



**ABBE Level 3 Award  
in  
Home Energy Advice  
Qualification Handbook**

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**ABBE LEVEL 3 AWARD IN HOME ENERGY ADVICE**

<b>OFQUAL Accreditation Number:</b>	500/8065/9
Qualification Accreditation start date:	01/01/2010
Qualification Operational start date in Centres:	01/01/2010
Qualification end date:	31/12/2010
Qualification Certification end date:	31/12/2013
Qualification Age Range	18+

This guide is for prospective and existing ABBE approved assessment centres that wish to offer the ABBE Level 3 Award in Housing Energy Advice, including organisations that employ prospective Housing Energy Advisers. It provides the qualification specification and guidance on assessment requirements.

This award is a knowledge based (theory) award. It covers the essential knowledge and understanding, described in the National Occupational Standards for Housing Energy Advisers, that a person needs to have in order to give energy advice in the home.

This handbook should be used in conjunction with the ABBE Centre Operations Guide, available from the ABBE website [www.abbega.co.uk](http://www.abbega.co.uk), or by telephone from the ABBE office on 0121 331 5174.

**ABBE (Awarding Body for the Built Environment)**

ABBE is an Awarding Body regulated by Ofqual (The Office of the Qualifications and Examinations Regulator) for the delivery of a range of qualifications that form part of the Qualification Credit Framework (QCF).

ABBE has developed considerable expertise in overseeing high quality assessment for the higher level NVQs in the Property and Construction sectors of industry. Since its inception in late 1997, ABBE has grown steadily and currently offers a suite of NVQs to the industry through its assessment centres.

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## SECTION 1 INTRODUCTION

### 1.1 Background to the development of the ABBE Level 3 Award in Home Energy Advice (AdHEA)

The need for the AdHEA has arisen from the Government's wish to encourage improved energy efficiency and sustainability of households in England and Wales. Energy Performance Certificates (EPCs), energy ratings for homes similar to consumer-friendly ratings of kitchen appliances, have been compulsory at the time of let or sale of domestic properties since 2008, and this new initiative builds on this. The Department for Communities and Local Government (CLG) has proposed that Housing Energy Advisers (HEAs) should use an approach similar to that used to deliver EPCs, to provide energy advice to occupiers of properties whether or not they are changing hands via sale or let.

HEAs will visit homes to undertake an energy assessment of individual households to identify recommendations that will help to reduce costs and lower CO<sub>2</sub> emissions. Their recommendations will not be limited to physical measures relating to a building, but will include changes to occupant behaviour to promote home energy efficiency and reduced fuel bills. The HEA will be a skilled adviser who can encourage and motivate the householders, easing the process of putting recommendations into action.

National Occupational Standards (NOS) covering the role of the HEA have been developed in consultation with representatives from industry organisations and employers, including the relevant Sector Skills Council (Asset Skills) and CLG. The NOS comprise 5 units relevant to HEAs, and 2 additional units relevant to Community Energy Advisers (CEAs).

Current legislation sets minimum qualification requirements for energy advisers working within the Carbon Emission Reduction Target (CERT) and Community Energy Saving Programme (CESP).

CERT and CESP are legal obligations on energy suppliers (and in the case of CESP, energy generators) to offer schemes which aim to reduce carbon emissions from domestic energy use. The nature of such schemes has to be agreed, in advance, with Ofgem, the energy regulator, which oversees the energy suppliers' delivery of CERT and CESP schemes. As of late 2009, energy advice has been an available measure in such schemes, and Ofgem issues guidance to suppliers on minimum standards for energy advice and energy advisers.

Ofgem states, in its draft guidance, that it considers that the home energy survey and consequent recommendations should be in line with current industry standards. ABBE considers that the only industry standard currently available to define a home energy survey is RDSAP (the methodology underpinning the domestic EPC). Therefore, the data entry and recommendations used in RDSAP are used to define the home energy survey used within this award.

In addition to the home energy survey, Ofgem states that energy advice should also cover energy saving behaviours relevant to the householder, and that the topics covered

and advice given should be in line with that provided by Act on CO<sub>2</sub> and the Energy Saving Trust. Therefore, this award considers the data and recommendations relating to energy saving behaviours contained in the EST's Home Energy Check (used on-line, and by the EST's Advice Centres (ESTACs)).<sup>1</sup>

AdHEA is the first qualification to focus on critical aspects of basic knowledge and understanding needed by a HEA, as defined in units 1 to 5 of the NOS for HEAs. It therefore covers the essential minimum knowledge and understanding of the HEA NOS

This qualification has been developed in consultation with representatives from industry organisations and employers, it has been accredited by Ofqual as a Level 3 qualification in the Qualification and Credit Framework (QCF), and may be eligible for public funding as determined by the DfES under Sections 96 and 97 of the Learning and Skills Act 2000. It can be found on the Ofqual database of accredited qualifications at [www.accreditedqualifications.org.uk](http://www.accreditedqualifications.org.uk).

## 1.2 Progression

This qualification has been designed to encourage participation in education and training in other related areas by:

- Enabling current practitioners in Domestic Energy Assessment (Domestic Energy Assessors [DEAs] or Home Inspectors [HIs]) to expand their portfolio of services offered to their customers by encompassing provision of energy advice in the home.
- Encouraging those with expertise in other housing areas to qualify as HEAs.
- Attracting candidates from outside this industry to qualify as HEAs.

## 1.3 Structure

The full AdHEA comprises of three units (7 credits). To achieve the full Award candidates must pass the external examination set by ABBE.

