


Qualification Guide

BPEC 601/0529/X - Level 3 Certificate in Domestic Energy Assessment (QCF)

BPEC 600/6277/0 - Level 3 Diploma in Green Deal Advice (QCF)

Energy Performance Certificate



17 Any Street, District, Any Town, B5 5XX

Dwelling type: Detached house Reference number: 0000-0000-0000-0000-0000
 Date of assessment: 15 August 2011 Type of assessment: RdSAP, existing dwelling
 Date of certificate: 06 October 2011 Total floor area: 165 m²

Use this document to:

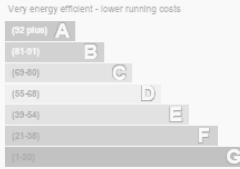
- Compare current ratings of properties to see which properties are more energy efficient
- Find out how you can save energy and money by installing improvement measures

Estimated energy costs of dwelling for 3 years	£5,367
Over 3 years you could save	£2,697

Estimated energy costs of this home			
	Current costs	Potential costs	Potential future savings
Lighting	£375 over 3 years	£207 over 3 years	<div style="border: 1px solid #ccc; padding: 5px; width: fit-content; margin: auto;"> <p style="margin: 0;">You could save £2,697 over 3 years</p> </div>
Heating	£4,442 over 3 years	£2,127 over 3 years	
Hot water	£550 over 3 years	£337 over 3 years	
Totals	£5,367	£2,670	

These figures show how much the average household would spend in this property for heating, lighting and hot water. This excludes energy use for running appliances like TVs, computers and cookers, and any electricity generated by microgeneration.

Energy Efficiency Rating

<p style="font-size: x-small;">Very energy efficient - lower running costs</p>  <p style="font-size: x-small;">Not energy efficient - higher running costs</p>	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 50%;">Current</th> <th style="width: 50%;">Potential</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">49</td> <td style="text-align: center;">75</td> </tr> </tbody> </table> <p style="font-size: x-small;">The graph shows the current energy efficiency of your home. The higher the rating the lower your fuel bills are likely to be. The potential rating shows the effect of undertaking the recommendations on page 3. The average energy efficiency rating for a dwelling in England and Wales is band D (rating 60).</p>	Current	Potential	49	75
Current	Potential				
49	75				

Top actions you can take to save money and make your home more efficient

Recommended measures	Indicative cost	Typical savings over 3 years	Available with Green Deal
1 Increase loft insulation to 270 mm	£100 - £300	£216	✔
2 Cavity wall insulation	£500 - £1,500	£825	✔
3 Draughtproofing	£100	£93	✔

See page 3 for a full list of recommendations for this property.

The Green Deal will be available from later this year. To find out more about how the Green Deal can make your home warmer and cheaper to run, visit www.direct.gov.uk/greendeal or contact the advice line on 0800 XXX XXX.

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BPEC Level 3 Certificate in Domestic Energy Assessment (QCF) **BPEC Level 3 Diploma in Green Deal Advice (QCF)**

Introduction

This Guide has been produced in conjunction with Asset Skills who have developed the 'National Occupational Standards' and Units of Assessment for the Domestic Energy Assessor and Green Deal Advisor qualifications. This guide details the requirements for both centres delivering the qualifications, and learners undertaking the qualifications - and aims to provide:

- An overview of the structure of the:
 - L3 Certificate in Domestic Energy Assessment qualification
 - L3 Diploma in Green Deal Advice
- An overview of the assessment strategy for each of the qualifications
- Guidance notes for assessors and other centre staff for the qualifications

The qualifications require the completion of a combination of centre based knowledge and practical assessments and workplace-based performance assessments. The qualifications are designed for individuals who are engaged in, or who wish to be engaged in the undertaking of domestic energy assessments and/or Green Deal Advice visits in domestic properties.

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Rules of Combination

Level 3 Certificate in Domestic Energy Assessment

This is a Level 3 Certificate in which learners must achieve at least 25 credits to achieve the qualification. This equates, as a minimum, to the completion of all the mandatory units. The optional unit does not count towards the credit required to complete the qualification, but may be taken if required.

Successful completion of this qualification proves that learners are competent to undertake the completion of domestic energy assessments and confirms that they have demonstrated the ability to meet 'licence to practice' requirements. The qualification and unit details are shown below:

Qualification Title	Level 3 Certificate in Domestic Energy Assessment				
Qualification Number	601/0529/X	BPEC Number	DEA-001a		
Last Registration Date	28/02/17				
Last Certification Date	28/02/19				
QCF Unit Ref	Unit Title	Level	Credit Value	Notional Learning Time	Guided Learning Hours
Mandatory units					
H/503/8162	Conduct energy assessments in a safe, effective and professional manner	3	6	30	30
K/503/8163	Prepare for Energy Assessments of Domestic property	3	4	20	20
T/503/8165	Undertake Energy Inspections	3	11	45	45
J/504/0924	Produce and explain Energy Performance Certificates relating to Domestic Property	3	4	25	25
Totals			25	150	120

Note

Notional Learning Time (NLT) is the average time for a learner to achieve the learning outcomes and assessment criteria. An initial assessment of a learner's ability to achieve the qualification should be carried out to estimate the learning time. It can be assumed that a learner with no previous experience in the work activity will require between 20 – 25% additional learning time to complete the qualification, whereas an experienced learner may require some 20 – 25% less learning time.

Guided Learning Hours (GLH) is the estimated number of hours of teacher supervised or directed study time required to teach the qualification and each unit.

Rules of Combination

Level 3 Diploma in Green Deal Advice

This is a Level 3 Certificate in which learners must achieve at least 47 credits to achieve the qualification. This equates, as a minimum, to the completion of all the mandatory units. The optional unit does not count towards the credit required to complete the qualification, but may be taken if required.

Successful completion of this qualification proves that learners are competent to undertake the role of Green Deal Advisors and confirms that they have demonstrated the ability to meet 'licence to practice' requirements. The qualification and unit details are shown below:

Qualification Title	Level 3 Diploma in Green Deal Advice				
Qualification Number	600/6277/0	BPEC Number	GDA-001		
Last Registration Date	28/02/2017				
Last Certification Date	28/02/2019				
QCF Unit Ref	Unit Title	Level	Credit Value	Notional Learning Time	Guided Learning Hours
H/503/8162	Conduct energy assessments in a safe, effective and professional manner	3	6	30	30
K/503/8163	Prepare for Energy Assessments of Domestic property	3	4	20	20
T/503/8165	Undertake Energy Inspections	3	11	45	45
J/504/0924	Produce and explain Energy Performance Certificates relating to Domestic Property	3	4	25	25
Y/503/8188	Explain the Green Deal Advice Report to the domestic customer	3	4	20	20
R/503/8187	Prepare and issue domestic Green Deal Advice Reports	4	6	30	30
T/503/8179	Provide information to customers on the principles, financing and operation of the Green Deal	3	4	20	20
L/503/8186	Undertake occupancy assessments and give advice	3	8	40	40
Totals			47	280	230
Optional unit					
M/503/8164	Identify representative properties for sampling and multiple certification	3	5	25	25
Totals			5	25	25

Note: Learners who have achieved the L3 Certificate in Domestic Energy Assessment (QCF) and the L3 Award in Domestic Energy Assessment Professional Development (QCF) can claim credit through Recognition of Prior Learning (RPL) for the first 4 units of this qualification.

Note

Notional Learning Time (NLT) is the average time for a learner to achieve the learning outcomes and assessment criteria. An initial assessment of a learner's ability to achieve the qualification should be carried out to estimate the learning time. It can be assumed that a learner with no previous experience in the work activity will require between 20 – 25% additional learning time to complete the qualification, whereas an experienced learner may require some 20 – 25% less learning time.

Guided Learning Hours (GLH) is the estimated number of hours of teacher supervised or directed study time required to teach the qualification and each unit.

Unit Details

The next pages detail the requirements of the 15 individual units that make up the qualifications in this suite:

QCF Unit Ref	Unit Title	Page
H/503/8162	Conduct energy assessments in a safe, effective and professional manner	9
K/503/8163	Prepare for Energy Assessments of Domestic property	10
T/503/8165	Undertake Energy Inspections	13
J/504/0924	Produce and explain Energy Performance Certificates relating to Domestic Property	17
K/502/6806	Identify representative properties for sampling	22
Y/503/8188	Explain the Green Deal Advice Report to the domestic customer	23
R/503/8187	Prepare and issue domestic Green Deal Advice Reports	26
T/503/8179	Provide information to customers on the principles, financing and operation of the Green Deal	29
L/503/8186	Undertake occupancy assessments and give advice	31
M/503/8164	Identify representative properties for sampling and multiple certification	35

H/503/8162 - Conduct energy assessments in a safe, effective and professional manner

This unit aims to develop the skills needed to develop and maintain effective working relationships and conduct energy assessments in a professional and ethical manner. It also ensures that the Energy assessor understands the thrust of government climate change strategy in general and the role of the Energy Performance of Buildings Directive (EPBD) in particular. Upon completion of the unit the learners will:

- Understand the Health and Safety requirements when undertaking energy assessments
- Understand the legislation, codes of conduct and compliance requirements in relation to energy assessment
- Understand the legislation, codes of conduct and compliance requirements in relation to energy assessment
- Be able to comply with organisational and legal requirements at all times
- Be able to maintain health and safety at work
- Be able to develop and maintain effective working relationships with colleagues, professionals, clients and others.
- Be able to conduct energy assessments in a professional manner

