



Level 3 Diploma in

Domestic Green Deal Advice

Qualification Specification

Qualification Recognition Number: 600/5488/8

ABBE Qualification Code: DipDGDAL312

April 2019

Why this document is being revised

This document has been revised by ABBE in April 2019. A summary of the changes made to this document is, as follows:

- New address added to 1.4

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1. ABBE

1.1 Introduction

ABBE, the Awarding Body for Building Education is a forward thinking organisation that offers a range of apprenticeships, qualifications, benefits and support.

ABBE is regulated by Ofqual for the delivery of a range of qualifications. Our qualifications are nationally recognised helping learners to achieve their full potential and ambitions.

The full range of qualifications can be found on our website <http://www.abbega.co.uk>

1.2 Our values, vision and mission

Our Values: Quality through Standards

Our aim is to provide a high quality experience by building a strong community of mutual support and trust. We can use our collective talents to build meaningful partnerships to help us all to achieve our goals. ABBE is a recognised Awarding Organisation with strong professional integrity.

Our Vision:

Is that every learner is confident, successful and has the opportunity to achieve their full potential.

Our Mission:

ABBE Educates, inspires and empowers learners

1.3 Qualification Specification

This is the ABBE Qualification Specification for the ABBE Level 3 Diploma in Domestic Green Deal Advice. The aim of this specification is to provide learners and centres with information about the content of this qualification.

This specification is a live document and, as such, will be updated when required.

Additional qualification details are available for ABBE approved centres in the ABBE qualification handbook.

1.4 Enquiries

Any enquiries relating to this qualification should be addressed to:

ABBE
Birmingham City University
University House
15 Bartholomew Row
Birmingham
B5 5JU

Telephone: 0121 331 5174
Email: abbeenquiries@bcu.ac.uk
Website: www.abbega.co.uk



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2. Qualification Information

2.1 Qualification purpose

This qualification has been developed to enable learners to demonstrate the professional requirements expected by the Department for Energy and Climate Change (DECC) as laid down in National Occupational Standards (NOS). This qualification is required to apply for membership of a certification scheme, accredited in their turn by the United Kingdom Accreditation Service (UKAS).

Holders of this qualification are also eligible to practice as Domestic Energy Assessors (DEA) and issue Energy Performance Certificates (EPC) in accordance with the Energy Performance of Buildings (Certificates and Inspections) (England and Wales) Regulations 2007.

2.2 Who could take this Qualification?

The qualification is available both to experienced energy assessment practitioners and also to those who have little or no previous background knowledge or experience of conducting energy assessments or delivering energy advice.

2.3 Qualification Number

ABBE Level 3 Diploma in Domestic Green Deal Advice: 600/5488/8

2.4 Qualification Level

This qualification has been listed on the Regulated Qualifications Framework (RQF) at: Level 3

2.5 Total Qualification Time

This qualification is allocated Total Qualification Time (TQT) this includes Guided Learning (GL) expressed in hours, which indicates the number of hours of supervised or directed study time and assessment. Credit has also be allocated to this qualification.

- The Total Qualification Time (TQT) for this qualification is: 470
- Guided Learning (GL) for this qualification is: 230
- Credit Value: 47 credits

2.6 Progression

This qualification has been designed to encourage participation in education and training in other related areas by:

- Enabling current practitioners in Domestic Energy Assessment to expand the portfolio of services offered to their customers by encompassing Green Deal assessment and advice
- Enable practitioners in delivering Home Energy Advice to incorporate Green Deal assessment and advice into the portfolio of services they offer
- Encouraging current practitioners in other energy assessment fields to expand the portfolio of services offered to their customers by encompassing Green Deal assessment and advice
- Attracting current residential surveyors and Home Inspectors by the opportunities presented through their offering Green Deal assessment and advice services



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- Offering a new career opportunity to learners wanting to provide Green Deal assessment and advice through retraining or up-skilling

2.7 Age ranges

Pre 16	No
16-18	No
18+	Yes
19+	Yes

2.8 Structure of the Qualification

To achieve the ABBE Level 3 Diploma in Domestic Green Deal Advice learners must achieve the eight mandatory units. An additional unit is also available for learners wishing to take if this if it is relevant to their role - this is optional.

Mandatory Units			
URN	Unit Name	Credit Value	Level
H/503/8162	Conduct energy assessments in a safe, effective and professional manner	6	3
K/503/8163	Prepare for energy assessments of domestic property	4	3
T/503/8165	Undertake energy inspections	11	3
J/504/0924	Produce and explain Energy Performance Certificates relating to domestic property	4	3
T/503/8179	Provide information to customers on the principles, financing and operation of the Green Deal	4	3
L/503/8186	Undertake occupancy assessments and give advice	8	3
R/503/8187	Prepare and issue domestic Green Deal Advice Reports	6	4
Y/503/8188	Explain the Green Deal Advice Report to the domestic customer	4	3
Additional Unit (Optional)			
M/503/8164	Identify representative properties for sampling and multiple certification	5	3



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2.9 Barred Units

Units with the same title at different levels or units with the same content cannot be combined in the same qualification.

2.10 Language

ABBE qualifications and assessment materials will be provided through the medium of English.

2.11 Grading

This qualification is: Pass/Fail

2.12 Pre-course Procedures

This qualification is available to anyone who is capable of reaching the required standards. They have been developed free from any barriers that unfairly restrict access or progression thereby promoting equal opportunities.

There are no pre-entry requirements for this qualification.

2.13 Qualification Review Boards

Qualification Review Boards (QRBs) are set up for each qualification. The Boards are drawn from employers, centres, Higher Educational Institutes (HEIs) and others with a vested interest in the sector in which the qualification is used. The purpose of the QRB is to ensure that the content of the qualification and the proposed assessment methodology are fit for purpose and are appropriate to meet the requirements of the sector.

QRBs are ongoing and will be scheduled for specific points within the qualification lifetime; at the notional mid-point and again towards the review date of the qualification. During this process, the QRB will consider any feedback received on the performance of the qualification and will consider if the content, structure, purpose and assessment methodology remain appropriate to the needs of the sector. This will help to improve both our qualification and the specification.



3. Qualification Unit(s)

Unit 1: Conduct energy assessments in a safe, effective and professional manner

Unit Reference Number: H/503/8162

Level: 3

Credit: 6

Unit Summary

To develop knowledge, understanding and skills to contribute to the health, safety and security of the workplace, develop effective working relationships with others, and conduct energy assessments in a professional and ethical manner, complying with organisational and legal requirements at all times.