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<sup>1</sup>

<http://www.energysavingtrust.org.uk/proxy/view/full/165/homeenergycheck>

Candidates would need to complete the following units:

Unit	Title	Credit value	Learning time (hours)		QCF unit reference
			Guided learning	Private study	
1	Inspect dwellings to gather data on their energy performance	3	10	20	Y/600/9820
2	Make recommendations for basic improvements to the energy efficiency of dwellings	1	5	5	D/600/9821
3	Gather information from householders on occupant factors and provide basic energy advice	3	10	20	H/600/9822

The ABBE DipHEA is designed to:

- establish a framework of education and training for HEAs;
- define the knowledge and understanding that candidates need to work as HEAs

#### 1.4 Credit Value

Every unit and qualification in the QCF will have a credit value. There are nine levels, ranging from Entry level to level 8, which indicate how difficult it is. There are three sizes of qualifications in the QCF:

- Awards (1 to 12 credits)
- Certificates (13 to 36 credits)
- Diplomas (37 credits or more)

Therefore the number of credits represents the size of a qualification and not how difficult it is.

One credit represents 10 hours of learning time, thus indicating how much time it takes to complete. The learning time is divided into two parts. Firstly, guided learning which is taken under the direction of the tutor or mentor, and secondly, private study which is carried out independently by the candidate.

#### 1.5 Guided learning hours (glh)

The ABBE AdHEA is a Level 3 Award and has an anticipated total learning time of 70 hours, of which 25 hours is anticipated to be guided learning time. Guided learning hours refer to the amount of study undertaken by the candidate under the direction of the tutor. This could include tutorials, seminars, workshops, directed research, project or assignment work and assessment. This is intended as a guide only and the actual amounts of time will vary according to the needs of the individual candidate.



## 1.6 Assessment and grading

The purpose of the ABBE AdHEA is to assess knowledge and understanding. The units in the ABBE AdHEA all have a standard format that is designed to provide clear guidance on the requirements of the qualification for candidates.

This qualification is awarded on a pass/fail basis only, i.e. none of the units within this qualification are graded. All 3 units must be completed successfully in order to gain the full qualification.

## 1.7 Resources

This qualification is designed to accredit the knowledge and understanding held by experienced candidates and to prepare inexperienced candidates for employment as HEAs. Centres must ensure that candidates have access to resources of industry standard to support the delivery of this programme.

Staff delivering programmes should be fully familiar with current practice and standards in the home energy advice sector. Centres will need to demonstrate how candidates will access any specialist resource requirements when they seek approval from ABBE.

All staff involved in the delivery of this qualification must have the necessary occupational skills and experience required.

## 1.8 Delivery

It is important that centres develop an approach to teaching and learning that supports the assessment of the AdHEA. It is expected that centres provide both practical and theoretical exercises in order to reinforce the knowledge and understanding.

Tutors need to ensure that appropriate links are made between theory and practice and that the knowledge base is applied to the sector. This will require the development of relevant and up-to-date teaching materials that allow candidates to apply their learning to actual events and activities within the sector.

## 1.9 Recruitment and access

ABBE's policy regarding access to its qualifications is that:

- the qualifications should be available to everyone who is capable of reaching the required standards;
- the qualifications should be free from any barriers that restrict access and progression;
- there must be equality of opportunity for all wishing to access the qualifications.

Centres should ensure that they recruit candidates to this qualification with integrity. This will include ensuring that applicants have appropriate information and advice about the award and that it will meet their needs and expectations.

Centres must assess each applicant's potential and make a professional judgment about their ability to successfully complete the programme of study, where applicable, and achieve the qualification. This assessment will need to take account of the support available to the candidate within the centre during their programme of study and any specific support that might be necessary to allow the candidate to access the assessment for the qualification.

ABBE recognises that some candidates have difficulty with the learning demands of a course or find the standard arrangements for the assessment a challenge. This may apply to candidates with known and long-standing learning difficulties and/or physical or other impairments.

Centres must take steps to ensure that any particular assessment requirements are identified as early in the programme as possible, preferably at initial assessment stage, and appropriate arrangements are put in place to support the candidate.

Further information on equal opportunities and access to fair assessment can be found in the ABBE Centre Operations Guide available on the ABBE website at [www.abbeqa.co.uk](http://www.abbeqa.co.uk) or by telephone on 0121 331 5174.

### 1.10 Categorising candidates' prior experience and/or qualifications

Centres may wish to categorise their candidates as either New Entrant or one of two recognised types of Experienced Practitioner, as follows

<b>New entrant</b>	No relevant qualifications in energy inspection of buildings or of providing advice
<b>or:</b>	
<b>Experienced practitioner (DEA)</b>	Relevant experience / qualified or accredited Domestic Energy Assessor, but little or no experience of giving home energy advice
<b>or:</b>	
<b>Experienced practitioner (HI)</b>	Relevant experience / qualified or accredited Home Inspector, but little or no experience of giving home energy advice
<b>or:</b>	
<b>Experienced practitioner (Energy Adviser)</b>	Relevant experience and qualifications in providing home energy advice, but not an accredited DEA

It is suggested that 'relevant experience and qualifications' for these three classes of Experienced Practitioner would normally mean:

**for a DEA:**

the candidate is either a qualified DEA, **or** has been assessed via APEL;  
**and** is a current practitioner, accredited as a DEA and with an up to date CPD record compliant with the minimum requirement for CPD.

**for a HI:**

the candidate is either a qualified HI **or** has been assessed via APEL;  
**and** is a current practitioner, accredited as a HI and with an up to date CPD record compliant with the minimum requirement for CPD.

**for an Energy Adviser:**

the candidate is qualified to City & Guilds 6176 in Energy Awareness **or** is qualified to the City and Guilds NVQ level 3 in Provide Energy Efficiency Services, (NVQ 6049 – 03), having taken the Energy Adviser options;  
**and** can demonstrate evidence of current practice in energy advice.

