

Accreditation of prior Learning and Experience for Green Deal Advice Functions

Green Deal Advisors

Reference	Unit Title	Level	Credit
ASTGDA1	Provide information to customers on the principles, financing and operation of the Green Deal	3	4
ASTGDA2	Undertake home visits to carry out Occupancy Assessments and give advice	3	8
ASTGDA3	Prepare and explain Domestic Green Deal Advice Reports	4	6
ASTGDA4	Explain the Green Deal Advice Report to the domestic customer	3	4
ASTGDA5	Carry out Non-domestic energy inspections to determine Operational Profile and give advice	4	10
ASTGDA6	Prepare and issue Non-domestic Green Deal Advice Reports	4	9
ASTGDA7	Explain the Green Deal Advice Report to the Non-domestic customer	4	4

All Green Deal QCF units have been be colour coded:

- those outcomes in red are new, Green Deal specific and for which there will be no APEL
- those outcomes in blue contain content which could be recognised through APEL either
 - through the possession of a validated qualification
 - or
 - through the review of a portfolio of evidence reviewed and validated by an Awarding Organisation

Green Deal Advisors

Title:	ASTGDA1 Provide information to customers on the principles, financing and operation of the Green Deal	
Level:	3	
Credit value:	4	
Learning outcomes	Assessment criteria	
<i>The learner will:</i>	<i>The learner can:</i>	
1 Understand the components of the Green Deal	<p>1.1 Describe the role of Green Deal in improving energy efficiency and reducing energy consumption</p> <p>1.2 Identify sources of information about Green Deal and how they are accessed by customers</p> <p>1.3 Identify who is eligible for the Green Deal and the restrictions that apply</p> <p>1.4 Identify the different types of tenure which affect the status of individuals</p> <p>1.5 Identify the different processes to be undertaken relevant to different types of tenure</p> <p>1.6 Identify the main roles and responsibilities of:</p> <ul style="list-style-type: none"> • the Green Deal Adviser • the Green Deal Provider • the Green Deal Installer <p>1.7 Explain the function of the Energy Performance Certificate and how it contributes to the Green Deal process</p> <p>1.8 Identify the eligible measures which can be funded under Green Deal</p> <p>1.9 Explain how the Green Deal is financed and repaid</p> <p>1.10 Explain the Golden Rule and its role in establishing the financial offer in Green Deal</p> <p>1.11 Explain how customers can access information about Green Deal Installers and Providers</p>	

<p>2 Understand how to provide high quality, independent and impartial advice to customers</p>	<p>2.1 Explain the components of the Green Deal Code of Practice including its impact on the service delivered to customers</p> <p>2.2 Explain the ways of providing impartial advice and recommendations within Green Deal</p> <p>2.3 Explain the legal safeguards available to customers in relation to mis-selling, credit agreements and redress for complaints</p> <p>2.4 Explain the support available to eligible customers through the Energy Company Obligation subsidy and heating and other fuel benefits</p> <p>2.5 Explain the permissions, consents and disclosure requirements operating in relation to Green Deal</p> <p>2.6 Explain the specific protections and support available for vulnerable groups and customers under Green Deal</p> <p>2.7 Explain the ways in which Green Deal can operate for rural customers, those who are off the gas grid and for older properties</p> <p>2.8 Identify energy efficiency measures, support and finance mechanisms outside the Green Deal</p> <p>2.9 Explain how customers can access information about energy efficiency measures, support and finance mechanisms outside the Green Deal</p>
<p>3 Be able to provide customers with information on Green Deal to meet their needs</p>	<p>3.1 Explain to customers the purpose of Green Deal and its role in promoting energy efficiency</p> <p>3.2 Identify for customers where further information and support about Green Deal can be accessed by customers</p> <p>3.3 Explain to customers the role of the Green Deal Adviser and how they provide impartial advice and recommendations to customers</p> <p>3.4 Inform the customer of their rights and protections under law in relation to Green Deal</p> <p>3.5 Explain to customers how the assessment of energy performance is undertaken and</p>

	<p>the role of that assessment in the Green Deal process</p> <p>3.6 Explain to customers the energy efficiency measures that can be funded through the Green Deal funding</p> <p>3.7 Explain to customers the long term nature of cost savings arising from the installation of energy saving measures</p> <p>3.8 Explain to customers how the funding offer is arrived at and who can provide financing</p> <p>3.9 Explain to customers the role of the Green Deal provider as the funding agency</p> <p>3.10 Explain to customers the role of the energy suppliers as collectors of payment via the energy bill</p> <p>3.11 Explain to customers the permissions and consents that are required in order to take up Green Deal</p> <p>3.12 Explain to customers the Energy Company Obligation subsidy and the eligibility criteria for it</p> <p>3.13 Explain to customers the heating and other fuel benefits that may be available under Green Deal and the eligibility criteria for them</p> <p>3.14 Provide information to customers on the Feed in Tariffs and Renewable Heat Incentive mechanisms and how they operate within Green Deal</p> <p>3.15 Explain to customers the impact of special requirements in relation to rural location, those off the gas grid or in traditional properties</p> <p>3.16 Respond to customer queries and signpost them to other information and services when required</p>
Additional information about the unit	
Unit aim(s)	This unit is about demonstrating a general understanding of the overall purpose of the Green Deal and how it operates and is financed.
Unit expiry date	

Details of the relationship between the unit and relevant national occupational standards (if appropriate)	Developed from Asset Skills National Occupational Standards for Green Deal Advisors ASTGDA1
Details of the relationship between the unit and other standards or curricula (if appropriate)	
Assessment requirements specified by a sector or regulatory body (if appropriate)	Please refer to Asset Skills Assessment Principles at www.assetskills.org
Endorsement of the unit by a sector or other appropriate body (if required)	N/A
Location of the unit within the subject/sector classification system	
Name of the organisation submitting the unit	Asset Skills
Availability for use	Shared
Equality & Diversity (Asset Skills use only)	Asset Skills has considered equality and diversity factors in a reasonable, practical and proportionate manner and that no barriers have been identified for learners to complete this unit.
Guided Learning Hours	20

