

## ASTGDA4

### Explain the Green Deal (or equivalent programme) Advice Report to the domestic customer



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#### Overview

This standard covers the competences of explaining the components of the Green Deal (or equivalent programme) Advice Report to domestic customers and the implications for implementing the recommendations. It also identifies the limits of the report and clarifies where impartial advice ends and where commercial activities begin. Funding eligibility and options are explained. The standard also identifies the motivational issues involved in taking the next steps in implementing the recommendations.

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#### Performance criteria

*You must be able to:*

- P1 explain which energy efficiency measures have greater impact on the energy performance of the building in question and why
- P2 explain the benefits of installing several measures as part of a package
- P3 explain how estimates of running costs have been arrived at, how robust they are, and for how long they will be valid
- P4 provide advice as to how the recommendations can be implemented and where to go for further help
- P5 provide advice on the use of the EPC Adviser tool to help the customer select appropriate energy efficiency measures
- P6 indicate how any future changes in energy consumption and costs not included in the assessment may impact on savings
- P7 identify and explain any relevant incentives for the customer adopting the proposed Green Deal (or equivalent programme) package of energy efficiency measures
- P8 explain any likely limitations on customer choice in respect of brands and appearance of equipment and materials that installers will provide in implementing a package of measures in respect of measures financed through Green Deal (or equivalent programme)
- P9 respond to the different circumstances of rural customers
- P10 explore issues and concerns the customer may have regarding the information provided and next steps in the process and provide additional explanation and information as required
- P11 explain the funding options available and how to apply for funding
- P12 provide information on other programmes and funding mechanisms for energy efficiency and carbon reduction outside Green Deal (or equivalent programme) , particularly where grants and offers may be available to support energy efficiency measures included in the Green Deal (or equivalent programme) Advice Report
- P13 explore the merits and demerits of the proposed energy efficiency measures based on the report and identify ways of overcoming barriers to implementing the energy efficiency measures
- P14 make the customer aware of responsibilities to future occupiers in terms of potential changes to energy savings should energy saving features be removed
- P15 provide precise disclosure of the limitations on the advice being given
- P16 invite and respond to client questions, issues and concerns based on the energy assessment and measures selection logic and process
- P17 make clear the nature of the impartial technical advice being provided up to this point in the process
- P18 make clear your personal professional responsibility for the recommendations made, any liabilities that arise from this and any

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- disclaimers relating to the recommendations
- P19 disclose any fees that the Green Deal (or equivalent programme) Adviser might receive if the customer follows the advice given in relation to one or more energy efficiency measure
  - P20 explain the gap between standard savings estimates and likely actual savings, which will depend on occupancy patterns in the building
  - P21 explain the role of the various parties involved in Green Deal (or equivalent programme)
  - P22 make clear the next stages in the process, following the requirements of the Green Deal(or equivalent programme) Code of Practice and indicate who may be involved in the process
  - P23 declare any specific links with suppliers of Green Deal (or equivalent programme) products and services you may have and the fact that any further involvement in the process will involve your promotion of the products and services of those suppliers

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### Knowledge and understanding

*You need to know and understand:*

- K1 the requirements of the Green Deal (or equivalent programme) Code of Practice in respect of issuing Green Deal (or equivalent programme) Advice Reports to customers
- K2 the objective of producing recommendations reports
- K3 which energy efficiency measures have greater impact on the energy performance of the building in question and why
- K4 the benefits of installing several energy efficiency measures at once as a package
- K5 how estimates of costs have been arrived at, how robust they are and for how long they will be valid
- K6 the different circumstances and requirements of rural customers in relation to Green Deal (or equivalent programme) arrangements
- K7 how to communicate and explain the recommendations to the customer
- K8 specific advice on implementing the recommendations which you may be required to provide and sources of further help and advice
- K9 how to provide clients with specific advice on implementing the recommendations
- K10 where to refer customers for further help and advice
- K11 the funding options available and the eligibility requirements of the Green Deal (or equivalent programme) financial package
- K12 the features, characteristics and eligibility criteria of alternative energy efficiency programmes outside the Green Deal (or equivalent programme) and how to access funding
- K13 the critical factors for the customer in deciding which measures to pursue
- K14 the key components of a business case for implementing the recommended measures
- K15 the economic and personal circumstances of the customer influencing the Green Deal (or equivalent programme) decision making process
- K16 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 whose services and products you will promote
- K17 professional responsibilities and liabilities in the giving of advice on Green Deal (or equivalent programme) and any disclaimers that should be made
- K18 the next steps in the process, the key individuals and organisations involved and how to provide impartial information and how to contact them
- K19 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 (or equivalent programme) process

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### 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

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**Status** Original

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**Originating organisation** Asset Skills

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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** carbon reduction; green deal (or equivalent programme) advice report; green deal (or equivalent programme) adviser; energy efficiency measures