

# ASTGDA6

## Prepare and issue Non-domestic Green Deal (or equivalent programme) Advice Reports



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### Overview

This standard covers the competences required to prepare and issue Non-domestic Green Deal (or equivalent programme) Advice Reports, lodge them on the approved register and issue them to clients. The competencies required to carry out an energy inspection of the property fabric and produce an Energy Performance Certificate, are covered in ASTNDEA3, ASTNDEA4 and ASTNDEA5; those that relate to carrying out the on-site determination of the Operational Profile, which precedes this stage, are covered in ASTGDA5. The competences in respect of explaining the components of the Green Deal (or equivalent programme) report to clients and the implications for implementing the energy efficiency measures in the report, are covered in ASTGDA7.

This unit 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 Non-domestic Green Deal (or equivalent programme) Advice Reports which provide bespoke recommendations for energy efficiency measures. You must ensure that you choose an appropriate software package from the approved software options available, input data correctly, and check that the energy efficiency measures are appropriate.

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

The energy efficiency measures included in Non-domestic Green Deal (or equivalent programme) Advice Reports provided to clients must be objective and impartial. However, it is possible that you will work for or with a particular organisation/employer and that you will receive referral fees or other benefits from them should the client use their services. Although you may offer clients quotations or proposals for the purchase of particular products, services or suppliers, it is vital that you fully disclose to the client, 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.

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#### Performance criteria

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*You must be able to:*

- P1 assemble and collate information gathered before, during and after your property visit, including any pre-existing Energy Performance Certificate or Display Energy Certificate for the property
- P2 choose from approved software options a software package which is appropriate to the type of assessment carried out
- P3 use approved software correctly to prepare Non-domestic Green Deal (or equivalent programme) Advice Reports, ensuring that data is entered accurately
- P4 obtain comprehensive information to ensure values entered for all components are accurate
- P5 identify areas of potential uncertainty or insufficient information which could affect value attribution and carry out checks to avoid likely errors when inputting data
- P6 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 the 'unknown' option, including requesting advice from a specialist where appropriate
- P7 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
- P8 identify the range of **energy efficiency measures** to improve the energy performance of a property that may be included within a Non-domestic Green Deal (or equivalent programme) Advice Report
- P9 review any **energy efficiency measures** generated by the approved software and identify any that are appropriate for this property/client, providing reasons for your choices
- P10 evaluate the feasibility, practicality and relevance of alternatives in relation to the fabric of the building and the building services
- P11 identify ways of optimising the efficiency of current plant and equipment in relation to heating, lighting and air conditioning
- P12 use approved software correctly to evaluate **energy efficiency measures** to reduce energy consumption and to assess their affect on energy performance, following any guidance and/or conventions that apply to its use
- P13 take account of the interaction between the building fabric and the services in the building when considering **energy efficiency measures**
- P14 take account of the effect of building location when considering **energy efficiency measures**
- P15 take account of the needs, circumstances and motivations of the client

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- when considering **energy efficiency measures**
- P16 appreciate the relative costs of any **energy efficiency measures** which may be proposed
  - P17 identify financial incentives and schemes to support energy efficiency and carbon reduction relevant to the **energy efficiency measures** being considered
  - P18 identify the legal requirements which impact on energy use and carbon emissions and their impact on the **energy efficiency measures** being considered
  - P19 maintain impartiality when identifying effective **energy efficiency measures** to reduce operational energy consumption and achieve carbon reduction
  - P20 use approved software correctly to estimate cost savings from **energy efficiency measures**, adjusting the assumed defaults in accordance with the operational profile and fuel prices to reflect actual tariffs, to produce figures to be used in the Green Deal (or equivalent programme) Principle (Golden Rule) calculation
  - P21 where specialist assessment(s) of particular building fabric or building services are necessary to establish appropriate **energy efficiency measures**, incorporate outputs from such specialist assessment(s) in the Non-domestic Green Deal (or equivalent programme) Advice Report
  - P22 record the choice of specialist and the basis for this choice, retaining evidence of their suitability to undertake the specialist assessment in the property in question
  - P23 where available, use approved software to normalise metrics between the Energy Performance Certificate and energy consumption data, obtained from an Operational Rating assessment, Display Energy Certificate or otherwise, to improve the estimates of energy savings from **energy efficiency measures**
  - P24 Explain to the client how the **energy efficiency measures** are assessed against the Golden Rule and that this is done at the quoting stage
  - P25 prepare Non-domestic Green Deal (or equivalent programme) Advice Reports that meet scheme requirements and certification body requirements relevant codes of practice and standards
  - P26 fully disclose, within Non-domestic Green Deal (or equivalent programme) Advice Reports, any referral fees or other benefits that you may receive should the client follow your suggestions for particular products, services and/or suppliers
  - P27 check the Non-domestic Green Deal (or equivalent programme) Advice Report to ensure it is clear and complete

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#### **Lodge and issue Non-domestic Green Deal (or equivalent programme) Advice Reports**

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- P28 collate **relevant information** to support the specific decisions made and **energy efficiency measures** considered
- P29 maintain written records of which **energy efficiency measures** were considered and rejected with reasons
- P30 keep accurate and traceable records of investigations carried out, values attributed and options considered
- P31 lodge Non-domestic Green Deal (or equivalent programme) Advice Reports and any associated data on the prescribed national register on completion
- P32 issue Non-domestic Green Deal (or equivalent programme) Advice Reports to clients promptly
- P33 update the Energy Performance Certificate after the installation of agreed energy efficiency measures
- P34 maintain internal records which are clear, complete and meet Green Deal (or equivalent programme) and statutory requirements and follow accepted professional standards

