**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.**

**This document is an example of how to complete Playbook Task 15. All blue text should be replaced with your organization’s information, assessments, and/or decisions.**

1. 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. | 1/30/24 |
| ☒ | We have communicated with top management the content we would like to communicate and they have agreed to deliver the message organization-wide. | 1/30/24 |

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 | An online suggestion box has been established to collect ideas submitted to a dedicated email address listed on the company website. |
| ☒ | We have assigned responsibility for this to: | Energy Team Leader |

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.

Maintained by Asst. General Manager who leads and coordinates external communication activities

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

Maintained by Asst. General Manager who leads and coordinates external communication activities

|  |  |  |
| --- | --- | --- |
| ☒ | We have created a system for soliciting and recording suggestions from external parties | An online suggestion box has been established to collect ideas submitted to a dedicated email address listed on the company website. |
| ☒ | We have assigned responsibility for this to the following: | Energy Team Leader |

|  |  |  |
| --- | --- | --- |
| 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.  X Position: Energy Team Lead   Department: | | |
| Required Awareness | **Specific Requirements** | **Reference Materials** |
| Energy policy conformance | Awareness of policy | Energy policy |
| Relevant procedure conformance | Awareness and ability to reference standard operating procedures | Standard operating procedures for department staff |
| EnMS requirements conformance | Awareness and ability to reference standard operating procedures | Standard operating procedures for department staff |
| Role, responsibilities, and authority in achieving EnMS requirements | Awareness and ability to reference standard operating procedures | Standard operating procedures for department staff |
| Improved energy performance benefits | Awareness of policy | Energy policy |
| Actual and potential impact of activities on energy consumption | Awareness and ability to reference standard operating procedures | Standard operating procedures for department staff |
| Activity contribution to the energy objectives and targets achievement | Awareness of EnPIs and performance year-to-date | EnPIs |
| Potential consequences of procedure deviation | Awareness and ability to reference standard operating procedures | Standard operating procedures for department staff |

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| EnMS External Communications Log | | | | | | | | |
| **1** | Date Received:  2/3/24 | Assigned To:  Director of Engineering | Name of Requester:  Utility Account Representative | Affiliation/Organization:  Electric Utility | | | Contact Information:  Click here to enter text. | |
| Summary of information requested:  List of improvement opportunities | | Summary of Response:  Shared list at quarterly meeting with utility representatives | | Date of Response:  2/8/24 | Follow-Up Required? (If yes, describe)  Yes, quarterly review | | Date of Follow-Up:  TBD |
| **2** | Date Received:  2/5/24 | Assigned To:  Asst. General Manager | Name of Requester:  City Energy Office | Affiliation/Organization:  City Government | | | Contact Information:  Click here to enter text. | |
| Summary of information requested:  Status on compliance with local laws and mandates | | Summary of Response:  Records of energy performance; [ENERGY STAR Portfolio Manager](https://www.energystar.gov/buildings/tools-and-resources/portfolio-manager) report | | Date of Response:  2/15/24 | Follow-Up Required? (If yes, describe)  Yes, annually | | Date of Follow-Up:  TBD |

|  |  |
| --- | --- |
| EnMS External Communication Record | |
| Date Received: 2/3/24 | Assigned To: Director of Engineering |
| Name of Requester: Utility Account Representative | |
| Affiliation/Organization: Electric Utility | |
| Contact Information (address/telephone/e-mail): Click here to enter text. | |
| Information Requested: List of improvement opportunities | |
| Summary of Response (Attach documents as appropriate): Shared list at quarterly meeting with utility representatives | |
| Date of Response: 2/8/24 |  |
| Is follow-up needed? (circle one) YES / NO  Quarterly | If yes, when is follow-up needed (date)?  TBD |
| If yes, describe what follow-up is needed:  Update the list based on prioritization of improvement opportunities to determine available incentive support and pre-approval | Follow-Up Assigned To:  Director of Engineering |
| Date Follow-Up Completed:  Click here to enter a date. |