Assessment Guidance

This unit can be assessed using the following method(s):

- Portfolio of evidence

Learning Outcome The learner will:	Assessment Criterion The learner can:
1. Understand the health and safety requirements when undertaking energy assessments	1.1 Explain the relevant legal duties for health, safety and security in the workplace
	1.2 Identify the health, safety and security risks that could exist in different locations, and the action to take to minimise or mitigate risks
	1.3 Identify the risks to self which are associated with lone working
	1.4 Explain why it is important to remain alert to the presence of risks in the workplace
	1.5 Explain the importance of personal conduct in maintaining the health, safety and security of yourself or others
	1.6 Explain how to make use of relevant suppliers and manufacturers' instructions for the safe use of equipment, materials and products
	1.7 Explain who should be informed of any conflicts between different health, safety and security requirements
	1.8 Describe the procedures for different types of emergency
	1.9 Identify the types of suggestions for improving health, safety and security at work that could be made and who should be given them
	1.10 Identify the actions that may be taken to protect customers' property



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2. Understand the nature of professional conduct required when conducting energy assessments	2.1 Explain why it is important to promote goodwill and trust when working with others and ways in which this can be achieved
	2.2 Explain how to identify the information you require and the potential sources of such information
	2.3 Describe how to respond to enquiries from others and how to clarify their information needs
	2.4 Explain how to respond to enquiries which are outside your authority, beyond your area of knowledge or expertise or where the information requested is confidential
	2.5 Define the extent and limits for your own competence and expertise and the importance of not working beyond these limits
	2.6 Describe the ways in which disputes or differences of opinion should be handled and resolved to minimise offence and maintain respect
	2.7 Describe the formal complaints procedure that covers your work in terms of: <ul style="list-style-type: none"> • any specific organisational requirements with regard to complaints • your own responsibility to deal with complaints and attempt to resolve them before escalating to the Accreditation Body, or the equivalent in the Devolved Administrations
	2.8 Identify the range of potential conflicts of interest that you may encounter and the action required to manage these
	2.9 Explain why it is important to present a positive personal and professional image when dealing with people and how this can be achieved
	2.10 Describe the ways in which you may develop yourself within your role to cover your development needs
	2.11 Define the level of service expected by customers, their expectations as to the outcomes of the energy assessment or advice process and how to deliver an appropriate level of customer service
	2.12 Explain the need for prompt responses to enquiries
3. Understand the legislation, codes of conduct and compliance requirements in relation to energy assessment	3.1 Describe the relevant policies and legislation on combating climate change and the reduction of carbon emissions from buildings
	3.2 Describe the relevant legislation covering: <ul style="list-style-type: none"> • The energy performance of buildings • Compliance with safe working practices • The relevant regulations in the Devolved Administrations • Where appropriate relevant legislation on the use of refrigerants
	3.3 Describe the relevant official guidance and conventions relating to the assessment of energy performance
	3.4 Describe your specific responsibilities under prescribed codes of conduct and ethical standards



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	3.5 Describe why it is important to comply with mandatory and advisory codes of practice
	3.6 Describe the specific auditing or monitoring requirements that relate to your registration with your accreditation organisation(s), or the equivalent in the Devolved Administrations and your responsibilities in complying with these
	3.7 Describe the framework under which Accreditation Bodies, or the equivalent in the Devolved Administrations, are required to operate, including their Scheme Operating Requirements or equivalent in the Devolved Administrations
	3.8 Explain the importance of obtaining and maintaining appropriate professional indemnity insurance (PII) cover, either through your own business or your employer and the extent and limitations of this type of cover
4. Be able to comply with organisational and legal requirements at all times	4.1 Carry out work in accordance with the relevant legal requirements, legislation and advisory and mandatory codes of practice
	4.2 Carry out work in accordance with the auditing and monitoring requirements of the relevant accreditation or certification organisation(s)
	4.3 Record customer contact information in accordance with organisational and legal requirements such as the Data Protection legislation
	4.4 Identify and maintain appropriate evidence to record to support your decisions and assumptions made when carrying out energy assessments
	4.5 Identify the evidence requirements defined in Scheme Operating Requirements, or their equivalent in the Devolved Administrations
5. Be able to maintain health, safety and security at work	5.1 Take action to mitigate health, safety and security risks
	5.2 Ensure personal conduct does not endanger the health, safety and security of self and other people
	5.3 Take action to ensure the protection of client's property and buildings
	5.4 Adhere to workplace policies and suppliers' or manufacturers' instructions for the safe use of equipment, personal protective equipment (PPE), materials and products
	5.5 Identify procedures for different types of emergency and implement them
	5.6 Make recommendations for improving health, safety and security in the workplace to the relevant person(s)
6. Be able to develop and maintain effective working relationships with colleagues, professionals, clients and others	6.1 Develop and maintain productive working relationships with others
	6.2 Request information from colleagues, professionals, clients and others in a polite, clear and professional manner
	6.3 Identify and make use of further sources of information/help



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	6.4 Deal with enquiries from colleagues, professionals, clients and others and seek clarification where necessary
	6.5 Handle enquiries which: <ul style="list-style-type: none"> • Are outside own authority • Are beyond own area of knowledge or expertise • Involve confidential information
	6.6 Handle and resolve disputes and/or differences of opinion
	6.7 Adhere to the formal complaints procedure when dealing with a complaint
7. Be able to conduct energy assessments in a professional manner	7.1 Deal with colleagues, professionals, clients and others in a tactful, courteous and equitable manner
	7.2 Carry out work in accordance with prescribed codes of conduct, ethical standards and recognised good practice
	7.3 Record all evidence supporting the assumptions and decisions made during the assessment
	7.4 Demonstrate effective management of work activities and personal and professional development
	7.5 Respond appropriately to pressure from any person(s) which may affect own judgment
	7.6 Demonstrate delivery of the appropriate level of customer service
	7.7 Assess customer expectations as to the outcomes of the energy assessment or advice process



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Unit 2: Prepare for energy assessments of domestic property

Unit Reference Number: K/503/8163

Level: 3

Credit: 4

Unit Summary

This unit aims to develop the knowledge and skills needed to prepare prior to making an energy assessment, for example taking instructions, clarifying requirements and making initial investigations relating to the property or properties.

Assessment Guidance

This unit can be assessed using the following method(s):

- Portfolio of evidence

Learning Outcome The learner will:	Assessment Criterion The learner can:
1. Understand the legislation and regulations relating to energy assessments and Energy Performance Certificates	1.1 Explain the relevant legislation giving rise to energy assessments and Energy Performance Certificates, for England and Wales and for the Devolved Administrations
	1.2 Explain the regulations and guidance under that legislation relating to the role of Domestic Energy Assessors or alternatives within the Devolved Administrations and the undertaking of energy assessments
	1.3 Identify the types of property and situations that do not by law require an Energy Performance Certificate
	1.4 Explain the principles of the Green Deal and the role of Energy Performance Certificates within Green Deal
2. Understand how to agree and confirm instructions to undertake energy	2.1 Explain how to clarify and confirm the expectations of the customer
	2.2 Describe the basic principles of the Green Deal or equivalents within the Devolved Administrations, and the role of Energy Performance Certificates within those schemes
	2.3 State when a potential conflict of interest will require disclosure to the customer, or will require the need to decline the instructions altogether
	2.4 Explain the limitations and constraints that apply to the conduct of energy assessments and to the prescribed methodology
	2.5 Describe the limited circumstances where representative properties and/or data collected by others may be used in the preparation of Energy Performance Certificates for existing dwellings
	2.6 Identify alternatives to the prescribed methodology for existing homes, Reduced Data SAP (RdSAP) and the