Centres are invited to design training courses that contain appropriate modules to suit the differing requirements of new entrants, HIs, DEAs, and 6176 award holders.

Experienced Practitioners, qualified as stated above, will be deemed exempt from specific sections of the External Examination, as itemised in Section 2, External Examination.

### 1.11 Accreditation of Prior Achievement (APA)

ABBE recognises the prior achievement of Home Inspectors, Domestic Energy Assessors and qualified Energy Advisers as covering parts of this award. To be entitled to such APA, candidates must provide their assessment centres with evidence, as defined in section 1.10 above.

**All credit must be accepted. Candidates who knowingly submit false information about their entitlement to APA will have their ABBE certification withdrawn.**

This award is aimed at registered Home Inspectors (HIs), accredited Domestic Energy Assessors (DEAs), and new entrants. HIs and DEAs have already demonstrated that they possess a significant proportion of the knowledge and understanding in this award, either via their qualification or Accreditation of Experiential Learning (APEL) route.

Whilst new entrants are assessed against the entire award, the existing knowledge and understanding of an accredited HI or DEA is not reassessed in this award. The modular structure, comprising 3 units, aids this process, and has been constructed to allow HIs and DEAs to access this new award in the minimum possible time. This award therefore provides a means by which HIs and DEAs may progress into the area of Home Energy Advice.

Equally, holders of the C&G 6176 also possess a proportion of the knowledge and understanding covered in this award. Holders of the C&G 6176 often work in telephone call centres offering energy advice, and may wish to progress into Home Energy Advice via this award. Again, the modular structure allows award holders to take only those parts that apply to them.

### **Guidance on how to handle candidate claims for APA from Accredited Providers**

It is a condition of approval that once an assessment centre has registered a candidate that they must honour the APA that ABBE has authorised from any of the accredited providers. As it is the responsibility of the assessment centre to declare candidates as covered by APA or not, they will need to check and validate all APA claims made by AdHEA candidates before formally granting the prior achievement/learning. Refusal to allocate the expected APA can only happen if there are strong reasons for doing so. Should this occur, then the centre must advise ABBE in writing immediately for ABBE to consider the matter before any further action is taken by the centre.

### **Equivalence with other ABBE awards**

There is no direct equivalence between this award and any of the current ABBE awards in energy assessment; this is because ABBE's other awards in this area are competence based. However, the AdHEA provides some of the underpinning knowledge and understanding required by the DipHI / DipDEA awards; and holders of these awards are exempt from part(s) of the AdHEA award.

The following information sets out the ways in which achievement of this award will help candidates achieve the ABBE energy awards and vice versa. It also sets out the way that holders of existing qualifications in Energy Advice may claim credit within this award.

#### **Unit 1**

- Candidates who have achieved the Level 3 DipDEA or Level 4 DipHI will be deemed to have covered Unit 1 of this award, provided they satisfy the requirements of an Experienced Practitioner as stated at section 1.10 of this Handbook.
- However, candidates who complete unit 1 of this award will not automatically be able to claim any specific units within the ABBE Level 4 Diploma in Home Inspection [DipHI] or the ABBE level 3 in Domestic Energy Assessment [DipDEA]. This is because these two awards, being competence based, are wider ranging than Unit 1 of the AdHEA award. However, candidates will be able to present Unit 1 of this award as satisfying much of the knowledge and understanding required within either the DipHI or DipDEA.

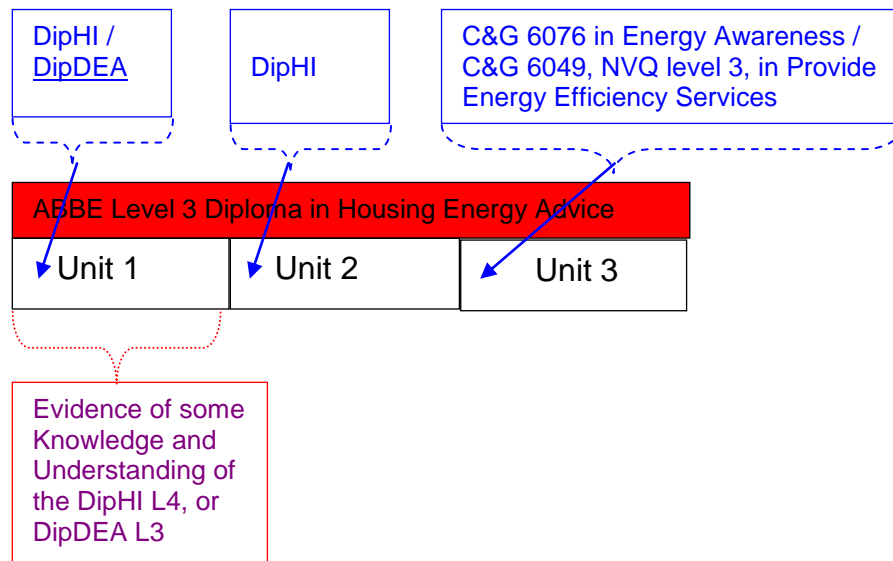
#### **Unit 2**

- Candidates who have achieved the Level 4 DipHI will be deemed to have covered Unit 2 of this award, provided they satisfy the requirements of an Experienced Practitioner as stated at section 1.10 of this Handbook.

- However, candidates who complete unit 2 of this award will not automatically be able to claim any specific units within the ABBE Level 4 Diploma in Home Inspection [DipHI] or the ABBE level 3 in Domestic Energy Assessment [DipDEA]. This is because these two awards, being competence based, are wider ranging than Unit 2 of the AdHEA award. However, candidates will be able to present Unit 2 of this award as satisfying some of the knowledge and understanding required within either the DipHI or DipDEA.

