

Overview

This standard is about conducting site visits to inspect property and providing initial, on-site information and advice to customers.

It is about inspecting property in accordance with the prescribed methodology for producing Home Energy Audit Reports and maintaining records of your site visits.

This standard includes presenting your key findings and initial recommendations to the customer, taking account of their priorities, motivation and capacity to act. 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 customers 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 customer use their services. Although you may make suggestions to customers 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 disclosed to the customer.

You must understand and work to the requirements of each devolved nation.

Performance criteria

You must be able to: **Inspect property**

1. confirm the availability of the equipment and resources required for the property inspection
2. use the relevant equipment and interpret the available and gathered data to the required devolved nation's standards
3. provide evidence of your identity to those present at the property before commencing the inspection
4. identify and record the method of construction of the property, the main materials used, and the space and water heating systems present
5. identify circumstances when at the property that prevent you from continuing with the inspection and explain the reasons to the customer
6. undertake a visual inspection of the relevant aspects of the property in accordance with organisational requirements
7. observe and take measurements which are required to provide data for the calculation of energy performance ratings
8. obtain the required additional information about the property and its use
9. make further investigations where observations are inconsistent with existing evidence and expected findings

Maintain records of site visits

1. maintain electronic and paper records of your site visits in accordance with organisational requirements
2. record, if required, where and why inspection has not been possible
3. store records securely in accordance with the relevant data protection legislation
4. confirm that records can be accessed for future use when required by relevant organisations

Provide initial information, advice and encouragement to customers

1. determine the requirements of the customer regarding reducing energy consumption and promoting sustainability
2. present your initial findings and recommendations to the customer

- and confirm their understanding of these
3. support customers to ask questions and to seek clarification where required
 4. develop an outline action plan, in consultation with the customer, that takes account of their requirements
 5. inform the customer about the follow-up services available to them, and the terms and conditions by which they can be provided
 6. inform the customer about referral fees or other benefits that you may receive should they follow your suggestions for particular products, services and/or suppliers
 7. verify and agree the next steps with the customer, including the date by which their Home Energy Audit Report will be delivered

Knowledge and understanding

You need to know and understand: **Inspect property**

1. the equipment and resources required for the inspection and how to use them
2. the relevant detailed inspection requirements that apply to the property as defined by the prescribed methodology for Home Energy Audit reports
3. the relevant definitions and conventions contained within the prescribed methodology for Home Energy Audit reports
4. how to recognise the various types of building construction and materials
5. how to identify the space and water heating system(s) present at the property
6. how to conduct the inspection in accordance with the relevant devolved nation's requirements
7. how to observe and take measurements which meet the required standards to produce a Home Energy Audit report
8. how to collate the required information to assess the energy performance of property

Maintain records of site visits

1. the range of methods, formats and conventions for recording information and evidence on the property, its use and energy performance
2. the required range of information and evidence relating to the property, its use and its energy performance as defined by the prescribed methodology for Home Energy Audit reports
3. the level of detail within your records required to produce a Home Energy Audit Report
4. how to record the information and evidence in accordance with the relevant data protection legislation
5. the reasons you are required to record where and why an accurate inspection has not been possible
6. the circumstances in which records can include the fact that information is 'unknown' and the evidence required to support this choice
7. the relevant organisations who can access the records when

required

Provide initial information, advice and support to customers

1. how to determine customer requirements regarding reducing energy consumption
2. how to explore the financial constraints that impact on the customer's ability to reduce their energy consumption how to present your findings and recommendations to customers and confirm their understanding of these
3. the importance of confirming that your recommendations are objective and impartial
4. how to encourage customers to ask questions and seek clarification on issues about which they are unsure
5. how to develop an outline action plan, in consultation with the customer, that takes account of their requirements
6. how to support customers in making decisions and prioritising actions
7. the range of follow-up support, products and services that are available to the customer, and the terms and conditions on which they can be provided
8. the importance of disclosing referral fees or other benefits you may receive as a result of the customer following your suggestions for particular products, services and/or suppliers
9. the importance of clarifying and agreeing next steps with the customer

Scope/range

Inspect property

Circumstances:

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

Provide initial information, advice and encouragement to customers

Recommendations may relate to:

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

Follow-up services may include:

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

INSEA2

Conduct site visits to inspect property and provide initial energy advice to customers



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Relevant Occupations Professional Occupations; Construction, planning and the built environment; Building and construction; Architects; Town Planners and Surveyors

Suite Energy Advisers

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