Title:	ASTGDA2 Undertake occupancy assessments and give advice	
Level:	3	
Credit value:	8	
Learning outcomes	Assessment criteria	
<i>The learner will:</i>	<i>The learner can:</i>	
1 Know how to conduct an occupancy assessment	<p>1.1 Explain why a home visit is needed in order to undertake an occupancy assessment for the purpose of Green Deal</p> <p>1.2 Identify the range of data that is required from the customer to enable an occupancy assessment as defined by the prescribed methodology</p> <p>1.3 Explain the methods used to obtain data and information</p> <p>1.4 Explain how to make a methodical visual on-site inspection of a property</p> <p>1.5 Identify the requirements of the prescribed methodology for the occupancy assessment</p> <p>1.6 Specify the definitions and conventions that apply to the prescribed methodology for occupancy assessment</p> <p>1.7 Identify the requirements of Codes of Practice or other guidance applying to the home visit</p> <p>1.8 Describe how to identify gaps in information gathered and any additional data required to fill them</p> <p>1.9 Explain the data protection requirements relating to customer's data</p> <p>1.10 Identify the features of a property that may indicate that RdSAP is an inappropriate methodology for energy assessment</p> <p>1.11 Describe how to assess the likely current energy performance of any property elements compared to its performance as originally built</p>	

	<p>1.12 Identify the performance and durability of materials and systems over time</p> <p>1.13 Describe the functioning of building services where this relates to energy performance</p>
<p>2 Understand the methods of reducing energy consumption and achieving affordable warmth</p>	<p>2.1 Explain how to establish and clarify the needs, circumstances, motivations and capabilities of customers regarding energy consumption</p> <p>2.2 State the definition of a household in Fuel Poverty</p> <p>2.3 Explain how to recognise households at risk of being in Fuel Poverty</p> <p>2.4 Identify the types of poor health typically associated with energy inefficient housing</p> <p>2.5 Identify the limits of own expertise in relation to Fuel Poverty and possible health outcomes</p> <p>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</p> <p>2.7 Identify the features of a property that encourage mould growth and condensation</p> <p>2.8 Identify the types of occupier behaviour that encourages mould growth and condensation</p> <p>2.9 Describe the indicators of under heating of a property and their implications for the occupancy assessment</p> <p>2.10 Identify the constraints that may affect the customer's ability to act</p> <p>2.11 Identify the sources of financial support available to customers including Green Deal finance and the Energy Company Obligation measures</p> <p>2.12 Identify the opportunities for the installation of energy efficiency measures</p> <p>2.13 Describe the impact of different types of tenure on occupancy assessment</p> <p>2.14 Describe the landlord's responsibilities for compliance with legislation and obligations regarding property standards</p>

	<p>and energy efficiency in housing</p> <p>2.15 Explain how the occupier's use of installed appliances, systems and controls affect overall energy efficiency and fuel bills</p> <p>2.16 Identify the efficient, safe and appropriate use of appliances, systems and controls</p> <p>2.17 Describe the main methods and products for controlling and managing:</p> <ul style="list-style-type: none"> • The use of water and minimising waste of water • Waste reduction, re-use and re-cycling <p>2.18 Describe the types of questions, issues and concerns that customers might have about the home visit and the occupational advice given</p> <p>2.19 Identify the sources of information to which the customer can be referred for further help and advice</p>
<p>3 Understand written records required for Inspection findings</p>	<p>3.1 Explain the methods, formats and conventions for recording information and evidence on the occupancy assessment</p> <p>3.2 Identify the information and evidence required by the current occupancy assessment methodology and associated guidance and conventions</p> <p>3.3 Define the level of detail required to produce a complete and comprehensive Green Deal Advice Report</p> <p>3.4 Explain how records can be used to justify decisions on the values recorded and the advice given</p> <p>3.5 Identify the evidence required to support the choice of the "unknown" value</p> <p>3.6 Explain the importance of storing information and records securely for future access and to meet Certification Scheme inspection requirements</p> <p>3.7 Explain the role and obligations of Certification schemes in respect of auditing records of inspection findings</p>
<p>4 Be able to conduct an occupancy assessment</p>	<p>4.1 Explain to customers the information they will need to provide for the occupancy assessment</p>

	<p>4.2 Use appropriate methods to obtain relevant information from customers</p> <p>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</p> <p>4.4 Gather data and information from appropriate documentation to enable the occupancy assessment to take place</p> <p>4.5 Establish that the RdSAP methodology is appropriate for identifying Green Deal energy efficiency measures in the property</p> <p>4.6 Conduct a methodical visual inspection of the property in accordance with the prescribed methodology for the occupancy assessment</p> <p>4.7 Assess how the current condition of the property may affect its energy performance</p> <p>4.8 Check for the presence of Carbon Monoxide Detectors in the property</p> <p>4.9 Seek confirmation that the Carbon Monoxide Detectors are working if present</p>
<p>5 Be able to advise customers on methods of reducing energy consumption and achieving affordable warmth</p>	<p>5.1 Establish with customers their needs, circumstances, abilities, motivations and capabilities in relation to energy consumption reduction</p> <p>5.2 Identify any constraints that might affect the customer's ability to act</p> <p>5.3 Provide advice which is consistent with the needs, circumstances, abilities, motivations and capabilities of the customer</p> <p>5.4 Provide the customer with information about potential funding and financial support available to them</p> <p>5.5 Advise customers affected by fuel poverty and poor environmental conditions about the sources of help and advice available to them</p> <p>5.6 Explain to customers how their current use of appliances, systems and controls affects:</p> <ul style="list-style-type: none"> • their energy consumption • fuel bills • thermal comfort

