

National Occupational Standards for Domestic Energy Assessors
--

These standards have been developed for individuals undertaking assessment of any dwelling being sold or rented out that requires an Energy Performance Certificate (EPC) to comply with the Energy Performance of Buildings Directive (EPBD). These standards require the competent application of the RDSAP methodology.

Units of Competence

Unit 1	Work in an effective and professional manner	page 2
Element 1.1	Develop and maintain effective working relationships	
Element 1.2	Manage your own time and resources	
Element 1.3	Develop yourself to improve your performance	
Element 1.4	Conduct work in a professional and ethical manner	
Unit 2	Contribute to the safety and security of people and property	page 10
Element 2.1	Contribute to the maintenance of health and safety at work	
Element 2.2	Contribute to the security of self, colleagues and others	
Element 2.3	Contribute to the security of property	
Element 2.4	Contribute to the security of information	
Unit 3	Prepare for energy assessments	page 19
Element 3.1	Agree and confirm instructions to undertake energy assessments	
Element 3.2	Make enquiries on relevant matters relating to the property	
Unit 4	Undertake energy inspections	page 24
Element 4.1	Inspect property to determine energy performance	
Element 4.2	Make records of inspection findings	
Unit 5	Produce and explain Energy Performance Certificates	page 28
Element 5.1	Produce Energy Performance Certificates	
Element 5.2	Issue Energy Performance Certificates and explain their contents	

[Note: An additional unit of competence may be required for those working in the rented sector (relating to Key Role A3 in the Functional Map) that covers the competence required to sample units e.g. evaluating stock condition data, making judgements about the sufficiency and validity of data, sampling units, making judgements about the extent and nature of energy assessment required.]

UNIT 1

Work in an effective and professional manner

Element 1.1	Develop and maintain effective working relationships
Element 1.2	Manage your own time and resources
Element 1.3	Develop yourself to improve your performance
Element 1.4	Conduct work in a professional and ethical manner

About this Unit

This Unit covers the essential, general competences expected of all professionals regardless of their working environment. You are expected to work effectively in the ways described throughout your work, whether you are in an office or at a property.

Element 1.1 covers the development and maintenance of effective working relationships with all those people with whom you come into contact during your work. You are expected to communicate with others in a polite, clear and respectful manner, respond to enquiries and work towards avoiding any disputes that may arise. You are also expected to handle formal complaints procedures if and when complaints are received. The main groups of people with whom you will need to develop good working relationships are the parties selling or letting property and their representatives, those present at property at the time of inspection (e.g. tenants), and other colleagues and professionals.

Element 1.2 describes the competences involved in managing your own time and resources. You must set your objectives, plan your time, take decisions and review and reschedule your activities as appropriate.

Element 1.3 describes the activities involved in developing and enhancing your own practice and performance. You must evaluate your performance and encourage feedback from others. You must also identify and meet your own development needs, through formal or informal means, to ensure that you keep up-to-date with the latest legislation, codes of practice, regulations and standards.

Element 1.4 covers the conduct of work in a professional and ethical manner. You are expected to present a positive and professional image at all times, work in accordance with prescribed codes of conduct and standards of good practice, and take steps to avoid any potential conflicts of interest during your work. Importantly, you must recognise and work within the limits of your own competence and expertise; this will entail, for example, refusing to take on unsuitable work such as the inspection of properties that fall outside your expertise and experience e.g. properties where RDSAP is not an appropriate methodology.

Element 1.1 Develop and maintain effective working relationships	
<p>Performance Criteria</p> <p>You must be able to:</p> <ol style="list-style-type: none"> 1 develop and maintain productive working relationships with others which promote goodwill and trust 2 request information from others in a polite, clear and professional manner 3 respond promptly to enquiries from others and ask questions to clarify their information needs 4 take action in cases where you are unable to respond to enquiries from others 5 handle disputes and differences of opinion in ways which minimise offence and maintain respect 6 comply with the formal complaints procedure 	<p>Knowledge and Understanding</p> <p>You must know and understand:</p> <ol style="list-style-type: none"> (a) why it is important to promote goodwill and trust when working with others, and ways in which this can be achieved (b) how to identify the information you require and the potential sources of such information (c) how to respond to enquiries from others and how to clarify their information needs (d) how to respond to enquiries which are outside your authority, beyond your area of knowledge/expertise or where the information requested is confidential (e) ways in which disputes or differences of opinion should be handled to minimise offence and maintain respect (f) how to identify and handle formal complaints (g) the details of the formal complaints procedure that covers your work, and any specific organisational requirements with regard to complaints

