

## ASTGDA3

# Prepare and issue Domestic Green Deal (or equivalent programme) Advice Reports



### Overview

This standard covers the competences required to prepare and issue Domestic Green Deal (or equivalent programme) Advice Reports, lodge them on the approved register and issue them to customers. The competencies required to carry out an energy inspection of the property fabric and produce an Energy Performance Certificate, are covered in ASTDEA4 and ASTDEA5; those that relate to carrying out the in-home occupancy assessment, which precedes this stage, are covered in ASTGDA2. The competencies relating to explaining the components of the Green Deal (or equivalent programme) report to customers and the implications for implementing the energy efficiency measures in the report, are covered in ASTGDA4.

This standard requires that you collate all the information you have obtained on the property and its use by the current occupiers and use approved software to produce Domestic Green Deal (or equivalent programme) Advice Reports, which provide bespoke recommendations for energy efficiency measures. You must ensure that data has been inputted correctly and check that the energy efficiency measures are appropriate.

You are required to use the approved software to produce and lodge the completed Domestic Green Deal (or equivalent programme) Advice Reports and issue them to customers. You must also maintain your own internal records in accordance with good practice and statutory requirements.

The assessment carried out and energy efficiency measures included in the Domestic Green Deal (or equivalent programme) Advice Reports provided to customers must be objective and impartial. However, it is possible that in addition to your role as an adviser, you will work for or with a particular organisation/employer and that you will receive referral fees or other benefits from them should the customer use their services. Although you may take on these additional roles including offering customers quotations or proposals for the purchase of particular products, services or suppliers, this must not interfere with the impartial assessment process. In addition you must fully disclose to the customer, as a minimum verbally ahead of the visit and in any case in writing, any personal interest, benefit or referral fee you will gain if they choose to take up such offers.

# ASTGDA3

## Prepare and issue Domestic Green Deal (or equivalent programme) Advice Reports

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### Performance criteria

### Prepare Domestic Green Deal (or equivalent programme) Advice Reports

*You must be able to:*

- P1 assemble and collate information gathered before, during and after your home visit, including any pre-existing Energy Performance Certificate for the property
- P2 use approved software correctly to prepare Domestic Green Deal (or equivalent programme) Advice Reports, ensuring that data is entered accurately
- P3 obtain comprehensive information to ensure values entered for all components are accurate
- P4 identify areas of potential uncertainty or insufficient information which could affect value attribution and carry out checks to avoid likely errors when inputting data
- P5 carry out further investigations to identify appropriate values following the applicable conventions and Code of Practice in order to reduce or eliminate the use of default values and 'unknown' option
- P6 provide a fully detailed explanation of why a default value or 'unknown' entry was used and the steps taken to try to avoid their use, in accordance with the relevant conventions and Code of Practice.
- P7 use approved software correctly to generate **energy efficiency measures** for the property following any guidance and/or conventions that apply to its use
- P8 take account of the interaction between the building fabric and the building services in the building when considering **energy efficiency measures**
- P9 take account of the effect of building location when considering **energy efficiency measures**
- P10 take account of the needs, circumstances and motivations of the customer when considering **energy efficiency measures**
- P11 check the **energy efficiency measures** generated and amend or delete any that are inappropriate for this property or this customer, providing your reasons
- P12 use approved software correctly to estimate energy use and associated energy costs and estimate energy and cost savings from **energy efficiency measures**, to produce figures to be used in the Domestic Green Deal (or equivalent programme) Principle (Golden Rule) calculation
- P13 use approved software correctly to assess which **energy efficiency measures**, or packages of **energy efficiency measures**, are likely to meet the Green Deal (or equivalent programme) Principle (Golden Rule) and are likely to be eligible for Green Deal (or equivalent programme) Finance

## ASTGDA3

### Prepare and issue Domestic Green Deal (or equivalent programme) Advice Reports

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- P14 prepare Domestic Green Deal (or equivalent programme) Advice Reports that meet scheme requirements and Certification Body requirements
- P15 fully disclose, within Domestic Green Deal (or equivalent programme) Advice Reports, any referral fees or other benefits that you may receive should the customer follow your suggestions for particular products, services and/or suppliers
- You must be able to:* P16 check the Domestic Green Deal (or equivalent programme) Advice Report to ensure it is clear and complete

#### **Lodge and issue Domestic Green Deal (or equivalent programme) Advice Reports**

- P17 collate **relevant information** to support the specific decisions made and **energy efficiency measures** considered
- P18 maintain written records of which **energy efficiency measures** were considered and rejected with reasons
- P19 keep accurate and traceable records of investigations carried out, values attributed and options considered
- P20 lodge Domestic Green Deal (or equivalent programme) Advice Reports on the prescribed national register on completion
- P21 issue Domestic Green Deal (or equivalent programme) Advice Reports to customers promptly
- P22 update the Energy Performance Certificate after the installation of agreed energy efficiency measures
- P23 maintain internal records which are clear, complete and meet Green Deal (or equivalent programme) and statutory requirements and follow accepted professional standards

# ASTGDA3

## Prepare and issue Domestic Green Deal (or equivalent programme) Advice Reports

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### Knowledge and understanding