	<ul style="list-style-type: none"> • risk of condensation <p>5.7 Provide information on the methods and products for achieving:</p> <ul style="list-style-type: none"> • the efficient management of water usage and minimisation of waste • reduction, re-use and re-cycling of waste <p>5.8 Advise the customer of the limitations on the advice given</p> <p>5.9 Respond to customer queries, issues and concerns about the home visit and the occupational advice given</p>
6 Be able to maintain written records of inspection findings	<p>6.1 Create and maintain complete, accurate and legible records of findings including:</p> <ul style="list-style-type: none"> • Investigations carried out • Values recorded • Options considered <p>6.2 Justify decisions on values and the nature of the advice based on the records produced</p> <p>6.3 Record clearly where information cannot be obtained and where data is recorded as “unknown” and why this action was unavoidable</p> <p>6.4 Catalogue, secure and store records for the prescribed periods of time to ensure access for future use</p>
Additional information about the unit	
Unit aim(s)	This unit is about carrying out an occupancy assessment and giving advice on reducing energy use.
Unit expiry date	
Details of the relationship between the unit and relevant national occupational standards (if appropriate)	Developed from Asset Skills National Occupational Standards for Green Deal Advisors ASTGDA2
Details of the relationship between the unit and other standards or curricula (if appropriate)	
Assessment requirements specified by a sector or regulatory body (if appropriate)	Please refer to Asset Skills Assessment Principles at www.assetskills.org
Endorsement of the unit by a sector or other appropriate body (if required)	N/A

Location of the unit within the subject/sector classification system	
Name of the organisation submitting the unit	Asset Skills
Availability for use	Shared
Equality & Diversity (Asset Skills use only)	Asset Skills has considered equality and diversity factors in a reasonable, practical and proportionate manner and that no barriers have been identified for learners to complete this unit.
Guided Learning Hours	40

Title:	ASTGDA3 Prepare and issue domestic Green Deal Advice Reports	
Level:	4	
Credit value:	6	
Learning outcomes	Assessment criteria	
<i>The learner will:</i>	<i>The learner can:</i>	
1 Understand the process of inputting data for the domestic Green Deal Advice Reports	<p>1.1 Describe the prescribed format and content of a domestic Green Deal Advice Report</p> <p>1.2 Identify the information required to produce a compliant domestic Green Deal Advice Report</p> <p>1.3 Explain how to retrieve any pre-existing Energy Performance Certificates for the property and the underpinning data linked to it</p> <p>1.4 Identify the range of energy efficiency measures that may be included within a domestic Green Deal Advice Report</p> <p>1.5 Explain the principles underpinning the approved software used to prepare a domestic Green Deal Advice Report</p> <p>1.6 Identify common areas of potential uncertainty or insufficient information which could affect value attribution</p> <p>1.7 Define the quality assurance checks to conduct on information to ensure that:</p> <ul style="list-style-type: none"> • Values are correct • Energy efficiency measures are realistic and appropriate for the subject property <p>1.8 Define the circumstances in which items can be recorded as “unknown” as defined by conventions</p> <p>1.9 Describe the consequences of recording an item as “unknown” or as built on the methodology’s assessment process</p> <p>1.10 Identify the implications for domestic Green Deal reports and energy efficiency measures when the conventions used in Green Deal assessments change</p>	

	<p>1.11 Describe how to ensure that data is inputted correctly and how to review data if the calculation will not process</p>
<p>2 Understand how to assess energy efficiency measures for the domestic Green Deal Advice Reports</p>	<p>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</p> <p>2.2 Explain how any future intentions for work on the property will affect the selection and ordering of work on energy efficiency measures</p> <p>2.3 Describe how to use approved software to generate energy efficiency measures that are bespoke to the property and its current occupier</p> <p>2.4 Explain how to check and amend energy efficiency measures generated to ensure they are appropriate for the property and customer</p> <p>2.5 Describe the consequences of making inappropriate suggestions for energy efficiency measures</p> <p>2.6 Describe how the approved software generates energy efficiency measures and estimates their cost savings</p> <p>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</p> <p>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</p>
<p>3 Understand how to lodge and issue domestic Green Deal Advice Reports</p>	<p>3.1 Explain the content of the codes of practice and standards that apply to preparing domestic Green Deal Reports</p> <p>3.2 Explain the importance of fully disclosing any referral fees or other benefits received in relation to suggested products, services and suppliers</p> <p>3.3 Explain the process of lodging and issuing a domestic Green Deal Advice Report</p> <p>3.4 Identify the level and detail of information storage required in relation to domestic Green Deal Advice Reports</p>

	<p>3.5 Explain how to update the Energy Performance Certificate after the installation of agreed energy efficiency measures</p>
<p>4 Be able to prepare domestic Green Deal Advice Reports</p>	<p>4.1 Collate information required including any pre-existing Energy Performance Certificates</p> <p>4.2 Use the approved software to prepare domestic Green Deal Reports</p> <p>4.3 Ensure that values entered for all components are accurate</p> <p>4.4 Identify areas of potential uncertainty or insufficient information which could affect value attribution and carry out checks to avoid likely errors</p> <p>4.5 Carry out further investigations to identify appropriate values in order to reduce or eliminate use of default values and the “unknown” option</p> <p>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</p> <p>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</p> <p>4.8 Identify energy efficiency measures which take account of:</p> <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 <p>4.9 Use approved software to:</p> <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 <p>4.10 Prepare domestic Green Deal Advice Reports that meet Certification Scheme</p>