|  |  |
| --- | --- |
| EnMS External Communication Record | |
| Date Received: 2/5/24 | Assigned To: Asst. General Manager |
| Name of Requester: City Energy Office | |
| Affiliation/Organization: City Government | |
| Contact Information (address/telephone/e-mail): Click here to enter text. | |
| Information Requested: Status on compliance with local laws and mandates | |
| Summary of Response (Attach documents as appropriate): Records of energy performance; [ENERGY STAR Portfolio Manager](https://www.energystar.gov/buildings/tools-and-resources/portfolio-manager) report | |
| Date of Response: 2/15/24 |  |
| Is follow-up needed? (circle one) YES / NO  Annually | If yes, when is follow-up needed (date)?  TBD |
| If yes, describe what follow-up is needed:  Meeting with the city’s energy office to prove continued energy performance that exceeds city laws and mandates. | Follow-Up Assigned To:  Asst. General Manager |
| Date Follow-Up Completed:  Click here to enter a date. |

EnMS Training Needs Planning Matrix

Location: Energy Team

Date:2/20/24

Completed by: Energy Team Lead

| **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?** |
| --- | --- | --- | --- | --- | --- | --- |
| Overview of EnMS, Energy Policy, EnPIs, and standard operating procedures. | Supervisors | Energy Policy, EnPIs, and documented standard operating procedures. | Energy Team Lead | In-person | 3/15/24 | Signed agreement by Supervisors to acknowledge EnMS & standard operating procedures. |
| Review of standard operating procedures. | Staff | Documented standard operating procedures. | Energy Team Lead | In-person | 3/16/24 | List of attendees, agenda & minutes of discussion. |
| 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? |
| --- | --- | --- | --- | --- | --- | --- |
| Clients/  Tenants | Raise awareness about the data center energy management initiatives. | Energy policy, annual energy performance improvements, and long-term goals. | Director of Engineering | Incorporated into the energy-related communications plan. | Yearly | 2/25/24 |
| City officials | Compliance with energy-related local laws. | Energy policy, annual energy performance improvements, and long-term goals. | Director of Engineering | Incorporated into the energy-related communications plan. | Yearly | 2/25/24 |
| Owners | Raise awareness about the data center energy management initiatives. | Energy policy, annual energy performance improvements, and long-term goals. | Director of Engineering | Incorporated into the energy-related communications plan. | Yearly | 2/25/24 |
| Utilities | Engage utilities in EnMS to assist with identifying improvement opportunities. | Energy policy, annual energy performance improvements, and long-term goals. | Director of Engineering | Incorporated into the energy-related communications plan. | Yearly | 2/25/24 |
| 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?** |
| Supervisors | Energy policy, status of site-wide EnPI to goals, major capital projects underway. | Director of Engineering | Email & quarterly updates distribution. | Quarterly |
| Staff | Updates on project implementation, operational controls, and significant deviations in EnPIs. | Director of Engineering | Email. | Quarterly |
| 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) |
| Clients/Tenants | Director of Operations | Ass. General Manager | General Manager |
| Shareholders | Director of Finance | Ass. General Manager | General Manager |
| Utility Companies | Director of Engineering | Ass. General Manager | General Manager |
| Contractors | Director of Engineering | Ass. General Manager | General Manager |
| Suppliers | Procurement | Ass. General Manager | General Manager |
| Insurers | Director of Finance | Ass. General Manager | General Manager |
| Government Regulators | Director of Engineering | Ass. General Manager | General Manager |
| Local Officials | Director of Operations | Ass. General Manager | General Manager |
| Emergency Responders | Director of Fire & Life Safety | Ass. General Manager | General Manager |
| Media (crisis) | Ass. General Manager | General Manager | General Manager |
| Media (non-crisis) | Marketing | Ass. General Manager | General Manager |
| Neighbors | Marketing | Ass. General Manager | General Manager |
| Community | Marketing | Ass. General Manager | General Manager |
| General Public | Marketing | Ass. General Manager | General Manager |
| Environmental Groups | Marketing | Ass. General Manager | General Manager |
| 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: | 2/25/24 |
| ☒ | Who approved: | General Manager |

Comments

Click here to enter text.