

# Green Deal Guide

The Green Deal Explained



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# Section 1: Introduction to the Green Deal

When the Energy Act 2011 came into force in October 2011, the government established the framework for the most revolutionary scheme for encouraging energy efficiency ever. At the core of the Bill is the Green Deal, which aims to lower UK carbon emission output, improve competition in the energy market and also reduce the national demand for imported gas supplies by offering consumers & businesses alike, access to funding for property improvements as part of a Green Deal Plan.

The Green Deal is a government backed initiative promoting the installation of energy efficiency measures to householders which will reduce energy use leading to lower energy bills. There will be no upfront cost to the householder, instead a finance package will be repaid via a charge on their existing electricity bill over a specified period. The Green Deal 'Golden Rule', set out in legislation, specifies that any additional charge on the electricity bill must be less than the expected savings from the retrofit over the specified period.

The Energy Company Obligation (ECO) is set to replace CERT and CESP and is designed to work with Green Deal to provide additional funding for the fuel poor and to drive more expensive measures e.g. solid wall insulation.

There has been some speculation as to the date of implementation, but the Department of Energy and Climate Change (DECC) has recently confirmed that the Green Deal will be launched in October 2012.

## Why the need for Green Deal?

- 1 Government policy objectives
  - Ageing housing stock -74% of UK properties were built before 1975
  - Homes produce 27% of UK green house gas emissions\*
- 2 Climate Change Act 2008 set carbon emission reduction targets
  - 34% by 2020
  - 80% by 2050
- 3 Average annual household energy bill
  - currently £1,124
  - could rise by 33% (in real terms) by 2030

## How will the Green Deal function?

The Green Deal aims to support CO<sub>2</sub> reduction targets by giving both consumers and businesses the opportunity to improve their property's energy efficiency via the Green Deal Plan with no upfront cost and paid back over time through the energy bills.

However, there are a number of important features which have been designed to protect consumers, and these include the following prerequisites:

- The anticipated cost savings must equal or exceed the collected payments attached to the energy bills (Also known as the 'Golden Rule' of the Green Deal)

- The works carried out as part of a Green Deal Plan must have been proposed by a \*\*Green Deal Advisor working through a certificated Green Deal Advisor Organisation.
- The Measures installed must be carried out by a certificated \*\*Green Deal installer.
- Where appropriate (in the case of householders) the Green Deal provider must give appropriate advice within the terms of the CCA (Consumer Credit Act) and have taken full account of the householder's ability to afford the payments.
- Full and express consent must be obtained from the energy bill-payer, along with all relevant parties before proceeding with a Green Deal plan.
- Disclosure of any Green Deal must be made in the event of the transfer of a property through sale or otherwise, and this will be made through the EPC.

\* Source: Energy Savings Trust

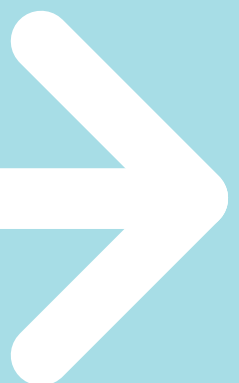
\*\* Certificated by a UKAS accredited Green Deal Certification Body and registered by the Green Deal Oversight Body

Impartial assessment to assess the property for suitable measures. This includes producing an EPC with an Occupancy Assessment which together form the Green Deal Advice Report

The customer can take the assessment to several Green Deal Providers to get quotations for the work