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	<p>circumstances when an alternative methodology should be considered</p> <p>2.7 Describe the options that the client could consider regarding the use of an alternative assessment methodology, such as referring on to an assessor accredited for that methodology</p> <p>2.8 Explain the importance of confirming in writing the arrangements agreed between you and the customer</p> <p>2.9 Describe the fee structures and payment arrangements for energy assessments</p> <p>2.10 Explain how to confirm on-site inspection arrangements with the customer or other occupier</p> <p>2.11 Explain the importance of confirming whether any specific arrangements apply to the energy assessment</p> <p>2.12 Describe how to identify and explain any circumstances that prevent you from undertaking an energy assessment</p> <p>2.13 Describe how to explain that ratings and recommendations may differ from past assessments due to changes in methodology or legislation and other differences</p>
3. Understand how to investigate relevant matters relating to the property	<p>3.1 Explain the different types of information that it is important to obtain to generate a complete and accurate Energy Performance Certificate</p> <p>3.2 Identify the different sources of information relating to the energy performance of the property that can be investigated</p> <p>3.3 Describe how to obtain information on relevant matters relating to the energy performance of the property</p> <p>3.4 Identify the prevailing geographical/environmental features that may affect the energy performance of the property</p> <p>3.5 Describe how to evaluate relevant information in order to identify any significant factors that may influence the energy assessment</p> <p>3.6 Describe how to identify circumstances that prevent you from assessing the energy performance of the property</p> <p>3.7 Explain why it is important to ensure that you have access to the most up-to-date version of the RdSAP software and associated reference materials</p>
4. Be able to agree and confirm instructions to undertake energy assessments	<p>4.1 Clarify and confirm the expectations and requirements of the client</p> <p>4.2 Respond to requests to undertake energy assessments</p> <p>4.3 Explain to the client that an Energy Performance Certificate is a legally required document, that its form and content is prescribed and that it must be accompanied by cost effective recommendations</p> <p>4.4 Explain to the client the terms and conditions under which the energy assessment will be undertaken including any circumstances or constraints that may prevent it</p>



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	4.5 Explain to the client when a potential conflict of interest requires disclosure to the client or requires the energy assessor to decline the instructions altogether
	4.6 Explain to the client the limited circumstances where representative properties and/or data collected by others may be used in the preparation of Energy Performance Certificates for existing dwellings
	4.7 Where use of the Reduced Data SAP (RdSAP) methodology is not appropriate, direct the customer towards the appropriate approved assessment methodology
	4.8 Confirm agreed arrangements in writing, including date and specific circumstances, protocols and the prescribed form and content
	4.9 Confirm with the client on-site inspection arrangements, including any specific arrangements, the fee structures and payment arrangements
	4.10 Where necessary, explain to the client that ratings and recommendations may differ from past assessments due to changes in methodology or legislation, and other differences
5. Be able to investigate relevant matters relating to the property	5.1 Explain options that the client could consider regarding the use of an alternative assessment methodology, such as referring on to an assessor accredited for that methodology
	5.2 Investigate and record the information necessary to generate a complete and accurate Energy Performance Certificate
	5.3 Evaluate significant factors such as geographical/environmental features that may influence or affect the conduct of the energy assessment
	5.4 Identify circumstances that prevent the assessment of the energy performance of a property (e.g. health and safety) and ensure that the client is informed
	5.5 Ensure that the most up-to-date version of the prescribed software and associated reference materials can be accessed



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Unit 3: Undertake energy inspections

Unit Reference Number: T/503/8165

Level: 3

Credit: 11

Unit Summary

To develop the competences to carry out an inspection in order to determine the energy performance of property by gathering data and information in accordance with the prescribed methodology (RDSAP) to generate an Energy Performance Certificate.

Assessment Guidance

This unit can be assessed using the following method(s):

- Portfolio of evidence

Learning Outcome The learner will:	Assessment Criterion The learner can:
1. Understand the information that is needed to produce the data to generate an Energy Performance Certificate (EPC) of a domestic property	1.1 Explain the principles of building structure, services, elements and fabric as relevant to energy performance of property
	1.2 Identify the equipment and resources needed for the inspection and explain how to use them
	1.3 Explain the detailed inspection requirements that apply to a property as defined by the current prescribed methodology, including the definitions and conventions that apply
	1.4 Identify the various characteristics of buildings
	1.5 Identify the space and water heating system(s) and lighting systems present at the property
	1.6 Explain the consequences, for both the rating result and energy efficiency measures, of recording an item as "unknown" or "as built"
	1.7 State the purpose behind government procedures for assessing the energy performance of property
2. Understand the range of factors that affect the energy performance of a property	2.1 Explain the factors and assumptions that are made in determining energy performance
	2.2 Explain the definitions and conventions of RdSAP methodology and the effect of changes to them over time
	2.3 Identify the factors that are not deemed to affect the energy performance
	2.4 Explain the relative sensitivity of the different factors that affect energy performance and critical property features where incorrect choice of values will be significantly detrimental to accuracy



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	<p>2.5 Identify in outline the differences between the RdSAP and Standard Assessment Procedure (SAP) energy assessment methodologies:</p> <ul style="list-style-type: none"> • Explain the factors that could affect the choice of energy efficiency measures for the property, including: • Issues that make them unsuitable for the property • Interactions between building fabric and building services • Listed building status/conservation areas
	2.6 Explain the requirements and application of relevant building regulations and other technical standards
	2.7 Explain the purpose behind government procedures for assessing the energy performance of property
	2.8 Describe the types of behavioural advice regarding energy efficiency that can be provided to occupants during inspection
	2.9 Identify the sources of information and advice about energy performance to which occupants can be referred
3. Understand how to collate and maintain records of inspection findings	3.1 Explain the importance of keeping your records legible, complete and accurate
	3.2 Explain the purpose behind government procedures for assessing the energy performance of property
	3.3 Identify the range of methods, formats and conventions for recording information and evidence on the property and its energy performance
	3.4 Identify the required range of information and evidence relating to the property and its energy performance as defined by the current RdSAP methodology and its associated guidance and conventions
	3.5 Identify the level of detail within your records required to produce complete and comprehensive Energy Performance Certificates and justify your decisions on values recorded and energy efficiency measures selected
	3.6 Describe the importance of making and maintaining records that are complete, accurate and legible
	3.7 State the reasons why it is necessary and important to record where and why accurate inspection has not been possible
	3.8 Describe the circumstances in which records can include the fact that information is "unknown" and the evidence required to support this choice
	3.9 Describe why it is important to store records securely allowing for future access
	3.10 State the purposes for which your records may be used