	<p>requirements and certification body requirements</p> <p>4.11 Check the Green Deal Advice Report to ensure it is clear and complete</p> <p>4.12 Disclose any referral fees or other benefits to be received should the customer follow suggestions for particular products, services or suppliers</p>
5 Be able to lodge and issue domestic Green Deal Advice Reports	<p>5.1 Collate information in support of:</p> <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 <p>5.2 Ensure that records kept are clear, complete and meet Green Deal and statutory requirements and follow accepted professional standards</p> <p>5.3 Follow the procedure for lodging domestic Green Deal Advice Reports on the prescribed national register</p> <p>5.4 Issue domestic Green Deal Advice Reports to customers</p> <p>5.5 Follow the procedures for updating an Energy Performance Certificate after the installation of energy efficient measures</p>
Additional information about the unit	
Unit aim(s)	This unit is about preparing and issuing a domestic Green Deal Advice Report
Unit expiry date	
Details of the relationship between the unit and relevant national occupational standards (if appropriate)	Developed from Asset Skills National Occupational Standards for Green Deal Advisors ASTGDA3
Details of the relationship between the unit and other standards or curricula (if appropriate)	
Assessment requirements specified by a sector or regulatory body (if appropriate)	Please refer to Asset Skills Assessment Principles at www.assetskills.org
Endorsement of the unit by a sector or other appropriate body (if required)	N/A

Location of the unit within the subject/sector classification system	
Name of the organisation submitting the unit	Asset Skills
Availability for use	Shared
Equality & Diversity (Asset Skills use only)	Asset Skills has considered equality and diversity factors in a reasonable, practical and proportionate manner and that no barriers have been identified for learners to complete this unit.
Guided Learning Hours	30

Title:	ASTGDA4 Explain the Green Deal Advice Report to the domestic customer	
Level:	3	
Credit value:	4	
Learning outcomes	Assessment criteria	
<i>The learner will:</i>	<i>The learner can:</i>	
1 Understand the components of the domestic Green Deal Advice Report to domestic customers	<p>1.1 Explain the requirements of the Green Deal Code of Practice in respect of:</p> <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 <p>1.2 Explain which energy efficiency measures have the greatest impact on the energy performance of a building</p> <p>1.3 Describe the benefits of installing energy efficiency measures as a package</p> <p>1.4 Describe the importance of the sequence of installation</p> <p>1.5 Describe how estimates are arrived at and how robust they are</p> <p>1.6 Describe for how long estimates will be valid</p> <p>1.7 Identify the different circumstances and requirements of rural customers, those off the gas grid and those living in traditional buildings</p> <p>1.8 Identify the specific advice needed on implementing the recommendations which may have to be provided</p> <p>1.9 Identify the sources of further information and advice</p> <p>1.10 Explain the funding options available and the eligibility requirements of the Green Deal finance package</p> <p>1.11 Identify the features, characteristics and eligibility criteria of alternative energy efficiency programmes outside the Green Deal</p> <p>1.12 Identify how to access funding for</p>	

	<p>alternative energy efficiency programmes outside the Green Deal</p> <p>1.13 Establish the critical factors for the customer in deciding which measures to pursue including economic and personal circumstances</p> <p>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</p> <p>1.15 Explain the next steps in the process</p> <p>1.16 Identify the key individuals and organisations involved and how to contact them</p>
<p>2 Be able to explain the components of the Green Deal Advice report and their implications to the domestic customer</p>	<p>2.1 Explain to customers which energy efficiency measures have greater impact on the energy performance of a building</p> <p>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</p> <p>2.3 Explain to customers the benefits of installing several measures as part of a package and the advantage of correctly sequencing the installation</p> <p>2.4 Explain to customers how estimates of running costs produced by RdSAP have been arrived at and for how long they are valid</p> <p>2.5 Explain to customers the gap between standard savings estimates and likely actual savings based on occupancy</p> <p>2.6 Identify ways in which the recommendations can be implemented and where to go for help</p> <p>2.7 Provide advice on the Energy Performance Certificate Adviser tool to help the customer select appropriate energy efficiency measures</p> <p>2.8 Indicate how any future changes in energy consumption and costs not included in the assessment may impact on savings</p> <p>2.9 Explain to customers any relevant incentives for the customer adopting the</p>

	<p>proposed Green Deal package of energy measures</p> <p>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</p> <p>2.11 Explain to customers the funding options available and how to apply for funding</p> <p>2.12 Provide information to customers on other programmes and funding mechanisms for energy efficiency and carbon reduction outside Green Deal</p>
<p>3 Be able to prepare and present a Green Deal Advice report in a professional and impartial manner</p>	<p>3.1 Provide precise disclosure of the limitations on the advice being given</p> <p>3.2 Make clear the impartial technical advice being provided up to this point</p> <p>3.3 Make clear own personal responsibility for:</p> <ul style="list-style-type: none"> • the recommendations made • any liabilities that arise from this • any disclaimers relating to the recommendations <p>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</p> <p>3.5 Declare any specific links with suppliers of Green Deal products and services</p> <p>3.6 Make clear that any further involvement in the process will involve exclusive promotion of the products and services of those suppliers</p> <p>3.7 Inform the customer of the Green Deal Code of Practice that regulates the preparation and issuing of the Green Deal Advice Report</p> <p>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</p> <p>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</p>

	<p>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</p> <p>3.11 Consider the specific needs of customers including those in rural locations, those off the gas grid or living in older buildings</p>
Additional information about the unit	
Unit aim(s)	This unit is about explaining the components of the Green Deal report to domestic customers and the implications for implementing the recommendations.
Unit expiry date	
Details of the relationship between the unit and relevant national occupational standards (if appropriate)	Developed from Asset Skills National Occupational Standards for Green Deal Advisors ASTGDA4
Details of the relationship between the unit and other standards or curricula (if appropriate)	
Assessment requirements specified by a sector or regulatory body (if appropriate)	Please refer to Asset Skills Assessment Principles at www.assetskills.org
Endorsement of the unit by a sector or other appropriate body (if required)	N/A
Location of the unit within the subject/sector classification system	
Name of the organisation submitting the unit	Asset Skills
Availability for use	Shared
Equality & Diversity (Asset Skills use only)	Asset Skills has considered equality and diversity factors in a reasonable, practical and proportionate manner and that no barriers have been identified for learners to complete this unit.
Guided Learning Hours	20