### Unit 3

- Candidates who have achieved either the City & Guilds 6176 in Energy Awareness **or** the City and Guilds NVQ level 3 in Provide Energy Efficiency Services, having taken the Energy Adviser options (NVQ 6049 – 03), will be deemed to have covered Unit 3 of this award, provided they satisfy the requirements of an Experienced Practitioner as stated at section 1.10 of this Handbook.
- Candidates who complete unit 3 of this award will not automatically be able to claim any specific units within the ABBE Level 4 Diploma in Home Inspection [DipHI] or the ABBE level 3 in Domestic Energy Assessment [DipDEA]. This is because the content of this Unit is generally outside the scope of either Diploma.
- Candidates wishing to claim credit for this unit towards either of the City and Guilds awards should contact City and Guilds.



## SECTION 2 EXTERNAL EXAMINATION

### 2.1 Examination arrangements

To successfully achieve the ABBE Level 3 AdHEA, candidates will be required to achieve a pass in each part of the external examination. The pass mark for each part of the examination is 70%.

The examination has been designed to test the knowledge and understanding required by the three units of this award.

The examination uses a multiple-choice examination mode and is available on pre-determined dates and times. A timetable showing the availability of the examination is available on the ABBE website at [www.abbeqa.co.uk](http://www.abbeqa.co.uk).

The examination is set and marked by ABBE and is 90 minutes long, covering the three units of the AdHEA. In order to register, candidates should contact their Centre.

The initial candidate registration fee includes entry to two attempts at the examination. Any further attempts required will attract a new examination entry fee.

Candidates should use the examination as a means by which to measure their current level of knowledge and understanding. Failing the examination may indicate the need for further training and this should be done prior to taking the examination for a second time.

The examination results are then ratified by ABBE and issued to the assessment centres.

The ABBE Centre Operations Guide provides information on how to register candidates for the examination.

The ABBE External Examination Guidelines for Assessment Centres and Invigilators provide comprehensive guidance on the administration and management of the examination. These documents are available on the ABBE website at [www.abbeqa.co.uk](http://www.abbeqa.co.uk).

### 2.2 Examination content and format

The examination is of 90 minutes duration in three parts, comprising 50 questions in total. Each part includes 5 minutes reading time, plus:

Part 1: 30 minutes to answer 20 multiple choice questions.

Part 2: 15 minutes to answer 10 multiple choice questions.

Part 3: 30 minutes to answer 20 multiple choice questions.

The following is a list of areas that will be covered. Candidates should also make use of the approved ABBE Reading List, which can be found on the ABBE website at [www.abbeqa.co.uk](http://www.abbeqa.co.uk).

Subject area	Number of questions in exam (Total for each section in brackets)
<b>Examination 1</b>  <b>Unit 1 – Know how to inspect dwellings to identify their energy performance:</b> <ul style="list-style-type: none"> <li>- The range of property specific data required; <span style="float: right;">1</span></li> <li>- The principles of building structure, elements and fabric; <span style="float: right;">1</span></li> <li>- Domestic building construction and materials; <span style="float: right;">5</span></li> <li>- Property age and type; <span style="float: right;">2</span></li> <li>- Space and water heating systems and controls; <span style="float: right;">8</span></li> <li>- Domestic lighting; <span style="float: right;">1</span></li> <li>- The process of property inspection. <span style="float: right;">2 (20)</span></li> </ul>	
<b>Examination 2</b>  <b>Unit 2 - Know the range of property improvement measures that may apply to dwellings and when not to recommend them:</b> <ul style="list-style-type: none"> <li>- Property improvement measures: fabric and airtightness; <span style="float: right;">3</span></li> <li>- Property improvement measures: heating, hot water and lighting; <span style="float: right;">5</span></li> <li>- When specific property improvement measures should not be recommended. <span style="float: right;">2 (10)</span></li> </ul>	
<b>Examination 3</b>  <b>Unit 3 – Know the range of additional (non property specific) information required and how it may be obtained:</b> <ul style="list-style-type: none"> <li>- Interpreting fuel bills and reference materials; <span style="float: right;">3</span></li> <li>- Meters; types, reading meters, fuel cost calculations; <span style="float: right;">3</span></li> <li>- Methods of payment. <span style="float: right;">2</span></li> </ul> <b>Unit 3 – Understand the individual context of a client when providing energy advice:</b> <ul style="list-style-type: none"> <li>- Fuel poverty and health; <span style="float: right;">3</span></li> <li>- Sources of grant funding and other support; <span style="float: right;">1</span></li> <li>- The impact of tenure and financial constraints on the client. <span style="float: right;">1</span></li> </ul> <b>Unit 3 – Know how to encourage clients to change their behaviour in the home in order to reduce their home energy consumption.</b> <ul style="list-style-type: none"> <li>- Efficient, safe and appropriate use of appliances, systems and controls; <span style="float: right;">5</span></li> <li>- Condensation; its causes and effects. <span style="float: right;">2 (20)</span></li> </ul>	
<b>Total Questions</b>	<b>50</b>

Each unit is assessed separately as follows.

Unit	Duration	No. of questions	Minimum for pass (70%)
1	30 + 5 minutes	20	14
2	15 + 5 minutes	10	7
3	30 + 5 minutes	20	14

The total exam covering three units would be 90 minutes (50 questions), including reading time

Each question will consist of the question and four possible answers, only one of which will be correct.