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4. Be able to inspect property to determine energy performance	4.1 Introduce self and provide evidence of identity to those present at the property before commencing the inspection
	4.2 Ensure that you have the equipment and resources needed for the inspection, use them correctly and interpret data accurately
	4.3 Identify and record the age and method of construction of the property, the main materials used including the glazing, and the space, water-heating and lighting systems present
	4.4 Explain to the client any circumstances which prevent the inspection of the property
	4.5 Undertake a methodical visual inspection of all relevant aspects of the property in accordance with the requirements of the Reduced Data SAP (RdSAP) methodology and its conventions, to provide an outcome which is consistent with other energy assessors
	4.6 Provide behavioural advice regarding energy efficiency to occupants where possible and sources of further information and advice
5. Be able to collate relevant information to assess the energy level of the property	5.1 Make accurate observations and measurements to provide data for calculation of energy performance ratings
	5.2 Obtain all additional information that is needed about the property especially where this is needed to avoid recording an item as 'unknown'
	5.3 Make further investigations where observations are inconsistent with existing evidence and expected findings, identifying the causes of these inconsistencies
	5.4 Identify property features, where incorrect choice of values will be significantly detrimental to accuracy and take appropriate steps to correctly represent these features to arrive at an accurate assessment of the property
	5.5 Follow the correct procedures for collecting information to enable the energy efficiency of the property to be determined
	5.6 Identify and record any factors that could affect the choice of energy efficiency measures for the property, such as: <ul style="list-style-type: none"> • Issues that make them unsuitable for the property • Listed building status • Interactions between building fabric and building services



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6. Be able to maintain records of inspection findings	6.1 Produce and maintain complete, accurate and legible records of your findings, including: <ul style="list-style-type: none"> • Investigations carried out • Values recorded • Options considered
	6.2 Record information at a sufficient level of detail to produce complete and comprehensive Energy Performance Certificates and justify your decisions on values recorded and energy efficiency measures selected
	6.3 Identify the range of information and evidence relating to the property and its energy performance as defined by the current RdSAP methodology and its associated guidance and conventions
	6.4 Create, maintain and supply records of which energy efficiency measures were considered and rejected with reasons
	6.5 Explain and record any circumstances where accurate inspection has not been possible or where the information is "unknown"
	6.6 Ensure that records are catalogued and stored securely and can be readily accessed for appropriate purposes
	6.7 Co-operate promptly with requests for inspection records in relation to monitoring or investigation by your Accrediting Body, or equivalent in the Devolved Administrations



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Unit 4: Produce and explain Energy Performance Certificates relating to domestic property

Unit Reference Number: J/504/0924

Level: 3

Credit: 4

Unit Summary

This unit aims to cover the activities once the inspection is completed, for example how the Energy Performance Certificate (EPC) is produced and filed, and how recommended measures work to improve the energy performance of the property may need to be communicated to the relevant individuals.

Assessment Guidance

This unit can be assessed using the following method(s):

- Portfolio of evidence

Learning Outcome The learner will:	Assessment Criterion The learner can:
1. Understand the principles underpinning the Energy Performance Certification process	1.1 Describe the implications for energy efficiency of building pathology and morphology and their implications for energy assessment and recommended action; the special considerations that apply to buildings of traditional construction
	1.2 Describe the relationship between the building fabric, building location and building services and their impact on energy assessment process and energy efficiency measures
	1.3 Identify ways of ensuring that the information gathered leads to realistic and practical energy efficiency measures
	1.4 Describe the necessary quality assurance checks to conduct on own information gathering to ensure values are correct and energy efficiency measures are realistic
	1.5 Describe how to identify problematic or 'unknown' factors which could affect value attribution
	1.6 Describe how to gather more information to avoid use of default values
	1.7 Identify the critical property features where incorrect choice of values will be significantly detrimental to accuracy
	1.8 Describe the prescribed format and content of an Energy Performance Certificate
	1.9 Describe the differences in the Energy Performance Certificate format used in England/Wales and in the Devolved Administrations
	1.10 Describe the Conventions used in Reduced Data SAP (RdSAP) energy assessment and the implications for results when these change
	1.11 Describe the role of Government's Scheme Operational Requirements on Accreditation Bodies, or equivalents in the Devolved Administrations and how they must be followed to ensure the accuracy of entries and quality of energy efficiency measures



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	1.12 Identify the special factors to take into account for listed buildings and other heritage factors
	1.13 Describe ways to minimise the impact of measures in conservation areas and/or listed buildings to address likely concerns of Conservation Officers, or equivalents in the Devolved Administrations
	1.14 Describe the range of energy efficiency measures to improve the energy performance of property that may be included within an Energy Performance Certificate
2. Understand the principles and operation of the approved software used to generate recommendations for improved energy performance of a property	2.1 Describe the software used to produce Energy Performance Certificates and how to use it correctly
	2.2 Describe the principles underpinning the approved software used to calculate energy ratings
	2.3 Describe how to input data using the approved software in order to determine energy performance ratings
	2.4 Describe how to use approved software to generate energy efficiency measures for measures to improve the energy performance of property
	2.5 Identify the circumstances in which items can be recorded as 'unknown'
	2.6 Describe why it is important to check that data has been inputted correctly and how to review data if the calculation will not process or appears incorrect
	2.7 Describe why it is important to check the energy efficiency measures generated, deleting any that are inappropriate and providing your reasons
	2.8 Describe the way in which energy efficiency measures are generated and circumstances when it is appropriate to delete them
	2.9 Describe why it is important to use plain language and appropriate terms where free text is allowed and of complying with data protection
	2.10 Describe why it is important to check the Energy Performance Certificate to ensure it is clear and complete
	2.11 Explain the special considerations that apply to buildings of traditional construction in relation to their energy efficiency
	2.12 Identify areas of potential uncertainty or insufficient information which could affect value attribution and carry out checks to avoid common misattributions when inputting data
	2.13 Identify critical property features where incorrect choice of values will be significantly detrimental to accuracy in terms of: <ul style="list-style-type: none"> • Rooms in the roof • Retrofitted insulation • Un-separated conservatory • Extensions Wall construction • Primary, secondary and portable heating • Inadequate heating • Age of main property and of any extensions or roof rooms • Low and zero carbon technologies • Any other features that when incorrectly identified will have a significant detrimental effect to rating accuracy



