

ASTDEA2

Prepare for energy assessments of domestic property



Overview

This standard covers those activities that are carried out prior to the energy assessment of a property e.g. taking instructions, clarifying requirements and making initial enquires on matters relating to the property in question.

Note that the term 'assessment' is used throughout the standards when referring to the overall process of determining the energy performance of a property, whereas 'inspection' is used only when referring to on-site inspection of the property and its features.

Note that the term Domestic Energy Assessor (DEA) is used throughout and should be taken to include equivalents within the Devolved Administrations, where the term EPC Assessors may be more commonly used.

You are required to respond to requests for energy assessments from customers, clarify their needs and expectations and check that the property is appropriate for energy assessment. You must clearly explain the terms and conditions, any limitations/constraints that apply to energy assessments and confirm your fee and payment arrangements. You are expected to confirm that customers fully understand the procedures for assessment and to acknowledge any special circumstances that apply to your site visit e.g. access to the property (or parts of the property) or who will be present at the time of the inspection.

You are required to investigate matters which are important to ensure that you provide a complete and accurate Energy Performance Certificate within the terms of your engagement. You should identify and research information that can reasonably be obtained, for example, that on the property type and construction, tenure, services to the property, modifications/extensions and any constraints that may affect the potential for improving the energy performance of the property. You must also identify any significant factors that may influence the conduct of the assessment e.g. health and safety issues or additional information that should be gathered during the on-site inspection. In some cases, your investigations may reveal problems that prevent you from undertaking an assessment of the energy performance of the property; you are expected to inform the customers and explain the reasons to them.

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Performance criteria

Agree and confirm instructions to undertake energy assessments

You must be able to:

- P1 **respond** promptly to requests to undertake energy assessments from prospective customers
- P2 build positive relationships with customers and through the use of skilful questioning, clarify and confirm customer requirements and expectations
- P3 explain to the customer that an Energy Performance Certificate is a legally required document in applicable circumstances, that its form and content is prescribed and it must include cost-effective energy recommendations
- P4 explain to the customer that terms and conditions under which you will undertake an energy assessment including the need to take photographs and record other evidence for audit purposes
- P5 explain to the customer the limitations and constraints of the planned energy assessment and associated legislation and direct the customer towards the approved methodology where the use of the Reduced Data SAP (RDSAP) methodology is not appropriate
- P6 write to the customer to confirm the instruction and the terms, conditions and arrangements that have been agreed
- P7 confirm with the customer or other occupiers the date and time of the on-site inspection
- P8 confirm with the customer or other occupiers any specific requirements that apply to the energy assessment
- P9 identify any circumstances that prevent you from undertaking an energy assessment and explain the reasons to the customer politely and clearly
- P10 where appropriate, explain to the customer the basic principles of the Green Deal or equivalents within the Devolved Administrations and the role of the Energy Performance Certificate in the Green Deal and wider government policy
- P11 where necessary, explain to the customer that ratings and recommendations may differ from past assessments due to methodology changes and other differences

Investigate relevant matters relating to the property

You must be able to:

- P12 investigate and record such **information** as is necessary to generate a complete and comprehensive Energy Performance Certificate, limiting the use of 'unknown' to cases where this information cannot be obtained
- P13 evaluate information in order to identify any significant factors that may influence the conduct of the energy assessment
- P14 assess, in cases of doubt, that the property falls within the scope of energy assessment legislation and may be assessed using the prescribed methodology
- P15 inform the customer promptly in cases where your investigations reveal

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problems that prevent you from assessing the energy performance of the property

- P16 ensure that the most up-to-date version of the approved software and associated reference materials can be accessed and used

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Knowledge and understanding

You need to know and understand:

Agree and confirm instructions to undertake energy assessments

- K1 the relevant legislation giving rise to energy assessments and Energy Performance Certificates, for England and Wales and for the Devolved Administrations
- K2 regulations and guidance under that legislation relating to the role of Domestic Energy Assessors or equivalent within the Devolved Administrations and the undertaking of energy assessments
- K3 the types of property and situations that do not by law require an Energy Performance Certificate
- K4 how to clarify and confirm the expectations of the customer
- K5 the basic principles of the Green Deal or equivalents within the Devolved Administrations and the role of the Energy Performance Certificate within those schemes
- K6 when a potential conflict of interest will require disclosure to the customer, or will require the need to decline the instructions altogether
- K7 the limitations and constraints that apply to the conduct of energy assessments and to the prescribed methodology
- K8 the limited circumstances where representative properties or data collected by others may be used in the preparation of Energy Performance Certificates for existing dwellings
- K9 alternatives to the prescribed methodology for existing homes, Reduced Data SAP (RDSAP) and the circumstances where an alternative methodology should be considered
- K10 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
- K11 the importance of confirming in writing the arrangements agreed between you and the customer
- K12 fee structures and payment agreements for energy assessments
- K13 how to confirm on-site inspection arrangements with the customer or other occupier
- K14 the importance of confirming whether any **specific requirements** apply to the energy assessment
- K15 how to identify and explain any **circumstances** that prevent you from undertaking an energy assessment
- K16 how to explain that ratings and recommendations may differ from past assessments due to changes in methodology or legislation and other differences

Investigate relevant matters relating to the property

You need to know and understand:

- K17 the types of property to which energy assessment legislation does not apply

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- K18 the different types of **information** that is important to obtain to generate a complete and accurate Energy Performance Certificate
- K19 the different sources of information relating to the energy performance of the property that can be investigated
- K20 how to obtain information on relevant matters relating to the energy performance of the property
- K21 prevailing geographical/environmental features that may affect the energy performance of the property
- K22 how to evaluate relevant information in order to identify any **significant factors** that may influence the energy assessment
- K23 how to identify **circumstances** that prevent you from assessing the energy performance of the property
- K24 the importance of ensuring that you have access to the most up-to-date version of the RDSAP software and associated reference materials

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Additional Information

Scope/range

1. **respond**
 - 1.1 face to face
 - 1.2 in writing
 - 1.3 by telephone

2. **specific arrangements**
 - 2.1 access to the property
 - 2.2 those present at the property at the time of the on-site inspection
 - 2.3 health and safety issues

3. **circumstances**
 - 3.1 properties beyond your current level of competence
 - 3.2 your own diary pressures
 - 3.3 difficulties in gaining access
 - 3.4 conflicts of interest

4. **information**
 - 4.1 concerning the age or construction of the property which may assist the energy assessment process
 - 4.2 concerning the installed building services (e.g. gas safety certificates)
 - 4.3 concerning any energy efficiency measures (original and retrofitted)

5. **significant factors**
 - 5.1 concerns about information (e.g. missing, incomplete, out of date, inaccurate)
 - 5.2 health and safety considerations relevant to the energy performance of property (e.g. potentially unsafe access to roof space or presence of asbestos cladding)

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