



Unit and Assessment Specification

Unit title	Prepare and Issue Non-Domestic Green Deal Advice Reports
SQA Code	H1VB 04
SCQF Level	
SCQF Credit Points	
SSC Ref	ASTGDA 6

History of changes

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Title		Prepare and Issue Non-Domestic Green Deal Advice Reports	
Learning Outcomes		Assessment Criteria	
The learner will:		The learner can:	
1	Understand the process of preparing, lodging and issuing non-domestic Green Deal Advice Reports.	1.1	Describe the prescribed format and content of a non-domestic Green Deal Advice report.
		1.2	Identify the approved software options available and how to choose software that is appropriate to the type of assessment being carried out.
		1.3	Summarise the information required to produce a compliant non-domestic Green Deal Advice report.
		1.4	Summarise the range of energy efficiency measures that may be included within a non-domestic Green Deal Advice Report.
		1.5	Summarise the principles underpinning the approved software used to prepare a non-domestic Green Deal Advice Report.
		1.6	Describe how to input data into the approved software to produce non-domestic Green Deal Advice Reports.
		1.7	Identify common areas of potential uncertainty or insufficient information which could affect value attribution.
		1.8	Define the quality assurance checks to conduct on information to ensure that: <ul style="list-style-type: none"> ◆ values are correct ◆ energy efficiency measures are realistic and appropriate for the subject property
		1.9	Define: <ul style="list-style-type: none"> ◆ the circumstances in which items can be recorded as unknown as defined by conventions ◆ the consequences of recording an item as unknown or as built on the methodology's assessment process ◆ ways of gathering more information to avoid the use of default values
		1.10	Describe the relationship between the building fabric and building services and the impact on energy the energy assessment process and energy efficiency measures proposed.

	<p>1.11 Explain:</p> <ul style="list-style-type: none"> ◆ the way in which energy efficiency measures are generated by approved software ◆ how to check the energy efficiency measures generated automatically by the approved software ◆ how to amend by deleting inappropriate energy efficiency measures for the property and customer <p>1.12 Describe how to use approved software to evaluate energy efficiency measures that are bespoke to the property and its current occupier.</p> <p>1.13 Explain how the current building energy consumption is taken into account when identifying energy efficiency measures likely to deliver the most savings to the customer.</p> <p>1.14 Explain how to select energy efficiency measures to evaluate using approved software and how to ensure they are feasible, practical and appropriate for the property and customer.</p> <p>1.15 Summarise the conventions used in non-domestic Green Deal advice assessment and the implications on the process when these change.</p> <p>1.16 Describe how to:</p> <ul style="list-style-type: none"> ◆ check the accuracy of inputted data ◆ review data when the calculation will not process ◆ incorporate outputs from specialist assessments <p>1.17 Summarise current typical costs of energy efficiency measures and explain how to estimate typical costs, for the particular building, of the proposed energy efficiency measures.</p> <p>1.18 Describe how the approved software estimates the cost savings from energy efficiency measures.</p> <p>1.19 Describe how to amend ascribed default values in accordance with the operational profile.</p> <p>1.20 Explain how to adjust estimated savings in accordance with the operational profile and current fuel tariffs to provide figures to be used in the Green Deal Principle (Golden Rule) calculation estimates.</p>
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	<p>1.21 Explain how to normalise metrics between the Energy performance Certificate and energy consumption data to improve the estimates of energy savings from energy efficiency measures.</p> <p>1.22 Explain how the Green Deal Principle (Golden Rule) is calculated and how measures are assessed against the Golden Rule.</p> <p>1.23 Explain the importance of fully disclosing any referral fees or other benefits received in relation to suggested products, services and suppliers.</p> <p>1.24 Explain the process of lodging and issuing a non-domestic Green Deal Advice report.</p> <p>1.25 Identify the level and detail of information storage required in relation to non-domestic Green Deal Advice reports.</p> <p>1.26 Explain how to update the Energy Performance Certificate after the installation of agreed energy efficiency measures.</p>
<p>2 Be able to prepare non-domestic Green Deal Advice Reports.</p>	<p>2.1 Assemble and collate information required including any pre-existing Energy Performance Certificate or display Energy certificate.</p> <p>2.2 Choose from approved software options a software package which is appropriate to the type of assessment being carried out.</p> <p>2.3 Use the approved software to prepare non-domestic Green Deal Reports.</p> <p>2.4 Ensure that values entered for all components are accurate.</p> <p>2.5 Identify areas of potential uncertainty or insufficient information which could affect value attribution and carry out checks to avoid likely errors.</p> <p>2.6 Carry out further investigations to identify appropriate values in order to reduce or eliminate use of default values and the unknown option, including requesting advice from a specialist where appropriate.</p>

