**Date last modified/updated:** Click here to enter a date.

**Who last modified/updated:** Click here to enter text.

**This part of the Navigator Playbook is completed when you have:**

1. **Defined the intervals at which top management will review the EnMS and energy performance.**
2. **Identified who must participate in the management review.**
3. **Compiled the relevant data and information (inputs) needed for the management review and prepared this information for presentation.**
4. **Conducted management reviews that address all required inputs and outputs.**
5. **Implemented the decisions and actions (outputs) of management reviews.**
6. **Determined if the EnMS continues to be suitable, adequate, effective and aligned with your organization’s strategic direction.**
7. **Maintained a record of management reviews.**
8. Define the intervals at which top management will review the EnMS and energy performance.

|  |  |  |
| --- | --- | --- |
| ☒ | We have defined the frequency of management reviews. | Annually |
| ☒ | A schedule of these management reviews has been established and is located: | Schedule located within Energy Team SharePoint site |
| ☒ | The frequency and duration of these reviews are: | One-half day meeting annually |
| ☒ | We increase these planned review intervals as significant changes occur at our organization that can impact energy consumption such as changes in usage or an increase in capital projects. | Evaluated on a quarterly basis for applicability |

Determine the means for accomplishing management reviews:

|  |  |  |
| --- | --- | --- |
| ☒ | The means for accomplishing the management reviews are established by the organization and dictated by its needs. | The VP, Corporate Engineering & the General Manager will define the meeting objectives and expected outcomes. The agenda will be developed by the Energy Team Leader |
| ☒ | We have a process in place to ensure key information is communicated to top management. | In addition to the annual Management Review, we provide the monthly Energy Team meeting minutes to top management and schedule meetings with top management when necessary. |
| ☒ | Our key findings are actionable and used to inform top management decisions so that necessary steps are taken to ensure continual improvement of energy performance and the EnMS. | Using the Management Review Data Assignment Sheet, we identify potential actions and include in the Management Review meeting agenda. |

Our management reviews are conducted via the following methods:

☒ Face-to-face meetings

☐ Teleconferences

☐ Email exchanges

☐ Electronic meetings

☐ Other forms of electronic reviews

☐ Other Click here to enter text.

1. Identify who must participate in the management review.

Our management review participants include:

|  |  |  |
| --- | --- | --- |
| ☒ | Top management representative: | General Manager |
| ☒ | Energy management representative: | Energy Team Leader |
| ☒ | Other: | VP, Corporate Engineering, Assistant General Manager, Energy Team members, Department representatives |

Our energy management review team primary activities include:

|  |  |  |
| --- | --- | --- |
| ☒ | Review of fact-based decision making (outputs) | We review audit findings, EnPIs, EnBs, progress toward Energy Objectives and Targets, nonconformities addressed, and other relevant topics suggested by interested parties. |
| ☒ | Analysis of the system and its performance based on specific information (inputs): | We verify that the data and information collected for the review are complete and accurate. |

1. Compile the relevant data and information (inputs) needed for the management review and prepare this information for presentation.

The responsible personnel have provided the energy team with:

☒ Detailed data and information

☒ A summary that is concise and represented graphically where possible.

☒ A big picture overview that is still detailed enough to make fact-based decisions.

*The following worksheet can help you track roles and responsibility allocations of the management reviews:*

Management Review Data Assignment Sheet

| **Inputs to Management Review** | **Person Responsible for Collecting Data** | **Due Date** |
| --- | --- | --- |
| * Energy policy | Energy Team Leader | 8/15/21 |
| * Objectives, targets, action plans and their status | Energy Team Leader | 8/15/21 |
| * EnPIs and current energy performance data | Energy Team Leader | 8/15/21 |
| * Past and projected energy performance data | VP, Corporate Engineering | 8/15/21 |
| * Significant energy uses and their performance | Energy Team Leader | 8/15/21 |
| * Changes in what energy uses are identified as significant | Energy Team Leader | 8/15/21 |
| * Results of evaluations of compliance to legal requirements | General Manager | 8/15/21 |
| * Results of evaluations of compliance to other energy related requirements subscribed to | VP, Corporate Engineering | 8/15/21 |
| * Changes in legal requirements | General Manager | 8/15/21 |
| * Changes in other energy related requirements subscribed to | VP, Corporate Engineering | 8/15/21 |
| * EnMS audit results | Energy Team Leader | 8/15/21 |
| * Status of corrective actions and preventive actions | Energy Team Leader | 8/15/21 |
| * Recommendations and opportunities for improvement | General manager | 8/15/21 |
| * Action items from previous management reviews | Energy Team Leader | 8/15/21 |

