

# Level 3 Diploma in Green Deal Domestic Advice 6066-01

September 2017 Version 2.5



## Qualification at a glance

<b>Subject area</b>	<b>Green Deal Advisor</b>
<b>City &amp; Guilds number</b>	6066-01
<b>Age group approved</b>	16-18, 19+
<b>Assessment</b>	Portfolio, Assignment, Role Play
<b>Support materials</b>	Centre handbook Assignment guide
<b>Registration and certification</b>	Consult the Walled Garden/Online Catalogue for last dates

<b>Title and level</b>	<b>GLH</b>	<b>TQT</b>	<b>City &amp; Guilds number</b>	<b>Accreditation number</b>
Level 3 Diploma in Green Deal Domestic Advice	230	470	6066-01	600/4934/0

<b>Version and date</b>	<b>Change detail</b>	<b>Section</b>
Version 2.1 June 2013	Amended date in introduction to January 2013  Amended approval to remove fast track approval paragraph  Amended resource requirements 2 <sup>nd</sup> paragraph	Introduction Section 1 Approval Section 2  Resource requirements Section 2
Version 2.2 August 2013	Minor amendments made on pages 6,7,12 and 13.	Structure
Version 2.4 February 2014	Amendment to approved age groups on page 2 and revised paragraph under 'Age restrictions' on page 8.	Qualification at a glance Centre requirements
Version 2.5 September 2017	Added TQT details  Deleted QCF	Qualification at a glance & Structure  Throughout



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# 1 Introduction

The Green Deal is a UK Government initiative to address the energy efficiency of UK building stock. It was introduced in January 2013 and will cover Domestic and Non-Domestic properties, both of which require qualified Green Deal Advisors capable of producing Energy Performance Certificates (EPC, domestic) or Display Energy Certificates (DEC, non-domestic), creating a Green Deal Assessment Report using approved software, and providing advice to the customer based on this assessment.

At a local level, the Green Deal will enable many households and businesses to improve the energy efficiency of their properties so less energy is consumed and less money is wasted. The key focus of the new energy company obligation – or “ECO” will be on those householders who cannot achieve significant energy savings without an additional or different measure of support. For example, this includes vulnerable and low-income households and those living in harder to treat properties, such as solid walled properties. A quarter of the UK’s carbon emissions comes from the energy used in homes and a similar amount comes from our businesses, industry and workplaces.

At a national level, the UK needs to become more energy efficient to reduce its greenhouse gas emissions, which risk dangerous climate change. The Climate Change Act 2008 legislated for a reduction in our carbon emissions and set legally-binding carbon budgets across all sectors of the UK economy — including our homes and communities, and our workplaces.

This handbook relates to the **Green Deal Domestic Advisor**, and tells you what you need to do to deliver the qualification. Centres are advised to visit the City & Guilds website regularly to look for updates.

<b>Area</b>	<b>Description</b>
Who is the qualification for?	Candidates wishing to become a Green Deal Domestic Advisor. It is relevant to both new entrants and existing Domestic Energy Assessors.
What does the qualification cover?	The qualification enables the learner to become a Green Deal Advisor and includes the abilities and knowledge to undertake energy inspections, create and lodge EPCs, understand domestic energy assessment and Green Deal policy, issue and lodge Green Deal Assessment Reports, and provide advice to customers based on the Green Deal Assessment Report.
Is the qualification part of a framework or initiative?	The qualification is part of the Governments Green Deal initiative.
What opportunities for progression are there?	It allows candidates to progress into employment or to the following City & Guilds qualifications: <ul style="list-style-type: none"> <li>• Level 4 Diploma in Green Deal Non-Domestic Advice</li> </ul>

## Structure

To achieve the Level 3 Diploma in Green Deal Domestic Advice, learners must achieve 47 credits from the mandatory units.

Learners that hold the Certificate in Domestic Energy Assessment and are currently practising DEA can be exempted from taking units 331, 332, 333, 334. Candidates that hold these qualifications (as listed below) and are practising as a DEA can be registered on 6066-11 if they have:

- achieved 6361-01 (old units) and 6361-11
- achieved 6361-01 (old units) and 6361-11 with another Awarding organisation.
- achieved 6020-01 and 6361-11
- achieved 6361-01 (new units)

In addition, learners must achieve units (320, 520), 321, 322, 410.

<b>Level 3 Diploma in Green Deal Domestic Advice</b>			
<b>Unit accreditation number</b>	<b>Unit number</b>	<b>Unit title</b>	<b>Credit value</b>
<b>Mandatory</b>			
H/503/8162	331	Conduct energy assessments in a safe, effective and professional manner	6
K/503/8163	332	Prepare for Energy Assessments of Domestic property	4
T/503/8165	333	Undertake five Energy Inspections	11
J/504/0924	334	Produce and explain Energy Performance Certificates relating to Domestic Property	4
T/503/8179	320/520	Provide information to customers on the principles, financing and operation of the Green Deal	4
L/503/8186	321	Undertake three occupancy assessments and give advice	8
Y/503/8188	322	Explain the Green Deal Advice Report to the domestic customer	4
R/503/8187	410	Prepare and issue domestic Green Deal Advice Reports	6

### **60661-01**

### **(DEA + GDA) 8 units**

(includes the 4 units from 6066-11

Includes the 4 units from 6361-01)

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### **6066-11**

GDA top up for existing DEA 4 units

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### **6361-01**

DEA 4 units

## Total Qualification Time

Total Qualification Time (TQT) is the total amount of time, in hours, expected to be spent by a Learner to achieve a qualification. It includes both guided learning hours (which are listed separately) and hours spent in preparation, study and assessment.

<b>Title and level</b>	<b>GLH</b>	<b>TQT</b>
Level 3 Diploma in Green Deal Domestic Advice	230	470



## 2 Centre requirements

### Approval

To offer this qualification, new centres will need to gain both centre and qualification approval. City & Guilds centres not currently offering qualifications in Energy Assessment will be required to gain qualification approval. Please refer to the *Centre Manual - Supporting Customer Excellence* for further information.

