

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?

Please use this link to see if this is the latest issued version of this framework:

afo.sscalliance.org/frameworkslibrary/index.cfm?id=FR04125

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CHANGES TO REQUIREMENTS FOR APPRENTICESHIP STARTS FROM 14TH 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 2016. Apprenticeship starts before this date must continue to meet the 2013 SASW requirements for Essential Skills and Employer Rights and Responsibilities.

Alternatives for Essential Skill qualifications

Foundation apprenticeships (Level 2): Where Essential Skills qualifications are specified in a foundation apprenticeship framework (Level 2), the apprenticeship framework must specify as a Welsh certificate requirement, the acceptance of one of the following recognised proxy qualifications.

For Communication:

- a. GCSE or iGCSE qualification in English language or literature to at least grade G (Level 1 equivalent); or
- b. O Level qualification in English language or literature to at least grade E; or
- c. A/AS Level qualification in English language or literature to at least grade E; or
- d. SCQF Level 4 – Communication Core Skills (Oral communication and written communication); or
- e. SQA National 4 English; or
- f. Functional Skills or Key Skills literacy qualifications in English provided the proxy qualification(s) attained are at Level 1 or above.

For Application of Number:

- a. GCSE or iGCSE qualification in Mathematics to at least grade G (Level 1 equivalent); or
- b. O Level qualification in Mathematics to at least grade E; or
- c. A/AS Level qualification in Mathematics to at least grade E; or
- d. SCQF Level 4 – Numeracy Core Skill (Graphical Information and using number); or
- e. SQA National 4 Mathematics ; or
- f. Functional Skills or Key Skills numeracy qualifications in Mathematics provided the proxy qualification(s) attained are at Level 1 or above.

Apprenticeships (Level 3): Where Essential Skills qualifications are specified in an apprenticeship framework (Level 3), the apprenticeship framework must specify as a Welsh certificate requirement, the acceptance of one of the following recognised proxy qualifications.

For Communication:

- a. GCSE or iGCSE qualification in English language or literature to at least grade C (Level 2 equivalent); or
- b. O Level Qualification in English language or literature to at least grade C; or
- c. A/AS Level qualification in English or literature to at least grade E; or
- d. SCQF Level 5 – Communication Core Skills (Oral communication and written communication); or
- e. SQA National 5 English; or
- f. Functional Skills or Key Skills literacy qualifications in English provided the proxy qualification(s) attained is at Level 2 or above.

For Application of Number:

- a. GCSE or iGCSE qualification in Mathematics to at least grade C (Level 2 equivalent); or
- b. O Level Qualification in Mathematics to at least grade C; or
- c. A/AS Level qualification in Mathematics to at least grade E; or
- d. SCQF Level 5 – Numeracy Core Skill (Graphical information and using number); or
- e. SQA National 5 Mathematics; or
- f. Functional Skills or Key Skills numeracy qualifications in Mathematics provided the proxy qualification(s) attained are at Level 2 or above.

Higher Apprenticeships (Levels 4-7): Essential Skills requirements are as for an apprenticeship frameworks at Level 3.

CHANGES TO REQUIREMENTS FOR APPRENTICESHIP STARTS FROM 14TH OCTOBER 2016

Employer Rights and Responsibilities (ERR)

The final modification to SASW is to Employer Rights and Responsibilities (ERR) which is no longer compulsory in frameworks. Please refer to the Employer Rights and Responsibilities section within the framework document to confirm specific requirements.

Additional Information

It should be noted that SASW has also been modified to reflect existing improvements to Essential Skills Wales Qualifications. These improvements to ESW qualifications were signalled by the revised names:

- Essential Skills Wales Communication is now Essential Communication Skills (still 6 credits in size)
- Essential Skills Wales Application of Number Skills is now Essential Application of Number Skills (still 6 credits in size)
- Essential Skills Wales Information Communication Technology Skills is now Essential Digital Literacy Skills (still 6 credits in size)

Whilst there have been some amendments to the content of ESW qualifications, the most significant change has been to the assessment methodology for these qualifications.

From 1 January 2016, all new starts have had to follow the revised Essential Skill qualifications.

