**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 document is an example of how to complete Playbook Task 21. All blue text should be replaced with your organization’s information, assessments, and/or decisions.**

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

1. **Determined what needs to be monitored and measured for energy performance, including the key characteristics of operations affecting energy performance. Use the data and information you generated in the energy review, energy data collection plan, analysis of SEUs, your energy performance indicators (EnPIs) and energy baselines (EnBs).**
2. **For each datum/metric, defined the method used for monitoring, measuring, analysis and evaluation. Defined how often and when the results are to be analyzed and evaluated.**
3. **Implemented all needed monitoring, measurement and analysis if not already in place from prior Navigator tasks.**
4. **Evaluated your organization’s energy performance by comparing EnPI values to the corresponding EnB.**
5. **For each performance metric in the energy measurement plan, defined the criteria or parameters for a significant deviation in energy performance.**
6. **Established a process for investigating and responding to such deviations and for retaining records of the results.**
7. **Trained the appropriate personnel on how to identify and respond to significant deviations in energy performance.**
8. **Recorded results from monitoring and measurement.**
9. Determine what needs to be monitored and measured for energy performance, including the key characteristics of operations affecting energy performance. Use the data and information you generated in the energy review, energy data collection plan, analysis of SEUs, your energy performance indicators (EnPIs) and energy baselines (EnBs).

|  |  |
| --- | --- |
| ☒ | We have reviewed and pulled together what was developed in the previous tasks relating to monitoring, measurement, analysis and evaluation of energy performance. The following task activities have been completed: |

**☒ Task:** Energy Data Collection and Analysis

**Activity:** Collection and analysis of energy consumption by energy type and other data in the energy review to determine energy performance and provide the basis for establishing energy performance metrics (EnPIs, EnBs).

**☒ Task:** Energy Data Collection and Analysis

**Activity:** Implemented an energy data collection plan and collected data, including relevant variables for SEUs, energy consumption, operational criteria for SEUs, static factors (if applicable) and data specified in action plans.

**☒ Task:** Significant Energy Uses

**Activity:** Analyzed data to determine the SEUs, performed analyses to determine SEU relevant variables and SEU current energy performance and then implemented associated monitoring activities.

**☒ Task:** Energy Performance Indicators (EnPIs) and Baselines (EnBs)

**Activity:** Implemented monitoring and analysis of the EnPIs and EnBs.

**☒ Task:** Objectives and Targets

**Activity:** Set and then implemented monitoring of the objectives and energy targets.

**☒ Task:** Action Plans for Continual Improvement

**Activity:** Defined how action plan results are evaluated and energy performance improvement verification methods used.

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| ☒ | For energy performance, our organization has determined and implemented the following: | The current methods, as described in Playbooks for Tasks 8, 11, 13, and 20, will be utilized. |

**☒** What needs to be monitored and measured.

**☒** The methods we will use to ensure valid results from monitoring, measurement, analysis, and evaluation.

**☒** How often the monitoring and measurement will be done.

**☒** When the analysis and evaluation of results will be done.

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| ☒ | We are monitoring and measuring key characteristics of operations affecting energy performance. The key characteristics include: | We will continue to monitor and measure in 2025 and beyond, as detailed in Playbooks for Tasks 9, 11, 13, and 20. |

**☒** Effectiveness of the action plans in achieving objectives and energy targets.

**☒** EnPIs.

**☒** Operation of SEUs.

**☒** Actual vs expected energy consumption

1. For each datum/metric, define the method used for monitoring, measuring, analyzing, and evaluating. Define how often and when the results are to be analyzed and evaluated.

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| ☒ | As part of the energy review in the Energy Data Collection and Analysis task, we identified all energy types, past and present energy consumption data were collected and analyzed, and used to accomplish the following: | As detailed in the Playbooks for Tasks 8 and 9, and the Energy Consumption Tracker spreadsheet. |

**☒** Profiled our organization’s energy use and energy consumption.

**☒** Determined our organization’s significant energy uses.

**☒** Identified and prioritized energy performance improvement opportunities.

**☒** Developed energy performance indicators and baselines needed to evaluate energy performance.

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| ☒ | We continually monitor our organization’s energy consumption and do this by comparing our present consumption to our past consumption. | Yes, this is done through our data collection tools. |
| ☒ | Our energy consumption data is: | We have committed to the following for 2024 and beyond. |

**☒** Monitored and measured prior to any change being made (baseline).

☒ Monitored and measured after each change is implemented and compared with the baseline.

☒ Representative of normal operating conditions.

☒ Reflective of consistency in factors affecting energy performance such as weather, occupancy, production, or hours of operation.

1. Implement all needed monitoring, measurement and analysis if not already in place from prior Navigator tasks.

*The following matrix may be useful in tracking energy performance data.*

Data Collection Management Matrix

*Purpose: Document data location and the process of maintaining, acquiring, and storing data necessary for the EnMS and management review.*

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Data | Data Source | Data Location | Acquisition | Recording Method | Frequency | Needed for Mgt. Review? |
| Electricity Consumption | Electrical utility meters | Engineering | Engineering | Automatic | Hourly | Yes |
| Water Consumption | Water utility meters | Engineering | Engineering | Automatic | Hourly | Yes |
| Electricity Usage and Costs | Electric utility bills | Engineering and purchasing | Engineering and purchasing | Automatic | Hourly | Yes |
| Water Usage and Costs | Water utility bills | Engineering and purchasing | Engineering and purchasing | Automatic | Hourly | Yes |
| 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. |

*If you have not already completed the Monitoring and Measurement of Key Characteristics Planning Worksheet in Task 20, then you may find it useful to do so when implementing the monitoring and measurement process as part of this Task.*

