpret a profit and loss statement

##### ***Supporting Evidence***

SE0101	Signed documentary evidence from supervisor / mentor for all required work activities such as logbooks and job instructions
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#### **6.2.2 WM-06-WE02: Create a personal and business budget**

##### ***Scope of Work Experience***

The person will be expected to engage in the following work activities:

- WA0201 List current financial risks
- WA0202 Record all expenses
- WA0203 Create short, medium- and long-term objectives
- WA0204 Create a personal budget aligned to objectives
- WA0205 Create a business budget aligned to objectives

### ***Supporting Evidence***

- SE0201 Signed documentary evidence from supervisor / mentor for all required work activities such as logbooks and job instructions

## **6.2.3 WM-06-WE03: Calculate the taxation on a property and real estate transaction**

### ***Scope of Work Experience***

The person will be expected to engage in the following work activities:

- WA0301 List personal tax on income of a property and real estate transaction
- WA0302 Calculate the VAT on a property and real estate transaction
- WA0303 Calculate income tax on revenue earned
- WA0304 Check on capitals gains tax on the property and real estate transaction

### ***Supporting Evidence***

- SE0301 Signed documentary evidence from supervisor / mentor for all required work activities such as logbooks and job instructions

## **6.2.4 WM-06-WE04: Draw up a business plan for an area of operation**

### ***Scope of Work Experience***

The person will be expected to engage in the following work activities:

- WA0401 Determine the purpose of the plan
- WA0402 Create an area profile
- WA0403 Document all aspects of the business
- WA0404 Define the business structure and organogram
- WA0405 Create a strategic marketing plan
- WA0406 Draw up a financial plan including funding options and projections

WA0407 Define the execution plan

WA0408 Monitor and evaluate

### ***Supporting evidence***

SE0401 Signed documentary evidence from supervisor / mentor for all required work activities such as logbooks and job instructions

### ***Supporting Evidence***

SE0401 Signed documentary evidence from supervisor / mentor for all required work activities such as logbooks and job instructions

## **6.3 Contextualised Workplace Knowledge**

1. Property and real estate legislation and regulations
2. Property and real estate cycles
3. Principles of budgeting
4. Concepts of marketing
5. Basic financial concepts
6. Standard operating procedures
7. Code of Conduct

## **6.4 Criteria for Workplace Approval**

### *Physical Requirements:*

- Access to all unrestricted areas in an organisation in order for learner to have exposure to all aspects of occupational tasks
- Equipment to conduct occupational tasks
- The physical resources in terms of equipment, systems, conditions and interfaces that the workplace must have to ensure that learners can participate in all work activities.

### *Human Resource Requirements:*

- Support from Supervisor / Manager
- Workplace coach/mentor: learner ratio 1 to 5

### *Legal Requirements:*

- Compliant to all relevant legislation and regulations
- Accredited with relevant authority

### **6.5 Additional Assignments to be Assessed Externally**

Assignment description:

None

Elements to be assessed:

None

Evaluation criteria:

None



## SECTION 4: STATEMENT OF WORK EXPERIENCE

Curriculum Number:	
Curriculum Title:	

Learner Details	
Name:	
ID Number:	

Employer Details	
Company Name:	
Address:	
Supervisor Name:	
Work Telephone:	
E-Mail:	

**333402000-00-WM-01: Procedures to identify the property and real estate environment and comply with legislative and regulatory framework, NQF level 4, Learning contract time 10 days (Credits: 13)**

WM-01-WE01	Observe and assist a qualified person with the identification of the property and real estate environment in respect to trends, industry supply and demand and market knowledge	Date	Signature
<b>Work Activities</b>			
WA0101	Gather and analyse current property and property and real estate trends information		
WA0102	Collect industry supply and demand statistics		
WA0103	Review the market and investigate trends		

