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

**Who last modified/updated:** Click here to enter text.

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

1. **Defined the intervals at which top management will review the EnMS and energy performance.**
2. **Identified who must participate in the management review.**
3. **Compiled the relevant data and information (inputs) needed for the management review and prepared this information for presentation.**
4. **Conducted management reviews that address all required inputs and outputs.**
5. **Implemented the decisions and actions (outputs) of management reviews.**
6. **Determined if the EnMS continues to be suitable, adequate, effective and aligned with your organization’s strategic direction.**
7. **Maintained a record of management reviews.**

**This document is an example of how to complete Playbook Task 23. All blue text should be replaced with your organization’s information, assessments, and/or decisions.**

1. Define the intervals at which top management will review the EnMS and energy performance.

|  |  |  |
| --- | --- | --- |
| ☒ | We have defined the frequency of management reviews. | Annually |
| ☒ | A schedule of these management reviews has been established and is located: | Energy Team |
| ☒ | The frequency and duration of these reviews are: | One-half day meeting annually. |
| ☒ | We increase these planned review intervals as significant changes occur at our organization that can impact energy consumption, such as changes in usage or an increase in capital projects. | Evaluated quarterly. |

Determine the means for accomplishing management reviews:

|  |  |  |
| --- | --- | --- |
| ☒ | The means for accomplishing the management reviews are established by the organization and dictated by its needs. | The Corporate Engineering team and the General Manager will define the meeting objectives and expected outcomes. The Energy Team Leader will develop the agenda. |
| ☒ | We have a process in place to ensure key information is communicated to top management. | In addition to the annual Management Review, we provide the monthly Energy Team meeting minutes to top management and schedule meetings with them as necessary.  |
| ☒ | Our key findings are actionable and used to inform top management decisions so that necessary steps are taken to ensure continual improvement of energy performance and the EnMS. | Using the Management Review Data Assignment Sheet (page 3), we identify potential actions and include them in the agenda for the Management Review meeting. |

Our management reviews are conducted via the following methods:

☒ Face-to-face meetings

☐ Teleconferences

☐ Email exchanges

☐ Electronic meetings

☐ Other forms of electronic reviews

☐ Other Click here to enter text.

1. Identify who must participate in the management review.

Our management review participants include:

|  |  |  |
| --- | --- | --- |
| ☒ | Top management representative: | General Manager |
| ☒ | Energy management representative: | Energy Team Leader |
| ☒ | Other: | Assistant General Manager, Procurement Lead, VP Corporate Engineering |

Our energy management review team primary activities include:

|  |  |  |
| --- | --- | --- |
| ☒ | Review of fact-based decision making (outputs) | We review audit findings, EnPIs, EnBs, progress toward Energy Objectives and Targets, nonconformities addressed, and other relevant topics suggested by interested parties. |
| ☒ | Analysis of the system and its performance based on specific information (inputs): | We verify that the data and information collected for the review are complete and accurate. |

1. Compile the relevant data and information (inputs) needed for the management review and prepare this information for presentation.

The responsible personnel have provided the energy team with:

☒ Detailed data and information

☒ A summary that is concise and represented graphically where possible.

☒ A big picture overview that is still detailed enough to make fact-based decisions.

*The following worksheet can help you track roles and responsibility allocations of the management reviews:*

Management Review Data Assignment Sheet

| **Inputs to Management Review** | **Person Responsible for Collecting Data** | **Due Date** |
| --- | --- | --- |
| * Energy policy
 | Energy Team Leader | 12/20/24 |
| * Objectives, targets, action plans, and their status
 | Energy Team Leader | 12/20/24 |
| * EnPIs and current energy performance data
 | Energy Team Leader | 12/20/24 |
| * Past and projected energy performance data
 | VP Corporate Engineering | 12/20/24 |
| * Significant energy uses and their performance
 | Energy Team Leader | 12/20/24 |
| * Changes in what energy uses are identified as significant
 | Energy Team Leader | 12/20/24 |
| * Results of evaluations of compliance with legal requirements
 | General Manager | 12/20/24 |
| * Results of evaluations of compliance with other energy-related requirements subscribed to
 | VP Corporate Engineering | 12/20/24 |
| * Changes in legal requirements
 | General Manager | 12/20/24 |
| * Changes in other energy-related requirements subscribed to
 | VP Corporate Engineering | 12/20/24 |
| * EnMS audit results
 | Energy Team Leader | 12/20/24 |
| * Status of corrective actions and preventive actions
 | Energy Team Leader | 12/20/24 |
| * Recommendations and opportunities for improvement
 | General Manager | 12/20/24 |
| * Action items from previous management reviews
 | N/A This is the first review. |  |