	<p>2.7 When the use of default values or 'unknown' is unavoidable, explain why this was the case and the steps taken to try to avoid their use, in accordance with relevant conventions and Code of Practice.</p> <p>2.8 Identify ways of optimising the efficiency of current plant and equipment in relation to heating, lighting and air conditioning.</p> <p>2.9 Generate energy efficiency measures which are feasible, practical and appropriate for the property using the approved software and the guidance or conventions applying to its use.</p> <p>2.10 Identify energy efficiency measures which take account of:</p> <ul style="list-style-type: none"> ◆ the interaction between the building fabric and the building services ◆ building location ◆ needs, circumstances and motivations of the customer <p>2.11 Evaluate the feasibility, practicality and relevance of alternatives in relation to the fabric of the building and the building services.</p> <p>2.12 Appreciate the relative costs of any energy efficiency measures which may be proposed.</p> <p>2.13 Maintain impartiality when identifying effective energy efficiency measures.</p> <p>2.14 Use approved software to:</p> <ul style="list-style-type: none"> ◆ estimate energy use and associated energy costs ◆ estimate energy and cost savings from energy efficiency measures ◆ adjust the assumed defaults in accordance with the operational profile and fuel prices to reflect actual tariffs ◆ produce figures to be used in the non-domestic Green Deal (Golden Rule) calculation ◆ assess which energy efficiency measures or packages of measures are likely to be eligible for Green Deal finance ◆ normalise metrics between the Energy Performance Certificate and energy consumption data to improve the estimates of energy savings from energy efficiency measures
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	<p>2.15 Identify the legal requirements which impact on energy use and carbon emissions and their impact on energy efficiency measures being considered.</p> <p>2.16 Prepare non-domestic Green Deal Advice reports that meet scheme requirements and certification body requirements.</p> <p>2.17 Incorporate outputs from any specialist assessment(s) in the Non-domestic Green Deal Advice Report.</p> <p>2.18 Disclose any referral fees or other benefits to be received should the customer follow suggestions for particular products, services or suppliers.</p> <p>2.19 Where specialist assessment is required, record the choice of specialist and the basis for this choice, retaining evidence of their suitability to undertake the specialist assessment in the property.</p> <p>2.20 Explain to the client how the energy efficiency measures are assessed against the Golden Rule, and that this is done at the quoting stage.</p> <p>2.21 Check the Non-domestic Green Deal Advice Report to ensure it is clear and complete.</p>
<p>3 Be able to lodge and issue domestic Green Deal Advice Reports.</p>	<p>3.1 Collate and maintain information in support of:</p> <ul style="list-style-type: none"> ◆ investigations carried out ◆ values attributed ◆ energy efficiency options considered ◆ energy efficiency options rejected with justification ◆ specific decisions made and energy efficiency measures proposed <p>3.2 Lodge non-domestic Green Deal Advice Reports on the prescribed national register.</p> <p>3.3 Issue non-domestic Green Deal Advice reports to customers.</p> <p>3.4 Update the Energy Performance Certificate after the installation of agreed energy efficiency measures.</p> <p>3.5 Maintain internal records which are clear, complete and meet Green Deal and statutory requirements and follow accepted professional standards.</p>

Additional information about the Unit
Unit purpose and aim(s)
This Unit is about preparing and issuing non-domestic Green Deal Advice Reports.
Details of the relationship between the Unit and relevant national occupational standards (if appropriate)
Developed from Asset Skills National Occupational Standards
Details of the relationship between the Unit and other standards or curricula (if appropriate)
Assessment requirements specified by a sector or regulatory body (if appropriate)
Please refer to Asset Skills Assessment Principles at www.assetskills.org

Assessment (evidence) Requirements
Guidance on Instruments of Assessment