

Remote Milestone Review Guidance Note

Purpose

This note is intended to provide guidance to Manufacturers contracted to deliver appliances, components and/or meters within Work Packages 4, 5 and 10 of the Hy4Heat programme. Remote review of milestones provides the option to verify delivery without necessitating physical site visit(s). They can provide greater flexibility and reduce overall resourcing requirements, including the need to travel. Although introduced in response to Covid-19, consideration will be given to their continued use as and when conditions and restrictions are eased.

Scope

This guidance is relevant for those milestones which require a site visit. There is no impact to the review process of those milestones described as 'Document Review'. The milestones relevant to this document are:

WP4/5b:

- Milestone 2b
- Milestone 3
- Milestone 5
- See separate clarifying note on Milestone 6 submission.
- Milestone 7a

WP10:

- Milestone 5
- Milestone 6

Where other contractual milestones have been agreed, they shall align with the above list for the purpose of determining site visits.

Process

As with site visits, online reviews should ideally be preceded one-week in advance with the relevant pre-visit documentation, including an agenda of tests to be conducted. This is required for the technical team to conduct a gap-analysis and to give both parties (Manufacturer and Hy4Heat teams) opportunity to identify missing evidence and gather resource to provide that evidence.

There are two methods for conducting remote audits:

1. Live demonstration via videoconferencing
2. Submission of pre-recorded testing videos

Both methods are acceptable and the decision on which is preferred is left to the Manufacturer.

The tests shall be conducted in such a way as to eliminate, or reduce as far as reasonably practicable, the opportunity for interference with tests, especially in pre-recorded videos. For example, demonstration of a cold-start ignition test should be a

single, continuously shot video, with a reading taken of the temperature with a relevant instrument (for example a calibrated infrared thermometer, or 'temperature gun') at a relevant location, immediately before ignition is filmed. Any tests where the Manufacturer foresees the potential for the demonstration to be queried are advised to explain the exact methodology for testing in advance for agreement with the Hy4Heat team. For long performance tests (e.g. flame picture after 10, 30, 60 minutes etc.), the entirety of the test should be filmed (with a way of assessing the time within the picture such as stopwatch or clock), and sped up. The end-result of such tests can then be presented in real time.

Manufacturers should consider any IP implications in their submissions, and conduct testing in such a way as to not jeopardise this.

Software

The Hy4Heat team will aim to accommodate Manufacturer preferred software:

- For live demonstration, applications such as Microsoft Teams, Skype, Zoom etc. MS Teams is our preferred platform.
- For video submissions, any video format compatible with standard Microsoft Windows applications. Videos can also be embedded into PowerPoint slides, which allows for supporting text in intermediate slides.

Note that submissions should aim to keep file sizes reasonable. Standard file sharing applications often limit transfer to 2GB, so this should be considered as an upper limit for any single file. Note Microsoft applications such as PowerPoint allow for media to be compressed which allows for smaller file-sizes while maintaining perfectly acceptable quality.