1. Conduct management reviews that address all required inputs and outputs.

While reviewing the Playbook Worksheets during the management reviews, we also:

|  |  |
| --- | --- |
| ☒ | Followed-up on actions from previous management reviews |
| ☒ | Reviewed the extent to which the energy objectives and targets have been met |
| ☒ | Considered EnMS internal audit results |
| ☒ | Reviewed the status of corrective actions and preventive actions |
| ☒ | Appraised projected energy performance for the following period |
| ☒ | Considered recommendations for improvement to the EnMS |

We ensure that the following outputs have been addressed when deciding on changes to the EnMS:

☒ The energy policy

☒ EnPIs and EnBs

☒ Objectives, energy targets, and actions plans

☒ Actions to be taken if the objectives, energy targets or action plans are not achieved

☒ Other elements of the EnMS

☒ Resource allocations

Decisions about continual improvement opportunities must address opportunities to improve:

☒ Energy performance

☒ Integration with business processes

☒ Competence

☒ Awareness and communication

*Complete the Management Review by going through the worksheet below with top management and when that review is finished, indicate its completion by inserting the date at the top of the page in the header block.*

Management Review Record Form

|  |  |
| --- | --- |
| Date of Management Review:1/15/25 | Prepared by (name/position):Energy Team Leader |
| **Attendees (Names):** | **Title/Position** | **Organization/Department Represented** |
| Charles Bowman | Energy Team Leader | Energy Team / Engineering |
| Rick Johnson | General Manager | Executive Leadership |
| John Spencer | Assistant General Manager | Executive Leadership |
| Steve Manning | VP Corporate Engineering | Corporate |
| Bill Smith | Procurement Lead | Energy Team / Purchasing Department |

| **Input** | **Covered in this management review?** | **Information attached?** | **Discussion/Decision Summary** | **Action Item(s)** | **Assigned to:** | **Due Date:** |
| --- | --- | --- | --- | --- | --- | --- |
| Previous management review action items | ☐ Yes ☒ No | ☐ Yes ☒ No | N/A – This is the first Management Review after implementing the EnMS | None | Click here to enter text. | Click here to enter a date. |
| EnMS audit results | ☒ Yes ☐ No | ☒ Yes ☐ No | Review of effort to implement EnMS; discuss audit findings; Agree upon actions for the next 12 months.  | Address remaining nonconformities; update communication materials and training. | Energy Team Leader | 2/15/25 |

1. Implement the decisions and actions (outputs) of management reviews.

After completing the above steps, we considered changes to:

|  |  |
| --- | --- |
| ☐ | Energy policy |
| ☐ | EnPIs |
| ☒ | Objectives, targets, and action plans |
| ☒ | Resources needed to continue to maintain the EnMS |

1. Determine if the EnMS continues to be suitable, adequate, effective, and aligned with your organization’s strategic direction.

Is/does the EnMS:

|  |  |
| --- | --- |
| ☒ | Still appropriate to the purpose of the organization, its culture, operations, and business systems?  |
| ☒ | Capable of continuing to meet the 50001 Ready Navigator guidance and the other EnMS requirements established by the organization? |
| ☒ | Achieving the planned results, including energy performance improvement and improvement in energy management? |
| ☒ | Reflect and contribute to the strategic business priorities of the organization? |

Use the space below to notate any barriers to your organization carrying out the above requirements:

|  |
| --- |
| No significant barriers have been identified. |

1. Maintain a record of the management reviews.

|  |  |  |
| --- | --- | --- |
| ☒ | We maintain a record of the management reviews, and they are located here: | Energy Team |
| ☒ | The person responsible for keeping reviews up to date is:  | Energy Team Leader |

Top Management Approval

|  |  |  |
| --- | --- | --- |
| ☒ | Date approved: | 2/1/25 |
| ☒ | Who approved: | General Manager |

Comments