**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. **Used your prioritized opportunities from Task 10 to select projects for implementation.**
2. **Applied any applicable criteria set by your organization to justify and gain approval of the project.**
3. **Developed action plans for meeting your organization’s objectives and energy targets identified in Task 12.**
4. **Communicated expectations to relevant positions and review action plan progress.**

**This document is an example of how to complete Playbook Task 13. All blue text should be replaced with your organization’s information, assessments, and/or decisions.**

1. Use your prioritized opportunities from Task 10 to select projects for implementation.

|  |  |  |
| --- | --- | --- |
| ☒ | We have used the opportunities tracker available in Task 10 to select projects for implementation. | 11/2/23 |

1. Apply any applicable criteria set by your organization to justify and gain approval of the project.

|  |  |  |
| --- | --- | --- |
| ☒ | We have included applicable criteria set by our organization to justify selecting the project for implementation. | 11/5/23 |
| ☒ | We have obtained approval to implement the project. | 11/5/23 |

1. Develop action plans for meeting your organization’s objectives and energy targets identified in Task 12.

|  |  |  |
| --- | --- | --- |
| ☒ | We have used the Energy Management Action Plan Template below for each project approved for implementation | 11/5/23 |
| ☒ | The action plans developed will meet our organization’s objectives and energy targets | 11/5/23 |

☒ A project leader has been designated for each project

The Energy Team leader will coordinate and track leadership responsibilities for each project.

☒ Project leaders have assembled project teams for their respective projects and have communicated expectations and responsibilities

Project leaders have selected their project teams and shared them with the Energy Team leader.

The following items have been detailed in each action plan:

☒ Activities to be completed to implement the project and achieve energy targets(s)

☒ Resources needed to complete activities

☒ Time frame for completing activities

☒ Description of the method for verifying project results

☒ Description of the method for verifying the improvement in energy performance

☒ Method(s) to verify results of action plan and performance improvement

☒ Process and procedure changes required by projects

☒ Training of employees or contractors on the changes implemented due to the project, as needed

☒ Continued monitoring and measurement of project parameters to ensure that the energy performance is sustained over time

☒ Communication of benefits to stakeholders

1. Communicate expectations to relevant positions and review action plan progress.

|  |  |  |
| --- | --- | --- |
| ☒ | Everyone involved in energy projects knows their roles and responsibilities. | Yes. Confirmed at project kick-off meeting. |
| ☒ | We held a project kick-off meeting for each project. | Yes. |
| ☒ | We have regular meetings to review the action plan(s) to determine if implementation is progressing as expected. | Part of the regular Engineering Team meetings. |

Top Management Approval

|  |  |  |
| --- | --- | --- |
| ☒ | Date approved: | 11/10/23 |
| ☒ | Who approved: | General Manager. |

Comments

Click here to enter text.

