

## Overview

This standard is about monitoring the implementation of energy advice recommendations by the customer and the provision of any follow-up services requested by them including further information and advice, support and action planning.

It is about contacting the customer after they have received their Home Energy Audit Report so that you can confirm their understanding of the report, review their progress with implementing the recommendations, and confirm their need for any follow-up services. You must support the customer to assess their progress in implementing the recommendations and help them identify any barriers. You must make sure that follow-up services are delivered, and customers are referred to relevant sources of information, advice and support as required.

This standard is also about gathering data and information that enables the carbon and cost savings made by them to be quantified. You may wish to consider the use of energy monitoring equipment, such as home energy meters, as a means of monitoring actual energy use, and the use of questionnaires to monitor behavioural changes for example. It is recognised that monitoring will rely, on the evidence that is provided by the customer and that, in some cases, such evidence may not easily be obtained. The Adviser is expected to work with customers to confirm that efforts to monitor improvements are made, and to use prescribed software to calculate the carbon and cost savings achieved. Records of the actions taken by customers and the savings made must be kept. You must understand and work to the requirements of each devolved nation.

## Monitor the implementation of energy advice

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### Performance criteria

*You must be able to:*

1. contact the customer, after receipt of the Home Energy Audit Report and as agreed with them, to confirm their understanding of the report and the accompanying guidance
2. monitor the customer's progress with implementing the recommendations of energy advice against the action plan, and confirm their requirement for follow-up services
3. support customers to assess, and to record evidence of, their progress against targets, and to identify barriers
4. provide follow-up services to the customer to the agreed timescales
5. direct the customer to relevant sources of information, advice and support to assist them with taking action to reduce energy consumption
6. gather evidence, in consultation with the customer, that is required for the quantification of carbon and cost savings
7. use the prescribed software to calculate the carbon and cost savings achieved
8. keep electronic and paper records of the actions taken by customers and the carbon and cost savings made by them, in accordance with the relevant data protection legislation

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### Knowledge and understanding

*You need to know and understand:*

1. the importance of contacting customers, within the agreed timescales, following receipt of the Home Energy Audit Report, and the reasons for doing so
2. how to support customers to assess, and record evidence of, their progress against targets to implement the recommendations from the report
3. the range of barriers to implement the recommendations from the report, and potential ways of overcoming them
4. to the importance of providing relevant follow-up services within the timescales agreed with the customer
5. the types and sources of further information, advice and support to which customers can be referred to assist them with taking action to reduce energy consumption
6. the importance of gathering data and information that enables quantification of the carbon and cost savings made by customers
7. how and when to gather data and information that enables the quantification of the carbon and cost savings made by customers
8. the issues associated with gathering evidence from customers regarding the carbon and cost savings made by them, and the ways of overcoming these difficulties
9. how to use the prescribed software to calculate the carbon and cost savings achieved
10. how to keep electronic and paper records of the actions taken by customers and the carbon and cost savings made by them, in accordance with the relevant data protection legislation

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**Scope/range**

Follow-up services may include:

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

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<b>Developed by</b>	Instructus
<b>Version Number</b>	1
<b>Date Approved</b>	March 2019
<b>Indicative Review Date</b>	January 2024
<b>Validity</b>	Current
<b>Status</b>	Original
<b>Originating Organisation</b>	Instructus
<b>Original URN</b>	ASTEAS5
<b>Relevant Occupations</b>	Professional Occupations; Construction, planning and the built environment; Building and construction; Architects; Town Planners and Surveyors
<b>Suite</b>	Energy Advisers
<b>Keywords</b>	recommendations; Audit Report; follow-up services; home energy meters; energy use; carbon savings; cost savings