

ASTNDEA3

Conduct site visits to inspect property and provide initial advice to clients



Overview

This Unit covers the conduct of site visits in order to inspect property and provide initial, on-site information, advice and encouragement to clients

Element 3.1 covers the competences required to inspect property in accordance with the prescribed methodology for producing Energy Audit Reports. You are expected to conduct a thorough visual inspection of the property, taking measurements and notes as appropriate, and identify factors that affect the energy performance of property. You must draw on your knowledge and experience of property structure and construction, materials performance, and space/water heating systems etc.

Element 3.2 requires that you maintain complete and accurate records of your site visits. You must record information using appropriate methods and ensure that records are legible and complete.

Element 3.3 covers the provision of on-site information, advice and encouragement. You are expected to present your key findings and initial recommendations to the client, taking account of their priorities, motivation and capacity to act. In consultation with the client, you must develop an outline action plan and help them to make decisions and prioritise their actions. You must agree the next steps with the client and any follow-up services that they wish to receive (e.g. on-going support, action planning). Note that you are not expected to process data using software or generate energy ratings during the site visit - this will take place at a later stage.

The recommendations provided to clients must be objective and impartial e.g. roof insulation is required, energy efficient light bulbs should be used, a condensing boiler should be installed. However, it is possible that you will be 'tied' to 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 make suggestions to clients that they use particular products, services or suppliers (e.g. a certain make of boiler, or a local insulation installation service), it is vital that any interest is fully disclosed to the client.

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Performance criteria

Inspect property

You must be able to:

- P1 ensure that you have the equipment and resources needed for the inspection
- P2 use equipment correctly and interpret data accurately
- P3 identify yourself to those present at the property before commencing the inspection
- P4 identify and record the method of construction of the property, the main materials used, and the space and water heating systems present
- P5 identify any **circumstances** when at the property that prevent you continuing with the inspection and explain the reasons to the client
- P6 undertake a methodical visual inspection of all relevant aspects of the property in accordance with the requirements of the prescribed methodology
- P7 make accurate observations and measurements which are necessary to provide data for the calculation of ratings
- P8 obtain all additional information that is needed about the property and its use
- P9 make further investigations where observations are inconsistent with existing evidence and expected findings
- P10 follow the correct procedures for collecting information to enable ratings to be determined and improvement measures identified

Maintain records of site visits

You must be able to:

- P11 maintain complete, accurate and legible records of your site visits
- P12 record clearly, if necessary, where and why accurate inspection has not been possible
- P13 store your records securely
- P14 catalogue your records methodically
- P15 ensure that records can be accessed readily for future use

Provide on-site information, advice and encouragement

You must be able to:

- P16 determine the needs, circumstances and motivations of the client regarding reducing energy consumption and promoting sustainability
- P17 explore, in a sensitive and tactful manner, the financial constraints that may affect the client's ability to act, and outline potential sources of financial support
- P18 present your key findings to the client in a manner, and at a pace and level, which is appropriate to them
- P19 discuss your key **recommendations** with the client, ensuring that the

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- potential benefits of each are promoted and the potential costs are explained
- P20 ensure that the **recommendations** you make are objective and impartial
- P21 encourage clients to ask questions and to seek clarification where necessary
- P22 take appropriate action in cases where you are unable to respond to client questions
- P23 demonstrate the efficient, safe and appropriate use of appliances, systems and controls where appropriate
- P24 develop an outline action plan, in consultation with the client, that takes account of their needs, circumstances and motivations
- P25 encourage and guide the client in making decisions and prioritising actions
- P26 inform the client about any **follow-up services** available to them, and the terms and conditions on which they can be provided
- P27 inform the client about any referral fees or other benefits that you may receive should they follow your suggestions for particular products, services and/or suppliers
- P28 clarify and agree next steps with the client, including the date by which their Home Energy Audit Report will be delivered

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Knowledge and understanding

You need to know and understand:

