**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 after the Internal Audit of the EnMS; Typically 2nd Wednesday of January |
|  | A schedule of these management reviews has been established and is located: | On shared Google Calendar |
|  | The frequency and duration of these reviews are: | Typically 3+ hours – afternoon booked out. |
|  | 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. | Additional meetings can and have been added if major changes to the EnMS, Process, or other important events occur. |

Determine the means for accomplishing management reviews:

|  |  |  |
| --- | --- | --- |
|  | The means for accomplishing the management reviews are established by the organization and dictated by its needs. | Top management and Energy Team work in parallel to dictate meeting objectives and expected outcomes. |
|  | We have a process in place to ensure key information is communicated to top management. | Energy Team debriefs Top Management at monthly meetings. |
|  | 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. | We clarify potential actions for findings presented in the meeting and include these as meetings briefs sent ahead of the event. |

Our management reviews are conducted via the following methods:

Face-to-face meetings

Teleconferences

Email exchanges

Electronic meetings

Other forms of electronic reviews

Other

1. Identify who must participate in the management review.

Our management review participants include:

|  |  |  |
| --- | --- | --- |
|  | Top management representative: | Jack Doe |
|  | Energy management representative: | Jill Doe |
|  | Other: | All Energy Team Members and 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 all information actively being collected is collected timely, appropriately, and via calibrated equipment (where applicable). |

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 Lead | 12/15/20 |
| * Objectives, targets, action plans and their status | Energy Team Lead | 12/15/20 |
| * EnPIs and current energy performance data | Facilities Manager | 12/10/20 |
| * Past and projected energy performance data | Energy Team Lead | 12/10/20 |
| * Significant energy uses and their performance | Facilities Manager | 12/10/20 |
| * Changes in what energy uses are identified as significant | Energy Team Lead | 12/10/20 |
| * Results of evaluations of compliance to legal requirements | Legal Team Representative | 12/15/20 |
| * Results of evaluations of compliance to other energy related requirements subscribed to | Legal Team Representative | 12/15/20 |
| * Changes in legal requirements | Legal Team Representative | 12/15/20 |
| * Changes in other energy related requirements subscribed to | Energy Team Lead | 12/15/20 |
| * EnMS audit results | Energy Team Lead | 1/10/21 |
| * Status of corrective actions and preventive actions | Facilities Manager | 1/10/21 |
| * Recommendations and opportunities for improvement | Energy Team Lead | 1/10/21 |
| * Action items from previous management reviews | PR Team Representative | 12/15/20 |

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:  1/13/21 | Prepared by (name/position):  Jill Doe – Energy Team Lead | |
| **Attendees (Names):** | **Title/Position** | **Organization/Department Represented** |
| Jack Doe | Plant Manager | Top Management |
| Jim Doe | Energy Team Lead | Energy Team |
| Jane Doe | Facilities Manager | Facilities |
| Jimmy Doe | Process Engineer | Engineering |
| Jess Doe | PR Coordinator | PR |
| Jeb Doe | Chief Counsel | Legal Team |
| Jen Doe | Municipal Representative | Municipality |

| **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 installing new 50001 Ready EnMS | None | N / A | N /A |
| EnMS audit results | Yes  No | Yes  No | We discussed process and efforts to ensure relevant voices were included. We then discussed trends and all identified non-conformities. Top Management agreed with proposed follow-up actions determined by the EnMS team prior to the meeting. | Install new trainings for all staff related to EnPIs and data collection related to EnMS | Jess Doe | 2/15/21 |

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:

|  |
| --- |
| No barriers identified as of yet. Potential addition of UV disinfection system in 2021 could alter our Energy Baseline and Energy Performance Indicators, therefore this will have to be considered and addressed if/when that occurs. |

1. Maintain a record of the management reviews.

|  |  |  |
| --- | --- | --- |
|  | We maintain a record of the management reviews and they are located here: | Shared Google Drive under “EnMS Management Review 2020” |
|  | Person responsible for keeping reviews up to date is: | Jill Doe – Energy Team Lead |

Top Management Approval

|  |  |  |
| --- | --- | --- |
|  | Date approved: | 1/20/21 |
|  | Who approved: | Jack Doe |

Comments

Click here to enter text.