Learning Outcome 1	
Understand the Health and Safety requirements when undertaking energy assessments	
Assessment Criteria	
1.1	Explain the relevant legal duties for health, safety and security in the workplace
1.2	Identify the health, safety and security risks that could exist in different locations, and the action to take to minimise or mitigate risks
1.3	Identify the risks to self which are associated with lone working
1.4	Explain why it is important to remain alert to the presence of risks in the workplace
1.5	Explain the importance of personal conduct in maintaining the health, safety and security of yourself or others
1.6	Explain how to make use of relevant suppliers and manufacturers' instructions for the safe use of equipment, materials and products
1.7	Explain who should be informed of any conflicts between different health, safety and security requirements
1.8	Describe the procedures for different types of emergency
1.9	Identify the types of suggestions for improving health, safety and security at work that could be made and who should be given them
1.10	Identify the actions that may be taken to protect customers' property

Learning Outcome 2	
Understand the legislation, codes of conduct and compliance requirements in relation to energy assessment	
Assessment Criteria	
2.1	Explain why it is important to promote goodwill and trust when working with others and ways in which this can be achieved
2.2	Explain how to identify the information you require and the potential sources of such information
2.3	Describe how to respond to enquiries from others and how to clarify their information needs
2.4	Explain how to respond to enquiries which are outside your authority, beyond your area of knowledge or expertise or where information requested is confidential

Learning Outcome 2 Continued

Understand the legislation, codes of conduct and compliance requirements in relation to energy assessment

Assessment Criteria

- 2.5 Define the extent and limits for your own competence and expertise and the importance of not working beyond these limits
- 2.6 Describe the ways in which disputes or differences of opinion should be handled and resolved to minimise offence and maintain respect
- 2.7 Describe the formal complaints procedure that covers your work in terms of:
 - a. any specific organisational requirements with regard to complaints
 - b. your own responsibility to deal with complaints and attempt to resolve them before escalating to the Accreditation Body, or the equivalent in Devolved Administrations
- 2.8 Identify the range of potential conflicts of interest that you may encounter and the action required to manage these
- 2.9 Explain why it is important to present a positive personal and professional image when dealing with people and how this can be achieved
- 2.10 Describe the ways in which you may develop yourself within your role to cover your development needs
- 2.11 Define the level of service expected by customers, their expectations as to the outcome of the energy assessment or advice process and how to deliver an appropriate level of customer service
- 2.12 Explain the need for prompt responses to enquiries

Learning Outcome 3

Understand the legislation, codes of conduct and compliance requirements in relation to energy assessment

Assessment Criteria

- 3.1 Describe the relevant policies and legislation on combating climate change and the reduction of carbon emissions from buildings
- 3.2 Describe the relevant legislation covering:
 - a. the energy performance of buildings
 - b. compliance with safe working practices
 - c. the relevant regulations in the Devolved Administrations
 - d. where appropriate relevant legislation on the use of refrigerants
- 3.3 Describe the relevant official guidance and conventions relating to the assessment of energy performance
- 3.4 Describe your specific responsibilities under prescribed codes of conduct and ethical standards
- 3.5 Describe why it is important to comply with mandatory and advisory codes of practice
- 3.6 Describe the specific auditing or monitoring requirements that relate to your registration with your accreditation organisation(s), or the equivalent in Devolved Administrations and your responsibilities in complying with these
- 3.7 Describe the framework under which Accreditation Bodies, or the equivalent in Devolved Administrations, are required to operate, including their scheme Operating Requirements or equivalent in the Devolved Administrations
- 3.8 Explain the importance of obtaining and maintaining appropriate professional indemnity insurance (PII) cover, either through your own business or your employer and the extent and limitations of this type of cover

Learning Outcome 4

Be able to comply with organisational and legal requirements at all times

Assessment Criteria

- 4.1 Carry out work in accordance with relevant legal requirements, legislation and advisory and mandatory codes of practice
- 4.2 Carry out work in accordance with the auditing and monitoring requirements of the relevant accreditation or certification organisation/s
- 4.3 Record customer contact information in accordance with organisational and legal requirements such as the Data Protection legislation
- 4.4 Identify and maintain appropriate evidence to record to support your decision and assumptions made when carrying out energy assessments
- 4.5 Identify the evidence requirements defined in Scheme Operating Requirements, or their equivalent in the Devolved Administrations

Learning Outcome 5

Be able to maintain health, safety and security at work

Assessment Criteria

- 5.1 Take action to mitigate health, safety and security risks
- 5.2 Ensure personal conduct does not endanger the health, safety and security of self and other people
- 5.3 Take action to ensure the protection of client’s property and buildings
- 5.4 Adhere to workplace policies and suppliers’ or manufacturers’ instructions for the safe use of equipment, personal protective equipment (PPE), materials and products
- 5.5 Identify procedures for different types of emergency and implement them
- 5.6 Make recommendations for improving health, safety and security in the workplace to the relevant person/s

Learning Outcome 6

Be able to develop and maintain effective working relationships with colleagues, professionals, clients and others

Assessment Criteria

- 6.1 Develop and maintain productive working relationships with others
- 6.2 Request information from colleagues, professionals, clients and others in polite clear and professional manner
- 6.3 Identify and make use of further sources of information/help
- 6.4 Deal with enquiries from colleagues, professionals, clients and others and seek clarification where necessary
- 6.5 Handle enquiries which:
 - a. are outside own authority
 - b. are beyond own area of knowledge or expertise
 - c. involve confidential information
- 6.6 Handle and resolve disputes and /or differences of opinion
- 6.7 Adhere to the formal complaints procedure when dealing with a complaint

Learning Outcome 7

Be able to conduct energy assessments in a professional manner

Assessment Criteria

- 7.1 Deal with colleagues, professionals, clients and others in a tactful, courteous and equitable manner
- 7.2 Carry out work in accordance with prescribed codes of conduct, ethical standards and recognised good practice
- 7.3 Record all evidence supporting the assumptions and decisions made during the assessment
- 7.4 Demonstrate effective management of work activities and personal and professional development
- 7.5 Respond appropriately to pressure from any person/s which may affect own judgement
- 7.6 Demonstrate delivery of the appropriate level of customer service
- 7.7 Assess customer expectations as to the outcomes of the energy assessment or advice process

K/503/8163 - Prepare for Energy Assessments of Domestic property

This unit aims to develop the knowledge and skills needed to prepare prior to making an energy assessment e.g. taking instructions, clarifying requirements and making initial investigations relating to the property of properties. Upon completion of the unit the learners will:

- Understand the legislation and regulations relating to energy assessments and Energy Performance Certificates
- Understand how to agree and confirm instructions to undertake energy assessments
- Be able to investigate relevant matters relating to the property
- Be able to agree and confirm instructions to undertake energy assessments
- Be able to investigate relevant matters relating to the property

Learning Outcome 1	
Understand the legislation and regulations relating to energy assessments and Energy Performance Certificates	
Assessment Criteria	
1.1	Explain the relevant legislation giving rise to energy assessments and Energy performance certificates, for England and Wales and for Devolved Administrations
1.2	Explain the regulations and guidance under that legislation relating to the role of Domestic energy Assessors or alternatives within the Devolved Administrations and the undertaking of energy assessments
1.3	Identify the types of property and situations that do not by law require an Energy Performance Certificates
1.4	Explain the principles of the Green Deal and the role of Energy Performance Certificates within Green Deal

Learning Outcome 2	
Understand how to agree and confirm instructions to undertake energy assessments	
Assessment Criteria	
2.1	Explain how to clarify and confirm the expectations of the customer
2.2	Describe the basic principles of the Green Deal or equivalent within the Devolved Administrations, and the role of Energy performance Certificates within those schemes
2.3	State when a potential conflict of interest will require disclosure to the customer, or will require the need to decline the instructions altogether
2.4	Explain the limitations and constraints that apply to the conduct of energy assessments and to the prescribed methodology
2.5	Describe the limited circumstances where representative properties an/or data collected by others may be used in the preparation of Energy performance Certificate for existing dwellings
2.6	Identify alternatives to prescribed methodology for existing homes, Reduced Data SAP (RdSAP) and the circumstances when an alternative methodology should be considered
2.7	Describe the options that the client could consider regarding the use of an alternative assessment methodology should be considered
2.8	Explain the importance of confirming in writing the arrangements agreed between you and the customer
2.9	Describe the fee structures and payment arrangements for energy assessments
2.10	Explain how confirm on-site inspection arrangements with the customer or other occupier
2.11	Explain the importance of confirming whether any specific arrangements apply to the energy assessment

Learning Outcome 2 Continued	
Understand how to agree and confirm instructions to undertake energy assessments	
Assessment Criteria	
2.12	Describe how to identify and explain any circumstances that prevent you from undertaking an energy assessment
2.13	Describe how to explain that ratings and recommendations may differ from past assessments due to changes in methodology or legislation and other differences

Learning Outcome 3	
Be able to investigate relevant matters relating to the property	
Assessment Criteria	
3.1	Explain the different types of information that it is important to obtain to generate a complete and accurate Energy Performance Certificate
3.2	Identify the different sources of information relating to the energy performance of the property that can be investigated
3.3	Describe how to obtain information on relevant matters relating to the energy performance of the property
3.4	Identify the prevailing geographical/environmental features that may affect the energy performance at the property
3.5	Describe how to evaluate relevant information in order to identify any significant factors that may influence the energy assessment
3.6	Describe how to identify circumstances that prevent you from assessing the energy performance of the property
3.7	Explain why it is important to ensure that you have access to the most up-to-date versions of the RdSAP software and associated reference materials