Element 1.1 Develop and maintain effective working relationships

Scope

A. others:

- (i) the party selling or letting the property or their representatives (e.g. estate agent, letting agent or lawyer)
- (ii) those present at the property at the time of inspection (e.g. the party selling or letting the property, their friends/family or tenants)
- (iii) other colleagues and professionals such as solicitors, conveyancers, work colleagues and other Domestic Energy Assessors

B. goodwill and trust:

- (i) demonstrating a duty of care
- (ii) honouring promises or undertakings
- (iii) developing honest relationships
- (iv) developing constructive relationships

C. request:

- (i) face to face
- (ii) in writing
- (iii) by telephone
- (iv) by email

D. respond:

- (i) face to face
- (ii) in writing
- (iii) by telephone
- (iv) by email

E. action:

- (i) inform the enquirer
- (ii) pass the enquiry onto the relevant person or organisation

Element 1.2 Manage your own time and resources	
<p>Performance Criteria</p> <p>You must be able to:</p> <ol style="list-style-type: none"> 1 set objectives that are specific, measurable and achievable 2 plan your work activities so that they are consistent with your objectives and your personal resources 3 undertake regular checks to your equipment to ensure that it is in full working order 4 make estimates of the time you need for activities that are realistic and allow for unforeseen circumstances 5 take decisions as soon as you have sufficient information 6 take prompt and efficient action when you need to obtain further information to take decisions 7 minimise unhelpful interruptions to, and digressions from, planned work 8 regularly review progress and reschedule activities to help achieve your planned objectives 	<p>Knowledge and Understanding</p> <p>You must know and understand:</p> <ol style="list-style-type: none"> (a) how to set objectives for yourself that are specific, measurable and achievable (b) how to plan activities so that they are consistent with your objectives and personal resources (c) how to estimate the amount of time required to carry out planned activities (d) the kind of contingencies which might occur and how to assess and plan for these (e) how to assess how much information is required before effective decisions can be taken (f) how to collect and check the validity of the information required for decision making (g) the importance of effective time management (h) how to identify and minimise unhelpful interruptions (i) the importance of regular reviews of activity and rescheduling of work to achieve planned objectives

Note: there is no Scope for this Element

Element 1.3 Develop yourself to improve your performance	
<p>Performance Criteria</p> <p>You must be able to:</p> <ol style="list-style-type: none"> 1 assess your performance and identify your development needs at appropriate intervals 2 base your assessment on your current objectives and likely future requirements 3 develop plans for personal development that are consistent with the needs you have identified and the resources available 4 develop plans for personal development that contain specific, measurable, realistic and challenging objectives 5 obtain support from relevant people to help you create leaning opportunities 6 undertake development activities that are consistent with your plans for personal development 7 obtain feedback from others and use it to enhance your performance in the future 8 update your plans for personal development at regular intervals 9 comply with the auditing and monitoring requirements of the regulatory body 	<p>Knowledge and Understanding</p> <p>You must know and understand:</p> <ol style="list-style-type: none"> (a) how to assess your own current level of competence (b) the current and likely future requirements and standards within your job role and how they correspond to your level of competence (c) the principal skills required for effective performance (d) the importance of continuing self-development (e) how to develop a personal action plan for learning and self-development with realistic but challenging objectives (f) the types of support that may be available from others (g) how to identify the need for support, select an appropriate source and obtain required help (h) the types of development activities and their relative advantages and disadvantages to your own situation (i) the importance of getting feedback from others on your performance and how to encourage, enable and use such feedback in a constructive manner (j) the appropriate people from whom to get feedback on your performance (k) how to assess your personal progress and update your plans accordingly (l) the specific auditing and monitoring requirements that relate to your continuing professional development; your responsibilities in complying with these

