**Standard Operating Procedure**

**Business Energy and Water – Undertaking a Site Assessment**

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| **Purpose** |

This Standard Operating Procedure (SOP) sets out procedures for the assessor for the Actsmart Business Energy and Water Program to follow when undertaking client energy and water site assessments.

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| **Scope** |

This procedure applies to all staff undertaking site assessments for the Actsmart Business Energy and Water Program. This includes, but is not limited to, the Lead Assessor for the program, the Actsmart Senior Energy and Water Assessor, the Manager of the Actsmart Business Energy and Water team, and any staff taking part in the assessment such as new employees undergoing training or other staff (technical and non-technical) for the purposes of cross-team training.

The employees undertaking the assessments are responsible for being familiar with this SOP and applying it in practice. The employees undertaking the assessments are responsible for identifying, mitigating and reporting potential and real risks and hazards.

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| **Procedure** |

The purpose of the site assessment in the Business Energy and Water Program is the following:

* build rapport with the client and to answer any questions they may have about the program.
* identify inefficient energy and water consuming equipment on the premises such as lighting, heating/cooling systems, refrigeration systems, general business appliances and water fixtures for the purposes of recommending solutions to reduce energy and water consumption (this is done with the assistance of the client)
* document the complete suite of energy consuming equipment onsite for the purposes of reconciling the client’s actual energy bills with modelled consumption.

**Field Equipment**

The following equipment is provided by Actsmart for the purposes of undertaking the site assessment:

Mobile phone/camera

PowerMate energy monitor

Tape measure

Pen and clipboard with client running sheet

Ultrasonic distance measuring device

Temperature/humidity data-loggers

Ballast discriminator

**The Day Prior to the Site Visit (Optional)**

The day prior to the site visit:

* call the client to check they are still available at the nominated time for the assessment
* check with the client to see if there are any potential safety issues (for example areas undergoing construction or renovation)
* ensure the car booking is still valid.

**The Day of the Site Visit**

1. Ensure you are wearing your Actsmart Business shirt and have your name badge and field equipment with you. Familiarise yourself with the Risk Assessment Procedures for Carrying Out Site Assessments, below.
2. Record your site visit details on the whiteboard in the office. This includes your departure time, the location(s) of your assessment(s) and your anticipated return time.
3. Ensure you leave the office with sufficient time to arrive 5-10 minutes prior to the nominated start time of the assessment.
4. Pick up the keys to the car from the Facilities Manager.
5. If you are held up during travel (heavy traffic, got lost enroute, mechanical problems with the car, etc) and think you may be late for the assessment, pull over to the side of the road in a safe location and call the client letting them know you may be late and estimate the delay. If there is no answer leave a voice message for the client. If convenient, call again.
6. Upon arrival park and secure the car.
7. Upon entry to the client’s premises introduce yourself as the ACT Government Actsmart Business Energy and Water Assessor.
8. Undertake the site assessment:
   1. Record the opening hours of the business (incl holiday shutdown times).
   2. Request electricity and water bills if they have not already been provided. If the client is with ActewAGL a recent bill (or photograph of the front page of a recent bill) is all that is required.

If the client is not with ActewAGL a copy (or photograph) of every bill (all sides) from the last 12 months is required.

* 1. Identify all energy consuming equipment including wattages and run times (if different from the normal opening hours) of the premises.
  2. Ask the client’s permission to take photographs where you require.
  3. Engage with the client during the walkthrough highlighting equipment that can potentially be upgraded, behaviours that can be modified in order to reduce consumption, and provide positive feedback to clients when they have proactively undertaken steps to reduce their consumption.

1. Once the walkthrough has been completed ask the client if they have any other questions. Provide an indication of when the report will be sent to them and if they request it, provide information on the chronology of the rest of the process.
2. Depart the premises and either continue to the next assessment or return to the office. Drop the keys back to the Facilities Manager. If you’re going to be late back ensure you contact someone at the office. Ask that person to contact the Facilities Manager if you will be returning the car late so the person with the next booking can potentially make alternative plans.
3. Remove your name from the whiteboard and inform those that you had notified of your departure that you have returned.

**Risk Assessment Procedures for Carrying Out Site Assessments**

The Actsmart officer must comply with the *EPD Standard Operating Procedure, Fieldwork of Sustainability and Climate Change Division* (2016) in planning and attending visits. The following table outlines the main potential risks associated with undertaking a site assessment and informs the subsequent list of procedures to be undertaken to mitigate the risks. This is by no means a complete list of potential risks. It is to be periodically reviewed and updated, and is to be reviewed in relation to the policies and documentation outlined at the end of this document.

