**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. **Determined necessary competencies for personnel and evaluated their current competencies.**
2. **Identified any gaps in the competencies of personnel whose work affects energy performance and the EnMS, and training needs to address competency gaps.**
3. **Evaluated the effectiveness of the actions taken.**
4. **Retained records of competence and related actions.**
5. Determine necessary competencies for personnel and evaluate their current competencies.

[x]  We have determined the necessary competencies for personnel and evaluated their current competencies. These are listed in the table below.

|  |  |  |
| --- | --- | --- |
| Person | Needed Competency | Evaluation of Current Competency |
| John Doe | Energy ManagementAdvanced Controls (Primary, Aeration) | AdeptTraining Required |
| Jane Doe | Energy ManagementAdvanced Controls (Primary) | Training RequiredAdept |
| Jack Doe | Energy Communication | Adept |
| Jenn Doe | Advanced Controls (Aeration) | Training Required |
| Jill Doe | Energy Efficient Procurement | Adept |

1. Identify any gaps in the competencies of personnel whose work affects energy performance and the EnMS and training needs to address competency gaps

[x]  Training gaps for our facility’s SEU(s) and other relevant EnMS elements have been identified and specific steps have been taken to ensure that relevant personnel are brought up to the competency level required to perform their specific jobs.

[x]  We have defined the competencies necessary for work positions related to SEUs and other elements related to the EnMS and have detailed them below:

|  |
| --- |
| The SEU of most concern is the Aeration Process in which we are going to hold a training on how to properly track, monitor, and control the process with regards to proper energy management. |

[x]  We have identified necessary training for filling in identified competency gaps:

EnMS-specific training modules have been added to all onboarding programs and are required for the annual training check-up for all relevant positions.

1. Evaluate the effectiveness of the actions taken
2. Retain records of competence and related actions

[x]  We have evaluated the effectiveness of the actions taken in the table below:

[x]  We have provided training and other necessary actions for filling competency gaps for personnel, and will maintain records of any training in the table below:

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Person | How they related to EnMS (SEU) | Training Required | Training Completed | Approving Supervisor | Next Training Planned | Action Effectiveness |
| John Doe | Plant Manager – General Overview Req’d  | Advanced Controls for EnMS | 10/15/20 | John Doe | Annual Training Check-Up | Highly Effective |
| Jane Doe | Primary Treatment Head Engineer | Advanced Controls (Primary) | 10/15/20 | John Doe | Annual Training Check-Up | Highly Effective |
| Jimmy Doe | Secondary Treatment Head Engineer | Advanced Controls (Aeration) | Not Completed, Yet | John Doe | N / A | TBD |

|  |  |  |
| --- | --- | --- |
| [x]  | Training needs for our facility will be updated at least annually | Confirmed. |
| [x]  | When: | At the same time as the annual Energy Team EnMS Review |
| [x]  | Responsible personnel: | Energy Team |

Top Management Approval

|  |  |  |
| --- | --- | --- |
| [x]  | Date approved: | 9/1/20 |
| [x]  | Who approved: | John Doe |

Comments

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