WA0104	Prepare and submit your findings to your mentor		
<b>Supporting Evidence</b>			
SE0101	Signed documentary evidence from supervisor / mentor for all required work activities such as logbooks and job instructions		
<b>Contextualised Workplace Knowledge</b>			
1	Property and real estate legislation and regulations		
2	Effective verbal and written communication skills		
3	Cross cultural sensitivity		
4	Code of Conduct		
5	Standard operating procedures		
6	Contract management		
<b>Additional Assignments to be Assessed Externally</b>			
1	None		

<b>WM-01-WE02</b>	<b>Prepare and complete various contracts aligned to legislative and regulatory requirements under the supervision of a qualified person</b>	<b>Date</b>	<b>Signature</b>
<b>Work Activities</b>			
WA0201	Prepare draft contracts for the following: <ul style="list-style-type: none"> <li>i. Sole and exclusive mandates</li> <li>ii. Lease agreement</li> <li>iii. Offer to purchase</li> <li>iv. Sectional Title sale agreement</li> </ul>		
WA0202	Verify Protection of Personal Information Act, 4 of 2013 requirements for a client		

	in a property and real estate transaction		
WA0203	Determine the Financial Intelligence Centre Act, 38 of 2001 requirements of a client		
WA0204	Establish the tax implications on a property and real estate transaction		
<b>Supporting Evidence</b>			
SE0201	Signed documentary evidence from supervisor / mentor for all required work activities such as logbooks and job instructions		
<b>Contextualised Workplace Knowledge</b>			
1	Property and real estate legislation and regulations		
2	Effective verbal and written communication skills		
3	Cross cultural sensitivity		
4	Code of Conduct		
5	Standard operating procedures		
6	Contract management		
<b>Additional Assignments to be Assessed Externally</b>			
1	None		

<b>WM-01-WE03</b>	<b>Apply rules and techniques to interpret appropriate legislative provisions affecting property and real estate transactions</b>	<b>Date</b>	<b>Signature</b>
<b>Work Activities</b>			
WA0301	Communicate the legal requirements for the formation of a contract		
WA0302	Agree on the relevant type of agreement		
WA0303	Discuss the consequences of an illegal and unlawful contract		

WA0304	Explain the nature of and process involved in the acceptance of the contract		
WA0305	Discuss the importance of timing of submission of documentation and the impact on the property and real estate transaction		
WA0306	Discuss the importance of applicable legislation and the implications within the property and real estate industry		
WA0307	Describe the consequences of fraudulent activities during the property and real estate process		
<b>Supporting Evidence</b>			
SE0301	Signed documentary evidence from supervisor / mentor for all required work activities such as logbooks and job instructions		
<b>Contextualised Workplace Knowledge</b>			
1	Property and real estate legislation and regulations		
2	Effective verbal and written communication skills		
3	Cross cultural sensitivity		
4	Code of Conduct		
5	Standard Operating Procedures		
6	Contract management		
<b>Additional Assignments to be Assessed Externally</b>			
1	None		

**333402000-00-WM-02: Processes and procedures for applying the Code of Conduct and adhering to ethical business principles, NQF level 5, Learning Contract Time: 12 days (Credit: 15)**

<b>WM-02-WE01</b>	<b>Gather and interpret information relating to the Code of Conduct</b>	<b>Date</b>	<b>Signature</b>
<b>Work Activities</b>			
WA0101	Examine the principles that underpin the Code of Conduct, business ethics and professionalism		
WA0102	Identify strengths and weaknesses when comparing organisation Code of Conduct to the property and real estate Code of Conduct		
WA0103	Scrutinise and explain the impact of the implementation of the business' value system		
WA0104	Draw up a plan to improve the commitment and compliance to the Code of Conduct in the organisation		
<b>Supporting Evidence</b>			
SE0101	Signed documentary evidence from supervisor / mentor for all required work activities such as logbooks and job instructions		
<b>Contextualised Workplace Knowledge</b>			
1	Property and real estate legislation and regulations		
2	Standard operating procedures		
3	Code of Conduct		
4	Business values and ethical conduct		
5	Change management procedures		
6	Impact of group dynamics		
<b>Additional Assignments to be Assessed Externally</b>			
1	None		