Learning Outcome 4	
Be able to agree and confirm instructions to undertake energy assessments	
Assessment Criteria	
4.1	Clarify and confirm the expectations and requirements of the client
4.2	Respond to request to undertake energy assessments
4.3	Explain to the client that an Energy Performance Certificate is a legally required document that its form and content is prescribed and that it must be accompanied by cost effective recommendations
4.4	Explain to the client the terms and conditions under which the energy assessment will be undertaken including any circumstances or constraints that may prevent it
4.5	Explain to the client when a potential conflict of interest requires disclose to the client or requires the energy assessor to decline the instructions altogether
4.6	Explain to the client the limited circumstances where representative properties and/or data collected by others may be used in the preparation of Energy Performance Certificates for existing dwellings
4.7	Where use of the reduces data SAP (RdSAP) methodology is not appropriate, direct the customer towards the appropriate approved assessment methodology
4.8	Confirm agreed arrangements in writing, including data specific circumstances, protocols and the prescribed form and content
4.9	Confirm with the client on-site inspection arrangements, including any specific arrangements, the fee structures and payment arrangements
4.10	Where necessary, explain to the client that ratings and recommendations may differ from past assessments due to changes in methodology or legislation, and other differences

Learning Outcome 5

Be able to investigate relevant matters relating to the property

Assessment Criteria

- 5.1 Explain options that the client could consider regarding the use of an alternative assessment methodology, such as referring to an assessor accredited for that methodology
- 5.2 Investigate and record the information necessary to generate a complete and accurate Energy Performance Certificate
- 5.3 Evaluate significant factors such as geographical/environmental features that may influence or affect the conduct of the energy assessment
- 5.4 Identify circumstances that prevent the assessor of the energy performance of a property (e.g. health and safety) and ensure that the client is informed
- 5.5 Ensure that the most up-to-date version of the prescribed software and associated reference material can be accessed

T/503/8165 - Undertake Energy Inspections

The aim of this unit is for learners to develop the competencies to carry out an inspection in order to determine the energy performance of property by gathering data and information in accordance with the prescribed methodology (RDSAP) to generate an Energy Performance Certificate. Upon completion of the unit the learners will:

- Understand the information that is needed to produce the data to generate an Energy Performance Certificate (EPC) of a domestic property
- Understand the range of factors that affect the energy performance of a property
- Understand how to collate and maintain records of inspection findings
- Be able to inspect property to determine energy performance
- Be able to collate relevant information to assess the energy level of the property
- Be able to maintain records of inspection findings

Learning Outcome 1	
Understand the information that is needed to produce the data to generate an Energy Performance Certificate (EPC) of a domestic property	
Assessment Criteria	
1.1	Explain the principles of building structure, services, elements and fabric as relevant to energy performance of property
1.2	Identify the equipment and resources needed for the inspection and explain how to use them
1.3	Explain the detailed inspection requirements that apply to a property as defined by the current prescribed methodology, including the definitions and conventions that apply
1.4	Identify the various characteristics of buildings
1.5	Identify the space and water heating system(s) and lighting systems present at the property
1.6	Explain the consequences, for both the rating result and energy efficiency measures, of recording an item as 'unknown' or 'as built'
1.7	State the purpose behind government procedures for assessing the energy performance of property

Learning Outcome 2	
Understand the range of factors that affect the energy performance of a property	
Assessment Criteria	
2.1	Explain the factors and assumptions that are made in determining energy performance
2.2	Explain the definitions and conventions of RDSAP methodology and the effect of changes to them over time
2.3	Identify the factors that are not deemed to affect the energy performance
2.4	Explain the relative sensitivity of the different factors that affect the energy performance and critical property features where incorrect choice of values will be significantly detrimental to accuracy
2.5	Identify in outline the differences between the RdSAP and Standard Assessment Procedure (SAP) energy assessment methodologies
2.6	Explain the factors that could affect the choice of energy efficiency measures for the property, including: <ol style="list-style-type: none"> a. issues that make them unsuitable for property b. interactions between building fabric and building services c. listed buildings status/conservation areas

Learning Outcome 2 Continued	
Understand the range of factors that affect the energy performance of a property	
Assessment Criteria	
2.7	Explain the requirements and application of relevant building regulations and other technical standards
2.8	Explain the purpose behind government procedures for assessing the energy performance of property
2.9	Describe the types of behavioural advice regarding energy efficiency that can be provided to occupants during inspection
2.10	Identify the sources of information and advice about energy performance to which occupants can be referred

Learning Outcome 3	
Understand how to collate and maintain records of inspection findings	
Assessment Criteria	
3.1	Explain the importance of keeping your records legible, complete and accurate
3.2	Explain the purpose behind government procedures for assessing the energy performance of property
3.3	Identify the range of methods, formats and conventions for recording information and evidence on the property and its energy performance
3.4	Identify the required range of information and evidence relating to the property and its energy performance as defined by the current RdSAP methodology and its associated guidance and conventions
3.5	Identify the level of detail within your records required to produce complete and comprehensive Energy performance Certificates and justify your decision on values recorded and energy efficiency measures selected
3.6	Describe the importance of making and maintaining records that are complete, accurate and legible
3.7	State the reasons why it is necessary and important to record where and why accurate inspection has not been possible
3.8	Describe the circumstances in which records can include the fact that information is 'unknown' and the evidence required to support this choice
3.9	Describe why it is important to store records securely allowing for future access
3.10	State the purpose for which your records may be used

Learning Outcome 4	
Be able to inspect property to determine energy performance	
Assessment Criteria	
4.1	Introduce self and provide evidence of identity to those present at the property before commencing the inspection
4.2	Ensure that you have the equipment and resources needed for the inspection, use them correctly and interpret data accurately
4.3	Identify and record the age and method of construction of the property, the main materials used including the glazing, and the space, water heating and lighting systems present
4.4	Explain to the client any circumstances which prevent the inspection of the property

Learning Outcome 4 Continued	
Be able to inspect property to determine energy performance	
Assessment Criteria	
4.5	Undertake a methodical visual inspection of all relevant aspects of the property in accordance with requirements of the Reduced Data SAP (RdSAP) methodology and its conventions, to provide an outcome which is consistent with other energy assessors
4.6	Provide behavioural advice regarding energy efficiency to occupants where possible and sources of further information and advice

Learning Outcome 5	
Be able to collate relevant information to assess the energy level of the property	
Assessment Criteria	
5.1	Make accurate observations and measurements to provide data for calculation of energy performance rating
5.2	Obtain all additional information that is needed about the property especially where this is needed to avoid recording an item as 'unknown'
5.3	Make further investigations where observations are inconsistent with existing evidence and expected findings, identifying the cases of these inconsistencies
5.4	Identify property features, where incorrect choice of values will be significantly detrimental to accuracy and take appropriate steps to correctly represent these features to arrive at an accurate assessment of the property
5.5	Follow the correct procedures for collecting information to enable the energy efficiency of the property to be determined
5.6	Identify and record any factors that could affect the choice of energy efficiency measures for the property, such as: <ul style="list-style-type: none"> a. issues that make them unsuitable for the property b. listed buildings c. interactions between building fabric and building services

Learning Outcome 6	
Be able to maintain records of inspection findings	
Assessment Criteria	
6.1	Produce and maintain complete, accurate and legible records of your findings, including: <ul style="list-style-type: none"> a. investigations carried out b. values recorded c. options considered
6.2	Record information at a sufficient level of detail to produce complete and comprehensive Energy Performance Certificates and justify your decision on values recorded and energy efficiency measures selected
6.3	Identify the range of information and evidence relating to the property and its energy performance as defined by current RdSAP methodology and its associated guidance and conventions
6.4	Create, maintain and supply records of which energy efficiency measures were considered and rejected with reasons
6.5	Explain and record any circumstances where accurate inspection has not been possible or where the information is 'unknown'
6.6	Ensure that records are catalogued and stored securely and can be readily accessed for appropriate purposes

Learning Outcome 6 Continued	
Be able to maintain records of inspection findings	
Assessment Criteria	
6.7	Co-Operate promptly with requests for inspection records in relation to monitoring or investigation by your Accrediting Body, or equivalent in the Devolved Administrations

J/504/0924 - Produce and issue Energy Performance Certificates relating to Domestic Property

This unit aims to cover the activities once the inspection is completed i.e. how the Energy Performance Certificate is produced and filed and how recommended measures to improve the energy performance of the property may need to be communicated to the relevant individuals. Upon completion of the unit the learners will:

- Understand the principles underpinning the Energy Performance Certification process
- Understand the principles and operation of the approved software used to generate recommendations for improved energy performance of a property
- Understand the process for issuing Energy performance Certificates and explain their contents
- Be able to generate Energy Performance Certificates using approved software
- Be able to produce an Energy Performance Certificate
- Be able to issue and explain the Energy Performance Certificate
- Be able to explain to customers how the Energy Performance Certificate may be used to improve the energy efficiency of domestic property

Learning Outcome 1	
Understand the principles underpinning the Energy Performance Certification process	
Assessment Criteria	
1.1	Describe the implications for energy efficiency of building pathology and morphology and their implications for energy assessment and recommended action; the special considerations that apply to buildings of traditional construction
1.2	Describe the relationship between the building fabric, building location and building services and their impact on energy assessment process and energy efficiency measures
1.3	Identify ways of ensuring that the information gathered leads to realistic and practical energy efficiency measures
1.4	Describe the necessary quality assurance checks to conduct on own information gathering to ensure values are correct and energy efficiency measures are realistic
1.5	Describe how to identify problematic or 'unknown' factors which could affect value attribution
1.6	Describe how to gather more information to avoid use of default values
1.7	Identify the critical property features where incorrect choice of values will be significantly detrimental to accuracy
1.8	Describe the prescribed format and content of an Energy Performance Certificate
1.9	Describe the differences in the Energy Performance Certificate format used in England/Wales and in the Devolved Administration
1.10	Describe the Conventions used in Reduced Data SAP (RdSAP) energy assessment and the implications for results when these change
1.11	Describe the role of Government's Scheme Operational Requirements on Accreditation Bodies, or equivalent in the Devolved Administrations and how they must be followed to ensure the accuracy of entries and quality of energy efficiency measures
1.12	Identify the special factors to take into account for listed buildings and other heritage factors
1.13	Describe ways to minimise the impact of measures in conservation areas and/or listed buildings to address likely concerns of Conservation Officers, or equivalents in the Devolved Administrations
1.14	Describe the range of energy efficiency measures to improve the energy performance of property that may be included within and Energy performance Certificate

