POST-UPGRADE SAVINGS ASSESSMENT / ILLUSTRATIVE CASE

How much of the change can we credit to the upgrade?

The management decision

Before using reported savings to justify a second installation, establish what the first site would reasonably have used without the upgrade. Show how much the answer depends on that estimate.

A bill can fall after an upgrade because of milder weather, lower production or shorter operating hours. It can also rise even when the upgrade helped. This assessment gives finance and operations teams a fairer comparison before they report savings, assess a supplier claim or decide whether to repeat the investment elsewhere.

Worked example

The estimated energy use without the upgrade is 105 MWh for the period after installation. The meter shows 96 MWh. The difference is 9 MWh, about 8.6% of the adjusted expectation.

Example figure	What it represents
105 MWh	Adjusted expected use
96 MWh	Actual use
9 MWh	Difference

What changes the answer

A second reasonable estimate puts expected use at 100 MWh. That gives a 4 MWh difference, or 4%. Report both estimates and what determines the choice between them.

Post-upgrade savings assessment

What to commission

Assess one upgrade across agreed before-and-after periods using available operating, weather or production records.

We consider changes in weather, occupancy or production where relevant, check for gaps in the data and explain how the reference period was chosen. Where more than one comparison is reasonable, we show how the result changes.

How to judge the result

The sponsor can reproduce the estimated change and see how it moves under a second reasonable comparison.

Apply an agreed energy price to the supported range and report the assumptions alongside it. Compare that range with the threshold used for the next investment.

Decision worksheet

Project detail	Starting point for your team
Decision owner	Energy programme sponsor. Name the person who will approve the next step.
Records to gather	Readings from before and after the change, its date and other conditions that may have affected use.
Agreed output	An editable workbook and a findings note explaining the estimate and its uncertainty.
Decision date	Record the deadline, any unresolved assumption and who will confirm it.

Discuss this case

Tell us what changed, the date it went into use and what figure your team needs to explain. Mention other changes around the same time and whether the result will inform a report or a new investment. Approximate dates and a description of the available readings are enough to begin.

Email info@oxetc.co.uk and mention ENG-13. All figures in the worked example are illustrative.