<b>WM-02-WE02</b>	<b>Conduct all property and real estate matters in an ethical manner</b>	<b>Date</b>	<b>Signature</b>
<b>Work Activities</b>			
WA0201	Use professional and ethical methods ensuring personal performance is consistent and aligned to customer needs		
WA0202	Create openness and transparency in all relationships and communication		
WA0203	Act with honest and integrity in all interactions		
<b>Supporting Evidence</b>			
SE0201	Signed documentary evidence from supervisor / mentor for all required work activities such as logbooks and job instructions		
<b>Contextualised Workplace Knowledge</b>			
1	Property and real estate legislation and regulations		
2	Standard operating procedures		
3	Code of Conduct		
4	Business values and ethical conduct		
5	Change management procedures		
6	Impact of group dynamics		
<b>Additional Assignments to be Assessed Externally</b>			
1	None		

<b>WM-02-WE03</b>	<b>Follow the Code of Conduct within the property and real estate context</b>	<b>Date</b>	<b>Signature</b>
<b>Work Activities</b>			
WA0301	Protect the public's interest		
WA0302	Act only with a sole or open mandate		

WA0303	Duty to disclose		
WA0304	Make honest representation, statements and use unharmful marketing techniques		
WA0305	Practice integrity in duties relating to offers and contracts		
WA0306	Exercise uprightness in remuneration including trust monies and interest as legislated		
WA0307	Respect confidentiality		
WA0308	Prevent contravention of the Code of Conduct in all capacities within property and real estate transactions		
<b>Supporting Evidence</b>			
SE0301	Signed documentary evidence from supervisor / mentor for all required work activities such as logbooks and job instructions		
<b>Contextualised Workplace Knowledge</b>			
1	Property and real estate legislation and regulations		
2	Standard operating procedures		
3	Code of Conduct		
4	Business values and ethical conduct		
5	Change management procedures		
6	Impact of group dynamics		
<b>Additional Assignments to be Assessed Externally</b>			
1	None		

**333402000-00--WM-03: Procedures to build internal and / or external client relationships and databases, NQF level 4, Learning contract time 10 days (Credits: 12)**

<b>WM-03-WE01</b>	<b>Engage with relevant stakeholders</b>	<b>Date</b>	<b>Signature</b>
<b>Work Activities</b>			
WA0101	Conduct a comprehensive stakeholder analysis		
WA0102	Draw up an engagement plan		
WA0103	Set up a meeting schedule		
WA0104	Initiate and maintain a consultative approach throughout engagement with relevant stakeholders		
WA0105	Contribute to a culture of seamless service standards		
WA0106	Display an understanding of cultural diversity in property practices		
WA0107	Provide accurate information about legislation and the impact on the client		
WA0108	Display openness and transparency during engagement opportunities		
WA0109	Initiate remedial action when required		
<b>Supporting Evidence</b>			
SE0101	Signed documentary evidence from supervisor / mentor for all required work activities such as logbooks and job instructions		
<b>Contextualised Workplace Knowledge</b>			
1	Property and real estate market principles, policies and economics		
2	Property and real estate legislation and regulations		
3	Contract management		
4	Termination of the contract		
5	Code of Conduct		
<b>Additional Assignments to be Assessed Externally</b>			



1	None		
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<b>WM-03-WE02</b>	<b>Involve all social partners in monitoring of compliance</b>	<b>Date</b>	<b>Signature</b>
<b>Work Activities</b>			
WA0201	Maintain strong reporting systems		
WA0202	Utilise viable and uniform reporting systems		
WA0203	Share individual experiences for best practice guidelines		
WA0204	Collaborate to simplify service delivery to clients		
<b>Supporting Evidence</b>			
SE0201	Signed documentary evidence from supervisor / mentor for all required work activities such as logbooks and job instructions		
<b>Contextualised Workplace Knowledge</b>			
1	Property and real estate market principles, policies and economics		
2	Property and real estate legislation and regulations		
3	Contract management		
4	Termination of the contract		
5	Code of Conduct		
<b>Additional Assignments to be Assessed Externally</b>			
1	None		