Title:	ASTGDA5 Carry out non-domestic energy inspections to determine an Operational Profile and give advice	
Level:	4	
Credit value:	10	
Learning outcomes	Assessment criteria	
<i>The learner will:</i>	<i>The learner can:</i>	
1 Understand the process of conducting an operational profile	<p>1.1 Identify the data that is required from the customer to enable an analysis of non-domestic energy consumption for the purposes of Green Deal in accordance with the prescribed methodology</p> <p>1.2 Explain the methods used to obtain data and information and the potential sources of that information</p> <p>1.3 Identify how to carry out a methodical visual on-site inspection of a property in order to produce an operational profile assessment</p> <p>1.4 Identify the requirements of the prescribed methodology for the operational profile</p> <p>1.5 Explain the appropriateness of the use of the Simplified Building Energy Model (SBEM) methodology and software for different building types and state where the Dynamic Simulation Model (DSM) methodology should be used instead</p> <p>1.6 Specify the definitions and conventions that apply to the prescribed methodology for operational profile assessment</p> <p>1.7 Describe how to identify gaps in information gathered and any additional data required to fill them</p> <p>1.8 Identify where it would be appropriate to request advice from a specialist</p> <p>1.9 Describe how to assess the likely current energy performance of any property elements compared to its performance as originally built</p> <p>1.10 Describe the impact of the following on the energy assessment process:</p> <ul style="list-style-type: none"> • the durability of materials and systems over time • the functioning of building services 	

	<p>1.11 Describe how to deal with any ad hoc health and safety issues at the time of inspection</p> <p>1.12 Explain the data protection requirements relating to customer's data</p> <p>1.13 Describe the requirements of Codes of Practice and other guidance as they apply to the operational profile process</p> <p>1.14 Describe how to apply the management score in order to reflect the quality of the building's management</p>
<p>2 Understand the factors and measures for reducing energy consumption in non-domestic buildings</p>	<p>2.1 Explain how to establish the client's situation in respect of reducing energy consumption including:</p> <ul style="list-style-type: none"> • Needs • Circumstances • Motivations • Capabilities • Managerial and other constraints • Potential barriers to action <p>2.2 Describe the key metrics by which energy consumption is measured and recorded</p> <p>2.3 Explain how to track energy consumption over time and identify significant trends in usage</p> <p>2.4 Describe the types of further investigations that can be carried out where data inconsistencies are discovered</p> <p>2.5 Explain the alternative methods for optimising the use of existing plant, equipment and consumables</p> <p>2.6 Explain how the current occupier's activities, systems and processes affect energy consumption and fuel bills</p> <p>2.7 Identify the alternative activities, systems and processes that would enhance energy efficiency and carbon reduction in relation to:</p> <ul style="list-style-type: none"> • Energy purchase and supply • Heating • Lighting • Air conditioning • Small power • Refrigeration • Building fabric • Passive strategies and processes • Ventilation

	<p>2.8 Explain the main methods and products used for:</p> <ul style="list-style-type: none"> • Controlling and managing the use of water • Managing waste through re-use and recycling methods <p>2.9 Describe how to evaluate alternatives against the constraints of the building and finances available</p> <p>2.10 Identify the sources of information and agencies providing advice and financial support for energy and carbon reduction</p> <p>2.11 Describe the legal and regulatory framework relating to energy efficiency and carbon reduction including national and international requirements</p> <p>2.12 Identify the limitations on the advice provided in the Green Deal Advisory Report</p> <p>2.13 Identify the circumstances where it is necessary to refer customers for specialist assessments of building fabric or services and how to choose a suitable specialist assessor</p> <p>2.14 Describe the types of questions, issues and concerns that clients might have about the operational profile visit and the operational advice given</p> <p>2.15 Identify the sources of information to which the customer can be referred for further help and advice</p>
<p>3 Understand the written records required for inspection findings</p>	<p>3.1 Describe the methods, formats and conventions for recording information and evidence on the operational profile</p> <p>3.2 Identify the required range of information and evidence relating to the assessment, as defined by the current operational profile methodology and any associated guidance and conventions</p> <p>3.3 Define the level of detail required to produce a complete and comprehensive non-domestic Green Deal Advice Report</p> <p>3.4 Explain how records can be used to justify decisions on the values recorded and the advice given</p> <p>3.5 Identify the circumstances in which records can include the fact that information is</p>

	<p>“unknown” and the evidence required to support this choice</p> <p>3.6 Explain the importance of storing information and records securely for future access and to meet Certification Scheme inspection requirements</p> <p>3.7 State the purposes for which records may be used</p>
<p>4 Be able to conduct an operational profile assessment</p>	<p>4.1 Explain to customers the information required for the operational profile assessment</p> <p>4.2 Use appropriate methods to obtain such information from customers</p> <p>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</p> <p>4.4 Gather the necessary data and information from appropriate documentation to enable the operational profile assessment to take place</p> <p>4.5 Undertake a methodical visual inspection of the property in accordance with the prescribed methodology for the operational profile</p> <p>4.6 Determine how the current condition of the property may affect its energy performance</p> <p>4.7 Determine the management score reflecting the quality of the building’s management</p>
<p>5 Be able to identify actions to reduce energy consumption in non-domestic buildings</p>	<p>5.1 Establish the needs, tenure, access to capital and motivations of the customer in relation to energy consumption reduction</p> <p>5.2 Identify any constraints that might affect the customer’s ability to act</p> <p>5.3 Identify areas of significant energy consumption and any trends and changes in energy use</p> <p>5.4 Compare data with operational performance and establish the reasons for any differences</p> <p>5.5 Establish any anticipated changes to energy consumption and their implications</p>