Green Deal measures installed and paid for by preferred Green Deal Provider

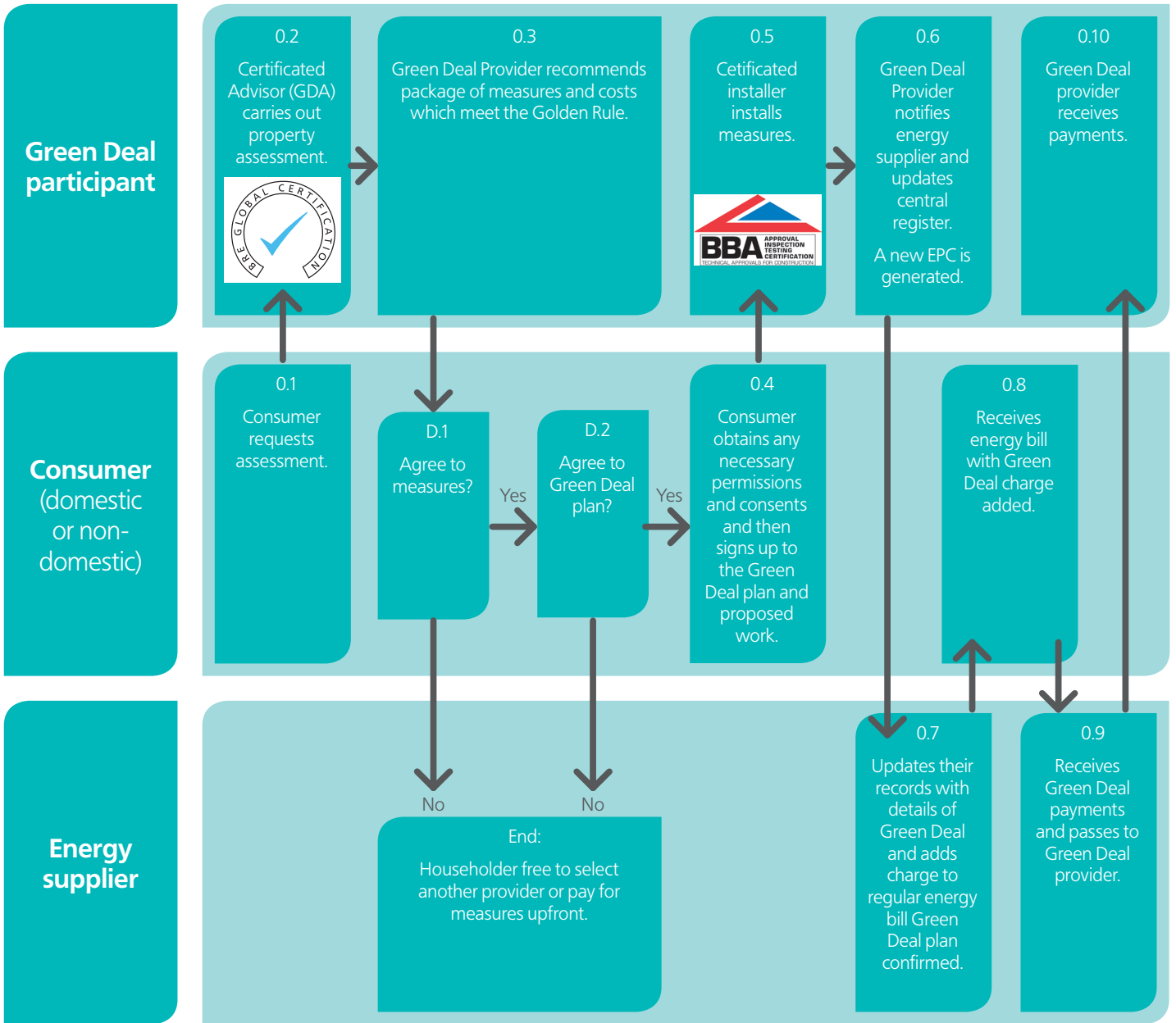
Householder or business begins repaying work through charge on electricity bill



# Overview of the Green Deal Process

## Customer journey through the Green Deal

(Source DECC: The Green Deal - A summary of the Government's proposals)



# BRE Global and BBA Collaboration

## BRE Global and BBA Support in Development of Green Deal

Working alongside the Department of Energy and Climate Change (DECC), BRE Global and BBA have supported the development of the Green Deal. We have also been working closely with a number of major potential Green Deal providers, and are uniquely poised to offer their services as a result, with proven records of impartiality and quality.

Both organisations have successfully completed the UKAS pilot programme and await approval and listing by the Green Deal Oversight Body. Applications for Certification can now be accepted from Advisor and Installer organisations.

**Advisor information: [www.bre.co.uk/greendeal](http://www.bre.co.uk/greendeal)**

**Installer information: [www.bbacerts.co.uk/green-deal/installer-requirements](http://www.bbacerts.co.uk/green-deal/installer-requirements)**

BRE Global is a UKAS accredited, independent, third party approvals organisation offering certification of products, services and systems to an international market. We have been approved for EPBD Energy Assessor schemes against BS EN 45011 since 2007 by DCLG and UKAS\*.