Element 1.3 Develop yourself to improve your performance

Scope

A. development needs:

- (i) the latest legislation, codes of practice and regulations
- (ii) technical issues in regard to factors that affect the energy performance of dwellings

B. plans:

- (i) informal on the job learning
- (ii) formal training courses
- (iii) open learning

C. feedback:

- (i) positive
- (ii) confirmatory
- (iii) negative

D. others:

- (i) colleagues
- (ii) other professionals
- (iii) those selling or letting property and others concerned with the selling/letting process

Element 1.4 Conduct work in a professional and ethical manner	
<p>Performance Criteria</p> <p>You must be able to:</p> <p>1 present a positive personal and professional image at all times when dealing with people</p> <p>2 carry out your work in accordance with prescribed codes of conduct, ethical standards and recognised good practice</p> <p>3 deal with people in a tactful, courteous and equitable manner at all times</p> <p>4 work within the limits of your own competence and expertise</p> <p>5 recognise and respond appropriately to pressure from any person which might influence the objectivity of your judgement</p> <p>6 recognise and manage any potential conflicts of interest that may arise during your work</p> <p>7 comply with the auditing and monitoring requirements of the regulatory body</p> <p>9 comply with all legislation relevant to your work</p> <p>10 comply with all officially published guidance in undertaking Domestic Energy Assessments using the RDSAP methodology</p>	<p>Knowledge and Understanding</p> <p>You must know and understand:</p> <p>(a) why it is important to present a positive personal and professional image when dealing with people, and how this can be achieved</p> <p>(b) your specific responsibilities under prescribed codes of conduct and ethical standards</p> <p>(c) the importance of complying with recognised good practice</p> <p>(d) the extent and limits for your own competence and expertise; the importance of not working beyond these limits</p> <p>(e) the range of potential conflicts of interest that you may encounter, and the action required to manage these</p> <p>(f) the specific auditing or monitoring requirements that relate to your work; your responsibilities in complying with these</p> <p>(g) the objectives, remit and constitution of the regulatory body, and the implications of membership</p> <p>(h) the main points of the legislation relevant to your work</p> <p>(i) all officially published guidance relating to the undertaking of Domestic Energy Assessments using the RDSAP methodology</p>

Element 1.4 Conduct work in a professional and ethical manner

Scope

A. people:

- (i) the party selling or letting the property or their representative(s)
- (ii) those present at the property at the time of inspection
- (iii) other colleagues and professionals
- (iv) others with whom you may be in contact during the course of your work as a Domestic Energy Assessor

B. recognised good practice:

- (i) duty of care
- (ii) statute law
- (iii) mandatory ethical codes of practice

UNIT 2 Contribute to the safety and security of people and property

Element 2.1	Contribute to the maintenance of health and safety at work
Element 2.2	Contribute to the security of self, colleagues and others
Element 2.3	Contribute to the security of property
Element 2.4	Contribute to the security of information

About this Unit

This Unit covers the important competences required to maintain the health, safety and security of self, other people and property. You are expected to adhere to the standards set out in this unit at all times during your work, whether you are in an office or at a property.

Element 2.1 describes the activities involved in contributing to the maintenance of health and safety at work. You must identify the risks associated with your work, and ensure that your conduct does not endanger yourself or others. You are expected to know, and work in accordance with, the provisions of relevant legislation (e.g. Health and Safety at Work Act) and any relevant workplace policies.

Element 2.2 requires that you take steps to maintain the security of self and other people. You must identify the potential security risks posed by work in various locations, and comply with the security procedures and guidelines aimed at protecting yourself and others. You are expected to react immediately to any unexpected circumstances, and take emergency action when required.

Element 2.3 covers the security of property, and applies both to your offices and to property inspected by you. You must identify the risks to property, and comply with the relevant procedures and guidelines for protecting property. In addition, you must keep personal belongings, valuables, monies, and keys secured in appropriate locations.

Element 2.4 requires that you contribute to the security of information. This entails identifying the potential risks to information, maintaining the confidentiality of information, and recording and disposing of information correctly. This always applies to information about the party selling or letting the property and also, where relevant, to any organisation for whom you may work, either directly as an employee or as a sub-contractor.