	<p>5.6 Review current activities, systems, processes and behaviours that affect energy efficiency and carbon emissions and their impact on energy consumption and fuel bills</p> <p>5.7 Review alternative activities, systems, processes and behaviours that would enhance energy performance</p> <p>5.8 Identify changes to activities, systems, processes and behaviours that could be made which are in scope of Green Deal provision</p> <p>5.9 Establish ways of improving the monitoring and measurement of operational energy usage including metering and sub-metering</p> <p>5.10 Identify financial incentives and schemes to support energy efficiency and carbon reduction relevant to the actions being considered</p> <p>5.11 Identify any legal requirements that impact on energy use and carbon emissions and their impact on the actions being considered</p> <p>5.12 Provide impartial advice when identifying effective actions to reduce operational energy consumption and achieve carbon reduction</p> <p>5.13 Identify situations where specialist assessment is required and the basis on which specialist are selected</p> <p>5.14 Provide customers with a clear explanation of their current energy consumption and trends in consumption</p> <p>5.15 Provide customers with a clear explanation of the impact on their current activities, systems, processes and behaviours on energy consumption and fuel bills</p> <p>5.16 Provide customers with a clear explanation of alternative activities, systems, processes and behaviours that would enhance energy performance</p> <p>5.17 Provide customers with a clear explanation of the financial incentives and support for making changes to energy consumption and how they can be accessed</p>
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	<p>5.18 Provide customers with a clear explanation of any specialist assessments required and how to access them</p> <p>5.19 Provide customers with a clear explanation of the recommendations made in the Green Deal Advice Report</p> <p>5.20 Provide information on the methods and products for achieving:</p> <ul style="list-style-type: none"> • Efficient management of water usage and minimisation of wastes • Waste reduction, re-use and re-cycling <p>5.21 Advise the customer on the limitations on the advice given within the Green Deal Advice Report</p> <p>5.22 Respond to customer queries, issues and concerns about the operational profile and the operational advice given</p>
<p>6 Be able to maintain written records of inspection findings</p>	<p>6.1 Create and maintain complete, accurate and legible records of findings including:</p> <ul style="list-style-type: none"> • Investigations carried out • Values recorded • Options considered • Reasons why “unknown” is used against data fields and why this was unavoidable <p>6.2 Record information in sufficient detail to produce a complete and comprehensive non-domestic Green Deal Advice Report and justify decisions on how values were arrived at and the nature of the advice</p> <p>6.3 Record where information cannot be obtained and where data is recorded as “Unknown” and why this action was unavoidable</p> <p>6.4 Catalogue, secure and store records for the prescribed periods of time</p> <p>6.5 Ensure that records can be accessed for future use</p>
<p>Additional information about the unit</p>	
<p>Unit aim(s)</p>	<p>This unit is about conducting non-domestic energy inspection, producing an Operational Profile and advising on energy reduction</p>
<p>Unit expiry date</p>	

Details of the relationship between the unit and relevant national occupational standards (if appropriate)	Developed from Asset Skills National Occupational Standards for Green Deal Advisors ASTGDA5
Details of the relationship between the unit and other standards or curricula (if appropriate)	
Assessment requirements specified by a sector or regulatory body (if appropriate)	Please refer to Asset Skills Assessment Principles at www.assetskills.org
Endorsement of the unit by a sector or other appropriate body (if required)	N/A
Location of the unit within the subject/sector classification system	
Name of the organisation submitting the unit	Asset Skills
Availability for use	Shared
Equality & Diversity (Asset Skills use only)	Asset Skills has considered equality and diversity factors in a reasonable, practical and proportionate manner and that no barriers have been identified for learners to complete this unit.
Guided Learning Hours	40

Title:	ASTGDA6 Prepare and issue Non-domestic Green Deal Advice Reports	
Level:	4	
Credit value:	9	
Learning outcomes	Assessment criteria	
<i>The learner will:</i>	<i>The learner can:</i>	
1 Understand the process of inputting data for Non-domestic Green Deal Advice Reports	<p>1.1 Describe the prescribed format and content of a Non-domestic Green Deal Advice Report</p> <p>1.2 Identify the approved software options available and how to choose software that is appropriate to the type of assessment being carried out</p> <p>1.3 Identify the information required to produce a compliant Non-domestic Green Deal Advice Report</p> <p>1.4 Describe the principles underpinning the approved software used to prepare a Non-domestic Green Deal Advice Report</p> <p>1.5 Describe how to input data into the approved software to produce Non-domestic Green Deal Advice Reports</p> <p>1.6 Identify common areas of potential uncertainty or insufficient information which could affect value attribution</p> <p>1.7 Describe the quality assurance checks to conduct on information to ensure that:</p> <ul style="list-style-type: none"> • Values are correct • Energy efficiency measures are realistic and appropriate for the subject property <p>1.8 Describe the circumstances in which items can be recorded as “unknown” as defined by conventions</p> <p>1.9 Explain the consequences of recording an item as “unknown” or as built on the methodology’s assessment process</p> <p>1.10 Describe the ways of gathering more information to avoid the use of default values</p> <p>1.11 Describe the conventions used in non-domestic Green Deal advice assessment and the implications on the process when</p>	

	<p>these change</p> <p>1.12 Describe how to check the accuracy of inputted data</p> <p>1.13 Describe how to review data when the calculation will not process</p> <p>1.14 Describe how to incorporate outputs from specialist assessments</p>
<p>2 Understand how to assess energy efficiency measures for Non-domestic Green Deal Advice Reports</p>	<p>2.1 Identify the range of energy efficiency measures that may be included within a Non-domestic Green Deal Advice Report</p> <p>2.2 Describe the relationship between the building fabric and building services and the impact on energy the energy assessment process and energy efficiency measures proposed</p> <p>2.3 Explain the way in which energy efficiency measures are generated by approved software</p> <p>2.4 Explain how to check the energy efficiency measures generated automatically by the approved software</p> <p>2.5 Explain how to amend by deleting inappropriate energy efficiency measures for the property and customer</p> <p>2.6 Describe how to use approved software to evaluate energy efficiency measures that are bespoke to the property and its current occupier</p> <p>2.7 Explain how the current building energy consumption is taken into account when identifying energy efficiency measure likely to deliver the most savings to the customer</p> <p>2.8 Explain how to select energy efficiency measures to evaluate using approved software and how to ensure they are feasible, practical and appropriate for the property and customer</p> <p>2.9 Identify current typical costs of energy efficiency measures and explain how to estimate typical costs, for the particular building, of the proposed energy efficiency measures</p> <p>2.10 Describe how the approved software estimates the cost savings from energy efficiency measures</p>