Learning Outcome 2

Understand the principles and operation of the approved software used to generate recommendations for improved energy performance of a property

Assessment Criteria

- 2.1 Describe the software used to produce Energy Performance Certificates and how to use it correctly
- 2.2 Describe the principles underpinning the approved software used to calculate energy ratings
- 2.3 Describe how to input data using the approved software in order to determine energy performance ratings
- 2.4 Describe how to use approved software to generate energy efficiency measures for to improve the energy performance of property
- 2.5 Identify the circumstances in which items can be recorded as 'unknown'
- 2.6 Describe why it is important to check that data has been inputted correctly and how to review data if the calculation will not process or appears incorrect
- 2.7 Describe why it is important to check the energy efficiency measures generated, deleting any that are inappropriate and providing your reasons
- 2.8 Describe the way in which energy efficiency measures are generated and circumstances when it is appropriate to delete them
- 2.9 Describe why it is important to use plain language and appropriate terms where free text is allowed and complying with data protection
- 2.10 Describe why it is important to check the Energy Performance Certificate to ensure it is clear and complete
- 2.11 Explain the special considerations that apply to buildings of traditional construction in relation to their energy efficiency
- 2.12 Identify areas of potential uncertainty or insufficient information which could affect value attribution and carry out checks to avoid common misattributions when inputting data
- 2.13 Identify critical property features where incorrect choice of values will be significantly detrimental to accuracy in terms of:
 - a. room in the roof
 - b. retrofitted insulation
 - c. un-separated conservatory
 - d. extensions
 - e. wall construction
 - f. primary, secondary and portable heating
 - g. inadequate heating
 - h. age of main property and of any extensions or roof rooms
 - i. low and Zero Carbon Technology
 - j. Any other features that when incorrectly identified will have a significant detrimental effect to rating accuracy
- 2.14 Explain the circumstances in which items can be recorded as 'unknown'
- 2.15 Explain the way in which recommendations are generated and the circumstances when it is appropriate to delete them
- 2.16 Describe the role of Government's Scheme Operational Requirements on Accreditation Bodies and how they must be followed to ensure the accuracy of enquiries and quality of energy efficiency measures

Learning Outcome 3	
Understand the process for issuing Energy performance Certificates and explain their contents	
Assessment Criteria	
3.1	Describe how to establish the customer's understanding of the Energy Performance Certification process and their expectations as to outcome
3.2	Identify the components and outcomes of the energy assessment process and likely customer queries about them
3.3	Describe how to use the information technology underpinning the national register for lodgement and retrieval of Energy Performance Certificates and how to provide necessary audit evidence via electronic transfer
3.4	Explain why it is important to inform the customer when the Energy performance Certificate is available
3.5	Describe how to interpret the ratings and energy efficiency measures provided in Energy Performance Certificate
3.6	Describe how to explain all the component parts of the Energy Performance Certificate and their implications clearly to the customer
3.7	Identify the limitations of the approved software and their implications for both ratings and energy measures
3.8	Describe the circumstances in which the data recorded on the prescribed database may be accessed by others
3.9	Describe how to respond to queries regarding the Energy Performance Certificate and provide clarification of the contents
3.10	Describe the limitations on answers to queries which it is appropriate to provide to customers
3.11	Identify the sources of further information and advice to which people could be referred
3.12	Describe the role of the Energy Performance Certificate within Green Deal
3.13	Describe how customers can express an interest in the Green Deal and the first steps in the process
3.14	Describe the characteristics of good customer service
3.15	Describe the necessary features of a complaints procedure and how customers may access your own complaints procedure
3.16	Describe the reason for maintaining clear and complete internal records
3.17	Identify the minimum period of time for which you must retain records
3.18	Describe how to draw the customer's attention to any energy efficiency measures specifically excluded by the assessor if requested to by the customer
3.19	Explain the terminology used on the Energy Performance Certificate, paying attention to differences between the precise meaning of the terms and their commonly used meanings
3.20	Describe how to advise customers about ways to minimise the impact of measures in conservation areas and or listed buildings, to address likely concerns of Conservation Officers

Learning Outcome 4

Be able to generate Energy Performance Certificates using approved software

Assessment Criteria

- 4.1 Assemble and collate information from the on-site inspection and from other relevant and reliable sources
- 4.2 Use approved software to determine energy performance ratings ensuring that data is entered accurately
- 4.3 Take appropriate steps to correctly represent the property’s critical property features to arrive at an accurate assessment of the property
- 4.4 Obtain sufficient information to ensure values entered for all components are accurate
- 4.5 Before inputting an item as ‘unknown’, carry out sufficient investigations to minimise the use of default values
- 4.6 Use approved software to generate energy efficiency measures for the property
- 4.7 Take account of the interaction between the building fabric and the services in the building when considering energy efficiency measures

Learning Outcome 5

Be able to produce an Energy Performance Certificate

Assessment Criteria

- 5.1 Produce an Energy Performance Certificate that meets relevant codes of practice and standards, including the accurate recordings
- 5.2 Use plain language and appropriate terms where free text is allowed
- 5.3 Check the recommendations generated and delete any inappropriate ones, in accordance with conventions and providing reasons for doing so
- 5.4 Provide a set of energy efficiency measures tailored to the fabric and location of the building, taking account of available fuel supplies and current conventions
- 5.5 Check that data has been inputted correctly and review data if the calculation will not process or appears incorrect
- 5.6 Recognise a result that is clearly incorrect for the property in question
- 5.7 Take the necessary corrective action where any of your checks indicate a possible misattribution of data or error in the resulting rating or energy efficiency measures
- 5.8 Check the data is complete before finalising the Energy Performance Certificate and check it to ensure it is clear and complete

Learning Outcome 6

Be able to issue and explain the Energy Performance Certificate

Assessment Criteria

- 6.1 Lodge Energy performance Certificates on the prescribed national databank on completion
- 6.2 Inform the customer that the Energy Performance Certificate has been completed and is available to them
- 6.3 Establish the customer’s understanding of the Energy Performance Certification process and their expectations as to outcomes
- 6.4 Explain all the component parts of the Energy Performance Certificate and their implications
- 6.5 Explain variations between ratings and energy efficiency measures produced by different versions of the calculation methodology and between assessment undertaken using the different methodology for new and existing homes

Learning Outcome 6 Continued	
Be able to issue and explain the Energy Performance Certificate	
Assessment Criteria	
6.6	Explain to customers the limitations of the approved software for both ratings and energy efficiency measures
6.7	Respond to queries about the Energy performance Certificate and clarify their contents when necessary
6.8	Provide a high standard of customer service in all dealings with your customer including issuing and explaining their Energy Performance Certificate
6.9	Inform your customer that you have a complaints procedure and advise them how to access it
6.10	Collect relevant information as evidence to support the specific decisions made on values and energy efficiency measures considered
6.11	Maintain records of which energy efficiency measures were considered and rejected with reasons
6.12	Keep accurate and traceable records of investigations carried out, values attributes and options considered
6.13	Maintain internal records which are clear, complete and conform to professional and statutory requirements

Learning Outcome 7	
Be able to issue and explain to customers how the EPC may be used to improve the energy efficiency of domestic property	
Assessment Criteria	
7.1	Identify the circumstances where data collected during the inspection and recorded on the prescribed database may be accessed by others
7.2	Identify relevant sources of additional information, advice and support
7.3	Identify ways to minimise the impact of measures in conservation areas and/or listed buildings to address likely concerns of Conservation Officers
7.4	Explain the precise meaning of any terms used on the Energy Performance Certificate where this differs from their commonly used meanings
7.5	Explain why predicted savings from energy efficiency measures, based on standard occupancy, may not be achieved in practice
7.6	Explain the role of the Energy performance Certificate within Green Deal
7.7	Explain how customers can express an interest in the Green Deal and the first steps in the process

K/502/6806 - Identify representative properties for sampling

This unit aims to assess the competency of the energy assessor in deciding which properties should be assessed as representative in circumstances in which sampling is appropriate. Upon completion of the unit the learners will:

- Be able to identify properties that are representative for inspection

Learning Outcome 1	
Be able to identify properties that are representative for inspection	
Assessment Criteria	
1.1	Explain the criteria for determining representative properties and how they can be applied in different circumstances
1.2	Obtain relevant information relating to the properties from the owner or manager, taking appropriate action where the required information is not forthcoming, is incomplete or inaccurate
1.3	Evaluate information relating to properties in order to determine their similarities and differences with regard to factors likely to affect energy performance, testing the accuracy of the information on site
1.4	Identify from evaluation of the information a property or group of properties that are representative for the purposes of assessing energy performance
1.5	Justify the reasons for selecting specific representative properties in a clear and concise manner
1.6	Record the rationale and explain the situation to the owner or manager of the property where it is not possible to identify representative property/properties

Y/503/8188 - Explain the Green Deal Advice Report to the domestic customer

The unit provides learning in the requirements for – recognising how to motivate different client groups to implement the measures recommended; understanding the reasons why some clients may not implement measures and identify the actions you can advise to address their concerns; explaining the implications for clients in relation to aspects of the Green Deal Advice Report. Upon completion of the unit the learners will:

- Understand the components of the domestic Green Deal Advice Report to domestic customers
- Be able to explain the components of the Green Deal Advice report and their implications to the domestic customer
- Be able to prepare and present a Green Deal Advice report in a professional and impartial manner