1. Evaluate your organization’s energy performance by comparing EnPI values to the corresponding EnB.

**Effectiveness of action plans in achieving the objectives and energy targets:**

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| --- | --- | --- |
| ☒ | Our action plans are analyzed and evaluated for appropriate reproduction in other processes or areas. | Action plans are analyzed and evaluated quarterly. |
| ☒ | When projects fail to meet energy targets, they are analyzed and evaluated to determine the reason(s) for the shortfalls, with appropriate follow-up planned and implemented. | Projects that failed to meet energy targets are analyzed and evaluated. |
| ☒ | When action plans are not generating the intended results (i.e. ineffective), they are modified as needed. Indicators that action plans may not be effective include:   * Objectives are not met. * Energy targets are not met. * Unable to meet due dates. * Personnel are not available. * Budget is not sufficient/available. * Inadequate technology. * Change in priorities. | Action plans are modified as needed based on established criteria. |

**EnPIs**

|  |  |  |
| --- | --- | --- |
| ☒ | When evaluating our organization’s energy performance, The EnPI values are compared against the corresponding EnB. | Yes, as described in Playbooks for Tasks 11 and 20. Reviewed monthly. |

**Operation of SEUs**

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| --- | --- | --- |
| ☒ | We collect data on SEU relevant variables, energy consumption of SEUs and operational criteria as part of our energy data collection plan. | Yes, as described in the Playbooks for Tasks 9 and 20. Collected monthly. |

**Actual vs expected energy consumption**

|  |  |  |
| --- | --- | --- |
| ☒ | We analyze variances between the action plan’s actual versus expected results and evaluate that information to identify elements that can improve performance or identify problems to address. | Yes, as outlined in Playbooks for Tasks 8, 9, and 20. Reviewed quarterly. |
| ☒ | We have a process in place to review and update estimates on a regular basis and in response to major changes to facilities, equipment systems and processes. | Yes, reviews are conducted quarterly and after significant system changes. |

1. For each performance metric, define the criteria or parameters for a significant deviation in energy performance.

**Set criteria and determine the methods of identifying a deviation**

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| --- | --- | --- |
| ☒ | We employ methods for identifying, specifying, and investigating significant deviations. Examples of deemed significant deviations can include:   * Values outside of control limits * Percent variation in value * Trends identified * Specified variation in EnPIs * Specified variation in SEU performance * Level of variance between expected and actual performance * Change in equipment efficiency * Variation in specific relevant variable performance * Failure to meet objectives and energy targets * Failure to meet a specific performance level | We define the performance metrics, which we then use to assess the energy performance. |

**Implement and determine the criteria to evaluate if a deviation is significant**

|  |  |  |
| --- | --- | --- |
| ☒ | Our organization has established criteria which has been determined by the key characteristics we deem acceptable or unacceptable relative to the impact on energy performance. | We define “significant deviation” for each performance metric, which we then use to assess the performance. |
| ☒ | In addition to the characteristics established, we will investigate both positive and negative performance deviations by the following percentage: | Greater than 10% |

1. Establish a process for investigating and responding to such deviations and for retaining records of the results.

|  |  |  |
| --- | --- | --- |
| ☒ | Our organization investigates and responds to significant deviations. | Yes |
| ☒ | As a best practice, our organization maintains a corrective action process to address significant deviations. | We use a corrective action checklist. |
| ☒ | Our investigations address normal operation and evaluation of energy use and consumption expected as a result of process changes or implementation of improvement opportunities. | Yes, reviews are conducted quarterly and after significant system changes. |
| ☒ | While we always investigate deviations, we understand that a decision not to take action can be a legitimate response. Some examples include being:   * A one-time occurrence. * Result of an improvement that will persist. * Result of process changes. * Result of a simple mathematical error. * Too expensive to fix. * Requires currently unavailable technology. | Such instances are documented. |
| ☒ | We maintain records of all determinations, actions and decisions of inaction in response to any significant deviation occurrence. These records are located: | Engineering |

In addition to records of the investigation results and the response taken, our records also track the following here

☒Responsibilities

☒Time frames

☒Activities undertaken

**☐** Resources consulted

☐ Equipment / meters used

☒ Analysis conducted and results

☐ Response

☐ Effectiveness of response

☐ Other Click here to enter text.

☐ Other Click here to enter text.

1. Train the appropriate personnel on how to identify and respond to significant deviations in energy performance.

|  |  |  |
| --- | --- | --- |
| ☒ | We have trained our personnel on our organization’s processes for identifying and responding to significant deviations. | Yes, as part of our training activities (Playbook for Task 14) |

*A spreadsheet like the following example may be useful in helping to track who and what department has been trained in the practices of identifying and responding to significant deviations in energy performance.*

**Personnel trained in identifying and responding to significant deviations in energy performance**

|  |  |  |  |
| --- | --- | --- | --- |
| Name of Personnel Trained | Department Trained | Name of Trainer | Training Date |
| Asst. Dir of Engineering | Engineering | Director of Engineering | 7/12/24 |
| Director of Operations | Operations | Director of Engineering | 7/12/24 |
| HVAC Technicians | Engineering | Asst. Dir of Engineering | 8/12/24 |
| IT Technicians | Engineering | Asst. Dir of Engineering | 8/12/24 |
| Click here to enter text. | Click here to enter text. | Click here to enter text. | Click here to enter a date. |

1. Record results from monitoring and measurement.

☒ We maintain the results our monitoring and measurement activities here: Engineering

Top Management Approval

|  |  |  |
| --- | --- | --- |
| ☒ | Date approved: | 8/30/24 |
| ☒ | Who approved: | General Manager |

Comments

Click here to enter text.