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

**Who last modified/updated:** Click here to enter text. **Management review:** Click here to enter a date.

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

1. **Developed and delivered an initial EnMS communication from top management that included the importance of energy management and the organization’s energy policy.**
2. **Developed the details for EnMS awareness training for specific personnel or departments.**
3. **Planned and implemented awareness training.**
4. **Conducted awareness training and retained records.**
5. **Planned and implemented internal communication processes of the EnMS, including a suggestion system.**
6. **Planned and implemented external EnMS communication processes.**
7. Develop and deliver an initial EnMS communication from top management that includes the importance of energy management and the organization’s energy policy.

|  |  |  |
| --- | --- | --- |
| [ ]  | We have developed content for an initial communication to the organization about our EnMS activities. | Click here to enter text. |
| [ ]  | We have communicated with top management the content we would like to communicate and they have agreed to deliver the message organization-wide. | Click here to enter text. |

1. Develop the details for EnMS awareness training for specific personnel or departments.

Awareness

[ ]  We have ensured that communications address awareness of the following:

[ ]  Conformance with the energy policy

[ ]  The importance of following EnMS procedures and requirements

[ ]  Roles, responsibilities, and authorities related to EnMS

[ ]  Improved energy performance benefits

[ ]  Impact of activities on energy consumption

1. Plan and implement awareness training.

[ ]  We have used the awareness training forms shown on the following pages.

1. Conduct awareness training and retain records.

[ ]  We have used the awareness training forms shown on the following pages.

1. Plan and implement internal communication processes of the EnMS, including a suggestion system.

[ ]  We have established a process that will ensure that internal communications related to energy performance and the EnMS are carried out on a continual basis and have included the following topics:

[ ]  Energy policy

[ ]  The importance of energy management

[ ]  Energy management responsibilities and authorities

[ ]  Energy objectives

[ ]  Energy performance of the organization

[ ]  Other information about the EnMS, as appropriate

|  |  |  |
| --- | --- | --- |
| [ ]  | We have created a system for soliciting and recording suggestions from internal parties | Click here to enter text. |
| [ ]  | We have assigned responsibility for this to:  | Click here to enter text. |

1. Plan and implement external EnMS communication processes.

[ ]  We have developed an external communication policy and process for our facility and will retain records of all activities pertaining to external communication.

Click here to enter text.

[ ]  We have decided if and how our facility will engage in external communication regarding the energy policy, energy management system, and energy performance.

Click here to enter text.

|  |  |  |
| --- | --- | --- |
| [ ]  | We have created a system for soliciting and recording suggestions from external parties | Click here to enter text. |
| [ ]  | We have assigned responsibility for this to the following: | Click here to enter text. |

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| EnMS Awareness Requirements Form |
| Check the appropriate box below to specify whether this form is being completed for an individual, a position, or a department/functional unit: ⬜ Employee: Click here to enter text.⬜ Position: Click here to enter text.⬜ Department: Click here to enter text. |
| Required Awareness | **Specific Requirements** | **Reference Materials** |
| Energy policy conformance | Click here to enter text. | Click here to enter text. |
| Relevant procedure conformance | Click here to enter text. | Click here to enter text. |
| EnMS requirements conformance | Click here to enter text. | Click here to enter text. |
| Role, responsibilities and authority in achieving EnMS requirements | Click here to enter text. | Click here to enter text. |
| Improved energy performance benefits | Click here to enter text. | Click here to enter text. |
| Actual and potential impact of activities on energy consumption | Click here to enter text. | Click here to enter text. |
| Activity contribution to energy objectives and targets achievement | Click here to enter text. | Click here to enter text. |
| Potential consequences of procedure deviation | Click here to enter text. | Click here to enter text. |

|  |
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| EnMS External Communications Log |
| **1** | Date Received:Click here to enter a date. | Assigned To:Click here to enter text. | Name of Requester:Click here to enter text. | Affiliation/Organization:Click here to enter text. | Contact Information:Click here to enter text. |
| Summary of information Requested:Click here to enter text. | Summary of Response:Click here to enter text. | Date of Response:Click here to enter a date. | Follow-Up Required? (If yes, describe)Click here to enter text. | Date of Follow-Up:Click here to enter a date. |
| **2** | Date Received:Click here to enter text. | Assigned To:Click here to enter text. | Name of Requester:Click here to enter text. | Affiliation/Organization:Click here to enter text. | Contact Information:Click here to enter text. |
| Summary of information Requested:Click here to enter text. | Summary of Response:Click here to enter text. | Date of Response:Click here to enter a date. | Follow-Up Required? (If yes, describe)Click here to enter text. | Date of Follow-Up:Click here to enter a date. |
| **3** | Date Received:Click here to enter a date. | Assigned To:Click here to enter text. | Name of Requester:Click here to enter text. | Affiliation/Organization:Click here to enter text. | Contact Information:Click here to enter text. |
| Summary of information Requested:Click here to enter text. | Summary of Response:Click here to enter text. | Date of Response:Click here to enter a date. | Follow-Up Required? (If yes, describe)Click here to enter text. | Date of Follow-Up:Click here to enter a date. |