Learning Outcome 1	
Understand the components of the domestic Green Deal Advice Report to domestic customers	
Assessment Criteria	
1.1	Explain the requirements of the Green Deal Code of Practice in respect of: <ol style="list-style-type: none"> a. issuing the Green Deal Advice Report to customers b. the professional responsibilities and liabilities in the giving of advice c. any disclaimers that should be made
1.2	Explain which energy efficiency measures have the greatest impact on the energy performance of a building
1.3	Describe the benefits of installing energy efficiency measures as a package
1.4	Describe the importance of the sequence of installation
1.5	Describe how estimates are arrived at and how robust they are
1.6	Describe for how long estimates will be valid
1.7	Identify the different circumstances and requirements of rural customers, those off the gas grid and those living in traditional buildings
1.8	Identify the specific advice needed on implementing the recommendations which may have to be provided
1.9	Identify the sources of further information and advice
1.10	Explain the funding options available and the eligibility requirements of the Green Deal finance package
1.11	Identify the features, characteristics and eligibility criteria of alternative energy efficiency programmes outside the Green Deal
1.12	Identify how to access funding for alternative energy efficiency programmes outside the Green Deal
1.13	Establish the critical factors for the customer in deciding which measures to pursue including economic and personal circumstances
1.14	Identify ways of creating a clear demarcation between the independent and impartial stage of the process and the declaration of any links to providers and/or suppliers
1.15	Explain the next steps in the process
1.16	Identify the key individuals and organisations involved and how to contact them

Learning Outcome 2	
Be able to explain the components of the Green Deal Advice report and their implications to the domestic customer	
Assessment Criteria	
2.1	Explain to customers which energy efficiency measures have greater impact on the energy performance of a building
2.2	Explore with customers the merits and demerits of the proposed energy efficiency measures and ways of overcoming any barriers to implementing the energy efficiency measures
2.3	Explain to customers the benefits of installing several measures as part of a package and the advantage of correctly sequencing the installation
2.4	Explain to customers how estimates of running costs produced by RdSAP have been arrived at and for how long they are valid
2.5	Explain to customers the gap between standard savings estimates and likely actual savings based on occupancy
2.6	Identify ways in which the recommendations can be implemented and where to go for help
2.7	Provide advice on the Energy Performance Certificate Adviser tool to help the customer select appropriate energy efficiency measures
2.8	Indicate how any future changes in energy consumption and costs not included in the assessment may impact on savings
2.9	Explain to customers any relevant incentives for the customer adopting the proposed Green Deal package of energy measures
2.10	Explain any likely limitations on customer choice in respect of brands and appearance of equipment and materials that installers will provide in implementing the package of measures
2.11	Explain to customers the funding options available and how to apply for funding
2.12	Provide information to customers on other programmes and funding mechanisms for energy efficiency and carbon reduction outside Green Deal

Learning Outcome 3	
Be able to prepare and present a Green Deal Advice report in a professional and impartial manner	
Assessment Criteria	
3.1	Provide precise disclosure of the limitations on the advice being given
3.2	Make clear the impartial technical advice being provided up to this point
3.3	Make clear own personal responsibility for: <ul style="list-style-type: none"> a. the recommendations made b. any liabilities that arise from this c. any disclaimers relating to the recommendations
3.4	Disclose any fees that the Green Deal Adviser may receive if the customer follows the advice given in relation to one or more energy efficiency measure
3.5	Declare any specific links with suppliers of Green Deal products and services
3.6	Make clear that any further involvement in the process will involve exclusive promotion of the products and services of those suppliers
3.7	Inform the customer of the Green Deal Code of Practice that regulates the preparation and issuing of the Green Deal Advice Report

Learning Outcome 3 Continued	
Be able to prepare and present a Green Deal Advice report in a professional and impartial manner	
Assessment Criteria	
3.8	Make clear the roles and responsibilities of the various parties involved in the Green Deal and who may be involved in the next stages of the process
3.9	Make the customer aware of responsibilities to future occupiers in terms of potential changes in energy savings should energy saving features be removed
3.10	Respond to customer questions, issues and concerns in relation to the Green Deal Advice Reports and the next steps in the process within the limits of personal expertise and knowledge
3.11	Consider the specific needs of customers including those in rural locations, those off the gas grid or living in traditional buildings

R/503/8187 - Prepare and issue domestic Green Deal Advice Reports

The unit provides learning in the requirements for – understanding the principles of the Green Deal Advice Report; identifying the range of energy efficiency measures including low cost/no cost measures that are eligible for Green Deal; Upon completion of the unit the learners will:

- Understand the process of inputting data for the domestic Green Deal Advice Reports
- Understand how to assess energy efficiency measures for the domestic Green Deal Advice Reports
- Understand how to lodge and issue domestic Green Deal Advice Reports
- Be able to prepare domestic Green Deal Advice Reports
- Be able to lodge and issue domestic Green Deal Advice Reports

Learning Outcome 1	
Understand the process of inputting data for the domestic Green Deal Advice Reports	
Assessment Criteria	
1.1	Describe the prescribed format and content of a domestic Green Deal Advice Report
1.2	Identify the information required to produce a compliant domestic Green Deal Advice Report
1.3	Explain how to retrieve any pre-existing Energy Performance Certificates for the property and the underpinning data linked to it
1.4	Identify the range of energy efficiency measures that may be included within a domestic Green Deal Advice Report
1.5	Explain the principles underpinning the approved software used to prepare a domestic Green Deal Advice Report
1.6	Identify common areas of potential uncertainty or insufficient information which could affect value attribution
1.7	Define the quality assurance checks to conduct on information to ensure that: <ul style="list-style-type: none"> a. Values are correct b. Energy efficiency measures are realistic and appropriate for the subject property
1.8	Define the circumstances in which items can be recorded as “unknown” as defined by conventions
1.9	Describe the consequences of recording an item as “unknown” or as built on the methodology’s assessment process
1.10	Identify the implications for domestic Green Deal reports and energy efficiency measures when the conventions used in Green Deal assessments change
1.11	Describe how to ensure that data is inputted correctly and how to review data if the calculation will not process

Learning Outcome 2	
Understand how to assess energy efficiency measures for the domestic Green Deal Advice Reports	
Assessment Criteria	
2.1	Describe the relationship between the building fabric and building services and the impact on the energy assessment process and energy efficiency measures proposed
2.2	Explain how any future intentions for work on the property will affect the selection and ordering of work on energy efficiency measures
2.3	Describe how to use approved software to generate energy efficiency measures that are bespoke to the property and its current occupier

Learning Outcome 2 Continued

Understand how to assess energy efficiency measures for the domestic Green Deal Advice Reports

Assessment Criteria

- 2.4 Explain how to check and amend energy efficiency measures generated to ensure they are appropriate for the property and customer
- 2.5 Describe the consequences of making inappropriate suggestions for energy efficiency measures
- 2.6 Describe how the approved software generates energy efficiency measures and estimates their cost savings
- 2.7 Explain how to adjust estimated savings in accordance with the occupancy assessment to provide an indication of how actual savings may differ from standard estimates
- 2.8 Explain what is meant by the Green Deal Principle (Golden Rule) and how it is calculated, including that the cost of energy efficiency measures used in the calculation could change

Learning Outcome 3

Understand how to lodge and issue domestic Green Deal Advice Reports

Assessment Criteria

- 3.1 Explain the content of the codes of practice and standards that apply to preparing domestic Green Deal Reports
- 3.2 Explain the importance of fully disclosing any referral fees or other benefits received in relation to suggested products, services and suppliers
- 3.3 Explain the process of lodging and issuing a domestic Green Deal Advice Report
- 3.4 Identify the level and detail of information storage required in relation to domestic Green Deal Advice Reports
- 3.5 Explain how to update the Energy Performance Certificate after the installation of agreed energy efficiency measures

Learning Outcome 4

Be able to prepare domestic Green Deal Advice Reports

Assessment Criteria

- 4.1 Collate information required including any pre-existing Energy Performance Certificates
- 4.2 Use the approved software to prepare domestic Green Deal Reports
- 4.3 Ensure that values entered for all components are accurate
- 4.4 Identify areas of potential uncertainty or insufficient information which could affect value attribution and carry out checks to avoid likely errors
- 4.5 Carry out further investigations to identify appropriate values in order to reduce or eliminate use of default values and the “unknown” option
- 4.6 Identify the circumstances in which the use of default values or “unknown” is unavoidable and the steps to be taken to avoid their use in accordance with relevant conventions and Code of Practice
- 4.7 Generate energy efficiency measures which are appropriate for the property using the approved software and the guidance or conventions applying to its use
- 4.8 Identify energy efficiency measures which take account of:
 - a. the interaction between the building fabric and the building services
 - b. building location
 - c. needs, circumstances and motivations of the customer

Learning Outcome 4 Continued	
Be able to prepare domestic Green Deal Advice Reports	
Assessment Criteria	
4.9	Use approved software to: <ul style="list-style-type: none"> a. estimate energy use and associated energy costs b. estimate energy and cost savings from energy efficiency measures c. produce figures to be used in the domestic Green Deal (Golden Rule) calculation d. assess which energy efficiency measures or packages of measures are likely to be eligible for Green Deal finance
4.10	Prepare domestic Green Deal Advice Reports that meet Certification Scheme requirements and certification body requirements
4.11	Check the Green Deal Advice Report to ensure it is clear and complete
4.10	Disclose any referral fees or other benefits to be received should the customer follow suggestions for particular products, services or suppliers

Learning Outcome 5	
Be able to lodge and issue domestic Green Deal Advice Reports	
Assessment Criteria	
5.1	Collate information in support of: <ul style="list-style-type: none"> a. investigations carried out b. values attributed c. energy efficiency options considered d. energy efficiency options rejected with justification e. specific decisions made and energy efficiency measures proposed
5.2	Ensure that records kept are clear, complete and meet Green Deal and statutory requirements and follow accepted professional standards
5.3	Follow the procedure for lodging domestic Green Deal Advice Reports on the prescribed national register
5.4	Issue domestic Green Deal Advice Reports to customers
5.5	Follow the procedures for updating an Energy Performance Certificate after the installation of energy efficient measures

