
Overview

This Unit covers the essential, general competences expected of all professionals regardless of their working environment. You are expected to work effectively in the ways described throughout your work, whether you are in an office or at a property.

Element 1.1 covers the development and maintenance of effective working relationships with all those people with whom you come into contact during your work. You are expected to communicate with others in a polite, clear and respectful manner, respond to enquiries and work towards avoiding any disputes that may arise. You are also expected to handle formal complaints procedures if and when complaints are received. The main groups of people with whom you will need to develop good working relationships are the parties selling or letting property and their representatives, those present at property at the time of inspection (e.g. tenants), and other colleagues and professionals.

Element 1.2 describes the competences involved in managing your own time and resources. You must set your objectives, plan your time, take decisions and review and reschedule your activities as appropriate.

Element 1.3 describes the activities involved in developing and enhancing your own practice and performance. You must evaluate your performance and encourage feedback from others. You must also identify and meet your own development needs, through formal or informal means, to ensure that you keep up-to-date with the latest legislation, codes of practice, regulations and standards.

Element 1.4 covers the conduct of work in a professional and ethical manner. You are expected to present a positive and professional image at all times, work in accordance with prescribed codes of conduct and standards of good practice, and take steps to avoid any potential conflicts of interest during your work. It is also vital that you register with an appropriate accreditation organisation, and conduct your work in accordance with their specific requirements. Importantly, you must recognise and work within the limits of your own competence and expertise; this will entail, for example, refusing to take on unsuitable work such as the inspection of properties that fall outside your expertise and experience e.g. properties where RDSAP is not an appropriate methodology.

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Work in an effective and professional manner

Performance criteria

Develop and maintain effective working relationships

- You must be able to:*
- P1 develop and maintain productive working relationships with **others** which promote **goodwill and trust**
 - P2 **request** information from others in a polite, clear and professional manner
 - P3 **respond** promptly to enquiries from others and ask questions to clarify their information needs
 - P4 take **action** in cases where you are unable to respond to enquiries from **others**
 - P5 handle disputes and differences of opinion in ways which minimise offence and maintain respect
 - P6 comply with the formal complaints procedure

Manage your own time and resources

- You must be able to:*
- P7 set objectives that are specific, measurable and achievable
 - P8 plan your work activities so that they are consistent with your objectives and your personal resources
 - P9 undertake regular checks to your equipment to ensure that it is in full working order
 - P10 make estimates of the time you need for activities that are realistic and allow for unforeseen circumstances
 - P11 take decisions as soon as you have sufficient information
 - P12 take prompt and efficient action when you need to obtain further information to take decisions
 - P13 minimise unhelpful interruptions to, and digressions from, planned work
 - P14 regularly review progress and reschedule activities to help achieve your planned objectives

Develop yourself to improve your performance

- You must be able to:*
- P15 assess your performance and identify your **development needs** at appropriate intervals
 - P16 base your assessment on your current objectives and likely future requirements
 - P17 develop **plans** for personal development that are consistent with the needs you have identified and the resources available
 - P18 develop plans for personal development that contain specific, measurable, realistic and challenging objectives
 - P19 obtain support from relevant people to help you create learning opportunities
 - P20 undertake development activities that are consistent with your plans for personal development

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- P21 obtain **feedback** from others and use it to enhance your performance in the future
- P22 update your plans for personal development at regular intervals

Conduct work in a professional and ethical manner

You must be able to:

- P23 present a positive personal and professional image at all times when dealing with **people**
- P24 carry out your work in accordance with prescribed codes of conduct, ethical standards and **recognised good practice**
- P25 deal with **people** in a tactful, courteous and equitable manner at all times
- P26 work within the limits of your own competence and expertise
- P27 recognise and respond appropriately to pressure from any person which might influence the objectivity of your judgement
- P28 recognise and manage any potential conflicts of interest that may arise during your work
- P29 comply with the auditing and monitoring requirements of the accreditation organisation
- P30 comply with all legislation relevant to your work
- P31 comply with all relevant guidance in undertaking Domestic Energy Assessments using the RDSAP methodology

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Knowledge and understanding

You need to know and understand:

Develop and maintain effective working relationships

- K1 why it is important to promote goodwill and trust when working with others, and ways in which this can be achieved
- K2 how to identify the information you require and the potential sources of such information
- K3 how to respond to enquiries from others and how to clarify their information needs
- K4 how to respond to enquiries which are outside your authority, beyond your area of knowledge/expertise or where the information requested is confidential
- K5 ways in which disputes or differences of opinion should be handled to minimise offence and maintain respect
- K6 how to identify and handle formal complaints
- K7 the details of the formal complaints procedure that covers your work, and any specific organisational requirements with regard to complaints