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	2.14 Explain the circumstances in which items can be recorded as 'unknown'
	2.15 Explain the way in which recommendations are generated and the circumstances when it is appropriate to delete them
	2.16 Describe the role of Government's Scheme Operational Requirements on Accreditation Bodies and how they must be followed to ensure the accuracy of entries and quality of energy efficiency measures selected
3. Understand the process for issuing Energy performance Certificates and explaining their contents	3.1 Describe how to establish the customer's understanding of the Energy Performance Certification process and their expectations as to outcomes
	3.2 Identify the components and outcomes of the energy assessment process and likely customer queries about them
	3.3 Describe how to use the information technology underpinning the national register for lodgement and retrieval of Energy Performance Certificates and how to provide necessary audit evidence via electronic transfer
	3.4 Explain why it is important to inform the customer when the Energy Performance Certificate is available
	3.5 Describe how to interpret the ratings and energy efficiency measures provided in the Energy Performance Certificate
	3.6 Describe how to explain all the component parts of the Energy Performance Certificate and their implications clearly to the customer
	3.7 Identify the limitations of the approved software and their implications for both ratings and energy efficiency measures
	3.8 Describe the circumstances in which the data recorded on the prescribed database may be accessed by others
	3.9 Describe how to respond to queries regarding the Energy Performance Certificate and provide clarification of the contents
	3.10 Describe the limitations on answers to queries which it is appropriate to provide to customers
	3.11 Identify the sources of further information and advice to which people could be referred
	3.12 Describe the role of the Energy Performance Certificate within Green Deal
	3.13 Describe how customers can express an interest in the Green Deal and the first steps in the process
	3.14 Describe the characteristics of good customer service
	3.15 Describe the necessary features of a complaints procedure and how customers may access your own complaints procedure
	3.16 Describe the reasons for maintaining clear and complete internal records
	3.17 Identify the minimum period of time for which you must retain records



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	3.18 Describe how to draw the customer’s attention to any energy efficiency measures specifically excluded by the assessor if requested to by the customer
	3.19 Explain the terminology used on the Energy Performance Certificate, paying attention to differences between the precise meaning of the terms and their commonly used meaning
	3.20 Describe how to advise customers about ways to minimise the impact of measures in conservation areas and or listed buildings, to address likely concerns of Conservation Officers
4. Be able to generate Energy Performance Certificates using approved software	4.1 Assemble and collate information from the on-site inspection and from other relevant and reliable sources
	4.2 Use approved software to determine energy performance ratings ensuring that data is entered accurately
	4.3 Take appropriate steps to correctly represent the property’s critical property features to arrive at an accurate assessment of the property
	4.4 Obtain sufficient information to ensure values entered for all components are accurate
	4.5 Before inputting an item as ‘unknown’, carry out sufficient investigations to minimise the use of default values
	4.6 Use approved software to generate energy efficiency measures for the property
	4.7 Take account of the interaction between the building fabric and the services in the building when considering energy efficiency measures
5. Be able to produce an Energy Performance Certificate	5.1 Produce an Energy Performance Certificate that meets relevant codes of practice and standards, including the accurate recording of the date prepared and relevant property address
	5.2 Use plain language and appropriate terms where free text is allowed
	5.3 Check the recommendations generated and delete any inappropriate ones, in accordance with conventions and providing reasons for doing so
	5.4 Provide a set of energy efficiency measures tailored to the fabric and location of the building, taking account of available fuel supplies and current conventions
	5.5 Check that data has been inputted correctly and review data if the calculation will not process or appears incorrect
	5.6 Recognise a result that is clearly incorrect for the property in question
	5.7 Take the necessary corrective action where any of your checks indicate a possible misattribution of data or error in the resulting rating or energy efficiency measures
	5.8 Check the data is complete before finalising the Energy Performance Certificate and check it to ensure it is clear and complete
6. Be able to issue and explain the Energy Performance Certificate	6.1 Lodge Energy Performance Certificates on the prescribed national databank on completion
	6.2 Inform the customer that the Energy Performance Certificate has been completed and is available to them



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	6.3 Establish the customer's understanding of the Energy Performance Certification process and their expectations as to outcomes
	6.4 Explain all the component parts of the Energy Performance Certificate and their implications
	6.5 Explain variations between ratings and energy efficiency measures produced by different versions of the calculation methodology and between assessment undertaken using the different methodologies for new and existing homes
	6.6 Explain to customers the limitations of the approved software for both ratings and energy efficiency measures
	6.7 Respond to queries about the Energy Performance Certificate and clarify their contents when necessary
	6.8 Provide a high standard of customer service in all dealings with your customer including issuing and explaining their Energy Performance Certificate
	6.9 Inform your customer that you have a complaints procedure and advise them how to access it
	6.10 Collate relevant information as evidence to support the specific decisions made on values and energy efficiency measures considered
	6.11 Maintain records of which energy efficiency measures were considered and rejected with reasons
	6.12 Keep accurate and traceable records of investigations carried out, values attributed and options considered
	6.13 Maintain internal records which are clear, complete and conform to professional and statutory requirements
7. Be able to explain to customers how the Energy Performance Certificate may be used to improve the energy efficiency of domestic property	7.1 Identify the circumstances where data collected during the inspection and recorded on the prescribed database may be accessed by others
	7.2 Identify relevant sources of additional information, advice and support
	7.3 Identify ways to minimise the impact of measures in conservation areas and/or listed buildings to address likely concerns of Conservation Officers
	7.4 Explain the precise meaning of any terms used on the Energy Performance Certificate where this differs from their commonly used meaning
	7.5 Explain why predicted savings from energy efficiency measures, based on standard occupancy, may not be achieved in practice
	7.6 Explain the role of the Energy Performance Certificate within Green Deal
	7.7 Explain how customers can express an interest in the Green Deal and the first steps in the process



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Unit 5: Provide information to customers on the principles, financing and operation of the Green Deal

Unit Reference Number: T/503/8179

Level: 3

Credit: 4

Unit Summary

This unit is about demonstrating a general understanding of the overall purpose of the Green Deal and how it operates and is financed.

Assessment Guidance

This unit can be assessed using the following method(s):

- Portfolio of evidence

Learning Outcome The learner will:	Assessment Criterion The learner can:
1. Understand the components of the Green Deal	1.1 Describe the role of Green Deal in improving energy efficiency and reducing energy consumption
	1.2 Identify sources of information about Green Deal and how they are accessed by customers
	1.3 Identify who is eligible for the Green Deal and the restrictions that apply
	1.4 Identify the different types of tenure which affect the status of individuals
	1.5 Identify the different processes to be undertaken relevant to different types of tenure
	1.6 Identify the main roles and responsibilities of: <ul style="list-style-type: none"> • the Green Deal Adviser • the Green Deal Provider • the Green Deal Installer
	1.7 Explain the function of the Energy Performance Certificate and how it contributes to the Green Deal process
	1.8 Identify the eligible measures which can be funded under Green Deal
	1.9 Explain how the Green Deal is financed and repaid
	1.10 Explain the Golden Rule and its role in establishing the financial offer in Green Deal
	1.11 Explain how customers can access information about Green Deal Installers and Providers