T/503/8179 - Provide information to customers on the principles, financing and operation of the Green Deal

The unit provides learning in the requirements for – explaining key principles and components of Green Deal to clients; understanding the roles and responsibilities of parties concerned; understanding the importance of providing independent and impartial advice to clients; demonstrating a range of techniques which will enable you to effectively communicate with clients on the telephone and in the home/place of work. Upon completion of the unit the learners will:

- Understand the components of the Green Deal
- Understand how to provide high quality, independent and impartial advice to customers
- Be able to provide customers with information on Green Deal to meet their needs

Learning Outcome 1	
Understand the components of the Green Deal	
Assessment Criteria	
1.1	Describe the role of Green Deal in improving energy efficiency and reducing energy consumption
1.2	Identify sources of information about Green Deal and how they are accessed by customers
1.3	Identify who is eligible for the Green Deal and the restrictions that apply
1.4	Identify the different types of tenure which affect the status of individuals
1.5	Identify the different processes to be undertaken relevant to different types of tenure
1.6	Identify the main roles and responsibilities of: <ul style="list-style-type: none"> a. the Green Deal Adviser b. the Green Deal Provider c. the Green Deal Installer
1.7	Explain the function of the Energy Performance Certificate and how it contributes to the Green Deal process
1.8	Identify the eligible measures which can be funded under Green Deal
1.9	Explain how the Green Deal is financed and repaid
1.10	Explain the Golden Rule and its role in establishing the financial offer in Green Deal
1.11	Explain how customers can access information about Green Deal Installers and Providers
Learning Outcome 2	
Understand how to provide high quality, independent and impartial advice to customers	
Assessment Criteria	
2.1	Explain the components of the Green Deal Code of Practice including its impact on the service delivered to customers
2.2	Explain the ways of providing impartial advice and recommendations within Green Deal
2.3	Explain the legal safeguards available to customers in relation to miss-selling, credit agreements and redress for complaints
2.4	Explain the support available to eligible customers through the Energy Company Obligation subsidy and heating and other fuel benefits
2.5	Explain the permissions, consents and disclosure requirements operating in relation to Green Deal
2.6	Explain the specific protections and support available for vulnerable groups and customers under Green Deal

Learning Outcome 2 Continued	
Understand how to provide high quality, independent and impartial advice to customers	
Assessment Criteria	
2.7	Explain the ways in which Green Deal can operate for rural customers, those who are off the gas grid and for traditional properties
2.8	Identify energy efficiency measures, support and finance mechanisms outside the Green Deal
2.9	Explain how customers can access information about energy efficiency measures, support and finance mechanisms outside the Green Deal

Learning Outcome 3	
Be able to provide customers with information on Green Deal to meet their needs	
Assessment Criteria	
3.1	Explain to customers the purpose of Green Deal and its role in promoting energy efficiency
3.2	Identify for customers where further information and support about Green Deal can be accessed by customers
3.3	Explain to customers the role of the Green Deal Adviser and how they provide impartial advice and recommendations to customers
3.4	Inform the customer of their rights and protections under law in relation to Green Deal
3.5	Explain to customers how the assessment of energy performance is undertaken and the role of that assessment in the Green Deal process
3.6	Explain to customers the energy efficiency measures that can be funded through the Green Deal funding
3.7	Explain to customers the long term nature of cost savings arising from the installation of energy saving measures
3.8	Explain to customers how the funding offer is arrived at and who can provide financing
3.9	Explain to customers the role of the Green Deal provider as the funding agency
3.10	Explain to customers the role of the energy suppliers as collectors of payment via the energy bill
3.11	Explain to customers the permissions and consents that are required in order to take up Green Deal
3.12	Explain to customers the Energy Company Obligation subsidy and the eligibility criteria for it
3.13	Explain to customers the heating and other fuel benefits that may be available under Green Deal and the eligibility criteria for them
3.14	Provide information to customers on the Feed in Tariffs and Renewable Heat Incentive mechanisms and how they operate within Green Deal
3.15	Explain to customers the impact of special requirements in relation to rural location, those off the gas grid or in traditional properties
3.16	Respond to customer queries and signpost them to other information and services when required

L/503/8186 - Undertake occupancy assessments and give advice

The unit provides learning in the – understanding of the requirements of the occupancy assessment; identification of specific client groups, their needs and motivations and suggestions of how to overcome barriers to action; how to recognise the non-property specific information required in relation to energy consumption; understanding the client context (in particular with respect to fuel poverty) and advise appropriately to encourage behavioural change; how to demonstrate a range of techniques that will enable learners to communicate with clients effectively. Upon completion of the unit the learners will:

- Know how to conduct an occupancy assessment
- Understand the methods of reducing energy consumption and achieving affordable warmth
- Understand written records required for Inspection findings
- Be able to conduct an occupancy assessment
- Be able to advise customers on methods of reducing energy consumption and achieving affordable warmth
- Be able to maintain written records of inspection findings

Learning Outcome 1	
Know how to conduct an occupancy assessment	
Assessment Criteria	
1.1	Explain why a home visit is needed in order to undertake an occupancy assessment for the purpose of Green Deal
1.2	Identify the range of data that is required from the customer to enable an occupancy assessment as defined by the prescribed methodology
1.3	Explain the methods used to obtain data and information
1.4	Explain how to make a methodical visual on-site inspection of a property
1.5	Identify the requirements of the prescribed methodology for the occupancy assessment
1.6	Specify the definitions and conventions that apply to the prescribed methodology for occupancy assessment
1.7	Identify the requirements of Codes of Practice or other guidance applying to the home visit
1.8	Describe how to identify gaps in information gathered and any additional data required to fill them
1.9	Explain the data protection requirements relating to customer's data
1.10	Identify the features of a property that may indicate that RdSAP is an inappropriate methodology for energy assessment
1.11	Describe how to assess the likely current energy performance of any property elements compared to its performance as originally built
1.12	Identify the performance and durability of materials and systems over time
1.13	Describe the functioning of building services where this relates to energy performance
Learning Outcome 2	
2. Understand the methods of reducing energy consumption and achieving affordable warmth	
Assessment Criteria	
2.1	Explain how to establish and clarify the needs, circumstances, motivations and capabilities of customers regarding energy consumption
2.2	State the definition of a household in Fuel Poverty

Learning Outcome 2 Continued

2. Understand the methods of reducing energy consumption and achieving affordable warmth

Assessment Criteria

- 2.3 Explain how to recognise households at risk of being in Fuel Poverty
- 2.4 Identify the types of poor health typically associated with energy inefficient housing
- 2.5 Identify the limits of own expertise in relation to Fuel Poverty and possible health outcomes
- 2.6 Describe the sources of help and advice available for those at risk of Fuel Poverty or poor health associated with energy inefficient housing
- 2.7 Identify the features of a property that encourage mould growth and condensation
- 2.8 Identify the types of occupier behaviour that encourages mould growth and condensation
- 2.9 Describe the indicators of under heating of a property and their implications for the occupancy assessment
- 2.10 Identify the constraints that may affect the customer’s ability to act
- 2.11 Identify the sources of financial support available to customers including Green Deal finance and the Energy Company Obligation measures
- 2.12 Identify the opportunities for the installation of energy efficiency measures
- 2.13 Describe the impact of different types of tenure on occupancy assessment
- 2.14 Describe the landlord’s responsibilities for compliance with legislation and obligations regarding property standards and energy efficiency in housing
- 2.15 Explain how the occupier’s use of installed appliances, systems and controls affect overall energy efficiency and fuel bills
- 2.16 Identify the efficient, safe and appropriate use of appliances, systems and controls
- 2.17 Describe the main methods and products for controlling and managing:
 - a. The use of water and minimising waste of water
 - b. Waste reduction, re-use and re-cycling
- 2.19 Describe the types of questions, issues and concerns that customers might have about the home visit and the occupational advice given
- 2.20 Identify the sources of information to which the customer can be referred for further help and advice

Learning Outcome 3

3. Understand written records required for Inspection findings

Assessment Criteria

- 3.1 Explain the methods, formats and conventions for recording information and evidence on the occupancy assessment
- 3.2 Identify the information and evidence required by the current occupancy assessment methodology and associated guidance and conventions
- 3.3 Define the level of detail required to produce a complete and comprehensive Green Deal Advice Report
- 3.4 Explain how records can be used to justify decisions on the values recorded and the advice given
- 3.5 Identify the evidence required to support the choice of the “unknown” value
- 3.6 Explain the importance of storing information and records securely for future access and to meet Certification Scheme inspection requirements
- 3.7 Explain the role and obligations of Certification schemes in respect of auditing records of inspection findings

Learning Outcome 4

Be able to conduct an occupancy assessment

Assessment Criteria

- 4.1 Explain to customers the information they will need to provide for the occupancy assessment
- 4.2 Use appropriate methods to obtain relevant information from customers
- 4.3 Confirm that the customer is the person responsible for the property’s fuel bills and has the authority to take action under the Green Deal
- 4.4 Gather data and information from appropriate documentation to enable the occupancy assessment to take place
- 4.5 Establish that the RdSAP methodology is appropriate for identifying Green Deal energy efficiency measures in the property
- 4.6 Conduct a methodical visual inspection of the property in accordance with the prescribed methodology for the occupancy assessment
- 4.7 Assess how the current condition of the property may affect its energy performance
- 4.8 Check for the presence of Carbon Monoxide Detectors in the property
- 4.9 Seek confirmation that the Carbon Monoxide Detectors are working if present

Learning Outcome 5

Be able to advise customers on methods of reducing energy consumption and achieving affordable warmth

