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**GEOMINING CONSULTANTS**

## PLANNING AND ORGANISING EFFECTIVE SITE VISITS

Site visits to exploration prospects, mine development properties and operating mine sites can be a critical component of many project reviews, audits, technical studies, expert reports and operational support projects undertaken for a client.

The VALMIN Code<sup>1</sup> provides guidance for site inspections required for Technical Assessment Reports, Valuation Reports and Independent Expert Reports. Specifically, Clause 11.1 of the Code states:

*“Where inspection of a Mineral Asset or Tenure is likely to reveal information or data that is Material to a Public Report, the Specialist should inspect it.*

*If an inspection is not made, the Specialist **must** be satisfied that there is sufficient current information available to allow an informed evaluation to be made without an inspection and **must** declare the reasons for not undertaking a site visit.*

*Any decision not to conduct an inspection **must** be made by the Specialist and not by the Commissioning Entity and the reason **must** be disclosed in the Public Report.*

*Inspection of Early-stage Exploration Projects would not normally be required, except where the Specialist considers it to be Material to the Public Report.”*

Derisk has recently completed an Independent Valuation Report (IVR) for a mineral asset in Southeast Asia without undertaking a site inspection due to travel restrictions resulting from the Covid19 pandemic. This is unusual and required a declaration in the IVR as to why a site visit was not made. Fortunately, both the Practitioner and the Specialist involved in preparing the IVR had previously visited the site, albeit some years ago, and both were satisfied that *“there is sufficient current information available to allow an informed evaluation to be made without an inspection”*.

This situation emphasises the importance of site inspections, even though they can sometimes be time consuming and costly exercises, particularly for small projects in remote locations. It is therefore essential that site visits be well planned and organised to maximise their value. Derisk consultants have undertaken many site inspections for a wide range of projects and the following tips result from that experience.

- **Safety requirements.** Check current travel warnings for the site location(s). Ensure arrangements are in place for protection and evacuation of personnel if appropriate. Arrange suitable travel and medical insurance. Register your travel details with the appropriate government department e.g. Foreign Affairs. Ensure vaccinations are up to date and arrange appropriate travel medications and first aid kits. Establish appropriate communication and reporting protocols back to base for the trip.
- **Travel documentation and requirements.** Make sure that information on passports, visas, invitation letters and any other travel permits are current and correct, especially if the team members are not all travelling together. Consider whether it is appropriate for personnel to be travelling together, especially in small aircraft. Allow enough time to obtain the necessary documentation and take extra hard copies of key documents with you. Be aware of luggage limits (size and weight) for all sectors of travel. Assess whether interpreters may be needed and arrange if required.
- **Status of facilities on site.** It may be necessary to make arrangements for mobile phone coverage or internet access before travelling to site. Make sure you carry appropriate work clothing and personal protective equipment if it is not available on site. Ensure that site is aware of any special medical or dietary requirements before your arrival.

<sup>1</sup> Australasian Code for Public Reporting of Technical Assessments and Valuations of Mineral Assets (The VALMIN Code), 2015





- **Availability of key site personnel.** This is especially important for fly-in fly-out or drive-in drive-out operations. Do not expect to get much value from someone who has just arrived on site or is leaving a few hours after you arrive on site because of staff change-over responsibilities. Have sufficient time and flexibility to deal with unexpected local crises and disruptions to the schedule.
- **Key objectives for the site visit.** Make sure whoever is preparing the itinerary understands exactly what the purpose of the visit is and how much time is needed to cover all the critical items. Decide when the team needs to split up and when they should be together. Provide a list of key files/documents that you need before you travel and those you expect to be available on site. Make sure everyone is aware of any confidentiality regarding the purpose of the visit and information flow.
- **Flexibility.** Allow enough time for the site visit and be realistic about travel times to and from site and the potential for some unavoidable interruptions during the visit itself. Do not expect consultants to work a long day on site immediately after spending a long time travelling. Be aware of possible impacts from events such as adverse weather, maintenance shutdowns, local customs such as religious practices, etc. If possible, have flexible travel arrangements in case the visit is cut short or extended.
- **Behaviour.** Be courteous, positive and patient during the visit. Site staff are always very busy and will have other priorities. Your visit may require them to work extra hours to catch up for the time they spend with you. If you plan to provide any gifts or company promotional items, check to make sure it is done sensitively with respect to local customs. Ask permission before taking photos or collecting samples or specimens.
- **Wrap up briefing before leaving site.** Allow time to meet with key site personnel to confirm whether all objectives have been achieved and if any follow-up is required, including timing for provision of requested documentation etc. Thank everybody involved in the visit for their time and assistance.
- **Post-visit follow-up.** Send a follow-up letter or email shortly after arriving home confirming safe arrival, following up any requests made for additional information, and confirming any commitments made.

If a site visit is an essential component in a scope of work for a project, these tips will help to ensure it is well-organised and effective.

## FOR MORE INFORMATION

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