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#### Knowledge and understanding

*You need to know and understand:*

#### Prepare Non-domestic Green Deal (or equivalent programme) Advice Reports

- K1 the prescribed format and content of a Non-domestic Green Deal (or equivalent programme) Advice Report
- K2 the approved software options available and how to choose software that is appropriate to the type of assessment carried out
- K3 the range of **energy efficiency measures** to reduce energy consumption that may be included within a Non-domestic Green Deal (or equivalent programme)Advice Report
- K4 the approved software used to produce Non-domestic Green Deal (or equivalent programme)Advice Reports and how to use it correctly
- K5 the principles underpinning the approved software used to prepare Non-domestic Green Deal (or equivalent programme) Advice Reports
- K6 how to input data using the approved software in order to prepare Non-domestic Green Deal (or equivalent programme)Advice Reports
- K7 how to identify common areas of potential uncertainty or insufficient information which could affect value attribution
- K8 the necessary quality assurance checks to conduct on own information gathering to ensure values are correct and **energy efficiency measures** are realistic
- K9 the circumstances in which items can be recorded as 'unknown'
- K10 how to gather more information to avoid the use of default values which arises when items are recorded as 'unknown'
- K11 the relationship between the building fabric and building services and their impact on energy assessment process and **energy efficiency measures** made
- K12 the importance of checking the **energy efficiency measures** automatically generated by approved software, amending any that are inappropriate for this property or the client and providing your reasons
- K13 the way in which **energy efficiency measures** are generated by approved software and why it is important to delete or amend them to ensure they are bespoke to the property and the client
- K14 how to use approved software to evaluate **energy efficiency measures** to reduce energy consumption that are bespoke to the property and its current occupier
- K15 the sorts of **energy efficiency measures** that are likely to be relevant to the property being evaluated and are therefore worth evaluating in approved software
- K16 how to take account of the current building energy consumption, from data or from an understanding of the operations within the building, to identify **energy efficiency measures** that are likely to deliver the most savings for the client

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- K17 how to evaluate the feasibility, practicality and relevance of alternative **energy efficiency measures**
- K18 the conventions used in Non-domestic Green Deal (or equivalent programme)Advice assessment and the implications for Non-domestic Green Deal (or equivalent programme) Advice Reports and **energy efficiency measures** when these change
- K19 the importance of checking that data has been inputted correctly and how to review data if the calculation will not process
- K20 how to incorporate outputs from any specialist assessment(s) in the **Non-domestic** Green Deal (or equivalent programme) Advice Report
- K21 current typical costs of **energy efficiency measures** and how to estimate typical costs, for the particular building, of any proposed **energy efficiency measures** the way in which approved software estimates the cost savings from **energy efficiency measures** including the effect of the order of evaluation on savings from specific **energy efficiency measures**
- K22 how to use approved software to adjust estimated savings in accordance with the operational profile and current fuel tariffs, to produce figures to be used in the Green Deal (or equivalent programme) Principle (Golden Rule) calculation
- K23 how approved software ascribes default values to the assessment and how to make adjustments to these values in accordance with the operational profile
- K24 how to use approved software to normalise metrics between the Energy Performance Certificate and energy consumption data, obtained from an Operational Rating assessment, Display Energy Certificate or otherwise, to improve the estimates of energy savings from **energy efficiency measures**
- K25 what is meant by the Green Deal (or equivalent programme) Principle (Golden Rule) and how it is calculated
- K26 how measures are assessed against the Golden Rule
- K27 the relevant codes of practice and standards that apply to preparing Non-domestic Green Deal (or equivalent programme) Advice Reports
- K28 the importance of using plain language and appropriate terms where free text is allowed
- K29 the importance of checking the Non-domestic Green Deal (or equivalent programme)Advice Report to ensure it is clear and complete
- K30 the importance of fully disclosing any referral fees or other benefits you may receive as a result of the client following your recommendations for particular products, such as products, services and/or suppliers

*You need to know and understand:*

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- K31 the data and information required to be lodged on the prescribed national register
- K32 how to lodge Non-domestic Green Deal (or equivalent programme) Advice Reports and associated data on the prescribed national register on completion
- K33 how to issue Non-domestic Green Deal (or equivalent programme) Advice Reports to clients and why it is important to do so promptly
- K34 how to update the Energy Performance Certificate after the installation of agreed energy efficiency measures
- K35 the level of detail within your records required to produce a complete and comprehensive Non-domestic Green Deal (or equivalent programme) Advice Report and justify your decisions on the values recorded, energy efficiency measures included and advice given
- K36 the circumstances in which records can include the fact that information is 'unknown' and the evidence required to support this choice
- K37 the importance of storing records securely allowing for future access
- K38 the purposes for which your records may be used
- K39 what constitutes appropriate evidence of the suitability of specialist assessors to undertake specialist assessment in the property in question

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### Additional Information

#### Scope/range

1. **energy efficiency measures**
  - 1.1 all energy performance improvements listed in the current version of the SBEM Technical Manual, published by BRE on behalf of Government
  - 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 operational profile
  - 2.2 clear site sketches (plan, elevation) to give an adequate record of the determination of the operational profile 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



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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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