



## Section: Energy Review

### Task 13: After using a documented project selection process, we have developed action plans and implemented energy improvement projects

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#### Getting It Done

- Use the [Energy Management Action Plan Template](#) to create action plans for meeting your organization's energy objectives and targets identified in [Baselines, Objectives and Targets](#).

#### Task Overview

Once you have selected the energy projects that will enable your organization to achieve its energy objectives and targets, designate a project leader for each project. If the scope and complexity of the project requires additional resources, assemble a project team with the support of the management representative and top management. Then, develop an energy management action plan for each project. A good plan considers resources and includes planning, implementing, verifying, and communicating.

An energy management action plan developed to meet the requirements of ISO 50001 defines, at a minimum, the following:

- The activities to be completed to implement the project and achieve the energy target(s)
- The resources needed to complete the activities
- The time frame for completing the activities
- The person or persons responsible for completing the activities
- A description of the method for verifying project results
- A description of the method for verifying the improvement in energy performance

The energy management action plans must be documented and kept up to date at defined intervals.

The designation of a project leader with overall responsibility for project implementation provides for one point of contact between management and the project team. This person directs the project team to ensure implementation is in accordance with the action plan.

#### At the completion of this task, you will have...

- Determined actions, time frames and responsible parties
- Defined verification methods



- Communicated expectations
- Documented and updated the action plan(s)
- Taken appropriate action

*This guidance is relevant to Section 4.4.6 of the ISO 50001:2011 standard.*

**Associated Resources**

**Short Description**

<a href="#">Project Management for EnMS Implementation</a>	This resource details the steps that need to be taken to establish the structure for EnMS implementation at an organization. The four steps described in this resource are: Step 1 - Set the timeframe for implementation Step 2 - Develop the implementation plan Step 3 - Establish communication channels Step 4 - Celebrate success often
<a href="#">Energy Management Action Plan Template</a>	A template to assist in the preparation of an energy management action plan (i.e., action plan)
<a href="#">Energy Management Action Plan Example</a>	An example energy management action plan.
<a href="#">ENERGY STAR Guidelines for Energy Management</a>	ENERGY STAR Guidelines for Energy Management guidance document.

**Full Description**

**Determine actions, time frames and responsible parties**

Designate a project leader for each energy project. The project leader assembles a project team with representatives from the appropriate functions or areas. The project team develops a list of actions required for project implementation. Each of these actions requires resources. The project team will document, in an energy management action plan, the required actions and resources. The [Energy Management Action Plan Template](#) can be a useful starting point.

When defining actions necessary for project implementation, be sure also to address the following:

- The method(s) to be used to verify the results of the action plan and the performance improvement(s) achieved
- Any process or procedure changes required by the project
- 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 improvement is sustained over time
- Communication of benefits to stakeholders



A comprehensive list of actions helps to ensure the team understands what is necessary to implement the project, and they can communicate required resources effectively to management.

After the list of activities and the required resources have been determined, the team develops the time frames for completing the activities, considering resource availability and the stated time frames established for achieving the energy objectives and targets. Ensure due dates are included in the action plan, and ensure the action plans are reviewed and updated at regular intervals.

Assign responsibilities to appropriate individuals or teams to ensure completion of each action. Ensure that the action plan documents the responsible parties. The project leader can use the action plan to track the progress of project activities.

### **Define verification methods**

To effectively evaluate project results, the project leader or team will need to identify who is going to be responsible for project verification. The person or team assigned should have a working knowledge of the systems involved, and be competent in performing the necessary data gathering and analysis.

To clearly define the method of verification the following questions will need to be answered:

- What will be measured or evaluated to identify project impacts?
- How will it be measured or evaluated?

The answers to these questions will establish the measurement or evaluation activities necessary for verification. Give consideration to any instrumentation or metering that could be included in the project scope to enhance the ability to measure and evaluate system energy performance and project results.

Once these activities are determined, the verification process will need to establish a baseline or measurement of pre-project operations. When the project is complete, the verification process will need to evaluate or measure the post-project results. The estimated or expected project results can then be compared with the actual data from the project verification to determine the action plan's effectiveness.

The project is not complete until the verification of results is complete and the project team has reviewed them. The verification methods and the verification results should be recorded on the energy management action plan.

### **Communicate expectations**

The first step to communicating expectations for the energy project(s) is to have them fully defined



within the documented [Energy Management Action Plan Template](#) .

Everyone involved in energy project(s) needs to know their role and responsibilities. Since action plans often can involve personnel who are not on the energy team, communicating to them the responsibilities and expectations for their involvement is critical. This should be done using existing methods of internal communication. A “project kick-off” meeting that brings together all the personnel involved can be an effective approach for communicating the expectations for the project. It can help them understand how their assigned tasks or actions fit into the overall effort.

### **Document and update the action plan(s)**

ISO 50001 requires that energy management action plans be documented. The format of the documented action plan is determined by your organization. If your organization has an existing project management planning form, consider comparing it to the ISO 50001 requirements for an action plan, and modify or edit where needed to conform to these requirements. If there is no existing format, consider using the [Energy Management Action Plan Template](#) .

The project implementation team holds regular meetings to review the action plan and determine progress against schedule. During team meetings, use the action plan to determine if implementation is progressing as expected. Also, use team meetings to determine if any additional resources are required or if any additional activities need to be included in the action plan. Review and update the energy management action plan in accordance with the schedule and use it to communicate regularly with management.

An [Energy Management Action Plan Example](#) illustrates a completed action plan, including the verification of the energy performance improvement achieved.

### **Take appropriate action**

Taking appropriate action to implement the action plan(s) involves relevant personnel executing their assigned tasks efficiently and in a timely manner. Any actual or potential impacts of one task on another should be understood by the personnel involved so that unintended “cascade effects” are avoided.

Good project management can ensure that the action plans are properly implemented. Ongoing communication such as status reporting and project team meetings when appropriate will contribute to this success. For further information on project management, see [Project Management for EnMS Implementation](#) , which provides best practice guidance that can be applied to both the entire EnMS implementation and energy projects with associated action plans.