
Overview

This standard covers the activities needed to produce and issue Advisory Reports, required for defined categories of public buildings to accompany Display Energy Certificates and to communicate their contents to clients. You must be able to process information to produce an Advisory Report, prepare and issue Advisory Reports, lodge them on the National Register or equivalent in the Devolved Administrations and communicate the contents of the Advisory Report to clients.

Note that the term 'assessment' is used throughout the standards when referring to the overall process of determining the Asset Rating of a property, or its Operational Rating, whereas 'inspection' is used only when referring to on-site inspection of the property and its features.

The references to clients throughout the standard refer both to internal clients, such as line managers, as well as external clients; for example individuals who have contracted your services or representatives of external client organisations.

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Produce Advisory Reports

Performance criteria

Process information to produce Advisory Reports

You must be able to:

- P1 identify the features present in a building that will be relevant to the development of recommendations for improving operational energy efficiency
- P2 determine operational and maintenance practices that will be relevant to the development of recommendations for improving operational energy efficiency
- P3 determine aspects of operational behaviour, energy awareness and training that will be relevant to the development of recommendations for improving operational energy efficiency
- P4 review the potential energy efficiency measures associated with each building feature, in terms of their financial payback and carbon impact, to determine which are relevant

Prepare Advisory Reports

You must be able to:

- P5 filter and prioritise a list of potential recommendations to produce a set tailored to the improvement of the operational energy efficiency of a building
- P6 assign carbon impact to selected recommendations for improving the operational energy efficiency of a building
- P7 review existing reports and energy surveys to identify additional recommendations that should be included in the report
- P8 develop additional recommendations where appropriate
- P9 comply with the approved guidance and conventions to gather the information necessary to generate the recommendations
- P10 provide clear reasons for any adjustments to recommendations
- P11 use approved software to generate the Advisory Report in accordance with approved guidance and conventions

Issue Advisory Reports

You must be able to:

- P12 use approved software to generate the data file for lodgement
- P13 explain the requirement for Energy Assessors to be accredited in order to produce valid Advisory Reports
- P14 explain the process by which an Energy Assessor's accreditation status is confirmed when producing a valid data file for lodgement
- P15 lodge Advisory Reports onto the national register
- P16 retrieve Advisory Reports from the national register

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Communicate the contents of the Advisory Reports to clients

You must be able to:

- P17 explain to the **clients** their responsibilities under the regulations for having and being able to produce, a current Advisory Report
- P18 explain to **clients** how the recommendations included in the Advisory Report are derived and the significance of their division into short, medium and long-term recommendations
- P19 explain the information presented in the Advisory Report to **clients** and be able to answer questions related to this
- P20 explain to **clients** how to obtain further information before deciding to implement any of the energy efficiency measures
- P21 produce, maintain and retain internal records which are clear, complete and conform to accepted professional and statutory requirements. These will include investigations carried out, values recorded and options considered, to the level of detail required to:
 - P21.1 produce a complete and comprehensive Advisory Report
 - P21.2 justify your decisions on values recorded and recommendations made

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Produce Advisory Reports

Knowledge and understanding

You need to know and understand:

Produce information to produce Advisory Reports

- K1 the features present in a building that are relevant to the development of recommendations for improving operational energy efficiency
- K2 operational and maintenance practices that are relevant to the development of recommendations for improving operational energy efficiency
- K3 the aspects of operational behaviour, energy awareness and training that are relevant to the development of recommendations for improving operational energy efficiency
- K4 the range of potential energy efficiency measures associated with each building feature
- K5 how to order potential energy efficiency measures in terms of payback
- K6 how to review the potential energy efficiency measures associated with each building feature, in terms of their financial payback and carbon impact, to determine which are relevant

Prepare Advisory Reports

You need to know and understand:

- K7 how to filter and prioritise a list of potential recommendations to produce a set tailored to the improvement of the operational energy efficiency of a building
- K8 how to assign carbon impact to selected recommendations for improving the operational energy efficiency of a building
- K9 how to review existing reports and energy surveys to identify additional recommendations that should be included in the report
- K10 the types of existing reports that could be reviewed to identify additional recommendations that should be included in the report
- K11 when it is appropriate to develop additional recommendations and how to do this
- K12 the approved guidance and conventions on gathering the information necessary to generate the recommendations
- K13 the reasons for making adjustments to recommendations
- K14 how to use approved software to generate the Advisory Report in accordance with approved guidance and conventions

Issue Advisory Reports

You need to know and understand:

- K15 how to use approved software to generate the data file for lodgement
- K16 the requirement for Energy Assessors to be accredited in order to produce valid Advisory Reports
- K17 the process by which an Energy Assessor's accreditation status is confirmed when producing a valid data file for lodgement
- K18 how to lodge Advisory Reports onto the national register

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K19 how to retrieve Advisory Reports from the national register

Communicate the contents of the Advisory Report to clients

You need to know and understand:

- K20 **clients'** responsibilities under the regulations for having, and being able to produce, a current Advisory Report; how to explain this to **clients**
- K21 how the recommendations included in the Advisory Report are derived and the significance of their division into short, medium and long-term measures; how to explain this to **clients**
- K22 how to explain the information presented in the Advisory Report to **clients**
- K23 how to respond to likely questions that **clients** may be expected to ask
- K24 the tax allowances and other incentives available for Low and Zero Carbon technologies
- K25 the sources of further information available to **clients** that may aid their decision to implement any of the recommended measures
- K26 the level of detail within your records required to produce a complete and comprehensive Advisory Report and justify your decisions on the values recorded and recommendations made
- K27 the importance of making and maintaining records that are complete, accurate and legible
- K28 the importance of storing records securely allowing for future access and the purposes for which your records may be used

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Additional Information

Scope/range

- 1 **clients**
 - 1.1 internal
 - 1.2 external

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Produce Advisory Reports

Developed by	Asset Skills
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Version number	2
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Date approved	February 2012
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Indicative review date	February 2017
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Validity	Current
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Status	Original
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Originating organisation	Asset Skills
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Original URN	OR4
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Relevant occupations	Professional Occupations; Construction, Planning and the Built Env; Building and Construction; Architects, Town Planners and Surveyors
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Suite	NOS for the production of ORs, DEC's and ARs
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Key words	energy performance of buildings directive; EPBD; energy performance certificate; EPC; display energy certificate; DEC; operational rating; OR; advisory report; AR
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