Experienced Practitioners, qualified as stated in section 1.10 of this Handbook, will be deemed exempt from the following specific sections of the External Examination:

Unit	Title	Exempt candidates
1	Inspect dwellings to gather data on their energy performance	DEA and HI
2	Make recommendations for basic improvements to the energy efficiency of dwellings	HI
3	Gather information from householders on occupant factors and provide basic home energy advice	Energy Adviser

### 2.3 Application of reasonable adjustments

The reasonable adjustments allowed for the external examination component of the ABBE Level 3 AdHEA are as follows:

#### Additional time

Where there is evidence of need, the centre may grant additional time to those candidates whose ability to demonstrate attainment is affected by their disability or difficulty. It is anticipated that in most cases an allowance of an additional 15 minutes of extra time will be sufficient to allow the candidate to complete on an equal basis with candidates who have no particular requirements.

Additional time must be requested at the time the candidate is registered for the examination with ABBE.



## Amanuensis

An amanuensis is a person who, in an examination, records (usually in writing, or on computer) a candidate's dictated answers to questions. Candidates are eligible to use an amanuensis if they suffer from long term or temporary disabilities that prevent them from providing their answers by other means.

Where an amanuensis is used, centres must ensure:

- their use neither gives a candidate an unfair advantage nor disadvantages the candidate;
- the role is carried out by a responsible adult who is able to produce an accurate record of the candidate's answers. Under no circumstances may a relative, friend or peer of the candidate carry out this role;
- the candidate is accommodated in such a way that no other candidate is able to hear what is being dictated;
- the amanuensis does not also act as the invigilator.

During the examination, the amanuensis:

- must not give factual help to the candidate;
- must not advise the candidate on any aspect of the examination;
- must record the answer exactly as specified by the candidate;
- must immediately refer any problems in communication during the examination to the invigilator.

An amanuensis can be used without prior application to ABBE, however their use must be recorded on the invigilation certificate submitted to ABBE after the examination.

## Reader

A reader is a person who in an examination reads questions to a candidate. Candidates are eligible to use a reader if they suffer from a long term or temporary disability, which prevents them from reading the questions themselves.

Where a reader is used, centres must ensure:

- 
- their use neither gives a candidate an unfair advantage nor disadvantages the candidate;
- the role is carried out by a responsible adult who is able to accurately convey the question to the candidate. Under no circumstances may a relative, friend or peer of the candidate carry out this role;
- the candidate is accommodated in such a way that no other candidate is disturbed by what is being read;
- the reader does not also act as the invigilator.

During the examination, the reader:

- must not give factual help to the candidate;
- must not advise the candidate on any aspect of the examination;

- must read the question exactly as specified in the examination;
- must immediately refer any problems in communication during the examination to the invigilator.

A reader can be used without prior application to ABBE, however their use must be recorded on the invigilation certificate submitted to ABBE after the examination.

### **Alternative examination accommodation arrangements**

Where a candidate is unable to attend an examination centre to undertake an ABBE examination due to temporary illness or disability, an alternative venue can be considered (e.g. hospital, home).

An alternative venue must be requested at the time the candidate is registered for the examination with ABBE.

## SECTION 3 ADMINISTRATIVE ARRANGEMENTS

### 3.1 Registering candidates

Full details of candidate registration and certification procedures can be found in the ABBE Centre Operations Guide on the website at [www.abbega.co.uk](http://www.abbega.co.uk).

Details of the fees for candidate registration can be found in the ABBE Fees List.

Once approval has been granted, candidates can be registered in the usual way. A flexible fee structure has been put in place for this qualification, to reflect the direct exemptions that apply to this qualification.

The following exemptions apply to the three units:

- Candidates who hold a Level 3 Diploma in Domestic Energy Assessment are exempt from **Unit 1**
- Candidates who hold a Level 4 Diploma in Home Inspection are exempt from **Units 1 and 2**
- Candidates who hold a City and Guilds 6176 Energy Awareness or 6049 Provide Energy Efficiency Services are exempt from **Unit 3**

A registration fee is payable for each individual unit. Centres will only need to pay a registration fee for the units a candidate needs to complete. Therefore, if a candidate holds none of the above qualifications already the full candidate registration fee will apply; where a candidate already holds a recognised qualification, e.g. the ABBE Level 3 Diploma in Domestic Energy Assessment, in this case a fee will be payable for Units 2 and 3 only.

As usual, the registration fee includes two attempts at each external examination.

For candidates who are claiming exemptions, the centre will be required to advise ABBE of the units that they will be completing at the time of registration. This should be recorded on the 'Summary of HEA candidate registrations' form available on the ABBE website at [www.abbega.co.uk](http://www.abbega.co.uk) and should be emailed to [abbeenquiries@bcu.ac.uk](mailto:abbeenquiries@bcu.ac.uk) at the time the registration is made on the ABBE online system. If this information is not received by ABBE before the invoice is generated, please be advised that the centre will be charged the full candidate registration fee for the registration.

### 3.2 Enquiries and appeals

If a candidate is in disagreement with their centre concerning the examination, the candidate has the right to refer the matter to the centre manager on one or more of the following grounds:

- that the examinations were not conducted in accordance with the current regulations for the course or that a significant material, administrative or other irregularity has occurred;
- that the centre failed to take account, or adequate account, of circumstances affecting the candidate's performance which were, or might have been expected to be, known to it.

In the first instance, the candidate's right to appeal is to the Centre Manager. The appeal to the Centre Manager must be in writing with supporting documentary evidence, where appropriate, and must be made not later than two weeks after the publication of the examination result. On

the basis of the evidence submitted the Centre Manager may reject the appeal or refer it to ABBE for further consideration.

In either case, the Centre Manager will provide a written decision to the appellant within ten days of the appeal being lodged. At the same time the candidate will be informed of their right to appeal to ABBE.

ABBE will only accept an appeal from a candidate if the above steps have already been taken. Further details on appeals can be found in the ABBE Centre Operations Guide.