BBA has been offering product Certification for over 40 years and has a similarly long record of approved installer schemes in the insulation sector. All such activities are covered by the BBA's UKAS accreditation to EN 45011.

2011 has been a year of heavy investment by both organisations in working with industry and DECC in helping to develop the Green Deal framework to ensure successful launch in October 2012. We have continued to play a key role in contributing to the development of standards, National Occupational Standards and training criteria. We have contributed to many, if not all, of the various DECC working groups to ensure that the framework is robust and provides opportunities for organisations large and small and particularly for the BRE Global's scheme members through the EPC being an integral part of the Green Deal process.

The BBA has been involved in much of the Green Deal developing framework, including the Installer Accreditation Forum and the development of the recently published installation standard PAS 2030. Therefore, we have an excellent understanding of the requirements that installers will need to meet to become approved under the Green Deal.

BRE Global and BBA have formed a collaboration to deliver Green Deal Advisor and Installer Certification services. The combined expertise of our two Certification Bodies will deliver a total solution for Green Deal Organisations enabling them to provide a comprehensive suite of services to the market.

The two companies are also in on-going talks with industry bodies and several major organisations in planning further partnerships within the Retail, Social Housing and Energy Provision sectors – ensuring the perfect position within the Green Deal market.

*\* BRE Global also offers Certification for Domestic, Non-Domestic Energy Assessors, Home Inspectors and several other schemes. It does not cover Air Conditioning Energy Assessors*



## The Green Deal Advice Report (GDAR)

The largest stakeholder in the Green Deal is the consumer, and therefore the Green Deal Advice Report, which consists of the revised EPC and the Occupancy Assessment plays a vital role as it is the visible output of the assessment visit. A Green Deal Advisor must be able to produce and lodge this full report.

These two documents will not only give details of the energy performance of their property as it stands after the initial visit, but will form the basis of the Green Deal Plan – the measures being offered to help reduce the households fuel bills.

Elements of the revised EPC include:

- Recommendations and Golden Rule based on standard occupancy
- Regional weather (degree days) for cost saving calculations
- Actual U-values where evidence supports
- Additional recommendations (annually refreshed)
- Additional measures modelled (roof insulation, heat recovery, heat pumps etc.)
- Partial installations, room by room
- Occupancy assessment to show effect of current lifestyle on standard savings

The Occupancy Assessment – requiring the input of:

- Occupant numbers
- Number of Showers/Baths
- Heating Systems, patterns & temperature
- Freezers & Fridges
- Driers
- Appliances

This assessment allows the householder to look at EPC recommendations and select one or more of the scenarios for comparison.

The Occupancy tool then calculates the savings based on the standard RdSAP assumptions and the entered occupancy figures. For information on a beta version of the software visit [www.rdsap.org.uk](http://www.rdsap.org.uk)





# Section 2: BRE Global Certification of Green Deal Advisor Organisations

The BRE Global Green Deal Advice Certification scheme operates to a rigorous set of procedures, some which have been adapted from existing (and well-tested) requirements, whilst others have been developed to meet new standards, to ensure that the criteria set under the DECC "Specification for Certification Bodies Certifying the Green Deal Advice Service" are fully met.

Through this guide, and the supporting Quality Plan, BRE Global aim to make the process of registration with the scheme as easy and efficient as possible.

## How do I register for the scheme?

In order to become certificated Green Deal Organisations through the BRE Global scheme, the application process below must be completed, following the scheme requirements.