Fast-track approval not available

Centre staff should familiarise themselves with the structure, content and assessment requirements of the qualification before designing a course programme. Centre staff should be familiar with the aims and intents of the Government's Green Deal programme, including the requirement to ensure that training for Green Deal Advisors (GDA) is of a high standard, due to the variety of tasks the GDA is expected to undertake.

### Resource requirements

#### Physical resources

Learners will need to be trained to use appropriate recognised RdSAP and Green Deal SAP Occupancy Assessment software. Centres will be required to provide access to this software, and may need to enter into agreement with an Accrediting Body or Green Deal Provider in order to ensure the learner has access to approved software.

Centres will also be required to provide a suitable area for learners to undertake Evolve online multiple choice tests under invigilated examination conditions.

#### Centre staffing

Staff delivering this qualification must be able to demonstrate that they meet the following occupational expertise requirements. They should:

- be occupationally competent or technically knowledgeable in the areas for which they are delivering training and/or have experience of providing training. This knowledge must be to the same level as the training being delivered
- have occupational expertise relevant to the inspection and reporting of residential property for energy assessment inspection purposes
- have a sound knowledge and understanding of the most recent version of RdSAP
- have recent relevant experience in the specific area they will be assessing
- have credible experience of providing training.



Centre staff may undertake more than one role, eg tutor and assessor or internal quality assurer, but cannot internally verify their own assessments.

### **Assessors and Internal Quality Assurer**

Centre staff should hold, or be working towards, the relevant Assessor/Internal Quality Assurer TAQA qualification for their role in delivering, assessing and verifying this qualification.

Assessors should have appropriate occupational expertise relevant to property inspection and the production of EPCs.

Assessors must:

- hold the Level 3 Certificate in Domestic Energy Assessment, or an equivalent qualification, or APEL option as recognised by relevant industry Accrediting Body
- be able to demonstrate Continuing Professional Development in the area of Energy Assessment and Green Deal Advice and Assessment.

IQAs should be able to demonstrate occupational competence.

Assessors and internal verifiers/internal quality assurers should adhere to the guidelines set out in the current Asset Skills Assessment Principles.

### **Continuing professional development (CPD)**

Centres must support their staff to ensure that they have current knowledge of the occupational area, that delivery, mentoring, training, assessment and verification is in line with best practice, and that it takes account of any national or legislative developments.

### **Candidate entry requirements**

City & Guilds does not set entry requirements for this qualification. However, centres must ensure that candidates have the potential and opportunity to gain the qualification successfully.

### **Age restrictions**

Although open to 16-18 year olds, it is recommended that learners be interviewed to check they have the necessary underpinning knowledge before starting the qualification.



## 3 Delivering the qualification

### Initial assessment and induction

An initial assessment of each candidate should be made before the start of their programme to identify:

- if the candidate has any specific training needs, such as the ability to use computer software, and perform calculations as relevant to the role.
- support and guidance they may need when working towards their qualification.
- any units they have already completed, or credit they have accumulated which is relevant to the qualification.
- any relevant APEL option that may reduce the level of training required.

We recommend that centres provide an induction programme so the candidate fully understands the requirements of the qualification, their responsibilities as a candidate, and the responsibilities of the centre. This information can be recorded on a learning contract.

### Support materials

City & Guilds will provide centres the Assessment Pack, which is live on our website.



## 4 Assessment

### Assessment of the qualification

<b>Level 3 Diploma in Green Deal Domestic Advice</b>			
<b>Unit Number</b>	<b>Unit Title</b>	<b>Assessment method</b>	<b>Where to obtain assessment materials</b>
331	Conduct energy assessments in a safe, effective and professional manner (Level 3) (6)	<p>Portfolio</p> <p>This unit will be assessed via observation and the development of a portfolio in a working environment and will be assessed to the assessment criteria set out in the unit.</p>	<p>The Logbook for this unit is available to download from the <b>City &amp; Guilds Website</b>. Please navigate to the 6361 general webpage where this Logbook can be found under centre documents.</p>
332	Prepare for Energy Assessments of Domestic property (Level 3) (4)	<p>Assignment 6361-332</p> <p>The assessment covers the practical activities for all outcomes and will also sample underpinning knowledge to verify coverage of the unit.</p> <p>City &amp; Guilds devised assignment, internally marked, externally verified.</p>	<p>This assignment will be available from the <b>City &amp; Guilds Website</b>.</p> <p>Passwords will be available on the Walled Garden.</p>
333	Undertake Energy Inspections (Level 3) (11)	<p>Assignment 6361-333</p> <p>The assessment covers the practical activities for all outcomes and will also sample underpinning knowledge to verify coverage of the unit.</p> <p>City &amp; Guilds devised assignment, internally marked, externally verified.</p>	<p>This assignment will be available from the <b>City &amp; Guilds Website</b>.</p> <p>Passwords will be available on the Walled Garden.</p>

<b>Level 3 Diploma in Green Deal Domestic Advice</b>			
<b>Unit Number</b>	<b>Unit Title</b>	<b>Assessment method</b>	<b>Where to obtain assessment materials</b>
334	Produce and explain Energy Performance Certificates relating to Domestic Property (Level 3) (4)	Assignment 6361-334  The assessment covers the practical activities for all outcomes and will also sample underpinning knowledge to verify coverage of the unit.  City & Guilds devised assignment, internally marked, externally verified.	This assignment will be available from the <b>City &amp; Guilds Website</b> .  Passwords will be available on the Walled Garden.
320          520	Provide information to customers on the principles, financing and operation of the Green Deal (Level 3) (4)	Role play       E-volve test 35 questions 1 hour Closed book	Guidance, sample questions and checklist on the <b>City &amp; Guilds Website</b> .  Passwords will be available on the Walled Garden.  City & Guilds E-volve.
321	Undertake occupancy assessments and give advice (Level 3) (8)	Portfolio evidence (from three occupancy assessments: survey data, method statements).  Verbal questions.	Template, guidance and questions on the <b>City &amp; Guilds Website</b> .  Passwords will be available on the Walled Garden.
322	Explain the Green Deal Advice Report to the domestic customer (Level 3) (4)	Role play	Guidance, sample questions and checklist on the <b>City &amp; Guilds Website</b> .  Passwords will be available on the Walled Garden.
410	Prepare and issue domestic Green Deal Advice Reports (Level 4) (6)	Three completed reports, using data collected in unit 321.  Written report.  Question paper.	Assessment pack on <b>City &amp; Guilds Website</b> .  Passwords will be available on the Walled Garden.