The updated version of SASW, and guidance documents, can be accessed here:

<http://gov.wales/topics/educationandskills/skillsandtraining/apprenticeships/providers/?lang=en&dgd>

Over the coming months, the Essential Skills section within AFO will be amended to reflect the SASW modifications and all current frameworks will be updated and reissued to incorporate these changes. In the meantime, if you are in any doubt as to the requirements of any framework then please contact the relevant Issuing Authority.

Energy Assessment and Advice - non statutory (Wales)

Contents

Framework summary	5
Framework information	6
Contact information	7
Revising a framework	8
Purpose of the framework	10
Entry conditions	12
Level 3: Apprenticeship in Energy Assessment and Advice	14
Pathway 1: Green Deal Domestic Assessor and Advisor	15
Equality and diversity	21
On and off the job training	22
Wider key skills	26
Additional employer requirements	27

Framework summary

Energy Assessment and Advice - non statutory

Apprenticeship in Energy Assessment and Advice

Pathways for this framework at level 3 include:

Pathway 1: Green Deal Domestic Assessor and Advisor

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

This pathway also contains information on:

- Employee rights and responsibilities
- Essential skills

Framework information

Information on the Publishing Authority for this framework:

Instructus

The Apprenticeship sector for occupations in air conditioning, building services engineering, business and administration, cleaning, customer service, 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: 2	This framework includes:
Framework ID: FR04125	Level 3
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. As the industry develops and job roles become defined it is likely that new pathways will be added.

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

Contact details

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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 new policy on domestic green deal advice.

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. Essential Skills Wales

If applicants already have GCSEs in English, Maths and/or Information and Communications Technology (ICT) they still have to do the Essential Skills Wales at the relevant level as these are new qualifications and proxies do not exist.

2. 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 this 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	
B1b	600/4934/0	City and Guilds	47	230	
B1c	000/0000/0	WITHDRAWN	00	000	
B1d	000/0000/0	WITHDRAWN	00	000	
B1e	000/0000/0	WITHDRAWN	00	000	

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

Transferable skills (Wales)

Essential skills (Wales)

	Minimum level	Credit value
Communication	3	6
Application of numbers	2	6
IT	N/A	N/A

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 information)

Employee rights and responsibilities

This is no longer a mandatory requirement.

DELIVERY AND ASSESSMENT OF ERR

All Apprentices MUST receive an induction to the workplace and to the Apprenticeship programme which will include ERR.

ERR will be delivered and assessed via one of two options, which meet the requirements of the nine national outcomes. The options are:

a) Instructus (formerly Skills CfA) workbook

OR

b) Level 2 Award in Employee Rights and Responsibilities

The different delivery methods will give apprentices the flexibility to complete ERR in a way that is most appropriate to them.

RECOGNITION OF ERR:

If the workbook is the preferred method of assessment, the sign off sheet, back page of the workbook, must be signed by the apprentice, the training provider or the employer. The workbook must be retained in the apprentice's portfolio for quality assurance purposes. The sign off sheet must be submitted to the certification authority in order to obtain the final apprenticeship certificate.

If the Regulatory Qualification is the preferred method of assessment the awarding organisation certificate must be submitted to the certification authority in order to obtain the final apprenticeship certificate. At present the Level 2 Award in Employee Rights and Responsibilities is offered by the following awarding organisations:

- City & Guilds Level 2 Award in Employee Rights and Responsibilities (600/5812/2)
- VTCT Level 2 Award in Employee Rights and Responsibilities (600/5598/4)
- FAQ Level 2 Award In Employee Rights and Responsibilities (600/5845/6)

The remaining sections apply to all levels and pathways within this framework.

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 (Wales)

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 (Wales)

Improving own learning and performance

The apprentice will have opportunities to demonstrate the importance of improving own learning through mentoring and progress review sessions as part of the apprenticeship framework.

Working with others

The apprentice will have opportunities to demonstrate working with others in the combined qualification and therefore employers felt that a separate qualification was not appropriate.

Problem solving

The apprentice will have opportunities to demonstrate problem solving skills in the combined qualification, therefore employers felt that a separate qualification was not appropriate.

Additional employer requirements

There are no additional employer requirements for this apprenticeship.

apprenticeship
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