<b>WM-03-WE03</b>	<b>Identify and manage areas of customer service impact</b>	<b>Date</b>	<b>Signature</b>
<b>Work Activities</b>			
WA0301	Identify the various ways in which customers interaction can take place		

WA0302	Determine solutions in areas of customer service		
WA0303	Action changes or improve areas of customer service		
<b>Supporting Evidence</b>			
SE0301	Signed documentary evidence from supervisor / mentor for all required work activities such as logbooks and job instructions		
<b>Contextualised Workplace Knowledge</b>			
1	Property and real estate market principles, policies and economics		
2	Property and real estate legislation and regulations		
3	Contract management		
4	Termination of the contract		
5	Code of Conduct		
<b>Additional Assignments to be Assessed Externally</b>			
1	None		

<b>WM-03-WE04</b>	<b>Identify advocacy opportunities available within the property and real estate environment</b>	<b>Date</b>	<b>Signature</b>
<b>Work Activities</b>			
WA0401	Based on research, identify the primary means of intervention within own area of work		
WA0402	Provide structured information and advice on the best opportunities for complying within own area of work		
WA0303	Provide clear, written instructions on how to comply and in what timeframe to do so		

WA0404	Explain the impact of the opportunities on individuals and groups in the workplace		
WA0405	Reflect on the implications for the property and real estate practice environment		
WA0406	Report loopholes in application of legislation and regulations		
<b>Supporting Evidence</b>			
SE0301	Signed documentary evidence from supervisor / mentor for all required work activities such as logbooks and job instructions		
<b>Contextualised Workplace Knowledge</b>			
1	Property and real estate market principles, policies and economics		
2	Property and real estate legislation and regulations		
3	Contract management		
4	Termination of the contract		
5	Code of Conduct		
<b>Additional Assignments to be Assessed Externally</b>			
1	None		

**333402000-00--WM-04: Procedures to build a brand reputation and develop a target market, NQF level 4, Learning Contract Time: 7 days (Credits: 9)**

<b>WM-04-WE01</b>	<b>Promote sufficient brand reputation to ensure business continuity</b>	<b>Date</b>	<b>Signature</b>
<b>Work Activities</b>			
WA0101	Conduct a survey to determine current professional brand reputation under supervision		
WA0102	Contribute to initiatives to improve		

	brand reputation		
WA0103	Act as a brand ambassador		
<b>Supporting Evidence</b>			
SE0101	Signed documentary evidence from supervisor / mentor for all required work activities such as logbooks and job instructions		
<b>Contextualised Workplace Knowledge</b>			
1	Property and real estate legislation and regulations		
2	Market analysis methodology		
3	Forecasting and business continuity		
4	Own area of expertise / specialisation		
5	Time management strategies		
6	Standard operating procedures		
7	Code of Conduct		
<b>Additional Assignments to be Assessed Externally</b>			
1	None		

<b>WM-04-WE02</b>	<b>Develop a target market to ensure sustainability</b>	<b>Date</b>	<b>Signature</b>
<b>Work Activities</b>			
WA0201	Conduct a comprehensive market analysis under supervision in your particular work area		
WA0202	Make recommendations to include or draw clients to the business		
WA0203	Follow up continuously		
WA0204	Maintain records of engagements for current and future property and real estate interventions		
<b>Supporting Evidence</b>			
SE0201	Signed documentary evidence from		

	supervisor / mentor for all required work activities such as logbooks and job instructions		
<b>Contextualised Workplace Knowledge</b>			
1	Property and real estate legislation and regulations		
2	Market analysis methodology		
3	Forecasting and business continuity		
4	Own area of expertise / specialisation		
5	Time management strategies		
6	Standard operating procedures		
7	Code of Conduct		
<b>Additional Assignments to be Assessed Externally</b>			
1	None		