## SECTION 4 STRUCTURE AND CONTENT

### 4.1 Qualification Structure

Candidates must satisfactorily complete all three units to achieve the ABBE Level 3 AdHEA.

The Units of the Award are as follows:

#### **Unit 1 Inspect dwellings to gather data on their energy performance**

Element 1.1 Know how to inspect dwellings to identify their energy performance in accordance with RDSAP

#### **Unit 2 Make recommendations for basic improvements to the energy efficiency of dwellings**

Element 2.1 Know the range of property improvement measures that may apply to dwellings (as defined by RDSAP), their relative costs, and when not to recommend them

#### **Unit 3 Gather information from householders on occupant factors and provide basic home energy advice**

Element 3.1 Know the range of additional (not property specific) information required to analyse energy consumption, and how it may be obtained

Element 3.2 Understand the individual context of a client when providing energy advice

Element 3.3 Know how to encourage clients to change their behaviour in the home in order to reduce their home energy consumption

### 4.2 Unit structure

Each unit of the qualification is structured in the same way, as follows:

**Element title:** states the 'task/activity' to be undertaken.

**Level:** represents the technical complexity of the unit.

**Credit value:** identifies the number of credits for which the unit qualifies.

**Purpose and aim of the unit:** provides a summary of the content of the unit, including detail of the individual elements that make up that unit.

**Learning Outcomes:** outlines what the candidate must do to meet the requirements of the unit. The statements:

- set out what a candidate is expected to know or understand as the result of the learning process

- are clear and coherent, and expressed in language that is understandable by candidates
- make sense to a candidate both before a unit is offered and after the learning outcomes have been achieved
- are capable of assessment and, in conjunction with the assessment criteria related to that outcome, set a clear assessment standard for the unit.

**Assessment Criteria:** outline what the candidate must demonstrate in order to satisfy the learning outcome of the unit. The statements:

- specify the standard a candidate is expected to meet to demonstrate that the learning outcomes of that unit have been achieved
- are sufficiently detailed to support reliable, valid and consistent judgements that a learning outcome has been achieved, without creating an undue assessment burden for candidates or assessors
- do not include any explicit references to the methods or instruments of assessment to be used.

**Fundamental knowledge and understanding:** identifies the minimum range of topics, activities, variables or contexts over which the candidate must demonstrate their knowledge.

**The Units of the Award are as follows:**

**UNIT 1 Inspect dwellings to gather data on their energy performance.**

**UNIT 2 Make recommendations for basic improvements to the energy efficiency of dwellings.**

**UNIT 3 Gather information from householders on occupant factors and provide basic home energy advice.**

## UNIT 1 Inspect dwellings to gather data on their energy performance

### About this Unit.

This Unit covers the knowledge and understanding required to inspect property in order to determine its energy performance. The aim of the inspection is to gather data and information needed by the RDSAP methodology, to enable the energy advice subsequently provided to the client to be based on sufficient relevant information about the property. The unit covers the inspection of most standard properties, whether they are houses, flats or maisonettes, traditional construction or purpose-built, leasehold or freehold.

The rationale for this unit is that energy advice is more effective when it is tailored to the needs of the enquirer, and information about the inherent energy performance of the subject property provides the foundation for this tailored advice. Energy advice is specific to individuals and their circumstances (otherwise it could only be information and not advice), so any advice given to clients without this basic data could, at best, only be general.

The range of knowledge and understanding within this unit includes everything that falls within the remit of RDSAP, i.e. construction, glazing, floors, insulation, lighting, hot water, and heating systems and controls. Candidates are expected to know how to undertake a thorough visual inspection of a property, take measurements and notes as appropriate, and identify all the factors that affect the energy performance of the property as recognised in RDSAP. They must demonstrate their knowledge of property structure and construction, materials performance, and space/water heating systems (including their controls).

<b>Title</b>	<b>Unit 1: Inspect dwellings to gather data on their energy performance.</b>
<b>Level</b>	<b>3</b>
<b>Credit Value</b>	<b>3</b>
<p><b>Unit purpose and aims</b>            This unit provides the knowledge and understanding needed to carry out an energy inspection of a dwelling. This includes all knowledge aspects of inspecting the property to identify its intrinsic level of energy efficiency and any energy efficient features already present, according to the RDSAP methodology for energy assessment of existing homes.</p> <p>NB this unit is only taken by new entrants and Experienced Practitioner (Energy Advisers). Experienced Practitioner DEAs and Experienced Practitioner HIs are exempt.</p>	
<b>Learning outcomes</b>	<b>Assessment criteria</b>
<b>Home Energy Advisers (HEAs) will:</b>	<b>To demonstrate this they can:</b>
1. know how to inspect dwellings to identify their energy performance in accordance with RDSAP.	a) state the range of property specific data and information required to enable a thorough analysis of energy performance. b) describe the principles of building structure, elements and fabric. c) recognise the various types of domestic building construction and materials. d) recognise property age and type. e) identify space and water heating systems including 1. Fuel types 2. Boilers

	<ul style="list-style-type: none"> <li>3. Central heating</li> <li>4. Non central heating systems</li> <li>5. Water heating systems and controls</li> <li>f) identify domestic lighting systems.</li> <li>g) explain the process of inspecting property.</li> </ul>
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**Fundamental Knowledge and Understanding**

1. RDSAP inspection requirements, including
  1. Equipment and resources needed
  2. Mensuration, linear, area, volume
  3. Production of sketch plans
  4. Methodical inspection technique
  5. Further investigations where observations are inconsistent
  6. RDSAP data items to be collected
  
2. Common forms of dwelling construction including
  1. walls: solid, cavity, filled & retro filled cavity, timber frame
  2. floors: solid, suspended timber
  3. roofs: pitched, flat, insulated at joists or rafters, thatch
  4. windows: age, materials, single/double glazed
  
