

apprenticeship FRAMEWORK

Energy Assessment and Advice - non statutory (Wales)

IMPORTANT NOTIFICATION FOR ALL APPRENTICESHIP STARTS FROM 14 OCTOBER 2016

Modifications to SASW came into effect on 14 October 2016. These changes relate to the **Essential Skills and Employer Rights and Responsibilities** requirements of a framework and they **ONLY** apply to new Apprenticeship starts on, or after, 14th October. Apprenticeship starts before this date must continue to meet the 2013 SASW requirements for Essential Skills and Employer Rights and Responsibilities.

For more details of the changes and how they will affect new apprenticeship starts, please read the following preface page to the framework document. NB: Please check the "Revising a Framework" section for information on any additional changes that may have been made to this framework.

Latest framework version?

For any previous versions of this framework: www.acwcerts.co.uk/framework_library

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Wales

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Framework information

Information on the Issuing Authority for this framework:

Instructus

The Apprenticeship sector for occupations in air conditioning, building services engineering, business and administration, cleaning, customer service, digital/information technology, electro technical, electrical and electronic servicing, enterprise and business support, facilities management, heating and ventilating, housing, human resources and recruitment, industrial relations, leadership and management, marketing and sales (also includes contact centres and third sector), plumbing, property and refrigeration.

| | |
|--|---|
| Issue number: 3 | This framework includes: |
| Framework ID: FR04254 | Level 2 <input type="checkbox"/> Level 3 <input checked="" type="checkbox"/> Level 4-7 <input type="checkbox"/> |
| Date this framework is to be reviewed by: 24/02/2023 | This framework is for use in: Wales |

Short description

Government legislation, public awareness surrounding sustainability and the need to reduce energy bills have increased demand for energy assessment and advice in both the commercial and domestic property sector. The Apprenticeship has one pathway which consists of the Green Deal Domestic Advisor qualification; a qualification which has been developed to provide the skills and knowledge to implement the government's domestic green deal policy. Green Deal Policy has diminished in its potency but is still in use in pockets of the country and two Awarding Organisations still support the apprentices wanting to qualify as Energy Advisors. As the industry develops, qualifications may focus less on Green Deal and more on other policies at which stage job roles are likely to alter and it is likely that new/revised pathways will be included.

Contact information

Proposer of this framework

Instructus Skills on behalf of employers within the sector in particular British Gas, EON, SSE and Egnida.

Developer of this framework

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Revising a framework

Why this framework is being revised

Some of the qualifications have been removed as they are no longer valid

Summary of changes made to this framework

The following qualifications have been removed

BPEC - 600/6277/0 - WITHDRAWN

ProQual - 600/6791/3 - WITHDRAWN

EDI PEARSON - 600/5124/3 - WITHDRAWN

Qualifications removed

600/6277/0 BPEC

600/6791/3 ProQual

600/5124/3 EDI Pearson

Qualifications added

N/A

Qualifications that have been extended

N/A

Purpose of this framework

Summary of the purpose of the framework

The main purpose of this framework is to ensure that new people into the industry and the job role are qualified to implement the government's policies on domestic green deal advice but also be aware of other green energy schemes.

It is envisaged that new pathways will be created in the future based on new energy assessment and advice competency qualifications to fit different job roles.

Green Deal is the British government's initiative which aims to encourage homeowners to install energy efficient devices within their homes. Green Deal is based on the principle that many energy efficiency related changes to properties pay for themselves. Households will be able to obtain finance to fund appropriate energy efficiency measures through the Green Deal, which will be paid back through the savings on fuel bills resulting from their installation. To ensure that real savings can be made, the energy saving measures recommended for properties will need to be both appropriate to the age and construction of the property and correctly installed. At a local level the Green Deal will enable many households and businesses to improve the energy efficiency of their properties without consuming as much energy and wasting so much money.

At a national level the UK needs to become more energy efficient to reduce its greenhouse gas emissions. The Climate Change Act 2008 legislated for a reduction in our carbon emissions of 34% by 2020 and 80% by 2050 (accurate February 2018). It set legally-binding carbon targets for the UK for the next twelve years across all sectors of the economy, including homes, communities and workplaces. To help meet the carbon targets there is a need to make our buildings more energy efficient, and use heat and power from low carbon sources.

Green Deal Advisors will work for utility companies, facilities management companies, green deal providers and consultancy businesses. The Level 3 Diploma in Green Deal Advice covers both energy assessment and advice and the financing aspects of green deal.

