FIELD LEARNING WORKBOOK / FREE STARTER GUIDE

# Plan a Purposeful Project Visit

Prepare useful questions for a solar, energy or infrastructure visit, and record what the visit can establish.

Allow 25 minutes for reading and practice. No account required.



Illustrative African business or field scene, created with AI. Not an actual engagement.

## Define the learning objective

Write what you want to understand before choosing a site. You might want to learn how an operator organises maintenance, how goods arrive at a facility or which assumptions support a proposed service. Ask the host what access can be offered and agree the purpose in advance. A learning visit is useful when its questions are clear; it should not be treated as an engineering inspection unless appropriately qualified professionals are engaged for that work.

## Prepare access, people and safety

Confirm who may attend, who will host the visit, the permitted areas and the safety requirements. Ask whether photography or recording is allowed. Arrange suitable transport and leave realistic time for the journey and briefing. If the questions concern technical performance, land rights, permissions or environmental matters, identify the appropriate specialist. A visit arranged around the wrong expertise can leave the most important questions unanswered.

UNDERSTAND THE LIMITS / TEST YOUR REASONING

# Write an observation record

During the visit, distinguish what you observed from what the host told you. Record the date, location, attendees and limits of access. Do not infer long-term performance from one operating moment or use a photograph as proof of ownership. In the debrief, list what was learned and what still needs documents, testing or expert review. Finish by defining the next decision and the evidence it requires.

## A fictional practice scenario

During a fictional solar-site visit, panels are visible and the host says the installation always supplies the surrounding community. No operating records are available during the visit.

**What can the visitor responsibly record?**

A. The facility’s long-term performance has been verified.

B. Panels were observed; the performance statement remains a claim requiring appropriate evidence.

C. Every nearby building must be connected.

## Worked response

The strongest response is B. Record the observation and the statement separately. Performance and service coverage need suitable records and, where appropriate, qualified technical review.

## Reading and context

Capital Africa: business visits and local coordination

The explanations and worksheet are original Capital Africa material. Follow the linked publishers for their own guidance. Educational material does not replace legal, financial, tax or engineering advice, laboratory testing, or current guidance from relevant authorities.

YOUR WORKING DOCUMENT

# Make the learning practical.

Work through a fictional example first. Use these prompts to organise your notes; keep confidential information out of shared learning discussions.

**1. Purpose of the visit and the decision it supports**

**2. Host, attendees and relevant specialist roles**

**3. Access permissions, recording permissions and safety arrangements**

**4. Questions and documents requested before the visit**

**5. Observations, host statements and limitations**

**6. Follow-up evidence, responsibilities and next decision**

**Next action / owner / review date:**