*You need to know and understand:*

### Prepare Domestic Green Deal (or equivalent programme) Advice Reports

- K1 the prescribed format and content of a Domestic Green Deal (or equivalent programme) Advice Report
- K2 the range of information that is required to produce an accurate and comprehensive Domestic Green Deal (or equivalent programme) Advice Report
- K3 how to retrieve any pre-existing Energy Performance Certificate for the property and the data underpinning it
- K4 the range of **energy efficiency measures** that may be included within a Domestic Green Deal (or equivalent programme) Advice Report
- K5 the approved software used to produce Domestic Green Deal (or equivalent programme) Advice Report and how to use it correctly
- K6 the principles underpinning the approved software used to prepare Domestic Green Deal (or equivalent programme) Advice Reports
- K7 how to input data using the approved software in order to prepare Domestic Green Deal (or equivalent programme) Advice Reports
- K8 how to identify common areas of potential uncertainty or insufficient information which could affect value attribution
- K9 the necessary quality assurance checks to conduct on own information gathering to ensure values are correct and **energy efficiency measures** are realistic and appropriate for the subject property
- K10 the circumstances in which items can be recorded as 'unknown' as defined in conventions
- K11 how to gather more information to avoid the use of default values which arises when items are recorded as 'unknown'
- K12 the consequences of recording an item as 'unknown' or 'as built' on the methodology's assessment of possible **energy efficiency measures**
- K13 the relationship between the building fabric and building services and their impact on energy assessment process and **energy efficiency measures** made
- K14 how any future intentions for work on the property will affect the selection and ordering of work on **energy efficiency measures**
- K15 how to use approved software to generate **energy efficiency measures** that are bespoke to the property and its current occupier
- K16 the Conventions used in Domestic Green Deal (or equivalent programme) Advice assessment and the implications for Domestic Green Deal (or equivalent programme) Advice Reports and **Energy efficiency measures** when these change
- K17 the importance of checking that data has been inputted correctly and how to review data if the calculation will not process
- K18 the importance of checking the **energy efficiency measures** generated,

## ASTGDA3

### Prepare and issue Domestic Green Deal (or equivalent programme) Advice Reports

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- amending any that are inappropriate for this property or the customer and providing your reasons
- K19 The consequences of making inappropriate suggestions for energy efficiency measures including the implications for both self and customer
  - K20 the way in which **energy efficiency measures** are generated and circumstances when it is appropriate to delete or amend them
  - K21 the way in which approved software estimates the cost savings from **energy efficiency measures**
  - K22 how to adjust estimated savings in accordance with the occupancy assessment, to provide an indication of how actual savings may differ from standard estimates
  - K23 what is meant by the Green Deal (or equivalent programme) Principle (Golden Rule) and how it is calculated, including that the cost of **energy efficiency measures** is based on best information available and could change
  - K24 how to use approved software to assess which **energy efficiency measures**, or packages of **energy efficiency measures**, meet the Green Deal (or equivalent programme) Principle (Golden Rule) and are eligible for Green Deal (or equivalent programme) finance
  - K25 the relevant Codes of Practice and standards that apply to preparing Domestic Green Deal(or equivalent programme) Advice Reports
  - K26 the importance of using plain language and appropriate terms where free text is allowed
  - K27 the importance of checking the Domestic Green Deal (or equivalent programme) Advice Report to ensure it is clear and complete
  - K28 the importance of fully disclosing any referral fees or other benefits you may receive as a result of the customer following your suggestions for particular products, services and/or suppliers
  - K29 your own liability in respect of providing incorrect or inappropriate advice

*You need to know and understand:*

#### **Lodge and issue Domestic Green Deal (or equivalent programme) Advice Reports**

- K30 how to lodge Domestic Green Deal (or equivalent programme) Advice Reports on the prescribed national register on completion
- K31 how to issue Domestic Green Deal (or equivalent programme) Advice Reports to customers and why it is important to do so promptly
- K32 the available formats in which Domestic Green Deal (or equivalent programme) Advice Reports may be issued to customers
- K33 how to update the Energy Performance Certificate after the installation of agreed **energy efficiency measures**
- K34 the level of detail within your records required to produce a complete and comprehensive Domestic Green Deal (or equivalent programme) Advice Report and justify your decisions on the values recorded, **energy**

## ASTGDA3

### Prepare and issue Domestic Green Deal (or equivalent programme) Advice Reports

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- efficiency measures** included and advice given
- K35 the circumstances in which records can include the fact that information is 'unknown' and the evidence required to support this choice
- K36 the auditing obligations within applicable Scheme Operating Requirements
- K37 the importance of storing records securely allowing for future access
- K38 the purposes for which your records may be used

### Additional Information

#### Scope/range

1. **Energy efficiency measures:**
  - 1.1 all energy performance improvements listed at Appendix T of the current version of SAP
  - 1.2 any other improvements that may be supported by UK Government policy or that of the devolved Administrations, as listed in relevant legislation or guidance.
2. **Relevant information**
  - 2.1 legible visit notes relating to the occupancy assessment
  - 2.2 clear site sketches (plan, elevation) to give an adequate record of the occupancy assessment for audit purposes
  - 2.3 clear photographs containing mandated data (e.g. time and date) appropriately staged and annotated where necessary
  - 2.4 legibly completed questionnaires or records of conversations
  - 2.5 records of web searches or other research
  - 2.6 records of fuel bills seen and meter readings taken
  - 2.7 any other information you consider necessary to support your decisions
  - 2.8 any other information required by Scheme Operating Requirements

## ASTGDA3

### Prepare and issue Domestic Green Deal (or equivalent programme) Advice Reports

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**Developed by** Asset Skills

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**Status** Original

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**Originating organisation** Asset Skills

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**Original URN** ASTGDA3

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**Relevant occupations** Professional Occupations; Construction, Planning and the Built Environment; Building and Construction; Architects, Town Planners and Surveyors

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**Suite** Green Deal Advisers

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**Key words** green deal; green deal advice report; energy performance certificate; EPC; energy efficiency measures; golden rule; green deal (or equivalent programme) finance