	<p>2.11 Describe how to amend ascribed default values in accordance with the operational profile</p> <p>2.12 Explain how to adjust estimated savings in accordance with the operational profile and current fuel tariffs to provide figures to be used in the Green Deal Principle (Golden Rule) calculation estimates</p> <p>2.13 Explain how to normalise metrics between the Energy Performance Certificate and energy consumption data to improve the estimates of energy savings from energy efficiency measures</p> <p>2.14 Explain how the Green Deal Principle (Golden Rule) is calculated and how measures are assessed against the Golden Rule</p>
<p>3 Understand how to lodge and issue Non-domestic Green Deal Advice Reports</p>	<p>3.1 Explain the importance of fully disclosing any referral fees or other benefits received in relation to suggested products, services and suppliers</p> <p>3.2 Explain the process of lodging and issuing a Non-domestic Green Deal Advice Report</p> <p>3.3 Identify the level and detail of information storage required in relation to Non-domestic Green Deal Advice Reports</p> <p>3.4 Explain how to update the Energy Performance Certificate after the installation of agreed energy efficiency measures</p>
<p>4 Be able to input data for prepare Non-domestic Green Deal Advice Reports</p>	<p>4.1 Assemble and collate information required including any pre-existing Energy Performance Certificate or Display Energy Certificate</p> <p>4.2 Choose from approved software options a software package which is appropriate to the type of assessment being carried out</p> <p>4.3 Use the approved software to prepare Non-domestic Green Deal Reports</p> <p>4.4 Ensure that values entered for all components are accurate</p> <p>4.5 Identify areas of potential uncertainty or insufficient information which could affect value attribution and carry out checks to avoid likely errors</p>

	<p>4.6 Carry out further investigations to identify appropriate values in order to reduce or eliminate use of default values and the “unknown” option, including requesting advice from a specialist where appropriate</p> <p>4.7 When the use of default values or “unknown” is unavoidable, explain why this was the case and the steps taken to try to avoid their use, in accordance with relevant conventions and Code of Practice</p>
<p>5 Be able to assess energy efficiency measures for the non-domestic Green Deal Advice report</p>	<p>5.1 Identify ways of optimising the efficiency of current plant and equipment in relation to heating, lighting and air conditioning</p> <p>5.2 Generate energy efficiency measures which are feasible, practical and appropriate for the property using the approved software and the guidance or conventions applying to its use</p> <p>5.3 Identify energy efficiency measures which take account of:</p> <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 <p>5.4 Evaluate the feasibility, practicality and relevance of alternatives in relation to the fabric of the building and the building services</p> <p>5.5 Establish the relative costs of any energy efficiency measures which may be proposed</p> <p>5.6 Provide impartial advice when identifying effective energy efficiency measures</p> <p>5.7 Use approved software to:</p> <ul style="list-style-type: none"> • Estimate energy use and associated energy costs • Estimate energy and cost savings from energy efficiency measures • Adjust the assumed defaults in accordance with the operational profile and fuel prices to reflect actual tariffs • Produce figures to be used in the non-domestic Green Deal (Golden Rule) calculation • Assess which energy efficiency measures or packages of measures are likely to be eligible for Green Deal finance • Normalise metrics between the Energy Performance Certificate and energy consumption data to improve the

	<p>estimates of energy savings from energy efficiency measures</p> <p>5.8 Prepare Non-domestic Green Deal Advice Reports that meet scheme requirements and certification body requirements</p> <p>5.9 Incorporate outputs from any specialist assessment(s) in the Non-domestic Green Deal Advice Report</p> <p>5.10 Disclose any referral fees or other benefits to be received should the customer follow suggestions for particular products, services or suppliers</p>
<p>6Be able to prepare, lodge and issue Non-domestic Green Deal Advice Reports</p>	<p>6.1 Identify the legal requirements which impact on energy use and carbon emissions and their impact on energy efficiency measures being considered</p> <p>6.2 Where specialist assessment is required, record the choice of specialist and the basis for this choice, retaining evidence of their suitability to undertake the specialist assessment in the property</p> <p>6.3 Explain to the client how the energy efficiency measures are assessed against the Golden Rule and that this is done at the quoting stage</p> <p>6.4 Check the Non-domestic Green Deal Advice Report to ensure it is clear and complete</p> <p>6.5 Collate and maintain information in support of:</p> <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 <p>6.6 Follow the procedure for lodging Non-domestic Green Deal Advice Reports on the prescribed national register</p> <p>6.7 Issue Non-domestic Green Deal Advice Reports to customers</p> <p>6.8 Follow the procedure for updating the Energy Performance Certificate after the installation of agreed energy efficiency measures</p> <p>6.9 Maintain internal records which are clear,</p>

	complete and meet Green Deal and statutory requirements and follow accepted professional standards
Additional information about the unit	
Unit aim(s)	This unit is about preparing and issuing non-domestic Green Deal Advice Reports.
Unit expiry date	
Details of the relationship between the unit and relevant national occupational standards (if appropriate)	Developed from Asset Skills National Occupational Standards for Green Deal Advisors ASTGDA6
Details of the relationship between the unit and other standards or curricula (if appropriate)	
Assessment requirements specified by a sector or regulatory body (if appropriate)	Please refer to Asset Skills Assessment Principles at www.assetskills.org
Endorsement of the unit by a sector or other appropriate body (if required)	N/A
Location of the unit within the subject/sector classification system	
Name of the organisation submitting the unit	Asset Skills
Availability for use	Shared
Equality & Diversity (Asset Skills use only)	Asset Skills has considered equality and diversity factors in a reasonable, practical and proportionate manner and that no barriers have been identified for learners to complete this unit.
Guided Learning Hours	40