### **Time constraints**

The following conditions must be applied to the assessment of this qualification:

- For units 320 and 322 candidates will have 24 hours preparation time for both role plays.
- For 520 candidates will have 1 hour to complete the E-volve test.

### **Assessment strategy**

#### **Role plays**

“Role plays are estimated to be between 30 and 45 minutes – 30 minutes if only 320 is assessed, and 45 minutes if 322 is assessed at the same time.

The candidate is to be provided with the preparation materials (as specified in the assessor guidance of the role play assignments) 24 hours in advance of the assessment. The 24 hour preparation time is provided for **both** 320 and 322 (**not** 24 hours each).

Notes made by the candidate during the preparation time may be taken into the assessment, but pre-printed materials (a list of examples is provided in the assessor guidance) are not permitted.

Role plays should be conducted on a one-to-one basis with the assessor. Role plays should not be a group activity.

#### **Verbal questions**

Knowledge questions to supplement the portfolio of evidence for Unit 321 are provided in the relevant assessment pack on the website. These questions can be asked orally or provided to candidates in written format to be completed in their own time.

#### **Green Deal Advice reports**

Reports must be generated using the approved software for unit 410.

#### **Written report**

One written report will be required as part of Unit 410. Areas to be covered will be specified within the relevant assessment pack. This will not be closed book or timed, so can be completed at any point.

## Test specifications

The way the knowledge is covered by the 520 test is laid out in the table below:

**Duration:** 1 hour

Unit	Outcome	Number of questions	%
520	1 Understand the components of the Green Deal	21	60
	2 Understand how to provide high quality, independent and impartial advice to customers	14	40
<b>Total</b>		<b>35</b>	<b>100</b>

## Recognition of prior learning

Recognition of Prior Learning (RPL) means using a person's previous experience or qualifications which have already been achieved to contribute to a new qualification. Learners that have already achieved the Level 3 Certificate in Domestic Energy Assessment, or are registered with an Accrediting Body via a valid APEL option, can be exempted from units 331, 332, 333, 334.

## Other useful information

### For 320 and 413

- This is a role play.
- Candidates will be supplied with a non-dom GDAR, Recommendations Report and supporting site documentation, such as site notes and data, in order for them to get an understanding of the building for which the sample GDAR has been produced. They have 24 hours to prepare for both 320 and 413 role plays.
- The **estimated** time for completion of the role plays is between 20 and 60 minutes.

### For 520

Outcomes 1 and 2 are covered.



## 5 Units

### Availability of units

The following units can also be obtained from The Register of Regulated Qualifications: <http://register.ofqual.gov.uk/Unit>

### Structure of units

These units each have the following:

- City & Guilds reference number
- unit accreditation number
- title
- level
- credit value
- unit aim
- relationship to NOS
- endorsement by a sector or other appropriate body
- information on assessment
- learning outcomes which are comprised of a number of assessment criteria
- notes for guidance can be found in Appendix 1

## Summary of units

<b>Unit Number</b>	<b>Unit Title</b>	<b>Credits</b>	<b>Unit number</b>
331	Conduct energy assessments in a safe, effective and professional manner	6	H/503/8162
332	Prepare for Energy Assessments of Domestic property	4	K/503/8163
333	Undertake Energy Inspections	11	T/503/8165
334	Produce and explain Energy Performance Certificates relating to Domestic Property	4	J/504/0924
320/520	Provide information to customers on the principles, financing and operation of the Green Deal	4	T/503/8179
321	Undertake occupancy assessments and give advice	8	L/503/8186
322	Explain the Green Deal Advice Report to the domestic customer	4	Y/503/8188
410	Prepare and issue domestic Green Deal Advice Reports	6	R/503/8187



## Unit 331

## Conduct energy assessments in a safe, effective and professional manner

<b>UAN:</b>	<b>H/503/8162</b>
<b>Level:</b>	Level 3
<b>Credit value:</b>	6
<b>GLH:</b>	30
<b>Relationship to NOS:</b>	This unit is based on the National Occupational Standards for Domestic Energy Assessors.
<b>Endorsement by a sector or regulatory body:</b>	This unit is endorsed by Asset Skills, the Sector Skills Council for facilities management, housing, property, planning, cleaning and parking.
<b>Aim:</b>	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 EPBD in particular.

### Guidance

For additional guidance please refer to Appendix 1 for Asset Skills syllabus documents.

<b>Learning outcome</b>
The learner will: 1. Understand the Health and Safety requirements when undertaking energy assessments
<b>Assessment criteria</b>
The learner can: 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.

<b>Learning outcome</b>
The learner will:
2. Understand the legislation, codes of conduct and compliance requirements in relation to energy assessment
<b>Assessment criteria</b>
The learner can:
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 the information requested is confidential
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: <ul style="list-style-type: none"> <li>• any specific organisational requirements with regard to complaints</li> <li>• your own responsibility to deal with complaints and attempt to resolve them before escalating to the Accreditation Body, or the equivalent in the Devolved Administrations</li> </ul>
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 outcomes 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.

<b>Learning outcome</b>
The learner will: 3. Understand the legislation, codes of conduct and compliance requirements in relation to energy assessment
<b>Assessment criteria</b>
The learner can: 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: <ul style="list-style-type: none"> <li>• The energy performance of buildings</li> <li>• Compliance with safe working practices</li> <li>• The relevant regulations in the Devolved Administrations</li> <li>• Where appropriate relevant legislation on the use of refrigerants</li> </ul> 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 the Devolved Administrations and your responsibilities in complying with these 3.7 Describe the framework under which Accreditation Bodies, or the equivalent in the 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.

<b>Learning outcome</b>
The learner will: 4. Be able to comply with organisational and legal requirements at all times
<b>Assessment criteria</b>
The learner can: 4.1 Carry out work in accordance with the 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 decisions 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.