<b>WM-04-WE03</b>	<b>Promote and contribute to training and education initiatives</b>	<b>Date</b>	<b>Signature</b>
<b>Work Activities</b>			
WA0301	Discuss the benefits of lifelong learning and career advancement to positive property and real estate relations		
WA0302	Engage in discussions to improve brand position within the property and real estate environment, improve practices and services delivery		
<b>Supporting Evidence</b>			
SE0301	Signed documentary evidence from supervisor / mentor for all required work activities such as logbooks and job instructions		
<b>Contextualised Workplace Knowledge</b>			
1	Property and real estate legislation and regulations		

2	Market analysis methodology		
3	Forecasting and business continuity		
4	Own area of expertise / specialisation		
5	Time management strategies		
6	Standard operating procedures		
7	Code of Conduct		
<b>Additional Assignments to be Assessed Externally</b>			
1	None		

<b>WM-04-WE04</b>	<b>Develop time management strategies</b>	<b>Date</b>	<b>Signature</b>
<b>Work Activities</b>			
WA0401	Determine deadlines required in the job		
WA0402	Establish client's requirements essential for property and real estate transactions with time frames		
WA0403	Identify and reduce time wasters		
WA0404	Manage time efficient work plans to meet deadlines		
<b>Supporting Evidence</b>			
SE0401	Signed documentary evidence from supervisor / mentor for all required work activities such as logbooks and job instructions		
<b>Contextualised Workplace Knowledge</b>			
1	Property and real estate legislation and regulations		
2	Market analysis methodology		
3	Forecasting and business continuity		
4	Own area of expertise / specialisation		
5	Time management strategies		
6	Standard operating procedures		

7	Code of Conduct		
<b>Additional Assignments to be Assessed Externally</b>			
1	None		

**333402000-00--WM-05: Practices to manage the property and real estate function, NQF level 4, Learning Contract Time: 12 days (Credit: 15)**

<b>WM-05-WE01</b>	<b>Identify and analyse the clients buying and selling needs</b>	<b>Date</b>	<b>Signature</b>
<b>Work Activities</b>			
WA0101	Prepare for clients' meeting		
WA0102	Introduce yourself		
WA0103	Establish the clients buying/selling needs		
WA0104	Perform an estimation of market value of the property and real estate		
WA0105	Qualify the clients		
WA0106	Obtain mandate and list the property		
WA0107	Introduce the property and real estate options to the clients		
WA0108	Explain the next steps		
WA0109	Clarify the necessary documents to the client		
WA0110	Report any high-risk clients		
WA0111	Prepare the sale agreement		
WA0112	Submit documentation and close the deal within required timeframes		
WA0113	Record and store all documentation		
<b>Supporting Evidence</b>			
SE0101	Signed documentary evidence from supervisor / mentor for all required work activities such as logbooks and job instructions		
<b>Contextualised Workplace Knowledge</b>			

1	Property and real estate legislation and regulations		
2	Rules, functions, powers and duties of organisations		
3	Deadlines requirements for statutory submission of documentation		
4	Contract requirements		
5	Levels of authority		
6	Code of Conduct		
<b>Additional Assignments to be Assessed Externally</b>			
1	None		