1. Conduct management reviews that address all required inputs and outputs.

While reviewing the Playbook Worksheets during the management reviews, we also:

|  |  |
| --- | --- |
| ☒ | Followed-up on actions from previous management reviews |
| ☒ | Reviewed the extent to which the energy objectives and targets have been met |
| ☒ | Considered EnMS internal audit results |
| ☒ | Reviewed the status of corrective actions and preventive actions |
| ☒ | Appraised projected energy performance for the following period |
| ☒ | Considered recommendations for improvement to the EnMS |

We ensure that the following outputs have been addressed when deciding on changes to the EnMS:

☒ The energy policy

☒ EnPIs and EnBs

☒ Objectives, energy targets, and actions plans

☒ Actions to be taken if the objectives, energy targets or action plans are not achieved

☒ Other elements of the EnMS

☒ Resource allocations

Decisions about continual improvement opportunities must address opportunities to improve:

☒ Energy performance

☒ Integration with business processes

☒ Competence

☒ Awareness and communication

*Complete the Management Review by going through the worksheet below with top management and when that review is finished, indicate its completion by inserting the date at the top of the page in the header block.*

Management Review Record Form

|  |  |  |
| --- | --- | --- |
| Date of Management Review:  8/22/21 | Prepared by (name/position):  Energy Team Leader | |
| **Attendees (Names):** | **Title/Position** | **Organization/Department Represented** |
| Click here to enter text. | Energy Team Leader | Energy Team / Engineering |
| Click here to enter text. | General Manager | Executive Leadership |
| Click here to enter text. | VP, Corporate Engineering | Corporate |
| Click here to enter text. | Director of Operations | Energy Team |
| Click here to enter text. | Director of Group Sales | Energy Team |
| Click here to enter text. | Procurement Lead | Energy Team / Purchasing Department |
| Click here to enter text. | Click here to enter text. | Click here to enter text. |
| Click here to enter text. | Click here to enter text. | Click here to enter text. |

| **Input** | **Covered in this management review?** | **Information attached?** | **Discussion/Decision Summary** | **Action Item(s)** | **Assigned to:** | **Due Date:** |
| --- | --- | --- | --- | --- | --- | --- |
| Previous management review action items | ☐ Yes  ☒ No | ☐ Yes  ☒ No | N/A – This is the first Management Review after implementing the EnMS | None | Click here to enter text. | Click here to enter a date. |
| EnMS audit results | ☒ Yes  ☐ No | ☒ Yes  ☐ No | Review of effort to implement EnMS; Discuss internal audit findings; Agree upon actions for next 12 months | Address remaining nonconformities; update communication materials and training | Energy Team Leader | 7/31/22 |

1. Implement the decisions and actions (outputs) of management reviews.

After completing the above steps, we considered changes to:

|  |  |
| --- | --- |
| ☐ | Energy policy |
| ☐ | EnPIs |
| ☒ | Objectives, targets, and action plans |
| ☒ | Resources needed to continue to maintain the EnMS |

1. Determine if the EnMS continues to be suitable, adequate, effective and aligned with your organization’s strategic direction.

Is/does the EnMS:

|  |  |
| --- | --- |
| ☒ | Still appropriate to the purpose of the organization, its culture, operations, and business systems? |
| ☒ | Capable of continuing to meet the 50001 Ready Navigator guidance and the other EnMS requirements established by the organization? |
| ☒ | Achieving the planned results, including energy performance improvement and improvement in energy management? |
| ☒ | Reflect and contribute to the strategic business priorities of the organization? |

Use the space below to notate any barriers to your organization carrying out the above requirements:

|  |
| --- |
| Staffing challenges have slowed the implementation of the EnMS, particularly the tasks led by the Engineering Team. The Director of Engineering, who also serves as the Energy Team Leader, has taken on additional responsibilities to cover key hotel engineering and facilities management responsibilities. The Engineering Team has been unable to fill three critical roles, leading to remaining team members having to pick up additional roles & responsibilities. |

1. Maintain a record of the management reviews.

|  |  |  |
| --- | --- | --- |
| ☒ | We maintain a record of the management reviews and they are located here: | Energy Team SharePoint site location: |
| ☒ | Person responsible for keeping reviews up to date is: | Energy Team Leader |

Top Management Approval

|  |  |  |
| --- | --- | --- |
| ☐ | Date approved: | Click here to enter a date. |
| ☐ | Who approved: | Click here to enter text. |

Comments

Click here to enter text.