Element 2.1 Contribute to the maintenance of health and safety at work	
<p>Performance Criteria</p> <p>You must be able to:</p> <ol style="list-style-type: none"> 1 carry out working practices in accordance with legal requirements 2 identify any health and safety risks in different locations 3 ensure your own personal conduct in the workplace does not endanger the health and safety of self and other people 4 follow the workplace policies and suppliers' or manufacturers' instructions for the safe use of equipment, materials and products 5 implement emergency procedures effectively to protect the health and safety of people 6 pass on any suggestions for improving health and safety within the workplace to the responsible persons 	<p>Knowledge and Understanding</p> <p>You must know and understand:</p> <ol style="list-style-type: none"> (a) the legal duties for health and safety in the workplace as required by legislation (b) what health and safety risks could exist in different locations (c) why it is important to remain alert to the presence of risks in the entire workplace (d) the importance of personal conduct in maintaining the health and safety of self and others (e) suppliers' and manufacturers' instructions for the safe use of equipment, materials and products (f) who should be informed of any conflicts between different health and safety requirements (g) the procedures for different types of emergency (h) who the appointed first aiders are (i) what types of suggestions for improving health and safety at work could be made and who should be given them

Element 2.1 Contribute to the maintenance of health and safety at work

Scope

A. health and safety risks:

- (i) the presence of equipment and its use
- (ii) power supplies
- (iii) fixtures
- (iv) interactions with other people
- (v) accidents
- (vi) effects of VDUs

B. locations:

- (i) office
- (ii) development site including new houses or converted buildings with some adjacent properties in a state of partial completion
- (iii) vacant property
- (iv) occupied property

C. workplace:

- (i) the office
- (ii) the property being inspected
- (iii) any other location you visit in the course of your work

Element 2.2 Contribute to the security of self, colleagues and others	
<p>Performance Criteria</p> <p>You must be able to:</p> <ol style="list-style-type: none"> 1 identify security risks to self, occupiers and other people in different locations 2 obtain information on national legislation, guidelines, and organisation procedures for the security of self and others 3 apply correctly and consistently the relevant security procedures and guidelines for protecting self and others 4 ensure self and colleagues provide clear schedules of movements 5 check and respond immediately to any unexpected circumstances, absences, or departures from colleagues' agreed schedules 6 take appropriate and effective emergency action when required 7 pass on any suggestions for improving security to the responsible persons 	<p>Knowledge and Understanding</p> <p>You must know and understand:</p> <ol style="list-style-type: none"> (a) potential security risks to self, colleagues, occupiers and others (b) current legislation and national guidelines relating to the security of people (c) the procedures of the organisation for whom you work relating to the security of people (d) which procedures and guidelines apply in different circumstances (e) the systems for recording people's movements and checking their security (f) what constitutes unexpected circumstances, absences or departures from agreed schedules and who should be informed of them (g) what types of emergency could occur (h) what the emergency procedures are (i) what types of suggestions for improving the security could be made and who should be given them

Element 2.2 Contribute to the security of self, colleagues and others

Scope

A. security risks:

- (i) intimidation
- (ii) verbal abuse
- (iii) physical abuse
- (iv) violence
- (v) kidnapping

B. locations:

- (i) office
- (ii) development site including new houses or converted buildings with some adjacent properties in a state of partial completion
- (iii) vacant property
- (iv) occupied property

Element 2.3 Contribute to the security of property	
Performance Criteria	Knowledge and Understanding
You must be able to:	You must know and understand:
<p>1 identify the risks to property that could occur in different locations</p> <p>2 obtain information on national legislation, guidelines and organisation procedures for the security of property</p> <p>3 apply correctly and consistently the relevant security procedures and guidelines for protecting property</p> <p>4 ensure security equipment is functioning properly</p> <p>5 ensure personal belongings, valuables, and monies are secured in appropriate locations</p> <p>6 ensure keys and access codes for properties are secured in appropriate locations</p> <p>7 take appropriate and effective emergency action when required</p> <p>8 pass on any suggestions for improving security to the responsible persons</p>	<p>(a) the risks to offices, personal property, and properties for sale</p> <p>(b) current legislation and national guidelines relating to the security of property</p> <p>(c) the organisation’s procedures relating to the security of property</p> <p>(d) which procedures and guidelines apply in different circumstances</p> <p>(e) what type of equipment could be used</p> <p>(f) how should it be operated</p> <p>(g) where to keep personal belongings, valuables, and monies</p> <p>(h) the systems for securing and logging keys and access codes</p> <p>(i) what types of emergency could occur</p> <p>(j) what the emergency procedures are</p> <p>(k) what types of suggestions for improving to the security could be made and who should be given them</p>