<b>WM-05-WE02</b>	<b>Identify and analyse the clients letting and renting needs</b>	<b>Date</b>	<b>Signature</b>
<b>Work Activities</b>			
WA0201	Prepare for the client meeting		
WA0202	Introduce yourself		
WA0203	Establish clients letting /renting needs		
WA0204	Qualify the clients		
WA0205	Obtain a mandate from the client		
WA0206	Inspect and list the property		
WA0207	Present property and real estate letting/renting options to the client		
WA0208	Discuss the documentation required with the client for letting/renting		
WA0209	Prepare the lease/rental agreement		
WA0210	Present the agreement to the client		
WA0211	Obtain signature and file with necessary parties		
<b>Supporting Evidence</b>			
SE0201	Signed documentary evidence from supervisor / mentor for all required		



	work activities such as logbooks and job instructions		
<b>Contextualised Workplace Knowledge</b>			
1	Property and real estate legislation and regulations		
2	Rules, functions, powers and duties of organisations		
3	Deadlines requirements for statutory submission of documentation		
4	Contract requirements		
5	Levels of authority		
6	Code of Conduct		
<b>Additional Assignments to be Assessed Externally</b>			
1	None		

<b>WM-05-WE03</b>	<b>Prepare for the marketing of properties under the supervision of a qualified person</b>	<b>Date</b>	<b>Signature</b>
<b>Work Activities</b>			
WA0301	Evaluate market condition and competitive pricing		
WA0302	Conduct a market analysis		
WA0303	Determine the type of pricing for property and real estate transactions		
WA0304	Identify evidence to collect during the visit		
WA0305	Prepare materials for marketing		
WA0306	Place marketing materials on various advertising platforms and at strategic positions as per legislation		
WA0307	Conduct a show house with viewings		
<b>Supporting Evidence</b>			

SE0301	Signed documentary evidence from supervisor / mentor for all required work activities such as logbooks and job instructions		
<b>Contextualised Workplace Knowledge</b>			
1	Property and real estate legislation and regulations		
2	Rules, functions, powers and duties of organisations		
3	Deadlines requirements for statutory submission of documentation		
4	Contract requirements		
5	Levels of authority		
6	Code of Conduct		
<b>Additional Assignments to be Assessed Externally</b>			
1	None		

<b>WM-05-WE04</b>	<b>Plan and prepare for the managing of properties including Community Schemes</b>	<b>Date</b>	<b>Signature</b>
<b>Work Activities</b>			
WA0401	Establish ownership		
WA0402	Verify legality of property and its use		
WA0403	Prepare all legal documentation to ensure compliance		
WA0404	Collect rent and other fees from tenants		
WA0405	Pay property and real estate expenses		
WA0406	Maintain property by settling tenants' complaints, enforcing rules of management and occupancy and inspecting vacant units		
WA0407	Maintains building systems by		

	contracting maintenance service providers and supervising repairs		
WA0408	Report the property's financial status and occupancy to property owners		
<b>Supporting Evidence</b>			
SE0401	Signed documentary evidence from supervisor / mentor for all required work activities such as logbooks and job instructions		
<b>Contextualised Workplace Knowledge</b>			
1	Property and real estate legislation and regulations		
2	Rules, functions, powers and duties of organisations		
3	Deadlines requirements for statutory submission of documentation		
4	Contract requirements		
5	Levels of authority		
6	Code of Conduct		
<b>Additional Assignments to be Assessed Externally</b>			
1	None		

<b>WM-05-WE05</b>	<b>Manage after-sales service</b>	<b>Date</b>	<b>Signature</b>
<b>Work Activities</b>			
WA0501	Follow up on all documentation submitted		
WA0502	Check on suspensive and resolute conditions		
WA0503	Ensure all financial aspects of the property and real estate transaction are complied with		

WA0504	Confirm all obligatory certificates have been passed onto the relevant authorities		
<b>Supporting Evidence</b>			
SE0501	Signed documentary evidence from supervisor / mentor for all required work activities such as logbooks and job instructions		
<b>Contextualised Workplace Knowledge</b>			
1	Property and real estate legislation and regulations		
2	Rules, functions, powers and duties of organisations		
3	Deadlines requirements for statutory submission of documentation		
4	Contract requirements		
5	Levels of authority		
6	Code of Conduct		
<b>Additional Assignments to be Assessed Externally</b>			
1	None		