3. Property age and type: ageing property & identifying built form
  
4. Provision of heating, hot water and lighting services within dwellings, including;
  1. fuel types: carbon intensities, fuel storage systems
  2. boilers: types, efficiencies, age
  3. central heating: electric, gas, other fuels, controls and their applicability to each system
  4. non central heating systems: room heaters, treatment of portable appliances, unheated habitable rooms
  5. lighting: tungsten filament (GLS), fluorescent including CFLs



## UNIT 2      **Make recommendations for basic improvements to the energy efficiency of dwellings**

### About this Unit

This Unit covers the knowledge and understanding required for recommending measures to improve the energy performance of dwellings. In this context, measures means physical measures that may be installed in or on the property, either to improve the fabric of the property, or the energy performance of the energy using systems within it. The available recommendations are defined in RDSAP.

The recommendations made will depend on the data gathered in the property inspection, but will also depend on other relevant factors, such as whether the property is a listed building, in an exposed position, owner occupied or tenanted, etc. The unit covers the relevance of improvement measures to most standard properties, whether they are houses, flats or maisonettes, traditional construction or purpose-built, leasehold or freehold.

Candidates are expected to be aware of the various options for improving the energy performance of homes, their relative costs and carbon savings, and to which type of dwellings they are most suited. They should also have a basic understanding of why recommendations are made by RDSAP, and why others are not. They are also required to understand circumstances when specific measures would not be available to an occupier, or would not be appropriate given the specifics of the property, such as its location.

<b>Title</b>	<b>Unit 2: Make Recommendations for basic improvements to the energy efficiency of dwellings.</b>
<b>Level</b>	<b>3</b>
<b>Credit Value</b>	<b>1</b>
<p><b>Unit purpose and aims</b> This unit provides the knowledge and understanding needed to make recommendations for physical improvements to the energy efficiency of dwellings, i.e. installation of physical measures in or to the property. This includes awareness of appropriate physical improvement measures that may be retrofitted to existing homes, and reasons why they are not appropriate in some circumstances.</p> <p>NB this unit is taken by new entrants, Experienced Practitioner (DEA)s and Experienced Practitioner (Energy Advisers). Experienced Practitioner (HIs) are exempt.</p>	
<b>Learning outcomes</b>	<b>Assessment Criteria</b>
<b>Home Energy Advisers (HEAs) will:</b>	<b>To demonstrate this they can:</b>
1. know the range of basic property improvement measures that may apply to dwellings (as defined by RDSAP), their relative costs, and when not to recommend them.	<ul style="list-style-type: none"> <li>a) describe the range of improvement measures to reduce energy consumption, applying to the property's fabric, heating or lighting systems, which may be included within a Home Energy Audit Report.</li> <li>b) recognise the circumstances when a specific improvement measure should not be recommended.</li> <li>c) compare the relative costs and carbon reduction for improvement measures and give approximate costs for specific measures.</li> </ul>

**Fundamental knowledge and understanding**

1. Methods of improving the thermal performance of dwelling fabric:
  1. retrofitting insulation; to lofts, rooms in the roof, solid and cavity walls, floors, replacement/secondary double glazing
  2. reducing heat loss through ventilation losses.
2. Methods of improving the energy performance of existing heating, hot water and lighting services within dwellings, including improving existing systems and installing new services and controls (to systems, boilers and heat emitters) where appropriate.
3. Costs of measures and their relative cost effectiveness.
4. Circumstances when specific improvement measures should not be recommended.
5. The logic used by RDSAP in making recommendations for improvement measures.

## **UNIT 3            Gather information from householders on occupant factors and provide basic home energy advice**

### **About this Unit**

This Unit covers the knowledge and understanding required to give advice to householders about actions they may take to reduce their home energy consumption by changing the way they use energy in their homes. Because this requires the occupant to make changes to the way they behave in their homes, such actions are often referred to as behavioural measures or behavioural recommendations.

The content of this unit may be considered in two parts: the additional data that needs to be obtained about the occupier's use of the home, and the knowledge and understanding needed to deliver behavioural advice.

### **Additional data**

The type of behavioural measures that may be recommended depends on both the physical features of the home, and also how the occupants use the home. The data on the physical features is covered by Unit 1 of this Award. Occupiers' fuel bills are the best indicator of how the occupiers use those installed features, and candidates are expected to be able to interpret fuel bills, and compare them with reference values (such as Sutherland tables, or predicted running costs given by RDSAP). They are also expected to know the questions they need to ask to identify any specific behaviours that could lead to unexpectedly high fuel bills, such as incorrect use of heating system controls.

### **Delivering behavioural advice**

Candidates are expected to know how to recognise fuel poverty, which is linked to poor housing conditions and poor health. Poor health is frequently a result of poor housing conditions, e.g. condensation is an acknowledged cause of respiratory difficulties, and its presence is associated with fuel poverty. Candidates are expected to know how to recognise such conditions and what remedial action to recommend. Often, behavioural changes by the occupants are needed to avoid condensation, and this is part of the behavioural advice that candidates are expected to understand.

Candidates should know the available methods of payment for fuels, and sources of grant aid and further help for householders, especially those in or at risk of fuel poverty. They should also know how to explore, in a tactful and sensitive manner, the financial constraints that affect the client's ability to act. Finally, candidates should know how to use the following efficiently: domestic heating, lighting, hot water systems, and white and brown goods.