Element 2.3 Contribute to the security of property

Scope

A. risks to property:

- (i) theft
- (ii) damage
- (iii) vandalism
- (iv) arson
- (v) unwanted occupancy

B. locations:

- (i) office
- (ii) development site including new houses or converted buildings with some adjacent properties in a state of partial completion
- (iii) vacant property
- (iv) occupied property

Element 2.4 Contribute to the security of information	
<p>Performance Criteria</p> <p>You must be able to:</p> <ol style="list-style-type: none"> 1 identify the risks to information that could occur 2 obtain information on national legislation, guidelines and organisation procedures for the security of information 3 apply correctly and consistently the relevant security procedures and guidelines for protecting information 4 maintain the confidentiality of seller and organisation information at all times 5 ensure information is disclosed only to people who are entitled to receive it 6 ensure information is recorded correctly and stored in a suitable manner 7 dispose of information in a way that maintains its security 8 pass on any suggestions for improving security to the responsible persons 9 demonstrate full compliance with relevant legislation 	<p>Knowledge and Understanding</p> <p>You must know and understand:</p> <ol style="list-style-type: none"> (a) the risks to different types of information (b) current legislation and national guidelines relating to the security of information (c) the procedures of the organisation for whom you work relating to the security of information (d) which procedures and guidelines apply in different circumstances (e) what type of information could be sensitive (f) how the disclosure of information could be damaging to others (g) who is entitled to different types of information (h) the systems for recording and storing information (i) how to dispose of paper-based or electronic information (j) what types of suggestions for improving security could be made and who should be given them (k) legislation relating to security of information

Element 2.4 Contribute to the security of information

Scope

- A. **risks to information:**
 - (i) loss
 - (ii) misplacement
 - (iii) unauthorised access

UNIT 3 Prepare for energy assessments

Element 3.1	Agree and confirm instructions to undertake energy assessments
Element 3.2	Investigate relevant matters relating to the property

About this Unit

This Unit covers those activities that are carried out *prior* to the energy assessment of a property i.e. taking instructions, clarifying requirements and making initial enquiries on matters relating to the property in question.

Note that the term 'assessment' is used when referring to the overall process of determining the energy performance of a property, whereas 'inspection' is used only when referring to on-site inspection of the property and its features. **Do you feel that these terms are used appropriately throughout?**

Element 3.1 requires that you respond to requests for energy assessments from the party selling or letting the property or their representatives, clarify their needs and expectations, and check that the property is appropriate for energy assessment. You must clearly explain the terms and conditions, any limitations/constraints that apply to energy assessments and confirm your fee and payment arrangements. You are expected to confirm that the parties selling or letting the property or their representatives fully understand the procedures for assessment, and to acknowledge any special circumstances that apply to your site visit e.g. access to the property (or parts of the property) or who will be present at the time of the inspection.

Element 3.2 covers the investigation of matters which are important to ensure that you provide a complete and accurate Energy Performance Certificate within the terms of your engagement. You should identify and research information that can reasonably be obtained, for example, that on the property type and construction, tenure, services to the property, modifications/extensions, and any constraints that may affect the potential for improving the energy performance of the property. You must also identify any significant factors that may influence the conduct of the assessment e.g. health and safety issues, or additional information that should be gathered during the on-site inspection. In some cases, your investigations may reveal problems that prevent you from undertaking an assessment of the energy performance the property; you are expected to inform the parties selling or letting the property or their representatives and explain the reasons to them.