<b>Learning outcome</b>
The learner will: 5. Be able to maintain health, safety and security at work
<b>Assessment criteria</b>
The learner can: 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.

<b>Learning outcome</b>
The learner will: 6. Be able to develop and maintain effective working relationships with colleagues, professionals, clients and others
<b>Assessment criteria</b>
The learner can: 6.1 Develop and maintain productive working relationships with others 6.2 Request information from colleague , professionals, clients and others in a 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: <ul style="list-style-type: none"> <li>• Are outside own authority</li> <li>• Are beyond own area of knowledge or expertise</li> <li>• Involve confidential information</li> </ul> 6.6 Handle and resolve disputes and/or differences of opinion 6.7 Adhere to the formal complaints procedure when dealing with a complaint.

<b>Learning outcome</b>
The learner will: 7. Be able to conduct energy assessments in a professional manner
<b>Assessment criteria</b>
The learner can: 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 judgment 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.

## Unit 332

## Prepare for Energy Assessments of Domestic property

<b>UAN:</b>	<b>K/503/8163</b>
<b>Level:</b>	Level 3
<b>Credit value:</b>	4
<b>GLH:</b>	20
<b>Relationship to NOS:</b>	This unit is based on the National Occupational Standards for Domestic Energy Assessors.
<b>Endorsement by a sector or regulatory body:</b>	This unit is endorsed by Asset Skills, the Sector Skills Council for facilities management, housing, property, planning, cleaning and parking.
<b>Aim:</b>	This unit aims to develop the knowledge and skills needed to prepare prior to making an energy assessment eg taking instructions, clarifying requirements and making initial investigations relating to the property of properties.

### Guidance

For additional guidance please refer to Appendix 1 for Asset Skills syllabus documents.

<b>Learning outcome</b>
The learner will: 1. Understand the legislation and regulations relating to energy assessments and Energy Performance Certificates
<b>Assessment criteria</b>
The learner can: 1.1 Explain the relevant legislation giving rise to energy assessments and Energy Performance Certificates, for England and Wales and for the 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 Certificate 1.4 Explain the principles of the Green Deal and the role of Energy Performance Certificates within Green Deal.

<b>Learning outcome</b>
The learner will: 2. Understand how to agree and confirm instructions to undertake energy assessments
<b>Assessment criteria</b>
The learner can: 2.1 Describe how to explain that ratings and recommendations may differ from past assessments due to changes in methodology or legislation and other differences 2.2 Explain how to clarify and confirm the expectations of the customer 2.3 Describe the basic principles of the Green Deal or equivalents within the Devolved Administrations, and the role of Energy Performance Certificates within those schemes 2.4 State when a potential conflict of interest will require disclosure to the customer, or will require the need to decline the instructions altogether 2.5 Explain the limitations and constraints that apply to the conduct of energy assessments and to the prescribed methodology 2.6 Describe 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 2.7 Identify alternatives to the prescribed methodology for existing homes, Reduced Data SAP (RdSAP) and the circumstances when an alternative methodology should be considered 2.8 Describe the options that the client could consider regarding the use of an alternative assessment methodology, such as referring on to an assessor accredited for that methodology 2.9 Explain the importance of confirming in writing the arrangements agreed between you and the customer 2.10 Describe the fee structures and payment arrangements for energy assessments 2.11 Explain how to confirm on-site inspection arrangements with the customer or other occupier 2.12 Explain the importance of confirming whether any specific arrangements apply to the energy assessment 2.13 Describe how to identify and explain any circumstances that prevent you from undertaking an energy assessment.

<b>Learning outcome</b>
The learner will: 3. Understand how to investigate relevant matters relating to the property
<b>Assessment criteria</b>
The learner can: 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 of 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 version of the RdSAP software and associated reference materials.

<b>Learning outcome</b>
The learner will: 4. Be able to agree and confirm instructions to undertake energy assessments
<b>Assessment criteria</b>
The learner can: 4.1 Clarify and confirm the expectations and requirements of the client 4.2 Respond to requests 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 disclosure 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 Reduced Data SAP (RdSAP) methodology is not appropriate, direct the customer towards the appropriate approved assessment methodology 4.8 Confirm agreed arrangements in writing, including date and 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.

<b>Learning outcome</b>
The learner will: 5. Be able to investigate relevant matters relating to the property
<b>Assessment criteria</b>
The learner can: 5.1 Explain options that the client could consider regarding the use of an alternative assessment methodology, such as referring on 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 assessment 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 materials can be accessed

## Unit 333

## Undertake Energy Inspections

<b>UAN:</b>	<b>T/503/8165</b>
<b>Level:</b>	Level 3
<b>Credit value:</b>	11
<b>GLH:</b>	45
<b>Relationship to NOS:</b>	This unit is based on the National Occupational Standards for Domestic Energy Assessors.
<b>Endorsement by a sector or regulatory body:</b>	This unit is endorsed by Asset Skills, the Sector Skills Council for facilities management, housing, property, planning, cleaning and parking.
<b>Aim:</b>	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.

### Guidance

For additional guidance please refer to Appendix 1 for Asset Skills syllabus documents.

<b>Learning outcome</b>
The learner will: 1. Understand the information that is needed to produce the data to generate an Energy Performance Certificate (EPC) of a domestic property
<b>Assessment criteria</b>
The learner can: 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.

<b>Learning outcome</b>
The learner will: 2. Understand the range of factors that affect the energy performance of a property
<b>Assessment criteria</b>
The learner can: 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 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 <ul style="list-style-type: none"> <li>• Explain the factors that could affect the choice of energy efficiency measures for the property, including: <ul style="list-style-type: none"> <li>• Issues that make them unsuitable for the property</li> <li>• Interactions between building fabric and building services</li> <li>• Listed building status/conservation areas</li> </ul> </li> </ul> 2.6 Explain the requirements and application of relevant building regulations and other technical standards 2.7 Explain the purpose behind government procedures for assessing the energy performance of property 2.8 Describe the types of behavioural advice regarding energy efficiency that can be provided to occupants during inspection 2.9 Identify the sources of information and advice about energy performance to which occupants can be referred.