Energy Management Action Plan Template

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Project Objective/Target:**  Reduce IT equipment electrical consumption by 25% from the baseline by 2028. | | | | | | | | | | | | | | **Planned Completion Date:** | | | | |
| 12/31/2028 | | | | |
| **Actual Completion Date:** | | | | |
| Not completed yet. | | | | |
| **Project Description:** Refresh older computer servers with new ENERGY STAR (if available), energy-efficient ones. Utilize the latest generation of virtualization software to leverage the capabilities of the new servers. The refresh should include a group of servers during each refresh, rather than individually. | | | | | | | | | | | | | | | | | | |
| **Project Budget:** $2.0M | | | | | | | **Project Leader:** Director of Engineering | | | | | | | | | | | |
| **Actual Cost:** Final costs have not yet been determined. | | | | | | | **Management Review:** 11/15/23 | | | | | | | | | | | |
| **Project Planning** | | | | | | | | | | | | | | | | | | |
| Action Items | | | | Responsible Position | | | | | Due Date | | | | | | Required Resources/Comments | | | |
| Inventory & catalog the existing computer servers | | | | Engineering Manager | | | | | 12/7/23 | | | | | | IT managers | | | |
| Engage an IT expert to identify server replacements | | | | Engineering Manager | | | | | 12/9/23 | | | | | | IT managers | | | |
| Develop a vendor list for scoping. | | | | Engineering Manager | | | | | 12/15/23 | | | | | | IT managers | | | |
| Develop RFP based on scope elements and contracting requirements | | | | Engineering Manager | | | | | 1/7/24 | | | | | | IT managers and the purchasing team | | | |
| Manage RFP process to select vendor. | | | | Purchasing Team | | | | | 1/15/24 | | | | | | Engineering Team's input into the process | | | |
| Develop an implementation plan in alignment with space access | | | | Engineering Manager | | | | | 1/15/24 | | | | | | IT managers and the operations team | | | |
| Deploy vendor for the turnkey installation process | | | | Engineering Manager | | | | | 1/20/24 | | | | | | IT managers and the operations team | | | |
| Inspect project for utility rebates. | | | | Engineering Manager | | | | | 1/20/24 | | | | | | Purchasing team. | | | |
| Click here to enter text. | | | | Click here to enter text. | | | | | Click here to enter a date. | | | | | | Click here to enter text. | | | |
| **Project Results Verification** | | | | | | | | | | | | | | | | | | |
| **Describe the method(s) to be used to verify the results of the action plan and the energy performance improvement achieved:**  Our energy engineers and the electric utility will determine the energy and cost savings. Energy savings are to be determined by the DCIM system's monitoring capabilities and utility data. | | | | | | | | | | | | | | | | | | |
| **Unit(s) of Measurement** | **Pre-Project Value** | | | | | **Post Project Value** | | **Net Change** | | | | | **Source of Measurement** | | | **Responsible Party** | | |
| Annual kilowatt-hours (kWh) | 20,000,000 kWh/yr | | | | | TBD | | TBD | | | | | DCIM and Utility | | | Engineering and Utility | | |
| Annual electricity costs | $2,000,000 | | | | | TBD | | TBD | | | | | DCIM and Utility | | | Engineering and Utility | | |
| 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. | | |
| **Evaluation of Results:**  Intermediate results will be available yearly until 2028, when the final results of this project will be available. | | | | | | | | | | | | | | | | | | |
| Energy Management Action Plan – Part 2 | | | | | | | | | | | | | | | | | | |
| **Communication/Training Plan** (Departments affected by the project. Mark the first column for departments involved/affected with the project implementation. Mark the second column for departments involved/affected with sustaining the project improvements.) | | | | | | | | | | | | | | | | | | |
| All Departments | | | X | | X | Production | | | |  |  | Lab | | | | |  |  |
| Sales/Marketing | | |  | |  | Maintenance | | | |  |  | Purchasing | | | | | X |  |
| Accounting | | |  | |  | Transportation | | | |  |  | Bldg/Facility Ops & Mgt | | | | | X |  |
| Human Resources | | |  | |  | Warehouse | | | | X |  | Engineering | | | | | X | X |
| Customer Service | | |  | |  | Custodial/Housekeeping | | | |  |  | Food & Beverage | | | | |  |  |
| Sustaining the project improvements Document the details for each responsibility necessary to sustain the energy savings achieved by the project’s implementation. | | | | | | | | | | | | | | | | | | |
| Function | | Tasks/Assignments for this Function | | | | | | | | | | | | | | | | |
| Roles | | Engineering (including IT and facility teams) will be key to maximizing the impact of the IT equipment upgrade. | | | | | | | | | | | | | | | | |
| Resources | | Engineering, purchasing, and vendors will work together to maintain a stock of the most common servers, ensuring a smooth operation. | | | | | | | | | | | | | | | | |
| Communication | | Staff will be reminded about the importance of ensuring the performance of the virtualization software. | | | | | | | | | | | | | | | | |
| Training | | Provide additional training to the engineering team on the new technologies. | | | | | | | | | | | | | | | | |
| Controls | | Ensure that the server equipment has energy-saving options enabled and that the virtualization software is functioning correctly. | | | | | | | | | | | | | | | | |
| Monitoring & Measurement | | Engineering will lead the monitoring and measurement activities, working closely with the energy engineer from the electric utility. | | | | | | | | | | | | | | | | |
| 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. | | | | | | | | | | | | | | | | |
| Project Follow-up Notes/Lessons Learned | | | | | | | | | | | | | | | | | | |
| Ensure adequate time is allocated in the project schedule for developing an RFP for these types of efforts, especially when navigating multiple levels of decision-making within the Purchasing Team. | | | | | | | | | | | | | | | | | | |