Title:	ASTGDA7 Explain the Green Deal Advice Report to the Non-domestic customer	
Level:	4	
Credit value:	4	
Learning outcomes	Assessment criteria	
<i>The learner will:</i>	<i>The learner can:</i>	
1 Understand the process of explaining the Green Deal Advice Report to non-domestic customers	<p>1.1 Describe the requirements of the Green Deal Code of Practice in respect of issuing the Green Deal Advice Report to customers and the professional responsibilities and liabilities in the giving of advice and any disclaimers that should be made</p> <p>1.2 Identify the difference between high, medium and low carbon impact energy efficiency measures and the scale of savings that each may achieve</p> <p>1.3 Explain which energy efficiency measures have the greatest impact on the energy performance of a building and explain why</p> <p>1.4 Describe the benefits of installing energy efficiency measures as a package and the importance of the sequence of installation</p> <p>1.5 Explain how estimates of costs are arrived at and how robust they are and for how long they will be valid</p> <p>1.6 Identify the different circumstances and requirements of rural customers and those living in traditional buildings</p> <p>1.7 Explain the impact of how the building is managed on the potential energy savings and actual costs</p> <p>1.8 Identify the specific advice needed to implement recommendations</p> <p>1.9 Explain the funding options available and the eligibility requirements of the Green Deal finance package</p> <p>1.10 Establish the critical factors for the customer in deciding which measures to pursue including economic and operational circumstances</p> <p>1.11 Identify ways of creating a clear demarcation between the independent and</p>	

	<p>impartial stage of the process and the declaration of any links to providers and/or suppliers</p> <p>1.12 Explain the next steps in the process, the key individuals and organisations involved and how to contact them and how to provide impartial information</p> <p>1.13 Explain how to disclose links to suppliers of products and services in a manner that ensures the customer understands the implications of your further engagement in the Green Deal process</p>
<p>2 Be able to explain the components of the Green Deal Advice Report and their implications to the Non-domestic customer</p>	<p>2.1 Explain the hierarchy of energy efficiency measures based on carbon impact and payback</p> <p>2.2 Explain the difference between high, medium and low carbon impact efficiency measures and the relative scale of savings which may be achieved</p> <p>2.3 Explain which energy efficiency measures have greater impact on the energy performance of a building</p> <p>2.4 Explain the relationship between:</p> <ul style="list-style-type: none"> • the Energy Performance Certificate asset rating based on standard assumptions • the Display Energy Certificate operational rating based on metered fuel use • the estimated savings based on the current use of the building <p>2.5 Explore the merits and demerits of the proposed energy efficiency measures</p> <p>2.6 Identify ways of overcoming any barriers to implementing the energy efficiency measures</p> <p>2.7 Explain the benefits of installing several measures as part of a package and the advantage of correctly sequencing the installation</p> <p>2.8 Explain how estimates of running costs have been arrived at, how robust they are and for how long they are valid</p> <p>2.9 Explain the gap between standard savings and likely savings based on occupancy</p> <p>2.10 Identify ways in which the</p>

	<p>recommendations can be implemented and where to go for help</p> <p>2.11 Provide information on how the management of the building and its services can impact on energy savings and costs</p> <p>2.12 Indicate how any future changes in energy consumption and costs not included in the assessment may impact on savings</p> <p>2.13 Explain any relevant incentives for the customer adopting the proposed Green Deal package of energy measures</p> <p>2.14 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</p> <p>2.15 Explain the funding options available and how to apply for funding</p>
<p>3 Be able to prepare and present a Green Deal Advice Report in a professional and impartial manner</p>	<p>3.1 Provide precise disclosure of the limitations on the advice being given</p> <p>3.2 Make clear the impartial technical advice being provided up to this point</p> <p>3.3 Explain to the client the extent of personal responsibility for the recommendations made, including appropriate disclaimers</p> <p>3.4 Inform the customer of 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</p> <p>3.5 Explain any specific links with suppliers of Green Deal products and services and that any further involvement in the process will involve exclusive promotion of the products and services of those suppliers</p> <p>3.6 Inform the customer of the Green Deal Code of Practice that regulates the preparation and issuing of the Green Deal Advice Report</p> <p>3.7 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</p>

	<p>3.8 Make the customer aware of responsibilities to future occupiers in terms of potential changes in energy savings should energy saving features be removed</p> <p>3.9 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</p> <p>3.10 Identify the specific needs of customers including those in rural locations, those off the gas grid or occupying older buildings</p>
Additional information about the unit	
Unit aim(s)	This unit is about explaining the components of the Green Deal Report to Non-domestic customers and the implications for implementing the recommendations.
Unit expiry date	
Details of the relationship between the unit and relevant national occupational standards (if appropriate)	Developed from Asset Skills National Occupational Standards for Green Deal Advisors ASTGDA7
Details of the relationship between the unit and other standards or curricula (if appropriate)	
Assessment requirements specified by a sector or regulatory body (if appropriate)	Please refer to Asset Skills Assessment Principles at www.assetskills.org
Endorsement of the unit by a sector or other appropriate body (if required)	N/A
Location of the unit within the subject/sector classification system	
Name of the organisation submitting the unit	Asset Skills
Availability for use	Shared
Equality & Diversity (Asset Skills use only)	Asset Skills has considered equality and diversity factors in a reasonable, practical and proportionate manner and that no barriers have been identified for learners to complete this unit.
Guided Learning Hours	20