Assessment Criteria

- 5.1 Establish with customers their needs, circumstances, abilities, motivations and capabilities in relation to energy consumption reduction
- 5.2 Identify any constraints that might affect the customer’s ability to act
- 5.3 Provide advice which is consistent with the needs, circumstances, abilities, motivations and capabilities of the customer
- 5.4 Provide the customer with information about potential funding and financial support available to them
- 5.5 Advise customers affected by fuel poverty and poor environmental conditions about the sources of help and advice available to them
- 5.6 Explain to customers how their current use of appliances, systems and controls affects:
 - a. their energy consumption
 - b. fuel bills
 - c. thermal comfort
 - d. risk of condensation
- 5.7 Provide information on the methods and products for achieving:
 - a. the efficient management of water usage and minimisation of waste
 - b. reduction, re-use and re-cycling of waste
- 5.8 Advise the customer of the limitations on the advice given
- 5.9 Respond to customer queries, issues and concerns about the home visit and the occupational advice given

Learning Outcome 6

Be able to maintain written records of inspection findings

Assessment Criteria

- 6.1 Create and maintain complete, accurate and legible records of findings including:
 - a. Investigations carried out
 - b. Values recorded
 - c. Options considered

Learning Outcome 6 Continued

Be able to maintain written records of inspection findings

Assessment Criteria

- 6.2 Justify decisions on values and the nature of the advice based on the records produced
- 6.3 Record clearly where information cannot be obtained and where data is recorded as “unknown” and why this action was unavoidable
- 6.4 Catalogue, secure and store records for the prescribed periods of time to ensure access for future use

M/503/8164 Identify representative properties for sampling and multiple certification

This unit aims to assess the competency of the energy assessor in deciding which properties should be assessed as representative in circumstances in which sampling is appropriate. Upon completion of the unit the learners will:

- Be able to identify properties that are representative for inspection

Learning Outcome 1	
Be able to identify properties that are representative for inspection	
Assessment Criteria	
1.1	Explain the criteria for determining representative properties and how they can be applied in different circumstances
1.2	Obtain relevant information relating to the properties from the owner or manager, taking appropriate action where the required information is not forthcoming, is incomplete or inaccurate
1.3	Evaluate information relating to properties in order to determine their similarities and differences with regard to factors likely to affect energy performance, testing the accuracy of the information on site
1.4	Identify from evaluation of the information a property or group of properties that are representative for the purposes of assessing energy performance
1.5	Justify the reasons for selecting specific representative properties in a clear and concise manner
1.6	Record the rationale and explain the situation to the owner or manager of the property where it is not possible to identify representative property/properties

Assessment of Requirements for Individual Units

Unit Ref: H/503/8162 - Conduct energy assessments in a safe, effective and professional manner

To achieve the completion of this unit, you must satisfactorily complete the applicable assessments for the learning outcomes within the unit (detail contained within the BPEC qualification manual). This unit requires the completion of written assignments and question papers designed to cover practical activities and underpinning knowledge.

Unit Ref: K/503/8163 - Prepare for Energy Assessments of Domestic property

To achieve the completion of this unit, you must satisfactorily complete the applicable assessments for the learning outcomes within the unit (detail contained within the BPEC qualification manual). This unit requires the completion of written assignments and question papers designed to cover practical activities and underpinning knowledge.

Unit Ref: T/503/8165 - Undertake Energy Inspections

To achieve the completion of this unit, you must satisfactorily complete the applicable assessments for the learning outcomes within the unit (detail contained within the BPEC qualification manual). This unit requires the completion of written assignments and question papers designed to cover practical activities and underpinning knowledge.

Unit Ref: J/504/0924 - Produce and Explain Energy Performance Certificates relating to Domestic Property

To achieve the completion of this unit, you must satisfactorily complete the applicable assessments for the learning outcomes within the unit (detail contained within the BPEC qualification manual). This unit requires the completion of written assignments and question papers designed to cover practical activities and underpinning knowledge.

Unit Ref: Y/503/8188 - Explain the Green Deal Advice Report to the domestic customer

To achieve the completion of this unit, you must satisfactorily complete the applicable assessments for the learning outcomes within the unit (detail contained within the BPEC qualification manual). This unit requires the completion of written assignments and question papers designed to cover practical activities and underpinning knowledge..

Unit Ref: R/503/8187 - Prepare and issue domestic Green Deal Advice Reports

To achieve the completion of this unit, you must satisfactorily complete the applicable competency assessments for the learning outcomes within the unit (detail contained within the BPEC qualification manual). This unit requires the completion of written assignments and question papers designed to cover practical activities and underpinning knowledge.

Unit Ref: T/503/8179 - Provide information to customers on the principles, financing and operation of the Green Deal

To achieve the completion of this unit, you must satisfactorily complete the applicable competency assessments for the learning outcomes within the unit (detail contained within the BPEC qualification manual). This unit requires the completion of written assignments and question papers designed to cover practical activities and underpinning knowledge.

Unit Ref: L/503/8186 - Undertake occupancy assessments and give advice

To achieve the completion of this unit, you must satisfactorily complete the applicable assessments for the learning outcomes within the unit (detail contained within the BPEC qualification manual). This unit requires the completion of written assignments and question papers designed to cover practical activities and underpinning knowledge.

Unit Ref: M/503/8164 - Identify representative properties for sampling and multiple certification

To achieve the completion of this unit, you must satisfactorily complete the applicable assessments for the learning outcomes within the unit (detail contained within the BPEC qualification manual). This unit requires the completion of written assignments and question papers designed to cover practical activities and underpinning knowledge.

Scheme Documentation

The following documentation will also be supplied by BPEC Certification Ltd. to support the delivery of the L3 Domestic Energy Assessor/Green Deal Advisor suite of qualifications.

- Combined qualification assessment manual, including:
 - Competency assignment guidance
 - Competency assignment document templates
 - Workplace evidence guidance
 - Workplace evidence document templates
 - Unit evidence checklists
- Knowledge assessment papers and question specifications (*centre only*)

Unit Assessment Requirements (as per Asset Skills Statement of Assessment Principles)

1. ASSESSMENT PRINCIPLES FOR COMPETENCY BASED UNITS

1.1 The following principles will apply to all competency based units:

1.1.1 Assessment should normally be at the candidate's workplace, but where the opportunity to assess across the range of standards is unavailable other comparable working environments may be used, following agreement from the External Verifier.

1.1.2 A holistic approach towards the collection of evidence should be encouraged, assessing activities generated by the whole work experience rather than focusing on specific tasks.
e.g. If the candidate communicates with a customer whilst engaged in cleaning activities these can be assessed against both cleaning and customer service elements.

1.1.3 Asset Skills does not prescribe a minimum number of observations, however, evidence provided must demonstrate that competency is consistent and reliable.

1.1.4 Assessors can only assess in their acknowledged area of occupational competence.

1.1.5 Assessors and Internal Verifiers will be registered with their Approved Centre and be accountable to the organisation for their assessment practice.

1.1.6 Health and safety of customers/clients and employees must be maintained throughout the assessment process and if any person carrying out assessment or

verification activities does not feel that there is due regard to health and safety then that person should refuse to continue with the activity(ies) until satisfied that due regard to health and safety is being taken.

2. SIMULATION AND WITNESS TESTIMONY FOR COMPETENCY BASED UNITS

There are a few occasions when simulation or witness testimony is warranted where the centre can demonstrate that performance evidence has been impossible to obtain.

The underlying reasons for either simulation or witness testimony are:

- health and safety considerations
- activities that would cause serious inconvenience or loss to an employer if there was an undue delay in their being carried out
- Infrequently occurring activities
- equality of access

2.1 Simulation

Simulation may be necessary for specific elements of the units. It is advisable that centres refer to the BPEC EV in these cases for clear guidelines.

BPEC guidance to centres will ensure that demands on the learner during simulation are neither more nor less than they would encounter in a real work situation. In particular:

- All simulations must be planned, developed and documented by the centre in a way that ensures the simulation accurately reflects what the unit seeks to assess
- All simulations should follow these documented plans
- A centre's overall strategy for simulation must be examined and approved by the external verifier
- There should be a range of simulations to cover the same aspect of the standard so that the risk of candidates successfully colluding is reduced
- The physical environment for the simulation must be as realistic as possible and draw on real resources that would be used in the industry
- The nature of the contingency must be realistic.

2.2 Witness Testimony

Witness testimony should not form the primary source of evidence. Centres must comply with BPEC guidance over the occupational competence and briefing of witnesses in the use of witness testimony.

Knowledge and Understanding Assessments

The units listed below all require the learner to complete a unit summative (knowledge) assessment. The knowledge assessments (and supporting rationale) are provided by BPEC Certification Ltd.

- H/503/8162 - Conduct energy assessments in a safe, effective and professional manner
- K/503/8163 - Prepare for Energy Assessments of Domestic property
- T/503/8165 - Undertake Energy Inspections
- J/504/0924 - Produce and Explain Energy Performance Certificates relating to Domestic Property
- Y/503/8188 - Explain the Green Deal Advice Report to the domestic customer
- R/503/8187 - Prepare and issue domestic Green Deal Advice Reports

- T/503/8179 - Provide information to customers on the principles, financing and operation of the Green Deal
- L/503/8186 - Undertake occupancy assessments and give advice

*The completed knowledge assessment papers (questions and answers) must be retained in the centre portfolio – **KNOWLEDGE ASSESSMENT QUESTIONS AND ANSWERS MUST NOT BE RETAINED IN THE LEARNER PORTFOLIO**

Marking Knowledge Assessments

The pass rate for the knowledge assessments is 100%

1. Following the learners first attempt, the assessor shall mark the attempt using the marking overlay for the relevant assessment
2. If the learner does not achieve the 100% pass mark, they will be given a second attempt at answering any questions answered incorrectly on the first attempt
3. Oral Verification - providing a level of achievement of 80% has been attained, the learner will be orally questioned in an attempt to establish competence in all remaining areas
4. Learners who have not achieved the 100% pass mark at this stage will be deemed to have failed the knowledge assessment. Learners wishing to retake the assessment will be required to re-attempt the full theory paper in its entirety

Learner Result Form

A Learner Result Form has been produced for each qualification within the BPEC L3 Domestic Energy Assessor/Green Deal Advisor suite of qualifications. These documents shall be used to record that learners have completed the whole qualification in a satisfactory manner. The document shall be completed and signed by the centre assessor and the internal verifier.