**333402000-00--WM-06: Process to apply financial business principles, NQF level 4, Learning Contract Time: 4 days (Credit: 11)**

<b>WM-06-WE01</b>	<b>Establish the cycles within the property and real estate industry</b>	<b>Date</b>	<b>Signature</b>
<b>Work Activities</b>			
WA0101	Identify and analyse the cycles within the property and real estate industry		
WA0102	Plot yourself in the current cycle		
WA0103	Draw up cash flow forecast on anticipated income		

WA0104	Review income against earnings		
WA0105	Read and interpret a profit and loss statement		
<b>Supporting Evidence</b>			
SE0101	Signed documentary evidence from supervisor / mentor for all required work activities such as logbooks and job instructions		
<b>Contextualised Workplace Knowledge</b>			
1	Property and real estate legislation and regulations		
2	Property and real estate cycles		
3	Principles of budgeting		
4	Concepts of marketing		
5	Basic financial concepts		
6	Standard operating procedures		
7	Code of Conduct		
<b>Additional Assignments to be Assessed Externally</b>			
1	None		

<b>WM-06-WE02</b>	<b>Create a personal and business budget</b>	<b>Date</b>	<b>Signature</b>
<b>Work Activities</b>			
WA0201	List current financial risks		
WA0202	Record all expenses		
WA0203	Create short, medium- and long-term objectives		
WA0204	Create a personal budget aligned to objectives		
WA0205	Create a business budget aligned to objectives		
<b>Supporting Evidence</b>			
SE0201	Signed documentary evidence from		

	supervisor / mentor for all required work activities such as logbooks and job instructions		
<b>Contextualised Workplace Knowledge</b>			
1	Property and real estate legislation and regulations		
2	Property and real estate cycles		
3	Principles of budgeting		
4	Concepts of marketing		
5	Basic financial concepts		
6	Standard operating procedures		
7	Code of Conduct		
<b>Additional Assignments to be Assessed Externally</b>			
1	None		

<b>WM-06-WE03</b>	<b>Calculate the taxation on a property and real estate transaction</b>	<b>Date</b>	<b>Signature</b>
<b>Work Activities</b>			
WA0301	List personal tax on income of a property and real estate transaction		
WA0302	Calculate the VAT on a property and real estate transaction		
WA0303	Calculate income tax on revenue earned		
WA0304	Check on capitals gains tax on the property and real estate transaction		
<b>Supporting Evidence</b>			
SE0301	Signed documentary evidence from supervisor / mentor for all required work activities such as logbooks and job instructions		
<b>Contextualised Workplace Knowledge</b>			

1	Property and real estate legislation and regulations		
2	Property and real estate cycles		
3	Principles of budgeting		
4	Concepts of marketing		
5	Basic financial concepts		
6	Standard operating procedures		
7	Code of Conduct		
<b>Additional Assignments to be Assessed Externally</b>			
1	None		

<b>WM-06-WE04</b>	<b>Draw up a business plan for an area of operation</b>	<b>Date</b>	<b>Signature</b>
<b>Work Activities</b>			
WA0401	Determine the purpose of the plan		
WA0402	Create an area profile		
WA0403	Document all aspects of the business		
WA0404	Define the business structure and organogram		
WA0405	Create a strategic marketing plan		
WA0406	Draw up a financial plan including funding options and projections		
WA0407	Define the execution plan		
WA0408	Monitor and evaluate		
<b>Supporting Evidence</b>			
SE0401	Signed documentary evidence from supervisor / mentor for all required work activities such as logbooks and job instructions		
<b>Contextualised Workplace Knowledge</b>			
1	Property and real estate legislation and regulations		
2	Property and real estate cycles		

3	Principles of budgeting		
4	Concepts of marketing		
5	Basic financial concepts		
6	Standard operating procedures		
7	Code of Conduct		
<b>Additional Assignments to be Assessed Externally</b>			
1	None		