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2. Understand how to provide high quality, independent and impartial advice to customers	2.1 Explain the components of the Green Deal Code of Practice including its impact on the service delivered to customers
	2.2 Explain the ways of providing impartial advice and recommendations within Green Deal
	2.3 Explain the legal safeguards available to customers in relation to mis-selling, credit agreements and redress for complaints
	2.4 Explain the support available to eligible customers through the Energy Company Obligation subsidy and heating and other fuel benefits
	2.5 Explain the permissions, consents and disclosure requirements operating in relation to Green Deal
	2.6 Explain the specific protections and support available for vulnerable groups and customers under Green Deal
	2.7 Explain the ways in which Green Deal can operate for rural customers, those who are off the gas grid and for traditional properties
	2.8 Identify energy efficiency measures, support and finance mechanisms outside the Green Deal
	2.9 Explain how customers can access information about energy efficiency measures, support and finance mechanisms outside the Green Deal
	3. Be able to provide customers with information on Green Deal to meet their needs
3.2 Identify for customers where further information and support about Green Deal can be accessed by customers	
3.3 Explain to customers the role of the Green Deal Adviser and how they provide impartial advice and recommendations to customers	
3.4 Inform the customer of their rights and protections under law in relation to Green Deal	
3.5 Explain to customers how the assessment of energy performance is undertaken and the role of that assessment in the Green Deal process	
3.6 Explain to customers the energy efficiency measures that can be funded through the Green Deal funding	
3.7 Explain to customers the long term nature of cost savings arising from the installation of energy saving measures	
3.8 Explain to customers how the funding offer is arrived at and who can provide financing	
3.9 Explain to customers the role of the Green Deal provider as the funding agency	
3.10 Explain to customers the role of the energy suppliers as collectors of payment via the energy bill	
3.11 Explain to customers the permissions and consents that are required in order to take up Green Deal	
3.12 Explain to customers the Energy Company Obligation subsidy and the eligibility criteria for it	
3.13 Explain to customers the heating and other fuel benefits that may be available under Green Deal and the eligibility criteria for them	



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	3.14 Provide information to customers on the Feed in Tariffs and Renewable Heat Incentive mechanisms and how they operate within Green Deal
	3.15 Explain to customers the impact of special requirements in relation to rural location, those off the gas grid or in traditional properties
	3.16 Respond to customer queries and signpost them to other information and services when required



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Unit 6: Undertake occupancy assessments and give advice

Unit Reference Number: L/503/8186

Level: 3

Credit: 8

Unit Summary

This unit is about carrying out home visits to carry out an occupancy assessment and give advice on reducing energy use.

Assessment Guidance

This unit can be assessed using the following method(s):

- Portfolio of evidence

Learning Outcome The learner will:	Assessment Criterion The learner can:
1. Know how to conduct an occupancy assessment	1.1 Explain why a home visit is needed in order to undertake an occupancy assessment for the purpose of Green Deal
	1.2 Identify the range of data that is required from the customer to enable an occupancy assessment as defined by the prescribed methodology
	1.3 Explain the methods used to obtain data and information
	1.4 Explain how to make a methodical visual on-site inspection of a property
	1.5 Identify the requirements of the prescribed methodology for the occupancy assessment
	1.6 Specify the definitions and conventions that apply to the prescribed methodology for occupancy assessment
	1.7 Identify the requirements of Codes of Practice or other guidance applying to the home visit
	1.8 Describe how to identify gaps in information gathered and any additional data required to fill them
	1.9 Explain the data protection requirements relating to customer's data
	1.10 Identify the features of a property that may indicate that RdSAP is an inappropriate methodology for energy assessment
	1.11 Describe how to assess the likely current energy performance of any property elements compared to its performance as originally built
	1.12 Identify the performance and durability of materials and systems over time
	1.13 Describe the functioning of building services where this relates to energy performance



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2. Understand the methods of reducing energy consumption and achieving affordable warmth	2.1 Explain how to establish and clarify the needs, circumstances, motivations and capabilities of customers regarding energy consumption
	2.2 State the definition of a household in Fuel Poverty
	2.3 Explain how to recognise households at risk of being in Fuel Poverty
	2.4 Identify the types of poor health typically associated with energy inefficient housing
	2.5 Identify the limits of own expertise in relation to Fuel Poverty and possible health outcomes
	2.6 Describe the sources of help and advice available for those at risk of Fuel Poverty or poor health associated with energy inefficient housing
	2.7 Identify the features of a property that encourage mould growth and condensation
	2.8 Identify the types of occupier behaviour that encourages mould growth and condensation
	2.9 Describe the indicators of under heating of a property and their implications for the occupancy assessment
	2.10 Identify the constraints that may affect the customer's ability to act
	2.11 Identify the sources of financial support available to customers including Green Deal finance and the Energy Company Obligation measures
	2.12 Identify the opportunities for the installation of energy efficiency measures
	2.13 Describe the impact of different types of tenure on occupancy assessment
	2.14 Describe the landlord's responsibilities for compliance with legislation and obligations regarding property standards and energy efficiency in housing
	2.15 Explain how the occupier's use of installed appliances, systems and controls affect overall energy efficiency and fuel bills
	2.16 Identify the efficient, safe and appropriate use of appliances, systems and controls
	2.17 Describe the main methods and products for controlling and managing: <ul style="list-style-type: none"> • The use of water and minimising waste of water • Waste reduction, re-use and re-cycling
	2.18 Describe the types of questions, issues and concerns that customers might have about the home visit and the occupational advice given
	2.19 Identify the sources of information to which the customer can be referred for further help and advice



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3. Understand written records required for inspection findings	3.1 Explain the methods, formats and conventions for recording information and evidence on the occupancy assessment
	3.2 Identify the information and evidence required by the current occupancy assessment methodology and associated guidance and conventions
	3.3 Define the level of detail required to produce a complete and comprehensive Green Deal Advice Report
	3.4 Explain how records can be used to justify decisions on the values recorded and the advice given
	3.5 Identify the evidence required to support the choice of the 'unknown' value
	3.6 Explain the importance of storing information and records securely for future access and to meet Certification Scheme inspection requirements
	3.7 Explain the role and obligations of Certification schemes in respect of auditing records of inspection findings
4. Be able to conduct an occupancy assessment	4.1 Explain to customers the information they will need to provide for the occupancy assessment
	4.2 Use appropriate methods to obtain relevant information from customers
	4.3 Confirm that the customer is the person responsible for the property's fuel bills and has the authority to take action under the Green Deal
	4.4 Gather data and information from appropriate documentation to enable the occupancy assessment to take place
	4.5 Establish that the RdSAP methodology is appropriate for identifying Green Deal energy efficiency measures in the property
	4.6 Conduct a methodical visual inspection of the property in accordance with the prescribed methodology for the occupancy assessment
	4.7 Assess how the current condition of the property may affect its energy performance
	4.8 Check for the presence of Carbon Monoxide Detectors in the property
	4.9 Seek confirmation that the Carbon Monoxide Detectors are working if present
5. Be able to advise customers on methods of reducing energy consumption and achieving affordable warmth	5.1 Establish with customers their needs, circumstances, abilities, motivations and capabilities in relation to energy consumption reduction
	5.2 Identify any constraints that might affect the customer's ability to act
	5.3 Provide advice which is consistent with the needs, circumstances, abilities, motivations and capabilities of the customer
	5.4 Provide the customer with information about potential funding and financial support available to them
	5.5 Advise customers affected by fuel poverty and poor environmental conditions about the sources of help and advice available to them