<b>Learning outcome</b>
The learner will: 3. Understand how to collate and maintain records of inspection findings
<b>Assessment criteria</b>
The learner can: 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 decisions 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 purposes for which your records may be used.

<b>Learning outcome</b>	
The learner will:	
4.	Be able to inspect property to determine energy performance
<b>Assessment criteria</b>	
The learner can:	
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
4.5	Undertake a methodical visual inspection of all relevant aspects of the property in accordance with the 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.

<b>Learning outcome</b>	
The learner will:	
5.	Be able to collate relevant information to assess the energy level of the property
<b>Assessment criteria</b>	
The learner can:	
5.1	Make accurate observations and measurements to provide data for calculation of energy performance ratings
5.2	Obtain all additional information that is needed about the property

<p>especially where this is needed to avoid recording an item as “unknown”</p> <p>5.3 Make further investigations where observations are inconsistent with existing evidence and expected findings, identifying the causes of these inconsistencies</p> <p>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</p> <p>5.5 Follow the correct procedures for collecting information to enable the energy efficiency of the property to be determined</p> <p>5.6 Identify and record any factors that could affect the choice of energy efficiency measures for the property, such as:</p> <ul style="list-style-type: none"> <li>• Issues that make them unsuitable for the property</li> <li>• Listed building status</li> <li>• Interactions between building fabric and building services.</li> </ul>
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<p><b>Learning outcome</b></p> <p>The learner will:</p> <p>6. Be able to maintain records of inspection findings</p>
<p><b>Assessment criteria</b></p> <p>The learner can:</p> <p>6.1 Produce and maintain complete, accurate and legible records of your findings, including:</p> <ul style="list-style-type: none"> <li>• Investigations carried out</li> <li>• Values recorded</li> <li>• Options considered</li> </ul> <p>6.2 Record information at a sufficient level of detail to produce complete and comprehensive Energy Performance Certificates and justify your decisions on values recorded and energy efficiency measures selected</p> <p>6.3 Identify the 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</p> <p>6.4 Create, maintain and supply records of which energy efficiency measures were considered and rejected with reasons</p> <p>6.5 Explain and record any circumstances where accurate inspection has not been possible or where the information is “unknown”</p> <p>6.6 Ensure that records are catalogued and stored securely and can be readily accessed for appropriate purposes</p> <p>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</p>

## Unit 334

# Produce and explain Energy Performance Certificates relating to Domestic Property

<b>UAN:</b>	<b>J/504/0924</b>
<b>Level:</b>	Level 3
<b>Credit value:</b>	4
<b>GLH:</b>	25
<b>Relationship to NOS:</b>	This unit is based on the National Occupational Standards for Domestic Energy Assessors.
<b>Endorsement by a sector or regulatory body:</b>	This unit is endorsed by Asset Skills, the Sector Skills Council for facilities management, housing, property, planning, cleaning and parking.
<b>Aim:</b>	This unit aims to cover the activities once the inspection is completed ie 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.

### Guidance

For additional guidance please refer to Appendix 1 for Asset Skills syllabus documents.

<b>Learning outcome</b>
The learner will: 1. Understand the principles underpinning the Energy Performance Certification process
<b>Assessment criteria</b>
The learner can: 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 Administrations
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 equivalents 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 an Energy Performance Certificate.

<b>Learning outcome</b>	
The learner will:	
2.	Understand the principles and operation of the approved software used to generate recommendations for improved energy performance of a property
<b>Assessment criteria</b>	
The learner can:	
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 measures 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 of 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: <ul style="list-style-type: none"> <li>• Rooms in the roof</li> <li>• Retrofitted insulation</li> <li>• Un-separated conservatory</li> <li>• Extensions</li> <li>• Wall construction</li> <li>• Primary, secondary and portable heating</li> <li>• Inadequate heating</li> <li>• Age of main property and of any extensions or roof rooms</li> <li>• Low and Zero Carbon Technologies</li> <li>• Any other features that when incorrectly identified will have a significant detrimental affect to rating accuracy</li> </ul>
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 entries and quality of energy efficiency measures selected.

<b>Learning outcome</b>
The learner will: 3. Understand the process for issuing Energy performance Certificates and explaining their contents
<b>Assessment criteria</b>
The learner can: 3.1 Describe how to establish the customer’s understanding of the Energy Performance Certification process and their expectations as to outcomes 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 the 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 efficiency 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 reasons 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 meaning
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.

<b>Learning outcome</b>	
The learner will:	
4.	Be able to generate Energy Performance Certificates using approved software
<b>Assessment criteria</b>	
The learner can:	
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

<p>property features to arrive at an accurate assessment of the property</p> <p>4.4 Obtain sufficient information to ensure values entered for all components are accurate</p> <p>4.5 Before inputting an item as “unknown”, carry out sufficient investigations to minimise the use of default values</p> <p>4.6 Use approved software to generate energy efficiency measures for the property</p> <p>4.7 Take account of the interaction between the building fabric and the services in the building when considering energy efficiency measures.</p>
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<p><b>Learning outcome</b></p> <p>The learner will:</p> <p>5. Be able to produce an Energy Performance Certificate</p>
<p><b>Assessment criteria</b></p> <p>The learner can:</p> <p>5.1 Produce an Energy Performance Certificate that meets relevant codes of practice and standards, including the accurate recording of the date prepared and relevant property address</p> <p>5.2 Use plain language and appropriate terms where free text is allowed</p> <p>5.3 Check the recommendations generated and delete any inappropriate ones, in accordance with conventions and providing reasons for doing so</p> <p>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</p> <p>5.5 Check that data has been inputted correctly and review data if the calculation will not process or appears incorrect</p> <p>5.6 Recognise a result that is clearly incorrect for the property in question</p> <p>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</p> <p>5.8 Check the data is complete before finalising the Energy Performance Certificate and check it to ensure it is clear and complete.</p>

<b>Learning outcome</b>
The learner will: 6. Be able to issue and explain the Energy Performance Certificate
<b>Assessment criteria</b>
The learner can: 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 methodologies for new and existing homes 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 Collate 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 attributed and options considered 6.13 Maintain internal records which are clear, complete and conform to professional and statutory requirements.