|  |
| --- |
| EnMS External Communication Record |
| Date Received: Click here to enter a date. | Assigned To: Click here to enter text. |
| Name of Requester: Click here to enter text. |
| Affiliation/Organization: Click here to enter text. |
| Contact Information (address/telephone/e-mail): Click here to enter text. |
| Information Requested: Click here to enter text. |
| Summary of Response (Attach documents as appropriate): Click here to enter text. |
| Date of Response: Click here to enter a date. |  |
| Is follow-up needed? (circle one) YES / NO | If yes, when is follow-up needed (date)?Click here to enter text. |
| If yes, describe what follow-up is needed:Click here to enter text. | Follow-Up Assigned To:Click here to enter text. |
| Date Follow-Up Completed:Click here to enter a date. |

EnMS Training Needs Planning Matrix

Location: **Click here to enter text.**

Date: **Click here to enter text.**

Completed by: **Click here to enter text.**

| WHAT TRAINING IS NEEDED? | WHO NEEDS THE TRAINING? | WHAT INFORMATION IS NEEDED? WHAT EnMS DOCUMENTS (if any) ARE INVOLVED? | WHO IS RESPONSIBLE FOR CONDUCTING THE TRAINING? (Position Title) | HOW/WHERE WILL THE TRAINING BE DONE? | WHEN WILL THE TRAINING BE DONE? | WHAT WILL BE THE TRAINING RECORD? |
| --- | --- | --- | --- | --- | --- | --- |
| 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. | 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. | 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. | 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. | Click here to enter text. | Click here to enter text. | Click here to enter text. | Click here to enter text. |

External Communications Planning Worksheet

| Who is the target audience? | What is the purpose (goal) of the communication? | What will be communicated? | Who will communicate it? (responsible position) | How will it be communicated? (mechanism or media) | How often will the communication occur? (frequency) | When will the communication start? |
| --- | --- | --- | --- | --- | --- | --- |
| 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. | 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. | Click here to enter text. | Click here to enter text. |
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| 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. | Click here to enter text. |

Internal EnMS Communications Planning Worksheet

|  |
| --- |
| **Internal EnMS Communications Planning Worksheet** |
| **Communicate to whom?** | **Communicate what?** | **Who will do the communication?** (Responsible Position) | **What media will be used to communicate?** | **How often will the communication occur?** |
| 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. | 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. | Click here to enter text. | Click here to enter text. | Click here to enter text. |
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| 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. | Click here to enter text. | Click here to enter text. | Click here to enter text. | Click here to enter text. |

Responsibility and Authority Matrix for Energy-Related External Communications

|  |  |  |  |
| --- | --- | --- | --- |
| Potential External Interested party | Frontline Responsibility/Authority(position title) | Back-Up Responsibility/Authority (position title) | Ultimate (Top-Level) Authority(position title) |
| Customers | Click here to enter text. | Click here to enter text. | Click here to enter text. |
| Shareholders | Click here to enter text. | Click here to enter text. | Click here to enter text. |
| Utility Companies  | Click here to enter text. | Click here to enter text. | Click here to enter text. |
| Contractors | Click here to enter text. | Click here to enter text. | Click here to enter text. |
| Suppliers | Click here to enter text. | Click here to enter text. | Click here to enter text. |
| Insurers | Click here to enter text. | Click here to enter text. | Click here to enter text. |
| Government Regulators | Click here to enter text. | Click here to enter text. | Click here to enter text. |
| Local Officials | Click here to enter text. | Click here to enter text. | Click here to enter text. |
| Emergency Responders | Click here to enter text. | Click here to enter text. | Click here to enter text. |
| Media (crisis) | Click here to enter text. | Click here to enter text. | Click here to enter text. |
| Media (non-crisis) | Click here to enter text. | Click here to enter text. | Click here to enter text. |
| Neighbors | Click here to enter text. | Click here to enter text. | Click here to enter text. |
| Community | Click here to enter text. | Click here to enter text. | Click here to enter text. |
| General Public | Click here to enter text. | Click here to enter text. | Click here to enter text. |
| Environmental Groups | Click here to enter text. | Click here to enter text. | Click here to enter text. |
| Other: | 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. | 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. | Click here to enter text. | Click here to enter text. | Click here to enter text. |

Top Management Approval

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

Comments

Click here to enter text.