

ASTGDA1

Provide information to customers on the principles, financing and operation of the Green Deal (or equivalent programme)



Overview

This standard is about demonstrating a general understanding of the overall purpose of the Green Deal (or equivalent programme) and how it operates, including the customer journey, energy assessment, eligible measures and how they are identified, how Green Deal (or equivalent programme) is funded and paid for and sources of information and support.

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Performance criteria

- You must be able to:*
- P1 explain the purpose of the Green Deal (or equivalent programme) and its intended contribution to improving energy efficiency and reducing demand for energy consumption
 - P2 explain sources of information on Green Deal (or equivalent programme) and how consumers can access them including on-line and remote services
 - P3 explain the role of the Green Deal (or equivalent programme) Adviser, the requirement for them to provide independent and impartial advice when acting as a Green Deal (or equivalent programme) Adviser and the measures to ensure that they do so
 - P4 explain how consumers are protected throughout the Green Deal (or equivalent programme) customer journey and which existing legislation governing mis-selling, unfair trading practices and consumer credit agreements are applicable to the Green Deal (or equivalent programme)
 - P5 explain that Green Deal Advisers may be engaged by Green Deal (or equivalent programme) providers and by suppliers of products and services in a role that is entirely separate from their role as a Green Deal(or equivalent programme) Adviser
 - P6 describe the ways in which the consumer can express an interest in the Green Deal (or equivalent programme) and the first steps in the process
 - P7 explain how the assessment of energy performance is made, how it is different to energy use (occupancy) and how this influences recommendations in relation to Green Deal o(or equivalent programme) r other relevant funding mechanisms such as Energy Company Obligation
 - P8 explain what constitutes an eligible energy efficiency measure and that only eligible energy efficiency measures will be funded under Green Deal(or equivalent programme)
 - P9 provide information on the UK Government and Devolved Administration assistance programmes, including Feed in Tariffs and Renewable Heat Incentive mechanisms
 - P10 explain the long-term nature of cost savings arising from the installation of energy saving measures and that these will reduce the effect of future energy price increases
 - P11 explain the conditions on funding in terms of eligible measures, the Golden Rule financial criterion, the controls on costs of equipment and installation and the period of repayment
 - P12 explain the Golden Rule principle to customers and ensure that they understand savings are not guaranteed
 - P13 explain the condition on finance that consent is required:
 - P13.1 from all parties with an interest in the property

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- P13.2 from the energy bill payer
- P13.3 from different parties; those who give consent to the measures; and those who give consent for the charge
- P14 explain the role of the Green Deal (or equivalent programme) provider as the creditor and the energy suppliers as collectors of repayments via the electricity bill
- P15 respond to the different circumstances of rural customers
- P16 explain how Energy Company Obligation subsidy, heating and other fuel benefits can work with Green Deal (or equivalent programme) finance and where to go for more information
- P17 explain the complaints procedure in relation to Green Deal (or equivalent programme) advice and the means of redress in the event of a complaint
- P18 explain the information and documents required for the Green Deal (or equivalent programme) process
- P19 explain that there are other ways in which energy efficiency measures can be accessed and financed and signpost customers to further sources of information
- P20 refer customers to other sources of further information and support

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Knowledge and understanding

You need to know and understand:

- K1 the role of Green Deal (or equivalent programme) in improving energy efficiency
- K2 the ways in which customers may find out about participating in, or express interest in joining, the Green Deal (or equivalent programme) process
- K3 the function of the Energy Performance Certificate in assessing energy efficiency for the domestic sector and acting as the starting point for the Green Deal (or equivalent programme) process
- K4 the requirements of the Green Deal (or equivalent programme) Code of Practice relating to the service delivered to customers
- K5 ways of ensuring that the Green Deal (or equivalent programme) process provides impartial advice and recommendations, as set out in the Green Deal (or equivalent programme) Code of Practice
- K6 the need to make sure that the consumer understands that there is no commitment or obligation to take up the Green Deal (or equivalent programme) finance offer, as set out in the Green Deal (or equivalent programme) Code of Practice
- K7 what constitutes an eligible measure and how they are selected to make a set of recommendations
- K8 the different circumstances and requirements of rural customers, those who are off the gas grid and for traditional built properties in relation to Green Deal(or equivalent programme) arrangements
- K9 how Green Deal (or equivalent programme) is financed in terms of finance to the consumer, installation costs and equipment purchase and energy provider recoupment
- K10 the Golden Rule principle which limits the amount of Green Deal (or equivalent programme) finance that a provider can attach to the electricity meter to the estimated energy bill savings that are likely to result from the installation of measures under the Green Deal (or equivalent programme) plan
- K11 pay as you save metering process and period of time for recoupment

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- and how these operate within the overall Green Deal(or equivalent programme) financial agreement
- K12 who are eligible for Green Deal (or equivalent programme) finance and the restrictions that apply on eligibility
 - K13 the quotation process and rules and responsibilities of the Green Deal(or equivalent programme) provider, energy supplier, installer and customer, as set out in the Green Deal (or equivalent programme) Code of Practice
 - K14 the components of the Energy Company Obligation and their implications for the Green Deal (or equivalent programme) process
 - K15 how consumers will be protected throughout the Green Deal (or equivalent programme) customer journey and how the existing legislation governing mis-selling, unfair trading practices and consumer credit agreements will apply to Green Deal (or equivalent programme) plans
 - K16 the types of information and documentation that should be prepared in advance to assist in the Green Deal (or equivalent programme) Energy Assessment process
 - K17 permissions and consents required to ensure eligibility for Green Deal (or equivalent programme) finance
 - K18 disclosure arrangements on Green Deal (or equivalent programme) finance packages at time of transfer of electricity bill obligations
 - K19 specific protection for vulnerable groups of consumers and its impact on Green Deal (or equivalent programme) repayment arrangements
 - K20 the range and availability of all types of Green Deal (or equivalent programme)providers and how consumers can access them
 - K21 alternative energy efficiency support schemes and how they can be accessed
 - K22 the content and quality assurance requirements of PAS2030
 - K23 the Green Deal (or equivalent programme) Adviser certification requirements
 - K24 commonly occurring issues, concerns and misconceptions around Green Deal (or equivalent programme) finances and how to respond to them
 - K25 ways of checking consumer understanding of Green Deal (or equivalent programme) finance offer

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Suite Green Deal Advisers

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