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	5.6 Explain to customers how their current use of appliances, systems and controls affects: <ul style="list-style-type: none"> • their energy consumption • fuel bills • thermal comfort • risk of condensation
	5.7 Provide information on the methods and products for achieving: <ul style="list-style-type: none"> • the efficient management of water usage and minimisation of waste • reduction, re-use and re-cycling of waste
	5.8 Advise the customer of the limitations on the advice given
	5.9 Respond to customer queries, issues and concerns about the home visit and the occupational advice given
6. Be able to maintain written records of inspection findings	6.1 Create and maintain complete, accurate and legible records of findings including: <ul style="list-style-type: none"> • Investigations carried out • Values recorded • Options considered
	6.2 Justify decisions on values and the nature of the advice based on the records produced
	6.3 Record clearly where information cannot be obtained and where data is recorded as 'unknown' and why this action was unavoidable
	6.4 Catalogue, secure and store records for the prescribed periods of time to ensure access for future use



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Unit 7: Prepare and Issue Domestic Green Deal Advice Reports

Unit Reference Number: R/503/8187

Level: 3

Credit: 6

Unit Summary

This unit is about producing and lodging a Green Deal Advice Report

Assessment Guidance

This unit can be assessed using the following method(s):

- Portfolio of evidence

Learning Outcome The learner will:	Assessment Criterion The learner can:
1. Understand the process of inputting data for the domestic Green Deal Advice Reports	1.1 Describe the prescribed format and content of a domestic Green Deal Advice Report
	1.2 Identify the information required to produce a compliant domestic Green Deal Advice Report
	1.3 Explain how to retrieve any pre-existing Energy Performance Certificates for the property and the underpinning data linked to it
	1.4 Identify the range of energy efficiency measures that may be included within a domestic Green Deal Advice Report
	1.5 Explain the principles underpinning the approved software used to prepare a domestic Green Deal Advice Report
	1.6 Identify common areas of potential uncertainty or insufficient information which could affect value attribution
	1.7 Define the quality assurance checks to conduct on information to ensure that: <ul style="list-style-type: none"> • Values are correct • Energy efficiency measures are realistic and appropriate for the subject property
	1.8 Define the circumstances in which items can be recorded as 'unknown' as defined by conventions
	1.9 Describe the consequences of recording an item as 'unknown' or as built on the methodology's assessment process
	1.10 Identify the implications for domestic Green Deal reports and energy efficiency measures when the conventions used in Green Deal assessments change
	1.11 Describe how to ensure that data is inputted correctly and how to review data if the calculation will not process



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2. Understand how to assess energy efficiency measures for the domestic Green Deal Advice Reports	2.1 Describe the relationship between the building fabric and building services and the impact on the energy assessment process and energy efficiency measures proposed
	2.2 Explain how any future intentions for work on the property will affect the selection and ordering of work on energy efficiency measures
	2.3 Describe how to use approved software to generate energy efficiency measures that are bespoke to the property and its current occupier
	2.4 Explain how to check and amend energy efficiency measures generated to ensure they are appropriate for the property and customer
	2.5 Describe the consequences of making inappropriate suggestions for energy efficiency measures
	2.6 Describe how the approved software generates energy efficiency measures and estimates their cost savings
	2.7 Explain how to adjust estimated savings in accordance with the occupancy assessment to provide an indication of how actual savings may differ from standard estimates
	2.8 Explain what is meant by the Green Deal Principle (Golden Rule) and how it is calculated, including that the cost of energy efficiency measures used in the calculation could change
3. Understand how to lodge and issue domestic Green Deal Advice Reports	3.1 Explain the content of the codes of practice and standards that apply to preparing domestic Green Deal Reports
	3.2 Explain the importance of fully disclosing any referral fees or other benefits received in relation to suggested products, services and suppliers
	3.3 Explain the process of lodging and issuing a domestic Green Deal Advice Report
	3.4 Identify the level and detail of information storage required in relation to domestic Green Deal Advice Reports
	3.5 Explain how to update the Energy Performance Certificate after the installation of agreed energy efficiency measures
4. Be able to prepare domestic Green Deal Advice Reports	4.1 Collate information required including any pre-existing Energy Performance Certificates
	4.2 Use the approved software to prepare domestic Green Deal Reports
	4.3 Ensure that values entered for all components are accurate
	4.4 Identify areas of potential uncertainty or insufficient information which could affect value attribution and carry out checks to avoid likely errors
	4.5 Carry out further investigations to identify appropriate values in order to reduce or eliminate use of default values and the 'unknown' option
	4.6 Identify the circumstances in which the use of default values or 'unknown' is unavoidable and the steps to be taken to avoid their use in accordance with relevant conventions and Code of Practice



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	4.7 Generate energy efficiency measures which are appropriate for the property using the approved software and the guidance or conventions applying to its use
	4.8 Identify energy efficiency measures which take account of: <ul style="list-style-type: none"> • the interaction between the building fabric and the building services • building location • needs, circumstances and motivations of the customer
	4.9 Use approved software to: <ul style="list-style-type: none"> • estimate energy use and associated energy costs • estimate energy and cost savings from energy efficiency measures • produce figures to be used in the domestic Green Deal (Golden Rule) calculation • assess which energy efficiency measures or packages of measures are likely to be eligible for Green Deal finance
	4.10 Prepare domestic Green Deal Advice Reports that meet Certification Scheme requirements and certification body requirements
	4.11 Check the Green Deal Advice Report to ensure it is clear and complete
	4.12 Disclose any referral fees or other benefits to be received should the customer follow suggestions for particular products, services or suppliers
5. Be able to lodge and issue domestic Green Deal Advice Reports	5.1 Collate information in support of: <ul style="list-style-type: none"> • investigations carried out • values attributed • energy efficiency options considered • energy efficiency options rejected with justification • specific decisions made and energy efficiency measures proposed
	5.2 Ensure that records kept are clear, complete and meet Green Deal and statutory requirements and follow accepted professional standards
	5.3 Follow the procedure for lodging domestic Green Deal Advice Reports on the prescribed national register
	5.4 Issue domestic Green Deal Advice Reports to customers
	5.5 Follow the procedures for updating an Energy Performance Certificate after the installation of energy efficient measures



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Unit 8: Explain the Green Deal Advice report to the domestic customer

Unit Reference Number: Y/503/8188

Level: 3

Credit: 4

Unit Summary

This unit is about demonstrating a general understanding of the overall purpose of the Green Deal and how it operates and is financed

Assessment Guidance

This unit can be assessed using the following method(s):