Element 3.1 Agree and confirm instructions to undertake energy assessments	
<p>Performance Criteria</p> <p>You must be able to:</p> <ol style="list-style-type: none"> 1 respond promptly to requests to undertake energy assessments from parties selling or letting property or their representatives 2 clarify and confirm the requirements and expectations of the parties selling or letting property or their representatives 3 explain to the parties selling or letting property or their representatives the terms and conditions under which you will undertake an energy assessment 4 explain to the parties selling or letting property or their representatives the limitations and constraints of the planned energy assessment 5 write to the parties selling or letting property or their representatives to confirm the instruction and the terms, conditions and arrangements that have been agreed 6 confirm with the parties selling or letting property or other occupiers the date and time of the on-site inspection 7 confirm with the parties selling or letting property or other occupiers any specific arrangements that apply to the energy assessment 8 identify any circumstances that prevent you from undertaking an energy assessment and explain the reasons to the parties selling or letting property or their representatives politely and clearly 	<p>Knowledge and Understanding</p> <p>You must know and understand:</p> <ol style="list-style-type: none"> (a) the legislation giving rise to energy assessments and Energy Performance Certificates (b) regulations under that legislation relating to the role of Domestic Energy Assessors and the undertaking of energy assessments (c) the types of property and situations that do not by law require an Energy Performance Certificate (d) how to clarify and confirm the requirements and expectations of the parties selling or letting property or their representatives (e) when a potential conflict of interest will require disclosure to the parties selling or letting property or their representatives, or will require the need to decline the instructions altogether (f) the limitations and constraints that apply to the conduct of energy assessments (g) the importance of confirming in writing the arrangements agreed between you and the parties selling or letting property or their representatives (h) fee structures and payment arrangements for energy assessments (i) how to confirm on-site inspection arrangements with the party selling or letting property or other occupier (j) the importance of confirming whether any specific arrangements apply to the energy assessment (k) how to identify and explain any circumstances that prevent you from undertaking an energy assessment

Element 3.1 Agree and confirm instructions to undertake energy assessments

Scope

A. respond:

- (i) face to face
- (ii) in writing
- (iii) by telephone
- (iv) by email

B. specific arrangements:

- (i) access to the property
- (ii) those present at the property at the time of on-site inspection
- (iii) health and safety issues

C. circumstances:

- (i) properties beyond your current level of competence
- (ii) your own diary pressures
- (iii) difficulties in gaining access

Element 3.2 Investigate relevant matters relating to the property	
<p>Performance Criteria</p> <p>You must be able to:</p> <ol style="list-style-type: none"> 1 investigate and record such information as is necessary to ensure a complete and comprehensive Energy Performance Certificate 2 investigate and record any constraints that may affect the potential for improving the energy performance of the property 3 evaluate information in order to identify any significant factors that may influence the conduct of the energy assessment 4 assess, in cases of doubt, that the property falls within the scope of energy assessment legislation 5 inform the parties selling or letting property or their representatives promptly in cases where your investigations reveal problems that prevent you from assessing the energy performance of the property 	<p>Knowledge and Understanding</p> <p>You must know and understand:</p> <ol style="list-style-type: none"> (a) the types of property to which energy assessment legislation does not apply (b) the types of property where the use of RDSAP methodology is not appropriate (c) the different types of information that it is important to obtain to ensure a complete and accurate Energy Performance Certificate (d) the different sources of information relating to the energy performance of the property that can be investigated (e) how to obtain information on relevant matters relating to the energy performance of the property (f) the range of constraints that may affect the potential for improving the energy performance of the property (g) prevailing geographical/environmental features that may affect the energy performance of the property (h) how to evaluate relevant information in order to identify any significant factors that may influence the energy assessment (i) how to identify circumstances that prevent you from assessing the energy performance of the property

Element 3.2 Investigate relevant matters relating to the property

Scope

A. constraints:

- (i) planning
- (ii) conservation
- (iii) restrictive covenants
- (iv) lease terms
- (v) localised conditions

B. significant factors:

- (i) gaps in information
- (ii) health and safety considerations relevant to the energy performance of property

UNIT 4 Undertake energy inspections

Element 4.1	Inspect property to determine energy performance
Element 4.2	Make records of inspection findings

About this Unit

This Unit covers the competences required to inspect property in order to determine the energy performance of property. The aim of the inspection is to gather data and information, in accordance with the RDSAP methodology, to enable the generation of an Energy Performance Certificate.