Inspect property

- K1 the principles of building structure, elements and fabric
- K2 what equipment and resources are needed for the inspection
- K3 the detailed inspection requirements that apply to the property as defined by the prescribed methodology
- K4 the definitions and conventions embodied within the prescribed methodology
- K5 how to recognise the various types of building construction and materials
- K6 how to identify the space and water heating system(s) present at the property
- K7 how to conduct the inspection in a thorough, methodical and consistent manner
- K8 how to make accurate observations and take accurate measurements
- K9 how to make further investigations where observations are inconsistent with existing evidence and expected findings, and how to identify the causes of these inconsistencies
- K10 the factors which are relevant to determining the energy performance of a property
- K11 the assumptions that are made in determining energy performance
- K12 the factors that are not deemed to affect the energy performance of the property
- K13 the relative sensitivity of the different factors that affect the energy performance of property
- K14 how to collate information required to assess the energy performance of property
- K15 the importance of keeping legible, complete and accurate records

Maintain records of site visits

You need to know and understand:

- K16 the range of methods, formats and conventions for recording information and evidence on the property, its use and energy performance
- K17 the required range of information and evidence relating to the property, its use and its energy performance as defined by the prescribed methodology
- K18 the level of detail within your records required to produce a complete and comprehensive Home Energy Audit Report
- K19 the importance of making and maintaining records that are complete, accurate and legible
- K20 the reasons why it is necessary and important to record where and why accurate inspection has not been possible
- K21 the circumstances in which records can include the fact that information

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is 'not known'

K22 the importance for storing records securely allowing for future access

K23 the purposes for which your records may be used

Provide on-site information, advice and encouragement

You need to know and understand:

K24 the importance of determining the needs, circumstances and motivations of clients regarding reducing energy consumption

K25 how to determine the needs, circumstances and motivations of clients regarding reducing energy consumption

K26 how to recognise 'fuel poverty', and the sources of support and advice to which those in fuel poverty can be directed

K27 how to explore the financial constraints that might affect the client's ability to act; the importance of doing so in a sensitive and tactful manner

K28 the different tenures/sectors within the property market (e.g. social rented, private rented, owner-occupied), and how this impacts on both the client's capacity to act and the funding/support available to them

K29 how to present your key findings to clients in a manner, and at a pace and level, which is appropriate to them

K30 the importance of communicating with clients in a manner, and at a pace and level, appropriate to them

K31 how to discuss key recommendations with clients, and the importance of promoting the potential benefits and explaining the potential costs of each

K32 the importance of ensuring that your recommendations are objective and impartial

K33 how to encourage clients to ask questions and seek clarification on any issues about which they are unsure

K34 action to take in cases where you are unable to respond to client questions (e.g. referral to other sources of information)

K35 how to develop an outline action plan that is specific, measurable, achievable, realistic and time-bound (i.e. SMART)

K36 the importance of consulting with the client, and taking account of their needs, circumstances and motivations, when developing an outline action plan

K37 the importance of prioritising planned actions

K38 how to encourage and guide clients in making decisions and prioritising actions

K39 the range of follow-up support, products and services that are available to the client, and the terms and conditions on which they can be provided

K40 the importance of fully disclosing any referral fees or other benefits you may receive as a result of the client following your suggestions for particular products, services and/or suppliers

K41 the importance of clarifying and agreeing next steps with the client

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Additional Information

Scope/range

Inspect property

1 **circumstances:**

- 1.1 situations/occupants upon which it would be inappropriate to intrude
- 1.2 the discovery of unexpected or hazardous conditions or materials
- 1.3 other potential threats to health and safety

Provide on-site information, advice and encouragement to clients

2 **recommendations** may relate to:

- 2.1 lighting, heating and hot water
- 2.2 insulation and glazing
- 2.3 household appliances, electrical equipment and their controls
- 2.4 occupants' use of the home
- 2.5 energy suppliers, tariffs and household bills
- 2.6 financial support available to implement measures to reduce energy consumption (e.g. grants)
- 2.7 options for low and zero carbon energy technologies

3 **follow-up services** may include:

- 3.1 further information and advice
- 3.2 encouragement and support
- 3.3 action planning
- 3.4 referral to other professionals
- 3.5 recommending products, services and/or suppliers

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