

## ASTGDA 2

# Undertake home visits to carry out Green Deal Occupancy Assessments and give advice



### Overview

This standard covers the competences required to carry out home visits to give advice on reducing energy use. It is intended to complement ASTDEA4, which covers inspecting domestic properties in order to determine their energy performance and make recommendations for improvement. It therefore focuses on the additional activities that must be carried out during the home visit. This includes conducting an occupancy assessment to collect relevant data, over and above that collected in a property inspection – that is, information about the occupier, their circumstances, and how they use their home. The purpose of the occupancy assessment is to provide more bespoke advice to the customer according to the way they use their home, and to provide them with a more accurate indication of the likely suitability of the Green Deal. It also covers the process of encouraging the customer, during the home visit, to take steps to reduce their energy consumption.

This standard requires that you carry out an occupancy assessment, including identifying the information needed from occupiers; agreeing with them how they will provide it; and gathering that information from your customer and from other sources. You must draw on your knowledge of patterns of occupation and its affect on energy consumption, and your ability to obtain the necessary information tactfully from your customer. You will also need to understand the detailed requirements of the approved methodology for the occupancy assessment.

The standard also covers the competences required to encourage your customer(s) to reduce their energy consumption. You will need to understand the individual context of the customer in respect of their energy advice needs, and be able to advise them on how to take appropriate steps to reduce energy consumption in their home by adopting more energy efficient behaviours.

It also requires that you maintain complete and accurate records of your findings, recommendations and details of any advice given. You must record information using appropriate methods and ensure that records are legible and complete, providing sufficient evidence to justify your decisions on values recorded as well as the nature and detail of the advice given.

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#### Performance criteria

*You must be able to:*

#### 5.1 Conduct an Occupancy Assessment to gather information relating to household energy consumption from occupiers and other sources

- P1 prior to your visit explain to customers the information that they will need to provide, in accordance with the prescribed methodology for the occupancy assessment, and agree with them how it will be obtained using appropriate **methods**
- P2 confirm that your customer is the person responsible for the dwelling's fuel bills and has the authority to take action under the Green Deal based on the advice given, after receiving any necessary consents from the property owner
- P3 gather necessary data and information from other potential sources, such as energy monitoring equipment, utility bills etc
- P4 gather any further data that is needed to complete any gaps or address any inconsistencies in the information provided
- P5 establish that the RDSAP methodology is an appropriate methodology for identifying suitable Green Deal energy efficiency measures for the property
- P6 undertake a methodical, visual inspection of any relevant aspects of the property, over and above that which is required to produce an EPC, in accordance with the requirements of the prescribed methodology for the occupancy assessment
- P7 draw on all relevant data and your expertise to make judgements about how the current condition of the property may affect its energy performance
- P8 Check for the presence of carbon monoxide detectors in the property and seek confirmation that they are working

#### 5.2 Explain to customers how they may reduce their energy consumption and/or achieve affordable warmth

- P9 establish and clarify the needs, circumstances and motivations of the customer to reduce energy consumption , and have regard to their needs, abilities and capabilities when giving advice

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- P10 identify with the customer, using sensitivity and tact, any **constraints** that might affect the customer's ability to act
- P11 provide the customer with information about potential funding and financial support that may be available to them
- P12 recognise instances of fuel poverty and/or poor indoor environmental conditions typically associated with energy inefficient housing and poor health, and advise those affected about the sources of help and advice available to them
- P13 give a clear explanation to customers of how their current use of their appliances, systems and controls affects their energy consumption, fuel bills, thermal comfort and risk of condensation
- P14 explain to customers the importance of efficient, safe and appropriate use of their fixed appliances, systems and controls and where to find out more information about those installed at the property
- P15 provide information on the methods and products for achieving the efficient management of water usage and minimisation of waste
- P16 provide information on the methods and products for achieving the reduction, re-use and re-cycling of waste
- P17 question clients on their future intentions for work on the property where this work may impact on recommendations'
- P18 advise the customer of the limitations on the advice given and where to find out more about energy efficiency
- P19 invite and respond to customer questions, issues and concerns about the home visit and the occupational advice given

*You must be able to:*

#### 5.3 Maintain written records of inspection findings

- P20 create and maintain complete, accurate and legible records of your findings, including investigations carried out, values recorded and options considered, to the level of detail required to:
- 1 produce a complete and comprehensive Green Deal Advice Report
  - 2 justify your decisions on values recorded and advice given
- P21 collate all **relevant information** to support the specific decisions made and advice given

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- P22 in situations where accurate information cannot be obtained and/or where data is recorded as 'unknown, record clearly where this applies and why this action was unavoidable
- P23 catalogue your records methodically and store them securely, ensuring that they are kept for the prescribed periods of time and can be accessed readily for future use when called upon

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#### Knowledge and understanding

#### 5.1 Conduct an Occupancy Assessment to gather information relating to household energy consumption from occupiers and other sources