Element 4.1 covers the extensive competences required to inspect property in accordance with the RDSAP methodology. It covers the inspection of all aspects of the property that fall within the remit of RDSAP. You are expected to conduct a thorough visual inspection of the property, taking measurements and notes as appropriate, and identify factors that affect the energy performance of property. You must draw on your knowledge and experience of property structure, construction and materials performance and understand the detailed requirements of the Energy Performance Certificate.

Element 4.2 requires that you make complete and accurate records of your findings. You must record information using appropriate methods and ensure that records are legible and complete.

Element 4.1 Inspect property to determine energy performance	
<p>Performance Criteria</p> <p>You must be able to:</p> <ol style="list-style-type: none"> 1 ensure that you have the equipment and resources needed for the inspection 2 use equipment correctly and interpret data accurately 3 identify yourself to those present at the property before commencing the inspection 4 identify and record the method of construction of the property and the main materials used 5 identify circumstances when at the property that prevent you continuing with the inspection and explain the reasons to sellers or their representatives 6 undertake a methodical visual inspection of all relevant aspects of the property in accordance with the requirements of the RDSAP methodology 7 make accurate observations and measurements which are necessary to provide data for the calculation of energy performance ratings 8 obtain all additional information that is needed about the property and its use 9 make further investigations where observations are inconsistent with existing evidence and expected findings 10 follow the correct procedures for collecting information to enable the energy efficiency of the property to be determined 	<p>Knowledge and Understanding</p> <p>You must know and understand:</p> <ol style="list-style-type: none"> (a) the principles of building structure, elements and fabric (b) what equipment and resources are needed for the inspection (c) the detailed inspection requirements that apply to the property as defined by the current RDSAP methodology (d) the definitions and conventions embodied within current RDSAP methodology (e) how to recognise the various types of building construction and materials (f) how to conduct the inspection in a thorough, methodical and consistent manner (g) how to make accurate observations and take accurate measurements (h) how to make further investigations where observations are inconsistent with existing evidence and expected findings, and how to identify the causes of these inconsistencies (i) the requirements and application of building regulations and other technical standards (j) the factors which are relevant to determining the energy performance of a property (k) the assumptions that are made in determining energy performance (l) the factors that are not deemed to affect energy performance (m) how to collate information required to assess the energy performance of property (n) the importance of keeping your records legible, complete and accurate

Element 4.1 Inspect property to determine energy performance

Scope

A. circumstances:

- (i) the discovery of unexpected or hazardous conditions or materials
- (ii) other potential threats to health and safety

B. inspection:

- (i) built form
- (ii) property dimensions
- (iii) constructions
- (iv) windows
- (v) heating systems including controls
- (vi) relevant aspects of non-standard properties
- (vii) other details (e.g. open fireplaces, photovoltaic supply)

NB The above list B is adapted from the contents of the RDSAP Dataset – is it appropriate, sufficient, complete etc? Is it required at all given the wording of PC6 on page 25?

Element 4.2 Make records of inspection findings	
<p>Performance Criteria</p> <p>You must be able to:</p> <ol style="list-style-type: none">1 keep complete, accurate and legible records of your findings2 store your records securely3 catalogue your records methodically4 ensure that records can be accessed readily for future use when called upon	<p>Knowledge and Understanding</p> <p>You must know and understand:</p> <ol style="list-style-type: none">(a) the range of methods, formats and conventions for recording information and evidence on the property and its energy performance(b) the required range of information and evidence relating to the property and its energy performance as defined by the current RDSAP methodology(c) the level of detail within your records required to produce a complete and comprehensive Energy Performance Certificate(d) the importance of making and maintaining records that are complete, accurate and legible(e) the importance for storing records securely allowing for future access(f) the purposes for which your records may be used

Note: there is no Scope for this Element

UNIT 5

Produce and explain Energy Performance Certificates

Element 5.1

Produce Energy Performance Certificates

Element 5.2

Issue Energy Performance Certificates and explain their contents

About this Unit

This Unit covers the activities undertaken once the inspection is completed i.e. the production and communication of complete and comprehensive Energy Performance Certificates in accordance with the prescribed format. The Energy Performance Certificate will detail the property's overall performance ratings, the current performance of each element of the property (e.g. walls, heating, lighting, and recommended measures to improve the energy performance of the property.