<b>Learning outcome</b>
The learner will: 7. Be able to explain to customers how use the Energy Performance Certificate may be used to improve the energy efficiency of domestic property
<b>Assessment criteria</b>
The learner can: 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 meaning
- 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.

## Unit 320/520 Provide information to customers on the principles, financing and operation of the Green Deal

<b>UAN:</b>	<b>T/503/8179</b>
<b>Level:</b>	Level 3
<b>Credit value:</b>	4
<b>GLH:</b>	10
<b>Relationship to NOS:</b>	This unit is linked to Asset Skills NOS ASTGDA0
<b>Endorsement by a sector or regulatory body:</b>	This unit is endorsed by Asset Skills, the Sector Skills Council for facilities management, housing, property, planning, cleaning and parking.
<b>Aim:</b>	To demonstrate a general understanding of the overall purpose of the Green Deal (or equivalent programme) and how it operates, including the customer journey, energy assessment, eligible measures and how they are identified, how Green Deal (or equivalent programme) is funded and paid for and sources of information and support.

### Guidance

For additional guidance please refer to Appendix 1 for Asset Skills syllabus documents.

**Please note:** The assessment for 520 will cover Learning Outcomes 1 and 2 and for 320 it will cover outcome 3.

<b>Learning outcome</b>
The learner will: 1. Understand the components of the Green Deal
<b>Assessment criteria</b>
The learner can: 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"> <li>• the Green Deal Adviser</li> <li>• the Green Deal Provider</li> <li>• the Green Deal Installer</li> </ul>
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.

<b>Learning outcome</b>	
The learner will:	
2.	Understand how to provide high quality, independent and impartial advice to customers
<b>Assessment criteria</b>	
The learner can:	
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 mis-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
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.

<b>Learning outcome</b>
The learner will: 3. Be able to provide customers with information on Green Deal to meet their needs
<b>Assessment criteria</b>
The learner can: 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.

## Unit 321

## Undertake occupancy assessments and give advice

<b>UAN:</b>	<b>L/503/8186</b>
<b>Level:</b>	Level 3
<b>Credit value:</b>	8
<b>GLH:</b>	40
<b>Relationship to NOS:</b>	This unit is linked to Asset Skills NOS ASTGDA
<b>Endorsement by a sector or regulatory body:</b>	This unit is endorsed by Asset Skills, the Sector Skills Council for facilities management, housing, property, planning, cleaning and parking.
<b>Aim:</b>	Unit is linked to NOS that aim to: Demonstrate ability to Conduct an Occupancy Assessment to gather information relating to household energy consumption from occupiers and other sources; Explain to customers how they may reduce their energy consumption and/or achieve affordable warmth; Maintain written records of inspection findings; Conduct an Occupancy Assessment to gather information relating to household energy consumption from occupiers and other sources; Explain to customers how they may reduce their energy consumption and/or achieve affordable warmth; Maintain written records of inspection findings.

### Guidance

For additional guidance please refer to Appendix 1 for Asset Skills syllabus documents.

<b>Learning outcome</b>
The learner will: 1. Know how to conduct an occupancy assessment
<b>Assessment criteria</b>
The learner can: 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.

<b>Learning outcome</b>	
The learner will:	
2.	Understand the methods of reducing energy consumption and achieving affordable warmth
<b>Assessment criteria</b>	
The learner can:	
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
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: <ul style="list-style-type: none"> <li>• The use of water and minimising waste of water</li> <li>• Waste reduction, re-use and re-cycling</li> </ul>
2.18 Describe the types of questions, issues and concerns that customers might have about the home visit and the occupational advice given
2.19 Identify the sources of information to which the customer can be referred for further help and advice.

<b>Learning outcome</b>
The learner will: 3. Understand written records required for Inspection findings
<b>Assessment criteria</b>
The learner can: 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.

<b>Learning outcome</b>
The learner will: 4. Be able to conduct an occupancy assessment
<b>Assessment criteria</b>
The learner can: 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.

<b>Learning outcome</b>
The learner will: 5. Be able to advise customers on methods of reducing energy consumption and achieving affordable warmth
<b>Assessment criteria</b>
The learner can: 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: <ul style="list-style-type: none"> <li>• their energy consumption</li> <li>• fuel bills</li> <li>• thermal comfort</li> </ul>

<ul style="list-style-type: none"> <li>• risk of condensation</li> </ul>
5.7 Provide information on the methods and products for achieving: <ul style="list-style-type: none"> <li>• the efficient management of water usage and minimisation of waste</li> <li>• reduction, re-use and re-cycling of waste</li> </ul>
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.

<b>Learning outcome</b>
The learner will: 6. Be able to maintain written records of inspection findings
<b>Assessment criteria</b>
The learner can: 6.1 Create and maintain complete, accurate and legible records of findings including: <ul style="list-style-type: none"> <li>• Investigations carried out</li> <li>• Values recorded</li> <li>• Options considered</li> </ul> 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.

## Unit 322

## Explain the Green Deal Advice Report to the domestic customer

<b>UAN:</b>	<b>Y/503/8188</b>
<b>Level:</b>	Level 3
<b>Credit value:</b>	4
<b>GLH:</b>	20
<b>Relationship to NOS:</b>	This unit is linked to Asset Skills NOS ASTGDA
<b>Endorsement by a sector or regulatory body:</b>	This unit is endorsed by Asset Skills, the Sector Skills Council for facilities management, housing, property, planning, cleaning and parking.
<b>Aim:</b>	This unit is linked to NOS that covers the competences of explaining the components of the Green Deal (or equivalent programme) Advice Report to domestic customers and the implications for implementing the recommendations. It also identifies the limits of the report and clarifies where impartial advice ends and where commercial activities begin. Funding eligibility and options are explained. The standard also identifies the motivational issues involved in taking the next steps in implementing the recommendations.

### Guidance

For additional guidance please refer to Appendix 1 for Asset Skills syllabus documents.