*You need to know and understand:*

- K1 the range of data and information that is required from the customer to enable an occupancy assessment of the customer's use of their home, as it relates to energy consumption, and as defined by the prescribed methodology for the occupancy assessment
- K2 how to explain the information that is required to customers and agree with them how it will be obtained
- K3 methods that may be used to obtain data and information, such as questioning, telephone interview, customer completion questionnaires etc
- K4 other potential sources of data and information, such as energy monitoring equipment, utility bills etc that may inform the occupancy assessment
- K5 how to carry out a methodical, visual, on-site inspection of any relevant aspects of the property needed for an occupancy assessment
- K6 the requirements of the prescribed methodology for the occupancy assessment
- K7 the definitions and conventions that apply to the prescribed methodology for occupancy assessment
- K8 how to identify gaps in information and gather any additional data to fill them
- K9 data protection requirements relating to the customer's data and the particular requirements that apply to personal data
- K10 the requirements of Codes of Practice or other guidance applying to the home visit
- K11 the features of a property that may indicate that RDSAP is an inappropriate methodology for energy assessment for the purpose of giving Green Deal Advice
- K12 how to assess the likely current energy performance of any property elements that may affect the energy performance of property, compared to its performance as originally built
- K13 the performance and durability of materials and systems over time
- K14 the functioning of building services (electricity, gas, heating) where this relates to energy performance

#### 5.2 Explain to customers how they may reduce their energy consumption and/or achieve affordable warmth

*You need to know and understand:*

- K15 the importance of establishing and clarifying the needs, circumstances

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- and motivations of the customer regarding reducing energy consumption and likely barriers to action for the customer
- K16 how to establish and clarify the needs, circumstances and motivations of the customer regarding reducing energy consumption
  - K17 the definition of a household in Fuel Poverty
  - K18 how to recognise households at risk of Fuel Poverty and poor health typically associated with energy inefficient housing
  - K19 features of property, and occupiers' behaviours, that encourage mould growth and condensation
  - K20 indicators of under-heating, including the comparison of actual fuel bills with the predictions made by the approved methodology
  - K21 the limits of your own expertise in advising those at risk of Fuel Poverty about the possible health outcomes from energy efficiency measures and/or behavioural change
  - K22 sources of help and advice available to those in, or at risk of, fuel poverty or poor health associated with energy inefficient housing
  - K23 how to sensitively explore opportunities and **constraints** that might affect the customer's ability to act; the importance of doing so in a sensitive and tactful manner
  - K24 the financial and other **constraints** that may affect the customer's ability to act
  - K25 potential sources of financial support including Green Deal finance and ECO subsidies
  - K26 potential opportunities for installation of energy efficiency measures
  - K27 the different **tenures/sectors** within the property market and how this impacts on both the customer's capacity to act and the funding/support available to them or the property owner
  - K28 landlords' responsibilities in terms of property standards, legislation and obligations relating to energy efficiency in housing, and how customers could encourage their landlord to take action
  - K29 how the occupier's use of their installed appliances, systems and controls affects overall energy consumption and fuel bills
  - K30 how to explain to customers the importance of efficient, safe and appropriate use of appliances, systems and controls and where to find more information about those installed at the property
  - K31 how to demonstrate the use of fixed appliances, systems and controls to customers with the aim of reducing their energy consumption
  - K32 how to explain to customers the importance of the efficient use of their installed hot water systems and where to find out more information about those installed at the property
  - K33 The main methods and products used for controlling and managing the use of water and ways of minimising water usage and how customers can access further information on them and their suppliers
  - K34 The main methods and products used for controlling and managing waste including reduction, re-use and re-cycling methods and how

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- customers can access further information on them
- K35 the limitations on advice given
- K36 the type of questions, issues and concerns that customers might have about the home visit and the occupational advice given; how to respond to those concerns
- K37 how to provide additional explanation and information if requested, referring the customer to other sources as appropriate
- K38 where to refer customers for further help and advice

*You need to know and understand:*

#### **5.3 Maintain written records of inspection findings**

- K39 the range of methods, formats and conventions for recording information and evidence on the occupancy assessment
- K40 the required range of information and evidence relating to the home visit as defined by the current occupancy assessment methodology and any associated guidance and conventions
- K41 the level of detail within your records required to produce a complete and comprehensive Green Deal Advice Report and justify your decisions on the values recorded and advice given
- K42 the importance of making and maintaining records that are complete, accurate and legible
- K43 the reasons why it is necessary and important to record where and why accurate information could not be obtained
- K44 the circumstances in which records can include the fact that information is 'unknown' and the evidence required to support this choice
- K45 the importance for storing records securely allowing for future access
- K46 the purposes for which your records may be used
- K47 the role and obligations of your Certification scheme in respect of auditing your records of inspection findings

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#### Additional Information

##### Scope/range

1. **Methods**
  - 1.1. Face to face questioning
  - 1.2. Telephone interview
  - 1.3. Customer completion questionnaires
  - 1.4. Observing the customer during the home visit
  
2. **Constraints**
  - 2.1. Financial
  - 2.2. tenure
  - 2.3. time
  
3. **Tenures/Sectors**
  - 3.1. Social rented
  - 3.2. Private rented
  - 3.3. Owner occupied
  - 3.4. Flats and apartment blocks
  - 3.5. Houses in multiple occupation
  
4. **Relevant information**
  - 4.1. Legible and detailed visit notes relating to the occupancy assessment
  - 4.2. clear site sketches (plan, elevation) to give an adequate record of the occupancy assessment for audit purposes
  - 4.3. clear photographs containing mandated data (e.g. time and date) appropriately staged and annotated where necessary
  - 4.4. legibly completed questionnaires or records of conversations
  - 4.5. records of web searches or other research
  - 4.6. records of fuel bills seen and meter readings taken
  - 4.7. any other information you consider necessary to support your decisions
  - 4.8. any other information required by Scheme Operating Requirements

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**Relevant occupations**

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