<b>Title</b>	<b>Unit 3: Gather information from householders on occupant factors and provide basic home energy advice.</b>
<b>Level</b>	<b>3</b>
<b>Credit Value</b>	<b>3</b>
<p><b>Unit purpose and aims</b>                  This unit provides the knowledge and understanding needed to give energy advice to householders about actions they may take to reduce their home energy consumption by changing their behaviour in their homes. It covers obtaining, from the occupier, any additional data relevant to providing home energy advice (that is, data that does not relate to the property and its building services, which is covered by Unit 1); and providing basic energy advice to clients in their homes.</p> <p>NB this unit is taken by all candidates except Experienced Practitioner (Energy Adviser)s, i.e. candidates who already possess either the C&amp;G 6176 or the C&amp;G 6049 and can demonstrate evidence of current practice in energy advice.</p>	
<b>Learning outcomes</b>	<b>Assessment Criteria</b>
<b>Home Energy Advisers (HEAs) will:</b>	<b>To demonstrate this they can:</b>
2. know the range of additional (not property specific) information required to analyse energy consumption, and how it may be obtained.	d) state the range of non property specific information that is required in order to analyse energy consumption, and list potential sources of that data. e) describe how to obtain non property specific data from clients, including taking meter readings, interpreting fuel bills, and noting clients' use of their installed systems.
3. understand the individual context of a client when providing energy advice.	a) explain what is meant by 'fuel poverty' and describe how to recognise it. b) list the sources of support and advice to which clients, including those in fuel poverty, can be directed. c) describe how to explore the financial constraints that might affect the client's ability to act, and why it is important to do this in a sensitive and tactful manner. d) recognise examples of the different tenures/sectors within the property market, explaining the impact of tenure on the client's ability to act and their entitlement to grant support.
4. know how to encourage clients to change their behaviour in the home in order to reduce their home energy consumption.	e) describe how to demonstrate the efficient, safe and appropriate use of appliances, systems and controls. f) describe how to recognise condensation in the home, and list its possible causes.

**Fundamental knowledge and understanding**

- 1 How to interpret domestic fuel bills and compare them with reference materials (Sutherland tables, RDSAP predicted running costs)
- 2 How to read utility meters, record gas and electricity consumption, and work out costs
- 3 Methods of payment for gas and electricity (prepayment meter, social tariffs, dual fuel discounts, dual rate tariffs)
- 4 How to recognise and avoid condensation, and take remedial action where condensation dampness occurs
- 5 Recognising fuel poverty; affect of fuel poverty on health
- 6 Grant aid available for domestic energy efficiency measures (WarmFront, CERT, CESP, local schemes, health related schemes)
- 7 The efficient use of domestic heating, lighting, and hot water systems, including controls, and domestic appliances (white and brown goods)

**Appendix 1: Additional Unit Information**

<b>Unit 1: Inspect dwellings to gather data on their energy performance</b>	
Additional information about this unit	
Unit expiry date	31/12/2010
Details of the relationship between the unit and the national occupational standards or other professional standards or curricula (if appropriate)	Asset Skills National Occupational Standards for Housing and Community Energy Advisers, 2009. Unit 2 element 2.3 Unit 3 element 3.1
Assessment requirements or guidance by a sector or regulatory body (if appropriate)	ABBE External Examination
Support for the unit from a SSC or other appropriate body [if required]	Building Research Establishment
Location of the unit within the subject/sector classification system	05 Construction, Planning and the Built Environment 05.2 Building and Construction
Name of the organisation submitting the unit	Awarding Body for the Built Environment
Availability for use	Private unit
Unit available from	01/01/2010
Unit Guided learning hours	10

<b>Unit 2: Make recommendations for basic improvements to the energy efficiency of dwellings</b>	
Additional information about this unit	
Unit expiry date	31/12/2010
Details of the relationship between the unit and the national occupational standards or other professional standards or curricula (if appropriate)	Asset Skills National Occupational Standards for Housing and Community Energy Advisers, 2009. Unit 3 element 3.3 Unit 4 element 4.1
Assessment requirements or guidance by a sector or regulatory body (if appropriate)	ABBE External Examination
Support for the unit from a SSC or other appropriate body [if required]	Building Research Establishment
Location of the unit within the subject/sector classification system	05 Construction, Planning and the Built Environment 05.2 Building and Construction
Name of the organisation submitting the unit	Awarding Body for the Built Environment
Availability for use	Private unit
Unit available from	01/01/2010
Unit Guided learning hours	5

<b>Unit 3:</b> Gather information from householders on occupant factors and provide basic home energy advice.	
Additional information about this unit	
Unit expiry date	31/12/2010
Details of the relationship between the unit and the national occupational standards or other professional standards or curricula (if appropriate)	Asset Skills National Occupational Standards for Housing and Community Energy Advisers, 2009. Unit 2 element 2.3 Unit 3 element 3.1, 3.3
Assessment requirements or guidance by a sector or regulatory body (if appropriate)	ABBE External Examination
Support for the unit from a SSC or other appropriate body [if required]	Building Research Establishment
Location of the unit within the subject/sector classification system	05 Construction, Planning and the Built Environment 05.2 Building and Construction
Name of the organisation submitting the unit	Awarding Body for the Built Environment
Availability for use	Private unit
Unit available from	01/01/2010
Unit Guided learning hours	10

**Appendix 3: Recommended equipment list**

- a) Binoculars
- b) Camera with spare batteries and a camera back up (a mobile phone fitted with camera is sufficient)
- c) Ladder and hard hat (for accessing loft spaces)
- d) Measuring devices (range of measuring tapes)
- e) Suitable footwear, safety shoes optional
- f) Torch
- g) Pocket mirror
- h) Compass
- i) Meter box key
- j) Umbrella / Wellingtons / wet weather protection, etc.
- k) Disposable dust masks
- l) Latex/vinyl gloves
- m) Hand cleaning wipes
- n) First aid kit
- o) Personal alarm/mobile phone
- p) Appropriate container/bag for equipment