## What are the Requirements for Green Deal Advisor Scheme?

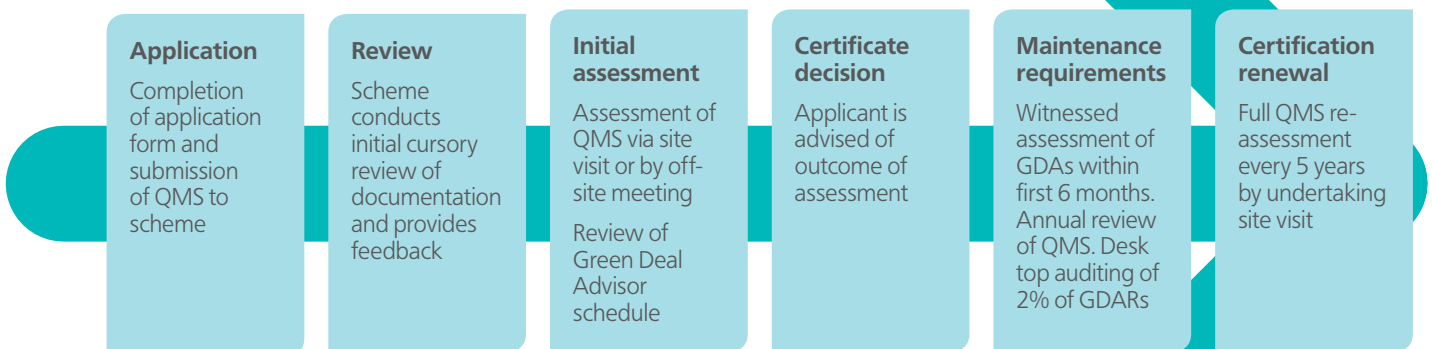
Below we have summarised the key Green Deal Advisor Scheme Requirements (Found in Section 2 of the QP) and the Quality Management Systems (QMS) Requirements.

It is not a requirement of the scheme that participants be ISO 9001 registered, however all organisations must have a robust and credible management system in place. Management review will not be required for sole trader businesses.

### Summary of Quality Management System requirements



### Summary of Application Process





## Certification application process summarised

- Application is via an online form – [www.bre.co.uk/greendeal](http://www.bre.co.uk/greendeal)
- BRE Global Staff review submission & schedule assessment of QMS via either site visit or off-site meeting. Review of Green Deal Advisor schedule is carried out.
- A certification decision is announced once a review has been successfully completed by the auditor.
- Maintenance requirements scheduled
  - Witnessed assessments of Green Deal Advisors carried out according to DECC criteria (See table)

The certificate awarded as a result of this process covers the complete scope of certification – Domestic & Non-Domestic – Green Deal Advisors are listed along with details of EPBD membership, indicates level if Non-Domestic., List of “licensed” Green Deal advisors and issue number of the certificate (schedule will reference the certificate number having its own issue number allowing for changes to be tracked)

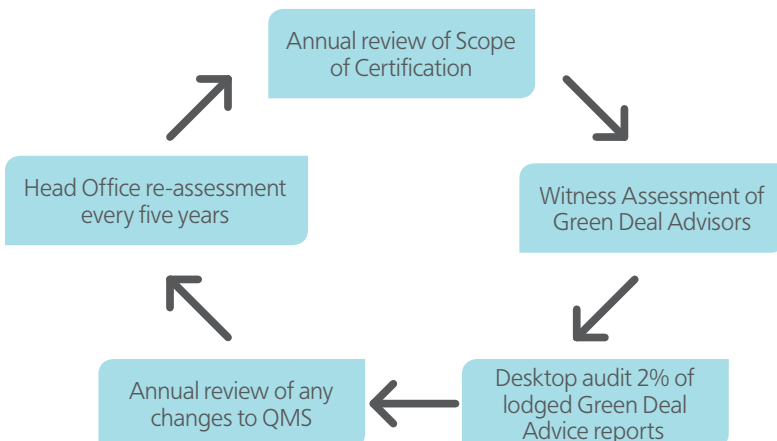
## How much will Certification cost?

Costs in becoming a Certified Green Deal Organisation will vary depending upon:

- The size of organisation
- Number of GDA's

For a quotation for certification services please visit [www.bre.co.uk/greendeal](http://www.bre.co.uk/greendeal) and complete the online application form.

## Summary of Certification Cycle



## Why choose BRE Global Advisor Certification for Green Deal?

- BRE Global has been a key partner on many large projects where the end outcome were significant financial savings as well as environmental improvement.
- BRE Global is independent and impartial, research-based, offering expertise in every aspect of the built environment and associated industries. We help clients create better, safer and more sustainable products, buildings, communities and businesses -

and we support the innovation needed to achieve this.

- BRE Global has extensive experience in reducing environmental impacts of buildings, communities and businesses at all stages, from planning and design, through use and refurbishment, to end of life disposal.
- BRE Training has drawn on the combined expertise of the BRE Group companies to develop a portfolio of training courses and accreditation schemes which can help companies and individuals extend their skills and capabilities, and increase their efficiency and competitiveness.