The completed Learner Result Form shall be sent to BPEC Certification Ltd. for certification. Copies of the Learner Result Form shall also be retained in the Learner Portfolio and the Centre Portfolio.

Unit Evidence Checklists

A Unit Evidence Checklist has been produced for each unit. This document shall be used to record that the learner has completed the unit in a satisfactory manner. Each section of the document shall be completed and the document signed by the learner, the assessor(s) and the internal verifier.

The Unit Evidence Checklist shall be used by the assessor to cross-reference the unit performance criteria to the evidence collected in order to demonstrate learner competence. The Unit Evidence Checklist and the evidence collected shall be retained in the learner portfolio.

Evidence Forms

BPEC Certification Ltd. has designed evidence forms which may be used to capture evidence relating to a learners performance in the workplace. Such evidence may include:

- Assessor feedback to the learner
- Records of supplementary questions posed by the assessor and the learner responses
- Learner feedback – statements made by the learner to clarify their competence
- Witness testimony – statements made by witnesses e.g. supervisor, customer etc. relating to the competence of the learner

These evidence forms are contained in the Qualification Manual and have been designed so that they can be copied/reprinted as many times as is required.

Portfolio Contents

The table below identifies the contents to be retained within the learner and the centre portfolios:

	Learner Portfolio	Centre Portfolio
Learner CV	✓	✓
Previous qualifications	✓	✓
Learner result form	✓	✓
Unit evidence checklists	✓	✓
Evidence collected e.g. work records, evidence forms	✓	
Knowledge assessment documentation		✓
Assignment documentation (contained in qualification manual)	✓	✓

Staff Qualification Requirements

Assessors

Assessors **MUST** be vocationally and occupationally competent in the areas they are assessing and have a thorough knowledge of the National Occupational Standards and Units of Assessment.

The assessor must be able to provide appropriate documented evidence that demonstrates they have a minimum of 5 years proven occupational experience in the activities they will be assessing e.g. a signed and dated CV. This verifiable evidence must be at or above the level of competence being assessed.

Qualifications

All assessors must

- have verifiable relevant current industry experience and knowledge of the occupational working area at or above the level being assessed. This experience and knowledge must be of sufficient depth to be effective and reliable when judging candidates' competence. Assessors' experience and knowledge could be verified by:
 - curriculum vitae and references
 - possession of a relevant qualification
 - corporate membership of a relevant professional institution
- have sufficient occupational expertise so they have up to date knowledge and experience of the particular aspects of work they are assessing. This could be verified by records of continuing professional development achievements
- have a sound in-depth knowledge of, and uphold the integrity of the sector's NOS, units of Assessment and these Assessment Principles
- be prepared to participate in training activities for their continued professional development

The assessor must also hold one of the following assessor qualifications:

- a) Hold D32 and/or D33 or A1 and or A2 or be working towards A1 and/or A2 Assessor Awards.

- In England, Wales and Northern Ireland, new Assessors must achieve unit A1 or A2 within 18 months of beginning assessment duties. Assessment decisions by Assessors who are still working towards certification must be countersigned by an Assessor who has gained certification.
- In Scotland, all new Assessors should have an assessment plan for achieving A1 or A2 and be working towards achieving the award. External Verifiers will monitor progress and achievement towards the achievement of A1 or A2 during centre visits.

Candidates in possession of a TQFE without having an appropriate A1 or A2 award should undertake continuing professional development to demonstrate that they are working to the appropriate A Unit standard.

Or:

- b) Where employers opt for an **'employer direct'** model, the qualification requirements specified by the regulatory authorities may be waived as described below.

The 'employer direct' model is where colleagues, supervisors and/or managers in the workplace are involved in the assessment process. Under this model, the employer, with the agreement of BPEC and Asset Skills and the approval of the qualifications Regulators, may choose between:

Achieving the appropriate regulatory body approved unit qualifications for assessment.

OR

Demonstrating that the employer's training and development activity undertaken to prepare, validate and review these assessment roles, maps 100% to the National Occupational Standards which these qualifications are based on. The mapping process **must** be agreed by BPEC as providing the equivalent level of rigour and robustness as achievement of the unit qualification.

The alternative option described above, which waives the need for the regulatory approved units, must be confined in application to an 'organisation by organisation' and 'qualification by qualification' basis, and agreed by the qualification regulators. Prospective organisations must be able to confirm that their in-house practices conform to the requirements of the Standards in association with BPEC.

Internal Verifiers

Internal Verifiers should be vocationally and occupationally competent in the areas they are verifying and have a thorough knowledge of the National Occupational Standards and Units of Assessment.

The Internal Verifiers must be able to provide appropriate documented evidence that demonstrates they have a minimum of 5 years proven occupational experience in the activities they will be verifying e.g. a signed and dated CV.

Qualifications

It is desirable that all Internal Verifiers hold a relevant qualification.

All Internal Verifiers must:

- have verifiable relevant current industry experience and knowledge of the occupational working area at or above the level being assessed. This experience and knowledge must be of sufficient depth to be effective and reliable when judging candidates' competence. Internal Verifiers experience and knowledge could be verified by:
 - curriculum vitae and references
 - possession of a relevant qualification
 - corporate membership of a relevant professional institution
- have expertise so they have up to date knowledge and experience of the particular aspects of work they are verifying. This could be verified by records of continuing professional development achievements
- have a sound in-depth knowledge of, and uphold the integrity of the NOS, Units of Assessment and these Assessment Principles
- be prepared to participate in training activities for their continued professional development
- demonstrate their ability to maintain occupational competence by continuous professional development
- undertake continuous professional development to ensure that they are working to the current National Occupational Standards in assessment and verification.
- have knowledge of the requirements and application of the Asset Skills Assessment Principles
- provide evidence of knowledge, understanding and application of the Regulatory Authorities' codes of practice

The Internal Verifier must:

- a) Hold an appropriate internal verifier qualification (D34 or V1) , or be working towards a V1 qualification.
 - In England, Wales and Northern Ireland all new internal verifiers should achieve unit V1 within 18 months of beginning internal verification duties. Internal verification decisions by verifiers who are still working towards certification must be countersigned by a Verifier who has gained certification.

- In Scotland, all new Verifiers should have an assessment plan for achieving the V1 and be working towards achieving the award. External Verifiers will monitor progress and achievement towards the achievement of V1 during centre visits
- All new Internal Verifiers must hold units A1 and/or A2

Or:

- b) Where employers opt for an **‘employer direct’** model, the qualification requirements specified by the regulatory authorities may be waived as described below.

The ‘employer direct’ model is where colleagues, supervisors and/or managers in the workplace are involved in the assessment process. Under this model, the employer, with the agreement of BPEC and Asset Skills and the approval of the qualifications Regulators, may choose between:

Achieving the appropriate regulatory body approved unit qualifications for assessment.

OR

Demonstrating that the employer’s training and development activity undertaken to prepare, validate and review these assessment roles, maps 100% to the National Occupational Standards which these qualifications are based on. The mapping process **must** be agreed by BPEC as providing the equivalent level of rigour and robustness as achievement of the unit qualification.

The alternative option described above, which waives the need for the regulatory approved units, must be confined in application to an ‘organisation by organisation’ and ‘qualification by qualification’ basis, and agreed by the qualification regulators. Prospective organisations must be able to confirm that their in-house practices conform to the requirements of the Standards in association with BPEC.

Continuing Professional Development (CPD)

The occupational competence of assessors and internal verifiers must be updated on a regular basis and be periodically reconfirmed via continuing professional development (CPD) which is recorded by the assessment centres.

Further Information

Requests for further information regarding centre/scheme approval or any aspect of assessment of the BPEC qualifications please contact:

BPEC Certification Ltd. 2 Mallard Way, Pride Park, Derby, DE24 8GX
T 0845 644 6558 F 0845 121 1931 E AAdmin@bpec.org.uk W www.bpec.org.uk

Annex 1 - Funding

BPEC Certification Ltd. does not provide details on funding as this may vary between regions. Centres should contact the appropriate funding body to check eligibility for funding and any regional/national arrangements which may apply to the centre or learners.

For funding regulatory purposes, learners should not be entered for a qualification of the same type, level and content as that of a qualification they already hold. Please see below for where to find out more about the funding arrangements.

England

Skills Funding Agency
Cheylesmore House
Quinton Road
Coventry
CV1 2WT

Email: qualifications@sfa.bis.gov.uk

<https://www.gov.uk/government/collections/qualifications-approved-for-public-funding>

<http://data.gov.uk/dataset/learning-aim-reference-service>

Northern Ireland

Please contact the Department for Employment and Learning at www.delni.gov.uk

Scotland

Colleges should contact the Scottish Further Education Funding Council, at www.sfc.ac.uk

Training providers should contact Scottish Enterprise at www.scottish-enterprise.com or one of the Local Enterprise Companies.

Wales

Centres should contact the department for education, lifelong learning and skills:
www.new.wales.gov.uk

Annex 2 – Sector Skills Councils

The Sector Skills Councils have the responsibility for development of the national occupational standards and in many cases, facilitating the development of relevant sector vocational qualifications. Similarly, the Sector Skills Councils formulate the ‘assessment strategy’ for these qualifications, contact details of the relevant Sector Skills Council(s) are shown below:

Asset Skills, 2 The Courtyard, 48 New North Road, Exeter, EX4 4EP

Email: info@assetskills.org Web: www.assetskills.org Tel: 01392 423 399/0845 678 2 888