Conduct of Company Site Survey

Consultant guidance note

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# CONDUCT OF SITE VISIT

## Health and Safety

The customer-completed pre-visit questionnaire will be sent to the consultant as part of the engagement process. This questionnaire captures the customers’ requirements regarding Health & Safety compliance whilst on site. Where appropriate, this will require the consultant to attend a Health & Safety briefing and for personal protective equipment (PPE) to be worn prior to admittance to operational areas. Consultants must adhere to customers Health and Safety requirements and should conduct their own risk assessment prior to visiting site and throughout their time on site. If, at any time, consultants assess there to be a risk of death or injury they should cease that activity and explain their concerns to the customer. At all times, Health and Safety takes precedence.

## Disposition and approach

In addition to bringing their technical and engineering skills to bear, consultants should also use their business skills to develop a rapport with the customer in order to encourage, inspire and motivate implementation of energy saving projects.

Experience has shown that the relationship between the customer and the consultant can have a significant bearing on the level of implementation and action taken by a customer. It is therefore important that the consultant engages with a customer in a professional manner at all times and builds trust and confidence around the advice and guidance being given.

Although there will be occasions when consultants observe poor/bad practice regarding the operation of customer systems and processes, the consultant should impart the best practice guidance in a constructive, non-critical fashion. Equally, when good/best practice is observed this should be noted and praised. In this regard, the consultant’s ‘tone of voice’ – both verbal and written – should be friendly, authoritative and encouraging with the objective of building positive relationships with customers in order to support their journey to better energy performance.

## Surveying instrumentation

The Purchase Order and/or scope of work will provide details on the key energy using systems and activities undertaken at the customers’ site. This will inform the consultant as to the type of instrumentation needed for the thorough conduct of the survey. Instrumentation commonly required includes:

* Single and three-phase electricity loggers e.g. for main incomer and sub-circuits;
* Ultra-sonic detectors e.g. for compressed air and steam systems;
* Lux meter;
* Thermal imaging camera e.g. for locating deficient/damaged thermal insulation;
* Flue-gas analyser;
* Temperature sensors e.g. room and pipework/process.

Consultants should ensure that they deploy appropriate metering and measurement equipment in order to produce a comprehensive evidence-based report.

## Structure of the site visit

Ahead of the site visit, the consultant should engage with the customer to confirm the date, time, location, who within the business they require access to e.g. Engineering/Production/Maintenance Manager/Director, and other logistical considerations. The consultant should also outline the structure for the visit. Typically, this might include:

* Health and Safety briefing;
* Introductions to key stakeholders;
* Opening meeting to agree the structure for the day;
* Fitting of metering/monitoring/logging equipment;
* Guided walk-through of the facilities;
* Supervised/unsupervised review of processes and systems (as agreed with customer); and
* Closing meeting at end of site visit.

The closing meeting should: (a) provide initial feedback on observations (good and bad); (b) agree arrangements for retrieving data logging equipment; (c) confirm actions regarding customer-provision of any outstanding/required data/information; (d) indicate when the site visit report will be available; and (e) agree arrangements for the final briefing post-issue of survey report.

Photographs of notable observations should be taken whilst on-site (subject to permission from customer) for incorporation into the survey report.

Remember, the key purpose of the site visit is to identify measures that the customer can take to reduce their energy consumption and costs. This will entail consideration of energy procurement, management, conservation, efficiency and low carbon / renewable energy technologies.

Aspects and systems to be reviewed as part of a ‘general’ site survey will typically include (where applicable):

* Operation of existing energy policy and strategy at the site;
* Energy management accountability and responsibility structure;
* Energy procurement;
* Energy metering, monitoring and targeting and standard of reporting;
* Energy performance against appropriate benchmarks;
* Levels of staff awareness and engagement;
* Process energy usage e.g. steam, furnaces, refrigeration, compressed air;
* Electrical motors and drives;
* Pumps and fans;
* Building services systems e.g. HVAC, lighting;
* Building fabric e.g. insulation, draught-proofing;
* Controls e.g. process and building services;
* IT and small power loads;
* ‘Out-of-hours’ energy usage; and
* Opportunities for combined heat and power, low carbon and renewable energy solutions.

Consultants should not change any controls or equipment settings whilst on site. However, if a control setting change is recommended to improve system efficiency, this should be communicated to the customer to enable them to make the change if they choose to do so.

# THE SITE VISIT REPORT



## Objective

The key objectives of the site visit report are to provide a written record of:

* Observations regarding the standard of energy management at the site;
* Analysis of energy usage and insightful commentary to improve the customers understanding of factors influencing usage;
* A prioritised, costed action plan and outline business case for investment; and
* ‘Next-steps’ required to realise the savings opportunity.

As referred to previously, the ‘tone’ of the report should be constructive, non-critical and encouraging of customer action. The report contents should be:

* Site specific i.e. focussed on the customer’s needs and avoid generic and unnecessary content / padding;
* Evidence based i.e. referencing measured data where possible;
* Accessible i.e. understandable to a non-technical reader; and
* Succinct i.e. focus should be on quality of content, not quantity.

Depending upon the size and nature of the customer’s facilities, it is unlikely that the consultant will have time to fully develop investment-grade business cases for major projects. However, the expectation is that the consultant will be able to provide realistic budget figures for capital projects alongside an accurate assessment of the expected savings arising from any investment. Additionally, the ‘next steps’ required to advance each recommendation should be clearly specified e.g. contact suppliers to obtain proposals and quotations (encouraging best-value procurement using whole-life costing and competitive tendering).

The report should provide a structured, systematic account of the opportunities that exist at the site that fall within the customer’s investment criteria. Care should be taken to ensure that improvement measures are prioritized to encourage implementation in an optimal sequence and that ‘either/or’ recommendations are clearly identified to avoid double counting of savings potential.









## Sample energy report

In order to illustrate the standard of report expected, we have prepared a sample report. See document *“Site Visit Report Sample”*. This sample report is provided for guidance only and should not be interpreted as a template.

It is expected that consultants apply their own skills, knowledge, experience and IP to produce high quality reports that deliver on the central objective of the company site visit programme namely to inspire and motivate businesses to take action to implement measures.