- Portfolio of evidence

Learning Outcome The learner will:	Assessment Criterion The learner can:
1. Understand the components of the domestic Green Deal Advice Report to domestic customers	1.1 Explain the requirements of the Green Deal Code of Practice in respect of: <ul style="list-style-type: none">• issuing the Green Deal Advice Report to customers• the professional responsibilities and liabilities in the giving of advice• any disclaimers that should be made
	1.2 Explain which energy efficiency measures have the greatest impact on the energy performance of a building
	1.3 Describe the benefits of installing energy efficiency measures as a package
	1.4 Describe the importance of the sequence of installation
	1.5 Describe how estimates are arrived at and how robust they are
	1.6 Describe for how long estimates will be valid
	1.7 Identify the different circumstances and requirements of rural customers, those off the gas grid and those living in traditional buildings
	1.8 Identify the specific advice needed on implementing the recommendations which may have to be provided
	1.9 Identify the sources of further information and advice
	1.10 Explain the funding options available and the eligibility requirements of the Green Deal finance package
	1.11 Identify the features, characteristics and eligibility criteria of alternative energy efficiency programmes outside the Green Deal



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	1.12 Identify how to access funding for alternative energy efficiency programmes outside the Green Deal
	1.13 Establish the critical factors for the customer in deciding which measures to pursue including economic and personal circumstances
	1.14 Identify ways of creating a clear demarcation between the independent and impartial stage of the process and the declaration of any links to providers and/or suppliers
	1.15 Explain the next steps in the process
	1.16 Identify the key individuals and organisations involved and how to contact them
2. Be able to explain the components of the Green Deal Advice report and their implications to the domestic customer	2.1 Explain to customers which energy efficiency measures have greater impact on the energy performance of a building
	2.2 Explore with customers the merits and demerits of the proposed energy efficiency measures and ways of overcoming any barriers to implementing the energy efficiency measures
	2.3 Explain to customers the benefits of installing several measures as part of a package and the advantage of correctly sequencing the installation
	2.4 Explain to customers how estimates of running costs produced by RdSAP have been arrived at and for how long they are valid
	2.5 Explain to customers the gap between standard savings estimates and likely actual savings based on occupancy
	2.6 Identify ways in which the recommendations can be implemented and where to go for help
	2.7 Provide advice on the Energy Performance Certificate Adviser tool to help the customer select appropriate energy efficiency measures
	2.8 Indicate how any future changes in energy consumption and costs not included in the assessment may impact on savings
	2.9 Explain to customers any relevant incentives for the customer adopting the proposed Green Deal package of energy measures
	2.10 Explain any likely limitations on customer choice in respect of brands and appearance of equipment and materials that installers will provide in implementing the package of measures
	2.11 Explain to customers the funding options available and how to apply for funding
	2.12 Provide information to customers on other programmes and funding mechanisms for energy efficiency and carbon reduction outside Green Deal



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3. Be able to prepare and present a Green Deal Advice report in a professional and impartial manner	3.1 Provide precise disclosure of the limitations on the advice being given
	3.2 Make clear the impartial technical advice being provided up to this point
	3.3 Make clear own personal responsibility for: <ul style="list-style-type: none"> • the recommendations made • any liabilities that arise from this • any disclaimers relating to the recommendations
	3.4 Disclose any fees that the Green Deal Adviser may receive if the customer follows the advice given in relation to one or more energy efficiency measure
	3.5 Declare any specific links with suppliers of Green Deal products and services
	3.6 Make clear that any further involvement in the process will involve exclusive promotion of the products and services of those suppliers
	3.7 Inform the customer of the Green Deal Code of Practice that regulates the preparation and issuing of the Green Deal Advice Report
	3.8 Make clear the roles and responsibilities of the various parties involved in the Green Deal and who may be involved in the next stages of the process
	3.9 Make the customer aware of responsibilities to future occupiers in terms of potential changes in energy savings should energy saving features be removed
	3.10 Respond to customer questions, issues and concerns in relation to the Green Deal Advice Reports and the next steps in the process within the limits of personal expertise and knowledge
	3.11 Consider the specific needs of customers including those in rural locations, those off the gas grid or living in traditional buildings



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Unit 9: Identify representative properties for sampling and multiple certification

Unit Reference Number: M/503/8164

Level: 3

Credit: 5

Unit Summary

This unit aims to assess the competency of the energy assessor in deciding which properties should be assessed as representative in circumstances in which sampling is appropriate.

Assessment Guidance

This unit can be assessed using the following method(s):

- Portfolio of evidence

Learning Outcome The learner will:	Assessment Criterion The learner can:
1 Understand how to identify representative properties for inspection in appropriate circumstances	1.1 Explain relevant guidance and advice relating to the identification of representative properties including the circumstances where this process is allowed
	1.2 Identify the range of information required relating to the properties in question and the potential sources of such information
	1.3 State the criteria for determining representative properties and how they can be applied in different circumstances
	1.4 Describe the action to take in cases where the required property information is not forthcoming, is incomplete or is inaccurate
	1.5 Describe the factors that affect the energy performance of buildings
	1.6 Describe how to evaluate information relating to properties in order to determine similarities and differences relevant to their energy performance
	1.7 Provide the definition of a representative property
	1.8 Describe how to identify a property or number of properties that are representative for the purposes of assessing energy performance where a sampling approach is relevant
	1.9 Describe the potential consequences of choosing inappropriate property/properties
	1.10 Explain why it is important to record and communicate your reasons where it has not been possible to identify representative property/properties
	1.11 Describe why it is important to be able to justify your reasons for selecting specific representative properties
	1.12 Describe the importance of testing the accuracy of the information on site in order to confirm that it is appropriate to use the data



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	1.13 Describe how to assess the number of on-site tests to conduct to give confidence that the data may be used
	1.14 Explain the importance of records in justifying your process of multiple certification
2. Be able to identify properties that are representative for inspection	2.1 Explain the circumstances where representative properties may be used for the preparation of Energy Performance Certificates
	2.2 Explain the criteria for determining representative properties and how they can be applied in different circumstances
	2.3 Explain how to assess the number of on-site tests on the subject properties to give confidence that the data may be used.
	2.4 Explain the potential consequences of choosing inappropriate property/properties as representative properties
	2.5 Obtain relevant information relating to the properties from the owner or manager, taking appropriate action where the required information is not forthcoming, is incomplete or inaccurate
	2.6 Evaluate information relating to properties in order to determine their similarities and differences with regard to factors likely to affect energy performance
	2.7 Test the accuracy of the information on-site by test inspections on sample properties
	2.8 Identify from evaluation of the information a property or group of properties that are representative for the purposes of assessing energy performance
	2.9 Justify the reasons for selecting specific representative properties in a clear and concise manner
	2.10 Record the rationale and explain the situation to the owner or manager of the property where it is not possible to identify representative property/properties
	2.11 Create and retain records and site notes for the sample properties inspected to support multiple certification and create and retain desk notes for the expansion to the cloned Energy Performance Certificates



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