Future competencies required by the sector include:

- development of energy assessment and advice technical skills
- development of softer skills and behaviours such as communication, sales and customer service
- technical knowledge - understanding the 'hierarchy' of energy efficiency measures and of renewables technology
- multi-skilling the workforce - consumers will expect one person to be able to answer and deal with their questions
- keeping up to date with changing legislation such as the Feed-In-Tariffs and the Energy

Company Obligation (ECO)

Employers have been involved with the design of the qualifications in this framework which will develop the critical skills required within the sector, the framework also meets the requirements of the Specification of Apprenticeship standards for Wales and contributes towards meeting the skills priorities for Wales.

Aims and objectives of this framework (Wales)

The aim of the apprenticeship is to attract new people into the sector to implement Green Deal policies, which, in the long term, will assist the UK reach its 2020 and 2050 carbon emissions reduction target.

The objectives are to:

1. Develop technical skills required for energy assessment and advice
2. Attract new people from under-represented groups into the sector to meet the predicted rise in new jobs.
3. Provide soft skills, such as customer service, verbal communication and problem solving .
4. Provide an opportunity for career progression within related sectors, such as property services, building engineering, construction and sales
5. Make energy assessment and advice a career of choice for people new to the sector

Entry conditions for this framework

Employers are looking to attract applicants from a wide range of backgrounds and experience and are particularly keen to hear from applicants who have experience in customer service, sales or construction and the built environment sector. An interest in the following areas will be important - providing high standards of customer service, energy issues, sustainability and renewable technologies. This framework is not suitable for the 16 - 18 age group due to the high level skills requirements and the amount of responsibility required for the job role. As the job role will involve visiting domestic properties, in most cases, a driving licence will be required.

Employers wish to stress that the job role of Green Deal assessor and advisor is demanding for new entrants to the sector and the qualification intensive, therefore applicants need to have commitment to this framework and the confidence to deal with the Maths and English requirements. The Communication Skills ESW is set at level 3 for this framework.

Training providers and employers will use initial assessment to ensure that applicants have a fair opportunity to demonstrate their ability and to tailor programmes to meet individual needs, recognising prior qualifications and experience.

RULES TO AVOID REPEATING QUALIFICATIONS

Processes exist to make sure that applicants with prior knowledge, qualifications and experience are not disadvantaged by having to repeat learning. Training providers and Awarding Organisations will be able to advise on the current rules for accrediting prior learning and recognising prior experience. Refer to the on and off the job training section for guidance about prior attainment and achievement. In the meantime, this is a short summary:

There are no relaxations or proxies for any qualifications specified in a framework in SASW, however, providers are encouraged to identify additional on-the-job training programmes that customise the learning to the new workplace.

1. Prior experience

Applicants already working in the sector will be able to have their prior experience recognised by the Awarding Organisation and this will count towards the competency and the knowledge qualifications in this framework. In the case of accredited prior learning (APL) for competence, knowledge or ESW the apprenticeship programme must be tailored to allow the apprentice to undertake new learning, including learning at a higher level and develop new skills

Level 3

Title for this framework at level 3

Apprenticeship in Energy Assessment and Advice

Pathways for the framework at level 3:

Pathway 1: Green Deal Domestic Assessor and Advisor

Level 3, Pathway 1: Green Deal Domestic Assessor and Advisor

Description of this pathway

The minimum number of credits is 59 which is made up as follows:

- 22 credits for knowledge
- 25 credits for competency
- 12 credits for Essential Skills Wales: Communication and Application of Number

Please note that Essential Skills Wales EDLS is not a mandatory requirement, as the curriculum is too broad and generic and does not cover specialist sector software. Training will be given to apprentices to use specialist in-house software systems.

Entry requirements for this pathway in addition to the framework entry requirements

There are no additional requirements other than the general entry conditions.

| Job title(s) | Job role(s) |
|--|--|
| Domestic Green Deal Assessor and Advisor | To provide energy assessments on domestic properties and produce energy performance certificates; advise the client on energy saving behaviour and improvements; advise the client on eligible energy efficient measures and finance; arrange finance and installation of the new energy efficiency measures |

Qualifications

Competence qualifications available to this pathway

N/A

Knowledge qualifications available to this pathway

N/A

Combined qualifications available to this pathway

B1 – Level 3 Diploma in Domestic Green Deal Advice

| No. | Ref no. | Awarding organisation | Credit value | Guided learning hours | UCAS points value |
|-----|------------|-----------------------|--------------|-----------------------|-------------------|
| B1a | 600/5488/8 | ABBE | 47 | 230 | N/A |
| B1b | 600/4934/0 | City and Guilds | 47 | 230 | N/A |

Relationship between competence and knowledge qualifications

The combined qualification consists of 8 mandatory units. Each unit contains knowledge and competency credits and the information below details the split.

