Purpose

The purpose of this procedure is to ensure that the opening and closing meetings which form part of all assessments of Clients are carried out in a uniform and consistent manner.

Scope

This procedure includes all opening and closing meetings conducted by licensed BREEAM In-Use Assessors during assessments carried out on our Clients seeking or maintaining certification and/or approval.

Assessor Responsibilities

BREEAM In-Use Assessors are responsible for:

1. Ensuring that the opening and closing meetings are held and conducted in accordance with this procedure;
2. Ensuring that all health and safety issues are resolved; and
3. Detailed minutes are recorded.

Client Responsibilities

The Client is the company being visited by the Assessor. The Client is responsible for:

1. Not exposing Assessors to any hazards that may pose a risk to health and safety;
2. Providing information on any known hazard that may be present and the control measures necessary to protect against that risk or hazard; and
3. Ensuring there is always one company employee per Assessor to accompany and guide the Assessor(s) for the duration of the site visit.

Requirements

Opening Meeting

An opening meeting is conducted with the Client’s management representative(s). The meeting shall include the following aspects:

a) Introduction of the Assessor(s) and their role(s);
b) The Objectives of the assessment and the possible outcomes of the assessment program;
c) Confirmation of the availability of Client employees to act as guides;
d) The purpose and the nature of observation reporting;
e) The purpose and outline date and time for the closing meeting;
f) Assurance of the confidentiality with regard to all documentation and information gained during the course of the assessment;
g) Confirmation of the locations and details of the site visit and access

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h) Details of any health and safety requirements and access to any safety equipment for the location(s) and area(s) to be visited (as noted in the Client responsibilities section).

Any questions about the site visits and access should be asked in the presence of the Client guide(s) and Client's management representative to ensure there is a common understanding.

Closing Meeting

A closing meeting is conducted with the Client's management representative(s). The meeting shall include the following aspects:

a) Thank the Client for their hospitality and cooperation;
b) Confirm the areas covered during the assessment;
c) Present any missing gaps in information that can be presented to the auditor by the close of the meeting or at an agreed date (usually 45 days for initial certification visits and 30 days for recertification visits);
d) Confirm recommendations and any necessary actions to be taken and whether a re-visit or re-assessment is necessary;
e) Inviting and answering any questions from the Client; and
f) Formally end the assessment.

Records

Minutes of both meetings shall be recorded in a manner that provides sufficient detail for anyone that was unable to attend and to demonstrate that the requirements (stated above) were met. These records must be kept with the assessment evidence collected by the Assessor and provided to BRE Global when submitting for certification.

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