<b>Learning outcome</b>
The learner will: 1. Understand the components of the domestic Green Deal Advice Report to domestic customers
<b>Assessment criteria</b>
The learner can: 1.1 Explain the requirements of the Green Deal Code of Practice in respect of: <ul style="list-style-type: none"><li>• issuing the Green Deal Advice Report to customers</li><li>• the professional responsibilities and liabilities in the giving of advice</li><li>• any disclaimers that should be made</li></ul> 1.2 Explain which energy efficiency measures have the greatest impact

<p>on the energy performance of a building</p> <p>1.3 Describe the benefits of installing energy efficiency measures as a package</p> <p>1.4 Describe the importance of the sequence of installation</p> <p>1.5 Describe how estimates are arrived at and how robust they are</p> <p>1.6 Describe for how long estimates will be valid</p> <p>1.7 Identify the different circumstances and requirements of rural customers, those off the gas grid and those living in traditional buildings</p> <p>1.8 Identify the specific advice needed on implementing the recommendations which may have to be provided</p> <p>1.9 Identify the sources of further information and advice</p> <p>1.10 Explain the funding options available and the eligibility requirements of the Green Deal finance package</p> <p>1.11 Identify the features, characteristics and eligibility criteria of alternative energy efficiency programmes outside the Green Deal</p> <p>1.12 Identify how to access funding for alternative energy efficiency programmes outside the Green Deal</p> <p>1.13 Establish the critical factors for the customer in deciding which measures to pursue including economic and personal circumstances</p> <p>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</p> <p>1.15 Explain the next steps in the process</p> <p>1.16 Identify the key individuals and organisations involved and how to contact them.</p>
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<p><b>Learning outcome</b></p> <p>The learner will:</p> <p>2. Be able to explain the components of the Green Deal Advice report and their implications to the domestic customer</p>
<p><b>Assessment criteria</b></p> <p>The learner can:</p> <p>2.1 Explain to customers which energy efficiency measures have greater impact on the energy performance of a building</p> <p>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</p> <p>2.3 Explain to customers the benefits of installing several measures as part of a package and the advantage of correctly sequencing the installation</p> <p>2.4 Explain to customers how estimates of running costs produced by RdSAP have been arrived at and for how long they are valid</p> <p>2.5 Explain to customers the gap between standard savings estimates and likely actual savings based on occupancy</p> <p>2.6 Identify ways in which the recommendations can be implemented and where to go for help</p> <p>2.7 Provide advice on the Energy Performance Certificate Adviser tool to help the customer select appropriate energy efficiency measures</p> <p>2.8 Indicate how any future changes in energy consumption and costs</p>

<p>not included in the assessment may impact on savings</p> <p>2.9 Explain to customers any relevant incentives for the customer adopting the proposed Green Deal package of energy measures</p> <p>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</p> <p>2.11 Explain to customers the funding options available and how to apply for funding</p> <p>2.12 Provide information to customers on other programmes and funding mechanisms for energy efficiency and carbon reduction outside Green Deal.</p>
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<p><b>Learning outcome</b></p> <p>The learner will:</p> <p>3. Be able to prepare and present a Green Deal Advice report in a professional and impartial manner</p>
<p><b>Assessment criteria</b></p> <p>The learner can:</p> <p>3.1 Provide precise disclosure of the limitations on the advice being given</p> <p>3.2 Make clear the impartial technical advice being provided up to this point</p> <p>3.3 Make clear own personal responsibility for:</p> <ul style="list-style-type: none"> <li>• the recommendations made</li> <li>• any liabilities that arise from this</li> <li>• any disclaimers relating to the recommendations</li> </ul> <p>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</p> <p>3.5 Declare any specific links with suppliers of Green Deal products and services</p> <p>3.6 Make clear that any further involvement in the process will involve exclusive promotion of the products and services of those suppliers</p> <p>3.7 Inform the customer of the Green Deal Code of Practice that regulates the preparation and issuing of the Green Deal Advice Report</p> <p>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</p> <p>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</p> <p>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</p> <p>3.11 Consider the specific needs of customers including those in rural locations, those off the gas grid or living in traditional buildings.</p>

## Unit 410

## Prepare and issue domestic Green Deal Advice Reports

<b>UAN:</b>	<b>R/503/8187</b>
<b>Level:</b>	Level 4
<b>Credit value:</b>	6
<b>GLH:</b>	30
<b>Relationship to NOS:</b>	This unit is linked to Asset Skills NOS ASTGDA
<b>Endorsement by a sector or regulatory body:</b>	This unit is endorsed by Asset Skills, the Sector Skills Council for facilities management, housing, property, planning, cleaning and parking.
<b>Aim:</b>	Unit is linked to NOS that aim to demonstrate knowledge and ability to: Prepare Domestic Green Deal Advice Reports; Lodge and issue Domestic Green Deal Advice Reports; Prepare Domestic Green Deal Advice Reports; Lodge and issue Domestic Green Deal Advice Reports.

### Guidance

For additional guidance please refer to Appendix 1 for Asset Skills syllabus documents.

<b>Learning outcome</b>
The learner will: 1. Understand the process of inputting data for the domestic Green Deal Advice Reports
<b>Assessment criteria</b>
The learner can: 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:

- Values are correct
- 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**

The learner will:

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

### **Assessment criteria**

The learner can:

- 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
- 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.

<b>Learning outcome</b>
The learner will: 3. Understand how to lodge and issue domestic Green Deal Advice Reports
<b>Assessment criteria</b>
The learner can: 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.