- Conduct energy assessments in a safe, effective and professional manner – 3 knowledge, 3 competency credits
- Prepare for Energy Assessments of Domestic property – 2 knowledge, 2 competency credits
- Undertake energy inspections – 6 knowledge, 5 competency credits
- Provide information to customers on the principles, financing and operation of the green Deal – 2 knowledge, 2 competency credits
- Undertake occupancy assessments and give advice – 3 knowledge, 5 competency credits
- Prepare and issue domestic Green Deal Advice Reports – 3 knowledge, 3 competency credits
- Explain the Green Deal Advice Report to the domestic customer – 1 knowledge, 3 competency credits
- Produce and explain energy performance certificates relating to domestic property – 2 knowledge, 2 competency credits

The total number of knowledge credits is 22 and competency credits 25

Essential Skills

An apprenticeship framework must specify as a Welsh certificate requirement the expected achievement levels of Essential Skills in Communication and the Application of Number, and Digital Literacy (where required).

ESSENTIAL SKILLS WALES

| | | |
|------------------------------|--------------------|-----------------------|
| Communication | Min.Level 3 | Credit Value 6 |
| Application of Number | Min.Level 2 | Credit Value 6 |
| IT/Digital Literacy | N/A | |

For the current list of acceptable proxy qualifications and appropriate minimum grade/level requirements, please refer to the most recent version of SASW on the gov.wales website. Additional guidance materials can be found on the Knowledge Base section of the ACW website.

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Progression routes into and from this pathway

Possible progression routes into this framework:

- A' levels or equivalent vocational qualifications with work experience
- Relevant experience
- Foundation Apprenticeship in Construction and the Built Environment or Building Services Engineering
- Welsh Baccalaureate with work experience

Possible progression routes could be as follows:

- Level 4 Diploma in Green Deal Non-Domestic Advice
- Senior roles relating to energy management of commercial properties and specialist project management
- HE qualifications in Building Surveying

UCAS points for this pathway:

(No requirement specified)

Employee rights and responsibilities

Please note that for Apprenticeship starts from 14/10/2016 onwards ERR is no longer a **mandatory** requirement in all frameworks.

However, it may still be included in some frameworks and where it is not explicitly stated that ERR is not a requirement then confirmation of an Apprentice's ERR achievement will still remain a requirement for Apprenticeship certification purposes.

Is ERR a requirement for this framework? **YES** ☒ **NO** ☐

Delivery and assessment

[Framework Developer to complete with relevant info]

[

]

How equality and diversity will be met

Providers will be encouraged to register on the ACE certification system so that information relating to diversity can be collected and analysed.

Instructus Skills will be taking the following steps to promote diversity in the sector:

- Raising awareness in schools about energy assessment and advice as a career through work with careers advisors
- Attending skill events to raise the profile of the sector
- Use of non stereotypical images on the careers website and materials
- Case studies of Apprentices which reflect a cross section of society

Apprenticeships are seen as a vital route to encourage, and facilitate, a greater diversity of individuals into the industry. Employers and training providers are encouraged to offer additional support and mentoring to ensure that apprentices complete their training.

Training providers and employers MUST comply with the Equality Act 2010 to ensure that applicants are not discriminated against in terms of entry to and promotion within, the Industry, using the 9 protected characteristics of :

1. Age
2. Disability
3. Gender
4. Gender reassignment
5. Marriage and civil partnerships
6. Pregnancy and maternity
7. Race
8. Religion and Belief
9. Sexual orientation

Instructus Skills will monitor take up and achievement of all Apprenticeships through the Apprenticeship Review and Approvals Group (ARAG) and continue to take steps to address any barriers to take up and achievement as part of our Sector Qualifications Strategy.

On and off the job training

Summary of on- and off-the-job training

Job roles within energy assessment and advice require a through level of technical competency and knowledge, which will be undertaken through work-based training practice and experience. The total number of hours for this framework is 382 which is made up as follows:

- 230 for the Level 3 Diploma in Domestic Green Deal Advice
- 120 for ESW, Communications and Application of Number
- 20 for ERR induction and recording
- 12 for mentoring

Off-the-job training

Off-the-job training is defined as time for learning activities away from normal work duties. Off-the-job training may include any activity where an apprentice receives any form of instruction, tuition, assessment or progress reviews. For illustration (but not exclusively) private study, coaching, mentoring, e-learning, distance learning or classroom training may count as off-the-job training, provided it is carried out during paid work time.