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| **Risk Description** | **Likelihood Rating** | **Consequence Rating** | **Risk Level** | **Risk Acceptability** |
| **1. Manual Handling Injury** Crawling into difficult spaces or having to adopt awkward postures during inspection activities leads to back, neck or shoulder strain | Possible | Minor | Low | Acceptable Given Controls |
| **2. Physical, psychological or emotional distress**  Difficult / argumentative, inappropriate or violent clients cause physical, psychological or emotional distress | Rare | Moderate | Low | Acceptable Given Controls |
| **3. Accusation of Inappropriate Behaviour** Accusations of inappropriate behaviour towards clients leads to personal distress, reputational damage or litigation | Rare | Moderate | Low | Acceptable Given Controls |
| **4. Incidental Injury.** Slips, trips and falls leads to broken bones, cuts, abrasions or needle stick injury | Possible | Moderate | Medium | Acceptable Given Controls |
| **5. Vehicle Accident** Vehicle accident to or from visit results in damage to vehicle, injury or death | Rare | Major | Medium | Acceptable Given Controls |

Controls related to the risks identified in the table above (Refer to Risk Register attachment at the end of this document):

1. The lifting or moving of objects, other than light objects, in order to view appliances or equipment nameplate specifications, is not to be undertaken during the assessment.

The assessor is not to request or agree to the client moving heavy objects in order to gather information due to the risk of personal injury.

Occasionally the assessor may move into narrow spaces, or bend down, in order to gather information. This should be avoided when in close proximity to equipment that has automated starting schedules such as large condenser units for heating/cooling.

1. Because Actsmart are visiting the business at the client’s request and contact with the client has already been established, it is unlikely this will occur. However, should the client become aggressive during the assessment, using their own discretion as to the level of aggression, the assessor is to thank the client for their time and remove themselves from the premises, following the protocols outlined in the *EPD - Fieldwork Safety and Security Policy and Framework*. The assessor is to report back to the Manager, Business Energy and Water Program on the incident.

These above steps are also applicable to risk number 3 (accusation of inappropriate behaviour).

1. The assessor, during the course of the site assessment, shall not stand on ladders, step ladders, tables or any other elevated platform in order to undertake the assessment.

When undertaking overhead lighting inspections the assessor shall stand in the same location until the inspection is complete. That is to say, walking while looking up is not to be undertaken.

When carrying out the assessment the assessor should be particularly aware of the following hazards when working in kitchens:

* slippery floors
* hot surfaces on grills, griddles, bain-maries, cooktops and hotplates. Avoid touching any surface due to potential contamination of food preparation surfaces.

When inspecting heating/cooling equipment be particularly aware of the potential for the equipment to start automatically and avoid standing in front of the equipment where air can be blown out of the unit.

1. EPSDD vehicles are to be driven within the designated speed limits and appropriate to the road conditions (eg, for example reducing travel speed by 10km/h in the wet). All road signage is to be obeyed and the assessor is to drive conservatively and with courtesy.

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| **Related Legislation, Policies and Standards** |

**Legislation**

*Work Health and Safety Act*

http://www.legislation.act.gov.au/a/2011-35/default.asp

*ACT Public Service Management Act 1994*

<http://www.psm.act.gov.au/legislation/psm>‐act/PSM‐1994‐37.pdf

*ACT Public Service ‐ Best Practice Notes Injury Prevention and Management* <http://www.psm.act.gov.au/legislation/bpn/bpn.htm>

**Policies**

*Environment and Planning Directorate – Fieldwork Safety and Security Policy and Framework*

<http://epdintranet.act.gov.au/__data/assets/pdf_file/0010/52966/S_-_Fieldwork_Security_Policy_and_Framework09sep.pdf>

*Motor Vehicle Policy Handbook*

<http://epdintranet.act.gov.au/__data/assets/pdf_file/0011/98615/ESDD_Motor_Vehicle_Policy_Handbook.pdf>

*Privacy policy*

<http://www.environment.act.gov.au/about/privacy>

**Standards**

<http://www.nohsc.gov.au/OHSLegalObligations/>

Occupational Health and Safety Management Systems – Specialisation with guidance use. AS/NZ 4801:2001.

Occupational Health and Safety Management Systems – General guidelines on principles, systems and supporting techniques. AS/NZ 4804:2001.

Risk Management AS/NZ 4360:2004.

**Other documents of direct relevance**

*EPD Security Incidents Operating Procedure*

<http://epdintranet.act.gov.au/__data/assets/pdf_file/0008/52964/P-Q_-_Security_Incidents_-_Security_Operating_Procedure.pdf>

*EPD Standard Operating Procedure, Fieldwork of Sustainability and Climate Change Division* (2016)

Sustainability Programs Risk Register



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