<b>Learning outcome</b>
The learner will: 4. Be able to prepare domestic Green Deal Advice Reports
<b>Assessment criteria</b>
The learner can: 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: <ul style="list-style-type: none"> <li>• the interaction between the building fabric and the building services</li> <li>• building location</li> <li>• needs, circumstances and motivations of the customer</li> </ul> 4.9 Use approved software to: <ul style="list-style-type: none"> <li>• estimate energy use and associated energy costs</li> <li>• estimate energy and cost savings from energy efficiency</li> </ul>

<ul style="list-style-type: none"> <li>measures <ul style="list-style-type: none"> <li>• produce figures to be used in the domestic Green Deal (Golden Rule) calculation</li> <li>• assess which energy efficiency measures or packages of measures are likely to be eligible for Green Deal finance</li> </ul> </li> </ul> <p>4.10 Prepare domestic Green Deal Advice Reports that meet Certification Scheme requirements and certification body requirements</p> <p>4.11 Check the Green Deal Advice Report to ensure it is clear and complete</p> <p>4.12 Disclose any referral fees or other benefits to be received should the customer follow suggestions for particular products, services or suppliers.</p>
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<b>Learning outcome</b>
The learner will: 5. Be able to lodge and issue domestic Green Deal Advice Reports
<b>Assessment criteria</b>
The learner can: 5.1 Collate information in support of: <ul style="list-style-type: none"> <li>• investigations carried out</li> <li>• values attributed</li> <li>• energy efficiency options considered</li> <li>• energy efficiency options rejected with justification</li> <li>• specific decisions made and energy efficiency measures proposed</li> </ul> <p>5.2 Ensure that records kept are clear, complete and meet Green Deal and statutory requirements and follow accepted professional standards</p> <p>5.3 Follow the procedure for lodging domestic Green Deal Advice Reports on the prescribed national register</p> <p>5.4 Issue domestic Green Deal Advice Reports to customers</p> <p>5.5 Follow the procedures for updating an Energy Performance Certificate after the installation of energy efficient measures.</p>



## Appendix 1 Relationships to other qualifications

### **Literacy, language, numeracy and ICT skills development**

This qualification can develop skills that can be used in the following qualifications:

- Functional Skills (England) – see [www.cityandguilds.com/functionalskills](http://www.cityandguilds.com/functionalskills)
- Essential Skills (Northern Ireland) – see [www.cityandguilds.com/essentialskillsni](http://www.cityandguilds.com/essentialskillsni)
- Essential Skills Wales – see [www.cityandguilds.com/esw](http://www.cityandguilds.com/esw)



## Appendix 2 Sources of general information

The following documents contain essential information for centres delivering City & Guilds qualifications. They should be referred to in conjunction with this handbook. To download the documents and to find other useful documents, go to the **Centres and Training Providers homepage** on [www.cityandguilds.com](http://www.cityandguilds.com).

**Centre Manual - Supporting Customer Excellence** contains detailed information about the processes which must be followed and requirements which must be met for a centre to achieve 'approved centre' status, or to offer a particular qualification, as well as updates and good practice exemplars for City & Guilds assessment and policy issues. Specifically, the document includes sections on:

- The centre and qualification approval process
- Assessment, internal quality assurance and examination roles at the centre
- Registration and certification of candidates
- Non-compliance
- Complaints and appeals
- Equal opportunities
- Data protection
- Management systems
- Maintaining records
- Assessment
- Internal quality assurance
- External quality assurance.

**Our Quality Assurance Requirements** encompasses all of the relevant requirements of key regulatory documents such as:

- SQA Awarding Body Criteria (2007)
- NVQ Code of Practice (2006)

and sets out the criteria that centres should adhere to pre and post centre and qualification approval.

**Access to Assessment & Qualifications** provides full details of the arrangements that may be made to facilitate access to assessments and qualifications for candidates who are eligible for adjustments in assessment.

The **centre homepage** section of the City & Guilds website also contains useful information such on such things as:

- **Walled Garden:** how to register and certificate candidates on line
- **Events:** dates and information on the latest Centre events
- **Online assessment:** how to register for GOLA/e-volve assessments.

## Useful contacts

<b>UK learners</b> <b>General qualification information</b>	<b>T: +44 (0)844 543 0033</b> <b>E: learnersupport@cityandguilds.com</b>
<b>International learners</b> General qualification information	T: +44 (0)844 543 0033 F: +44 (0)20 7294 2413 E: <b>intcg@cityandguilds.com</b>
<b>Centres</b> Exam entries, Certificates, Registrations/enrolment, Invoices, Missing or late exam materials, Nominal roll reports, Results	T: +44 (0)844 543 0000 F: +44 (0)20 7294 2413 E: <b>centresupport@cityandguilds.com</b>
<b>Single subject qualifications</b> Exam entries, Results, Certification, Missing or late exam materials, Incorrect exam papers, Forms request (BB, results entry), Exam date and time change	T: +44 (0)844 543 0000 F: +44 (0)20 7294 2413 F: +44 (0)20 7294 2404 (BB forms) E: <b>singlesubjects@cityandguilds.com</b>
<b>International awards</b> Results, Entries, Enrolments, Invoices, Missing or late exam materials, Nominal roll reports	T: +44 (0)844 543 0000 F: +44 (0)20 7294 2413 E: <b>intops@cityandguilds.com</b>
<b>Walled Garden</b> Re-issue of password or username, Technical problems, Entries, Results, e-assessment, Navigation, User/menu option, Problems	T: +44 (0)844 543 0000 F: +44 (0)20 7294 2413 E: <b>walledgarden@cityandguilds.com</b>
<b>Employer</b> Employer solutions, Mapping, Accreditation, Development Skills, Consultancy	T: +44 (0)121 503 8993 E: <b>business@cityandguilds.com</b>
<b>Publications</b> Logbooks, Centre documents, Forms, Free literature	T: +44 (0)844 543 0000 F: +44 (0)20 7294 2413

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As the UK's leading vocational education organisation, City & Guilds is leading the talent revolution by inspiring people to unlock their potential and develop their skills. We offer over 500 qualifications across 28 industries through 8500 centres worldwide and award around two million certificates every year. City & Guilds is recognised and respected by employers across the world as a sign of quality and exceptional training.

### **City & Guilds Group**

The City & Guilds Group operates from three major hubs: London (servicing Europe, the Caribbean and Americas), Johannesburg (servicing Africa), and Singapore (servicing Asia, Australia and New Zealand). The Group also includes the Institute of Leadership & Management (management and leadership qualifications), City & Guilds Land Based Services (land-based qualifications), the Centre for Skills Development (CSD works to improve the policy and practice of vocational education and training worldwide) and Learning Assistant (an online e-portfolio).

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