Element 5.1 requires that you collate all the information you have obtained on the property, and use prescribed technology to determine energy performance ratings and to generate recommendations for measures to improve the energy performance of the property. You must ensure that data has been inputted correctly, and check that the recommendations generated are appropriate.

Element 5.2 requires that you use the relevant information technology to produce and file the completed Energy Performance Certificate, inform the party selling or letting the property or their representative that the report is available, and respond appropriately to any requests for clarification on aspects of the report. You must also maintain your own internal records in accordance with good practice and statutory requirements.

Element 5.1 Produce Energy Performance Certificates	
<p>Performance Criteria</p> <p>You must be able to:</p> <ol style="list-style-type: none"> 1 assemble and collate information from your on-site inspection and from other relevant and reliable sources 2 use prescribed technology correctly to determine energy performance ratings 3 use prescribed technology to generate recommendations for measures to improve the energy performance of the property 4 check the recommendations generated and delete any that are inappropriate providing your reasons 5 prepare an Energy Performance Certificate that is complete, objective and meets relevant codes of practice and standards 6 state clearly if, where and why accurate inspection and measurement has not been possible 	<p>Knowledge and Understanding</p> <p>You must know and understand:</p> <ol style="list-style-type: none"> (a) the prescribed format and content of an Energy Performance Certificate (b) the range of measures to improve the energy performance of property that may be included within an Energy Performance Certificate (c) the technology used to produce Energy Performance Certificates and how to use it correctly (d) the principles underpinning the software used to calculate energy ratings (is this appropriate?) (e) how to input data using the appropriate software in order to determine energy performance ratings (f) how to use appropriate software to generate recommendations for measures to improve the energy performance of property (g) the importance of checking that data has been inputted correctly and how to review data if the calculation will not process (h) the importance of checking the recommendations generated, deleting any that are inappropriate, and providing your reasons (i) the way in which recommendations are generated and circumstances when it is appropriate to delete them (j) the reasons why it is necessary and important to indicate where and why accurate inspection and measurement has not been possible (k) the importance of using plain language, and appropriate terms where free text is allowed (l) the importance of checking the Energy Performance Certificate to ensure it is clear and complete (m) how the energy performance rating is affected by changes in the physical properties of the fabric of the building

Element 5.1 Produce Energy Performance Certificates

Scope

A. measures:

- (i) specific lower cost measures
- (ii) specific higher cost measures
- (iii) specific further measures to achieve an even higher standard
- (iv) simple behavioural measures (e.g. using energy saving appliances, turning off lights)

Element 5.2 Issue Energy Performance Certificates and explain their contents	
<p>Performance Criteria</p> <p>You must be able to:</p> <ol style="list-style-type: none"> 1 file Energy Performance Certificates on the prescribed national database on completion 2 inform the party selling or letting the property or their representative that the Energy Performance Certificate has been completed and is available to them 3 explain the ratings and recommendations included within the Energy Performance Certificate, and their implications, clearly to the party selling or letting the property or their representative 4 respond to queries about the Energy Performance Certificate and provide clarification of the contents when required 5 maintain internal records which are clear, complete and conform to accepted professional and statutory requirements 	<p>Knowledge and Understanding</p> <p>You must know and understand:</p> <ol style="list-style-type: none"> (a) the relevant technology applications for the production and filing of completed Energy Performance Certificates (b) the importance of informing the party selling or letting the property or their representative when the Energy Performance Certificate is available (c) how to interpret the ratings and recommendations provided in the Energy Performance Certificate (d) how to explain the ratings, recommendations and their implications clearly to the party selling or letting the property or their representative (e) how to respond to queries regarding the Energy Performance Certificate and provide clarification of the contents (f) the limitations on answers to queries which it is appropriate to provide to the parties selling or letting the property or their representatives (g) the reasons for, and methods for, maintaining your own internal records in a clear, complete and acceptable manner (h) the minimum period of time for which you must retain inspection records

Element 5.2 Issue Energy Performance Certificates and explain their contents

Scope

A. records:

- (i) paper-based
- (ii) electronic

Is this scope statement required given content of PC5 on page 31?