

**Domestic Energy Efficiency Advice Code of Practice Application Form –  
Installations**  
**Notes for Applicants: 2004 Edition (amended September 2006)**

<b>Quality of Advice and Information</b>		<i>Tick for yes</i>	<i>Notes for applicants</i>
<b>1</b> <b>*</b>	<b>There are written procedures in place relating to the manner in which the survey and the installation are carried out and the way in which energy efficiency advice is provided.*</b>	<input type="checkbox"/>	<b>Compulsory</b>
	a) Which of the following do you use? <input type="checkbox"/> Advice checklist <input type="checkbox"/> Computer surveys <input type="checkbox"/> Handwritten forms <input type="checkbox"/> Other (please state)		Tick as many of these boxes as apply (but you must tick at least one)

<b>Training and Development</b>		<i>Tick to confirm</i>	<i>Notes for Applicants</i>
<b>2</b>	<b>All staff that carry out surveys and installations including commissioning equipment (i.e. customer facing roles in the home) are trained in giving advice about energy efficient specification and use of the energy efficiency measures.</b>	<input type="checkbox"/>	<b>Compulsory</b>
	a) Please supply a list of the staff that have a customer facing role in the home, with brief details of the energy efficiency training they have completed.		Please fill in the table below. Use an additional sheet if necessary

Name	NVQ	C&G	Best Practice Programme	Other (please state)
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

<b>Customer Access</b>		<i>Tick for yes</i>	<i>Notes for Applicants</i>
<b>3</b>	<p><b>All customers are given energy efficiency advice about the energy efficiency measures that are being/have been installed. The advice comprises, at the appropriate stage of the installation:</b></p> <p><b>i) Best practice advice on system selection for the property and lifestyle.</b></p> <p><b>ii) Good practice advice and guidance on the use of the energy efficiency measure(s).</b></p> <p><b>iii) Good practice advice on maintenance of the energy efficiency measure(s).</b></p>	<input type="checkbox"/>	<b>Compulsory</b>
	<p>a) Where do you source your best practice information from?</p> <p><input type="checkbox"/> Manufacturers</p> <p><input type="checkbox"/> Energy Efficiency Best Practice for Homes Programme</p> <p><input type="checkbox"/> Trade Association</p> <p><input type="checkbox"/> Other (please state)</p>		<p>Tick as many of these boxes as apply (but you must tick at least one)</p>
	<p>b) How do you ensure staff involved in carrying out surveys and installations are aware of and made use of best practice guidelines?</p> <p><input type="checkbox"/> Training</p> <p><input type="checkbox"/> Website/intranet</p> <p><input type="checkbox"/> Regular staff updates</p> <p><input type="checkbox"/> Weekly meetings</p> <p><input type="checkbox"/> Other (please state)</p>		<p>Tick as many of these boxes as apply (but you must tick at least one)</p>
	<p>c) Procedures are in place to ensure that demonstrations of system controls are understood by the customer, as well as essential maintenance instructions</p>	<input type="checkbox"/>	<p>You must be able to tick YES for this question</p>

<b>Quality Assurance and Service Improvement</b>		<i>Tick to confirm</i>	<i>Notes for Applicants</i>
<b>4</b>	<p><b>Records of all installations of energy efficiency measures are provided for/maintained within an auditable system.</b></p>	<input type="checkbox"/>	<b>Compulsory</b>
	<p>a) Is your auditable system:</p> <p><input type="checkbox"/> Electronic</p> <p><input type="checkbox"/> Hard Copy</p> <p><input type="checkbox"/> Other (please state)</p>		<p>Tick as many of these boxes as apply (but you must tick at least one)</p>
	<p>b) How is your system auditable?</p> <p><input type="checkbox"/> By Reference Number</p> <p><input type="checkbox"/> By Surname</p> <p><input type="checkbox"/> By Address</p> <p><input type="checkbox"/> Other (please state)</p>		<p>Tick as many of these boxes as apply (but you must tick at least one)</p>

	c) I have written policy/procedure/guidelines to cover this element	<input type="checkbox"/>	This question is optional
<b>5</b>	<b>A customer feedback system is in place to gather information that can be used to measure the quality of staff performance and to recommend improvements to the provision of energy efficiency advice.</b>	<input type="checkbox"/>	<b>Compulsory</b>
	a) How do you collect customer feedback? <input type="checkbox"/> Self-completion questionnaires <input type="checkbox"/> Face-to-Face (direct at time of installation) <input type="checkbox"/> Over the phone <input type="checkbox"/> Other (please state)		Tick as many of these boxes as apply (but you must tick at least one)
	b) How do you share the feedback with your staff?		You must answer this question. Use an additional sheet if necessary
	c) I have written policy/procedure/guidelines to cover this element	<input type="checkbox"/>	This question is optional
<b>6</b>	<b>An effective quality assurance system is in place to ensure that any contracted and sub-contracted personnel specifically involved in installing energy efficiency measures meet the appropriate parts of the Code of Practice.</b>	<input type="checkbox"/>	<b>Compulsory</b>
	a) Do you have any contracted or sub-contracted personnel specifically involved in installing energy efficiency measures?	<input type="checkbox"/> Yes <input type="checkbox"/> No	You must answer this question. If you answer YES, you must also answer 6b, 6c, 6d and 6e.  If you answer NO, go straight to question 7
	b) Do you require all your contracted or sub-contracted personnel to have signed up to the Code of Practice?	<input type="checkbox"/>	If you answered YES to 6a, you must also answer one of these questions. Use an additional sheet if necessary
	c) Is compliance with the appropriate parts of the Code of Practice explicit in your contract / agreement with them?	<input type="checkbox"/>	
	d) If no (to part b or c), how do you ensure that they meet the appropriate parts of the Code of Practice?		
	e) How do you monitor compliance with the appropriate parts of the Code of Practice?		If you answer YES to 6a, you must also answer this question. Use an additional sheet if necessary.
<b>7</b> <b>*</b>	<b>There is an explicit policy setting out the procedures and guidelines for carrying out surveys and installations to ensure staff and customer safety.*</b>	<input type="checkbox"/>	<b>Compulsory</b>