## BRE Global positioning in Green Deal market

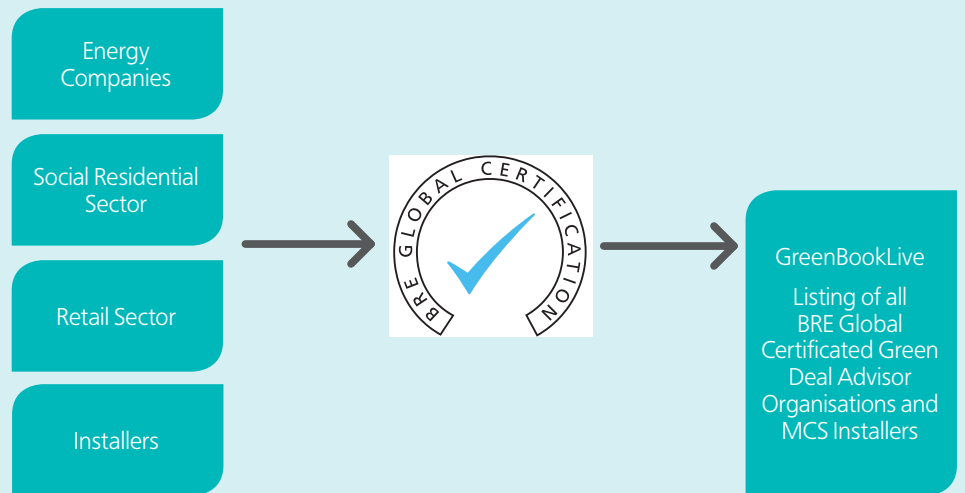


Table illustration of size thresholds for organisations

Size of Organisation (Number of Green Deal Advisors)	Number of witnessed assessments to be performed annually and within first six months of certification
1	1
2	2
5	3
10	4
20	5
30	6
50	8
100	10
150	13
200	14
250	15



## GreenBookLive

GreenBookLive is a free to use online database designed to help specifiers and end users identify products and services that can help to reduce their impact on the environment.

It brings together listings from a number of organisations and delivers comprehensive information on 'green' products and services. Some of these products and services are independently approved by BRE Global, others are listed based on information provided by other reputable organisations. Independently listed products and services that are certified by BRE Global will carry our 'BRE Global Listed' certification mark. Visit [www.greenbooklive.com](http://www.greenbooklive.com) for more information.

## Green Deal Advisor Qualification & Training with BRE Training

The Revised Energy Assessment National Occupational Standards have been converted to QCF Units and form part of the new qualifications and credit Framework.

These new NOS and QCF Units have been developed for both domestic and non-domestic Green Deal.

The additional QCF units for Green Deal Advice services are as follows:

- ASTGDA1: Provide information to customers on the principles, financing and operation of the Green Deal - Level 3-Credit 4
- ASTGDA 2: Undertake home visits to carry out Occupancy Assessments and give advice Level 3-Credit 8
- ASTGDA 3: Prepare and explain Domestic Green Deal Advice Reports Level 4-Credit 6
- ASTGDA 4: Explain the Green Deal Advice report to the domestic customer Level 3-Credit 4
- ASTGDA 5: Carry out non-domestic energy inspections to determine an Operational Profile and give advice Level 4-Credit 10
- ASTGDA 6: Prepare and issue Non-domestic Green Deal Advice Reports Level 4-Credit 9
- ASTGDA 7: Explain the Green Deal Advice report to the non-domestic customer Level 4-Credit 4

BRE Training is a City & Guilds, ABBE & Edexcel (BTEC) approved assessment centre, and we have been offering NVQ qualifications for all energy assessor qualifications and more for many years.

