

## ASTGDA7

### Explain the Green Deal (or equivalent programme) Advice report to the Non-domestic customer



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#### Overview

This standard covers the competences of explaining the components of the Green Deal (or equivalent programme) report to Non-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 the hierarchy of **energy efficiency measures** based on carbon impact and payback period
  - P2 explain the difference between high, medium and low carbon impact **energy efficiency measures**, giving examples of the relative scale of savings which may be achieved by each
  - P3 explain which **energy efficiency measures** have greater impact on the energy performance of the building elements in question and why
  - P4 explain the relationship between the Energy Performance Certificate asset rating based on standard assumptions, the operational rating based on metered fuel use used in Display Energy Certificates in England and Wales and the estimated savings based on the current use of the building
  - P5 explain the benefits of installing several **energy efficiency measures** as part of a package
  - P6 explain how estimates of running costs have been arrived at, how robust they are and for how long they will be valid
  - P7 provide advice as to how the recommendations can be implemented and where to go for further information
  - P8 provide information on how the management of the building and its services can impact on energy savings and costs
  - P9 indicate how any future changes in energy consumption and prices not included in the assessment may impact on savings
  - P10 identify any relevant incentives for the customer adopting the proposed Green Deal (or equivalent programme) package of **energy efficiency measures**
  - P11 explain any likely limitations on customer choice in respect to brands and appearance of equipment and materials that installers will provide in implementing a package of **energy efficiency measures** in respect of measures financed through Green Deal (or equivalent programme)
  - P12 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
  - P13 explain the funding options available and how to apply for funding
  - P14 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
  - P15 provide precise disclosure of the limitations on the advice being given
  - P16 invite and respond to customer questions, issues and concerns based on the energy assessment and **energy efficiency measures** selection logic and process

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- P17 Make the customer aware of responsibilities to future occupiers in terms of potential changes to energy savings should energy saving features be removed
- P18 make clear the nature of the impartial technical advice being provided up to this point in the process
- P19 make clear your personal professional responsibility for the recommendations made, any liabilities that arise from this and any disclaimers relating to the recommendations
- P20 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
- P21 explain the gap between standard savings and likely savings based on occupancy
- P22 explain the role of the various parties involved in Green Deal (or equivalent programme)
- P23 make clear the next stage 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
- P24 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 the difference between high, medium and low carbon impact **energy efficiency measures** and the scale of savings that each may achieve
- K4 which **energy efficiency measures** have greater impact on the energy performance of the building in question and why
- K5 the benefits of installing several **energy efficiency measures** at once as a package
- K6 how estimates of costs have been arrived at, how robust they are and for how long they will be valid
- K7 The different circumstances and requirements of rural customers in relation to Green Deal (or equivalent programme) arrangements
- K8 The impact of how the building is managed on potential energy savings and actual costs
- K9 how to communicate and explain the **energy efficiency measures** to the customer
- K10 specific advice on implementing the **energy efficiency measures** which you may be required to provide and sources of further help and advice
- K11 how to provide customers with specific advice on implementing the energy efficiency measures
- K12 where to refer customers for further help and advice
- K13 the funding options available and the eligibility requirements of the Green Deal (or equivalent programme) financial package
- K14 the critical factors for the customer in deciding which energy efficiency measures to pursue
- 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 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

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engagement in the Green Deal (or equivalent programme) process

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### Additional Information

#### Scope/range

- 1 **energy efficiency measures**
  - 1.1 Non domestic: 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

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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 Surveying

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**Suite** Green Deal Advisers

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**Key words** non-domestic green deal (or equivalent programme) advice report; energy efficiency measures;