Manage your own time and resources

You need to know and understand:

- K8 how to set objectives for yourself that are specific, measurable and achievable
- K9 how to plan activities so that they are consistent with your objectives and personal resources
- K10 how to estimate the amount of time required to carry out planned activities
- K11 the kind of contingencies which might occur and how to assess and plan for these
- K12 how to assess how much information is required before effective decisions can be taken
- K13 how to collect and check the validity of the information required for decision making
- K14 the importance of effective time
- K15 how to identify and minimise unhelpful interruptions
- K16 the importance of regular reviews of activity and rescheduling of work to achieve planned objectives

Develop yourself to improve your performance

You need to know and understand:

- K17 how to assess your own current level of competence
- K18 the current and likely future requirements and standards within your job role and how they correspond to your level of competence
- K19 the principal skills required for effective performance
- K20 the importance of continuing self-development
- K21 how to develop a personal action plan for learning and self-development

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- with realistic but challenging objectives
- K22 the types of support that may be available from others
- K23 how to identify the need for support, select an appropriate source and obtain required help
- K24 the types of development activities and their relative advantages and disadvantages to your own situation
- K25 the importance of getting feedback from others on your performance and how to encourage, enable and use such feedback in a constructive manner
- K26 the appropriate people from whom to get feedback on your performance
- K27 how to assess your personal progress and update your plans accordingly
- K28 the specific auditing and monitoring requirements that relate to your registration with your accrediting organisation; your responsibilities in complying with these

Conduct work in a professional and ethical manner

You need to know and understand:

- K29 why it is important to present a positive personal and professional image when dealing with people, and how this can be achieved
- K30 your specific responsibilities under prescribed codes of conduct and ethical standards
- K31 the importance of complying with recognised good practice
- K32 the extent and limits for your own competence and expertise; the importance of not working beyond these limits
- K33 the range of potential conflicts of interest that you may encounter, and the action required to manage these
- K34 the specific auditing or monitoring requirements that relate to your registration with your accreditation organisation; your responsibilities in complying with these
- K35 the objectives, remit and constitution of the accreditation organisation, and the implications of membership
- K36 the main points of the legislation relevant to your work
- K37 all relevant guidance relating to the undertaking of Domestic Energy Assessments using the RDSAP methodology
- K38 the importance of obtaining and maintaining appropriate professional indemnity insurance (PII) cover; the extent and limitations of PII

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Additional Information

Scope/range

Develop and maintain effective working relationships

1. **Others**
 - 1.1. the party selling or letting the property or their representatives (e.g. estate agent, letting agent or lawyer)
 - 1.2. those present at the property at the time of inspection (e.g. the party selling or letting the property, their friends/family or tenants)
 - 1.3. other colleagues and professionals such as solicitors, conveyancers, local authority maintenance teams, work colleagues and other Domestic Energy Assessors, and Home Inspectors
2. **Goodwill and trust**
 - 2.1. demonstrating a duty of care
 - 2.2. honouring promises or undertakings
 - 2.3. developing honest relationships
 - 2.4. developing constructive relationships
3. **Request**
 - 3.1. face to face
 - 3.2. in writing
 - 3.3. by telephone
 - 3.4. by email
4. **Respond**
 - 4.1. face to face
 - 4.2. in writing
 - 4.3. by telephone
 - 4.4. by email
5. **Action**
 - 5.1. inform the enquirer
 - 5.2. pass the enquiry onto the relevant person or organisation

Manage your own time and resources

6. **development needs:**
 - 6.1. the latest legislation, codes of practice and regulations
 - 6.2. technical issues in regard to factors that affect the energy performance of dwellings
7. **plans:**
 - 7.1. informal on the job learning
 - 7.2. formal training courses
 - 7.3. open learning

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8. **feedback:**
 - 8.1. positive
 - 8.2. confirmatory
 - 8.3. negative
9. **others:**
 - 9.1. colleagues
 - 9.2. other professionals
 - 9.3. those selling or letting property and others concerned with the selling/letting process

Develop yourself to improve your performance

10. **people:**
 - 10.1. the party selling or letting the property or their representative(s)
 - 10.2. those present at the property at the time of inspection
 - 10.3. other colleagues and professionals
 - 10.4. others with whom you may be in contact during the course of your work as a Domestic Energy Assessor
11. **recognised good practice:**
 - 11.1. duty of care
 - 11.2. statute law
 - 11.3. mandatory and advisory codes of practice (e.g. Inspection and Reporting Requirements)

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