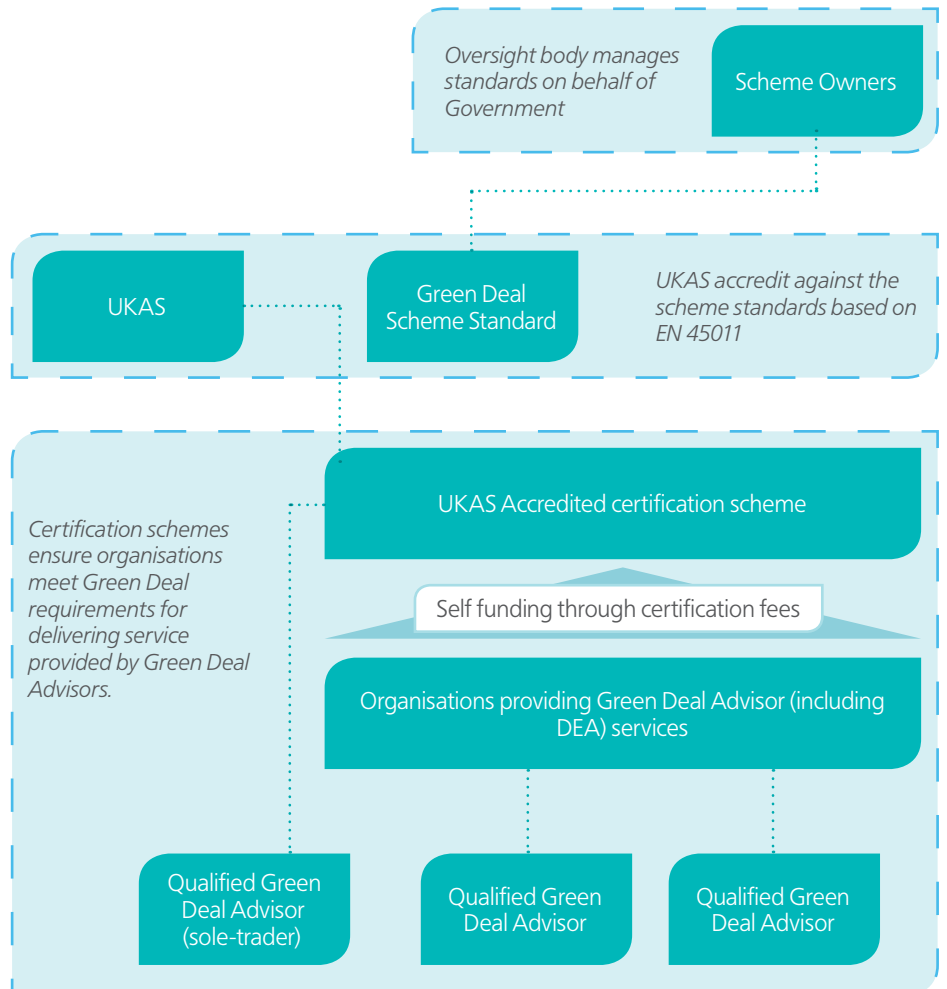
We offer a range of other courses & CPD, in subjects including sustainability, fire, health and safety & energy management.

BRE Training offers both classroom-based and online learning courses providing real flexibility – learn when you need - with many of our more popular courses being taught at locations across the UK – BRE Global Training (e: [train@bre.co.uk](mailto:train@bre.co.uk) t: 01923 664829)

BRE Training has already trained:

- 1,920 students in energy assessment
- 2,000 Code and BREAM Assessors per year
- 150 Code designers

- 160 Passivhaus Designers
  - 300 students in Renewable energy technology
  - 100 students in Sustainable Refurbishment
- Being a BRE Training brings a host of benefits:
- Identification with an internationally renowned brand training provider
  - High quality training with flexible learning solutions
  - Access to BRE Global's 600+ consultants & staff
  - Extensive onsite facilities
  - Use of BRE Training Green Deal enhanced modelling software
  - Regular Green Deal awareness updates



(Source DECC - Green Deal: Advisors – May 2012) – How BRE Global GD Certification fits in.





# Microgeneration Installer Certification through BRE Global Ltd.

BRE Global Ltd offers Installer Certification to the following Microgeneration Technologies:

- Solar Thermal
- Solar Photovoltaic
- Micro Wind
- Biomass
- Heat Pump Systems
- Heat LED Micro CHP
- Electricity LED Micro CHP

The remit of BRE Global Ltd as a Certification Body under the MCS is to assess and certificate installers initially for competence against the scheme requirements, and to ensure that they maintain this level of competence on an ongoing basis.

BRE Global offers UKAS accredited certification services installer approvals under MCS

All applicants for the Microgeneration Certification installer scheme will have to demonstrate that they meet the requirements of the Green Deal Code of Practice.

