**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. **Identified the facilities, equipment, systems, and processes that can have significant impact on energy performance.**
2. **Incorporated consideration of energy opportunities and operational controls in design projects.**
3. **Included results of energy performance considerations in specification, design, and procurement activities, where applicable.**
4. **Retained records of the results of design activities related to energy performance.**
5. Identify the facilities, equipment, systems, and processes that can have significant impact on energy performance:

|  |  |  |
| --- | --- | --- |
| [ ]  | Facilities, equipment, systems and processes have been identified | Click here to enter text. |

For the energy uses associated with those mentioned above, the following items have been identified:

|  |  |  |
| --- | --- | --- |
| [ ]  | Management and operation of SEUs. | Click here to enter text. |
| [ ]  | Achievement of energy objectives, targets and action plans. | Click here to enter text. |
| [ ]  | EnPIs identified. | Click here to enter text. |

1. Incorporate consideration of energy opportunities and operational controls in design projects:

|  |  |  |
| --- | --- | --- |
| [ ]  | Energy opportunities and operational controls have been incorporated into design, renovation, and modification efforts. | Click here to enter text. |
| [ ]  | We have ensured that design projects include an operational control strategy to make sure that anticipated savings are achieved. | Click here to enter text. |

Energy performance improvement considerations:

|  |  |  |
| --- | --- | --- |
| [ ]  | Potential energy performance improvements have been considered. | Click here to enter text. |
| [ ]  | Necessary operational controls have been identified. | Click here to enter text. |
| [ ]  | Management of energy performance impacts on designs. | Click here to enter text. |

When evaluating opportunities for improving energy performance, the following items have been considered:

|  |  |  |
| --- | --- | --- |
| [ ]  | How will existing infrastructure and processes be modified?  | Click here to enter text. |
| [ ]  | What can be changed to improve energy consumption over time? | Click here to enter text. |
| [ ]  | What is the right energy source for the application?  | Click here to enter text. |
| [ ]  | What are the technological options? | Click here to enter text. |
| [ ]  | What operational controls are needed to achieve and sustain energy performance? | Click here to enter text. |

*The worksheet below can be useful in identifying and evaluating energy performance improvement opportunities and operational controls in design activities.*

Worksheet for Energy Considerations in Design

**Purpose**: To help the user identify and consider energy performance improvement opportunities and operational control in the design of new, modified and renovated facilities, equipment, systems and processes that can have a significant impact on energy performance.

|  |
| --- |
| **This design effort is related to: (Check all that apply)**[ ]  New facility(ies) [ ]  New equipment, systems or processes[ ]  Renovated or modified facility(ies) [ ]  Renovated or modified equipment, systems or processes[ ]  Significant energy uses and associated controls [ ]  Objectives, targets and action plans [ ]  Energy performance improvement [ ]  Maintenance of the energy systems**Describe the Project:**  Click here to enter text.  |
| **Prepared by:** Click here to enter text. | **Date:** Click here to enter text. |
| **Identify the facilities, equipment, systems and processes involved in this design effort that can significantly impact energy performance** (energy efficiency, use and consumption) | **What is the current energy source?** | **Is there another energy source option?** | **What are some technology and other options for improving energy performance?** | **Are new or additional operational controls needed?** (specify) | **Who is responsible for the design?** | **What improvements can be expected?**(Examples: energy savings; maintenance cost savings; environmental impact reduction) |
| 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. |

1. Include results of energy performance considerations in specification, design, and procurement activities, where applicable:

|  |  |  |
| --- | --- | --- |
| [ ]  | Energy performance considerations detailed in the ‘Worksheet for Energy Considerations in Design’ (above) have been incorporated into our specifications, designs and procurement activities. | Click here to enter text. |

|  |  |  |
| --- | --- | --- |
| [ ]  | We have ensured that new energy efficient technology is specified, applied, and used correctly in order to avoid misapplications | Click here to enter text. |
| [ ]  | We have assigned roles and responsibilities to qualified personnel. | Click here to enter text. |

1. Retain records of the results of design activities related to energy performance:

|  |  |  |
| --- | --- | --- |
| [ ]  | We continually maintain a record of the results of design activities and have recorded this data in a central location. | Click here to enter text. |

The documentation we maintain includes:

|  |  |  |
| --- | --- | --- |
| [ ]  | Completed checklists | Click here to enter text. |
| [ ]  | Meeting minutes | Click here to enter text. |
| [ ]  | Design drawings | Click here to enter text. |
| [ ]  | Purchasing specifications | Click here to enter text. |
| [ ]  | Project records | 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.