

Energy Management System Implementation Toolkit

Organizational Structure

Step 1 Getting Started

Step 1.1 Make the business case

- Step 1.1.1 Identify key internal influencers
- Step 1.1.2 Understand your business drivers
- Step 1.1.3 Prepare sales pitch
- Step 1.1.4 Brief top management

Step 1.2 Secure top management commitment

- Step 1.2.1 Establish the scope and boundaries
- Step 1.2.2 Appoint a management representative
- Step 1.2.3 Assign the members of the energy team
- Step 1.2.4 Define the energy policy
- Step 1.2.5 Create organizational awareness
- Step 1.2.6 Ensure continual awareness

Step 1.3 Establish the structure for EnMS implementation

- Step 1.3.1 Set the timeframe for implementation
- Step 1.3.2 Develop the implementation plan
- Step 1.3.3 Establish communication channels
- Step 1.3.4 Celebrate success often

Step 1.4 Understand the role of documents and records

Step 2 Profile Your Energy Situation

Step 2.1 Acquire energy data

Step 2.1.1 Identify data needs

Step 2.1.2 Determine availability of data

Step 2.1.3 Formulate a process for acquiring and recording data

Step 2.2 Track and analyze energy data

Step 2.2.1 Investigate tools for tracking and analyzing energy data

Step 2.2.2 Determine information desired by stakeholders

Step 2.2.3 Choose and implement an energy data management tool

Step 2.3 Establish baseline and determine energy performance indicators (EnPIs)

Step 2.3.1 Get stakeholder requirements for measuring performance

Step 2.3.2 Establish a base year

Step 2.3.3 Develop a list of possible EnPIs

Step 2.3.4 Determine factors that affect EnPIs

Step 2.3.5 Select and test EnPIs

Step 2.3.6 Analyze EnPIs to determine performance

Step 2.3.7 Records baseline EnPIs

Step 2.4 Identify, evaluate and track legal and other requirements

Step 2.4.1 Identify and access legal requirements

Step 2.4.2 Identify and access other requirements

Step 2.4.3 Establish a process for evaluating and updating requirements

Step 2.4.4 Plan for evaluating compliance with legal and other requirements

Step 2.5 Determine significant energy uses

Step 2.5.1 Prepare a list of your energy systems

Step 2.5.2 Develop an energy balance

Step 2.5.3 Determine criteria for significance and prioritize your major energy systems

Step 2.5.4 Record significant energy uses and method used

Step 2.5.5 Track and analyze significant energy uses

Step 2.6 Identify energy opportunities

Step 2.6.1 Use energy assessments

Step 2.6.2 Utilize other methods

Step 3 Develop Opportunities, Objectives and Resources

Step 3.1 Prioritize energy opportunities

- Step 3.1.1 Get the right people together
- Step 3.1.2 Review relevant organizational information
- Step 3.1.3 Determine criteria
- Step 3.1.4 Develop tools or techniques for applying criteria
- Step 3.1.5 Apply criteria to prioritize opportunities

Step 3.2 Establish energy objectives

- Step 3.2.1 Get the right people together
- Step 3.2.2 Review the organization's policies, goals and strategies
- Step 3.2.3 Set objectives and define metrics
- Step 3.2.4 Provide objectives to managements for review and approval
- Step 3.2.5 Document and communicate the energy objectives

Step 3.3 Set energy targets

- Step 3.3.1 Get the right people together
- Step 3.3.2 Review the energy objectives
- Step 3.3.3 Set targets and define metrics
- Step 3.3.4 Provide targets to management for review and approval
- Step 3.3.5 Document and communicate the energy targets

Step 3.4 Develop the energy action plan(s)

- Step 3.4.1 Select projects based on resources and other factors
- Step 3.4.2 List the actions needed
- Step 3.4.3 Develop the schedule
- Step 3.4.4 Assign roles and responsibilities
- Step 3.4.5 Document and regularly update energy action plans

Step 4 Reality Check: Stop! Look! Can I Go?

Step 4.1 Review the status of your efforts

Step 4.2 Perform a sanity check on resources

Step 4.3 Identify accomplishments and lessons learned

Step 4.4 Conduct a management review

Step 4.5 Communicate across the organization

Step 5 Manage Current State and Improvements

Step 5.1 Manage and control information

Step 5.2 Determine operational controls

Step 5.2.1 Determine and establish effective operating criteria

Step 5.2.2 Operate according to establish controls

Step 5.2.3 Communicate operational controls

Step 5.3 Ensure competence of personnel

Step 5.3.1 Define competency

Step 5.3.2 Assess personnel against competencies

Step 5.3.3 Develop plan to fill competency gap

Step 5.4 Ensure awareness of personnel

Step 5.4.1 Define awareness requirements

Step 5.4.2 Plan and implement training

Step 5.5 Define purchasing specifications for energy supply

Step 5.6 Incorporate energy considerations in procurement

Step 5.7 Manage energy considerations in design

Step 5.8 Communicate internally

Step 5.9 Decide on external communications

Step 6 Check the System

Step 6.1 Monitor, measure and analyze key characteristics

Step 6.2 Calibrate monitoring and measuring equipment

Step 6.3 Evaluate legal and other compliance

Step 6.4 Plan and conduct internal audits

Step 6.5 Take action to correct and prevent nonconformities

Step 6.6 Check and use the evidence

Step 7 Sustain and Improve the System

Step 7.1 Conduct management reviews

Step 7.2 Ensure continual improvement

Step 7.3 Manage change