If you are certified under the Microgeneration Certification Scheme (MCS), subject to meeting the above additional requirements, you will be registered automatically if you wish to operate under the Green Deal on the basis of your MCS approval.

## Why choose BRE Global?

Benefits of BRE Global certification for Microgeneration are:

- BRE Global is an independent, trusted, world leading certification brand
- We are the only organisation that provides both installer and product certification, each independently UKAS accredited truly making us a one-stop-shop
- BRE Global has an unprecedented knowledge of all renewable energy technologies and the facilities to test most products in the market
- BRE Global endeavours to provide the highest standard of assessment, consistency and professionalism.

We also take our responsibilities in terms of our UKAS accreditation very seriously.

Approvals can be combined with the measures offered by the BBA Installer Certification Scheme to offer an integrated service for multiple measures.

BRE Global has an excellent reputation as an authoritative and independent leader in the built environment. So an Installer certificated by BRE Global is perceived as sharing the same values. Your clients will see that by maintaining

your MCS certification through BRE Global you are committed to 'quality' and we actively encourage you to use your association with BRE Global to help promote your business.

MCS certification achieved through BRE Global is both rigorous and robust. Knowing that your business has met the challenge and demonstrated excellence will provide you (and your clients) with renewed confidence.

BRE Global assessment adds value to your business – we leave other certification bodies to simply tick boxes - we believe a BRE Global assessment provides the gold standard.

Part of your BRE Global Ltd Microgen Installer certification is inclusion in "GreenBookLive".

For Further information on Microgeneration certification scheme please contact [microgeninstallers@bre.co.uk](mailto:microgeninstallers@bre.co.uk) for the relevant forms.

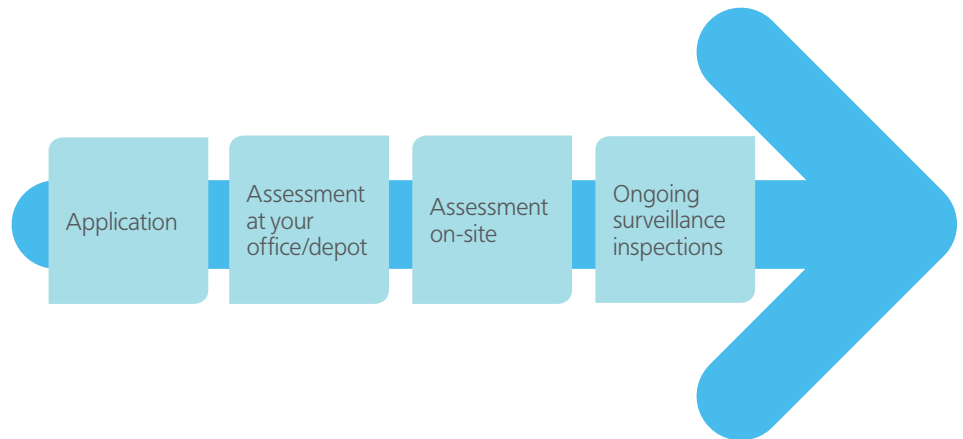


## Section 3: BBA Certification of Green Deal Installers Approval

Becoming a Green Deal authorised Installer via Certification with the BBA is straightforward, especially if you are already a BBA Approved Installer under one of our existing schemes such as our Cavity Wall Insulation Approved Installer scheme.

Follow the simple steps outlined in this publication and you will be on your way to registration as a Green Deal Installer and being part of the Government's flag-ship energy efficiency initiative for improving British property.

At first glance the requirements can appear complex and daunting, but the BBA will work with you to lead you through the process as follows:



### How do I become an authorised Green Deal Installer?

In order to install measures under the Green Deal and the Energy Company Obligation (ECO), it will be necessary for installers to become Green Deal authorised, which will require Certification from a UKAS accredited body such as the BBA followed by registration with the Oversight body (which can be facilitated by the BBA).

### What are the requirements?

The requirements are set out in a Green Deal Code of Practice and Publically Available Specification (PAS 2030: 2012) issued by DECC.

The initial BBA assessment will be a two stage process, firstly an office audit to examine this system to evaluate whether it is sufficiently developed to ensure that a consistent level of quality will be achieved in all cases. A single visit can normally cover all of the measures for which the Installer is seeking approval.