Apprenticeship

The amount of off-the-job training is **258**. This is made up of the following:

106 hours for the knowledge element of the combined qualification 120 hours for ESW 20 hours for ERR induction and recording 12 hours for mentoring Examples of off-the-job training include the following: Training hours relating to the knowledge qualification Induction where activities are covered away from normal work duties Taught hours relating to Employment Rights and Responsibilities Essential Skills Wales Mentoring/coaching/ feedback and assessment reviews which are carried away from normal work duties Private study in work time including web based learning

How this requirement will be met Off-the-job training needs to: be planned, reviewed and evaluated jointly between the apprentice and tutor, mentor or manager; allow access as and when required by and apprentice either to a tutor, teacher, mentor or manager; be delivered during contracted working hours; be delivered through one or more of the following methods listed above. Off-the-job training must be formally recorded, either in a diary, workbook, portfolio, or be verified by attendance records. A declaration form confirming that off-the-job training hours have been completed must be provided as evidence when applying for an apprenticeship completion certificate. Evidence for off-the-job training will include: Achievement certificate for the Level 3 Diploma in Domestic Green Deal Advice Essential Skills Wales Certificates Employment Rights & Responsibilities evidence Previous experience Where a learner enters an apprenticeship agreement with previous work-related experience, this prior learning needs to be recognised (see Regulatory Qualification Guidance on Claiming credit for further details). To count towards apprenticeship certification, previous experience must be recorded using the appropriate Awarding Organisation's "Regulatory Qualification recognition of Prior Learning" procedures and the hours recorded may then count towards the off-the-job hours required to complete the apprenticeship.

On-the-job training

On-the-job training is defined as skills, knowledge and competence gained within normal work duties. The amount of on-the-job training is **124** which are hours for the competency qualification.

Examples of on-the-job training could include:

- coaching and mentoring given whilst on the job
 - job shadowing
 - company updates on policy and procedures whilst on the job
 - instructions, briefings and guidance given whilst on the job
 - collecting evidence for portfolio work whilst on the job
-
- essential skills practice and development whilst on the job

How this requirement will be met

On-the-job training needs to be:

- planned, reviewed and evaluated jointly between the apprentice and tutor, mentor or manager;
- allow access as and when required by and apprentice either to a tutor, teacher, mentor or manager
- delivered during contracted working hours;
- formally recorded, either in a diary, workbook, portfolio, or be verified by attendance records.

Evidence for on-the-job training will include:

- Achievement of the Level 3 Diploma in Green Deal Domestic Energy Advice

On-the-job training must be formally recorded, either in a diary, workbook, portfolio, or be verified by attendance records. A declaration form confirming that on-the-job training hours have been completed must be provided as evidence when applying for an apprenticeship completion certificate.

Previous attainment and experience

Where a learner enters an apprenticeship agreement having previously attained or acquired the appropriate competencies this prior learning needs to be recognised and documented using the relevant Regulatory Qualification credit transfer, Regulatory Qualification exemption or Recognition of Prior Learning (RPL) procedures (same as off-the-job above).

The amount of on-the-job training required to complete the apprenticeship under the

apprenticeship agreement may then be reduced accordingly, provided the number of on-the-job hours for this framework can be verified for apprenticeship certification.

Apprentices who commence training under a new apprenticeship agreement with a new employer may bring a range of prior experience with them. When an apprentice can claim a substantial proportion of hours towards the on-the-job framework total through prior learning acquired from previous employment or other vocational programmes, then the apprentice's learning programme should include 'customisation'. Training providers are encouraged to identify additional on-the-job training programmes that customise the learning to the new workplace. Customisation programmes may include selecting appropriate units from Regulatory Qualifications, or relevant units recognised as Quality Assured Lifelong Learning (QALL) through a CQFW recognised body, or follow Essential Skills at a level higher than that specified in the framework and other competency-based qualifications/units relevant to the workplace.

The training provider must have transparent APL procedures in place to evidence the level of APL recognition. |

Wider key skills assessment and recognition

While Wider Key Skills are not a **mandatory** part of the framework, training providers are encouraged to provide apprentices the opportunity to achieve them.

For this framework, there are natural opportunities for Wider Key Skills to be embedded within the mandatory units of the following qualifications:

| |
|--------------------------------------|
| <div>Enter Qualification Names</div> |
|--------------------------------------|

Improving own learning and performance

Give examples - signpost to specific units in framework qualifications that would meet these requirements

Working with others

Give examples - signpost to specific units in framework qualifications that would meet these requirements

Problem solving

Give examples - signpost to specific units in framework qualifications that would meet these requirements

apprenticeship FRAMEWORK

For more information visit-
www.acwcerts.co.uk/framework_library