On satisfactory completion of this stage, a second inspection will be made on site for each of the measures for which the installer is seeking approval. This will examine the on-site processes and the competence of the staff involved.

Once this stage is complete, the installer can be certificated against the requirements of PAS 2030 and their details passed to the Oversight Body for registration as a Green Deal Approved Installer.

Installer Certification includes evaluation of the core requirements in sections 4 to 7 of the PAS. This means:

- Initial evaluation of installation process and management by office and site visits
- On-going surveillance visits
- Adherence to the Green Deal Code of Practice.

The inspection process set out above will be familiar to installers already approved under a BBA installer scheme. For existing approved BBA installers, while there may be some additional work required to qualify under the Green Deal, this can be carried out together with existing annual visits to help minimise costs.

### Why should installers choose the BBA?

The BBA believes that it has a unique set of credentials to be able to guide installers through the process with the minimum of disruption to their business. Our key attributes include:

- Being totally independent with no conflict of interests
- Having forty full time regionally based inspectors, all of whom have worked on site
- Having a respected brand with over forty years of experience in running construction installer schemes
- Being competitively priced and offering a range of different measures

- Having excellent technical support with a clear understanding of product and installation.
- Links to product Certification, allowing easy compliance with additional requirements such as Building Regulation compliance.
- MCS measures can also be covered in partnership with BRE Global (see below).

### How much will it cost?

This will depend on a variety of factors including:

- Whether you are an existing installer under a BBA Installer Scheme
- Which areas you wish to become approved under the Green Deal e.g. EWI, CWI, Loft Insulation, MCS or a combination of these measures
- How many depots you operate from.



## Which Green Deal measures can the BBA certify?

- Cavity wall insulation
- Loft Insulation
- Pitched roof insulation
- Flat roof insulation
- Internal wall insulation
- External wall insulation
- Hybrid wall insulation
- Draught proofing
- Floor insulation
- Energy efficient glazing and doors.

Installers approved by the BBA will be licensed to use a new BBA logo as illustrated\*.

This logo can be used on letterheads, advertisements, literature, quotations, invoices, websites and vehicles.



**APPROVED INSTALLER nnnn**

**Cavity Wall Insulation Installer**

The relevant installer number must be shown directly below the logo as shown below plus the name(s) of the measure(s) for which approval has been achieved.

## What's the application and certification process?

### How will I be assessed?

We will be looking at the installation process, record keeping, management and service provision aspects of the PAS and the Code of Practice, including:

- Pre-installation survey
- Use of agreed installation method statements
- Use of Green Deal eligible products and systems
- Correct use of Green Deal Quality Mark (when available)
- Avoidance of conflicts of interest
- Agreement of specification changes with Green Deal Provider
- Building Regulations and planning issues (e.g. conservation area)
- Adequacy of site supervision and competency of technicians (carding)
- Supervision of subcontractors
- Equipment, tools and calibration
- Checking, handling and storage of products/systems
- Contact with customers and provision of information
- Handling of complaints
- Insurance and warranty provision
- Adherence to all relevant Green Deal Code of Practice requirements.

### What happens after initial certification?

The Green Deal requires that on-going review of Certificated installers is carried out, based on an evaluation of at least 1% per annum (minimum of 1) of recorded installations for each of the measures for which the installer has been certificated.

In normal circumstances, this means an annual office visit and a number of site visits (minimum of one per annum) for each certificated measure. In most cases, the annual office visit will include all the certificated measures carried out from that office/depot during the same visit. Depending on the type of measure, a proportion of the on-site evaluation requirement may include visits to completed installations as well as sites in progress.

### How do I apply to become an Installer under the Green Deal?

Although applying to become a Green Deal Installer may seem daunting, the BBA can guide you through the process in simple stages with the minimum of disruption to your business.

Contact us now for an application form on:

e-mail: [greendeal@bba.star.co.uk](mailto:greendeal@bba.star.co.uk)

Phone: 01923 665300

**BRE Trust**

The BRE Trust uses profits made by BRE Group to fund new research and education programmes, that will help it meet its goal of 'building a better world together'.

The BRE Trust is a registered charity in England & Wales:  
No. 1092193, and Scotland: No. SC039320.

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