**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. **Formed an energy team and obtained authority from top management for it to oversee the EnMS and carry out assigned responsibilities.**
2. **Documented who the energy team leader is.**
3. **Scheduled regular energy management team meetings.**
4. **Assigned and communicated EnMS responsibilities and authorities within the organization.**
5. **Addressed and communicated responsibilities for other relevant roles.**
6. **Identified, communicated to top management, and allocated the resources needed for the EnMS.**
7. Form an energy team and obtain authority from top management for it to oversee the EnMS and carry out assigned responsibilities

Qualifications:

|  |  |  |
| --- | --- | --- |
| [x]  | We have established a set of qualifications for the energy team leader | 2+ years of experience with facility equipment, familiarity with maintenance operations, and understanding of energy efficiency principles. |
| [x]  | We have established a set of qualifications for members of the energy team  | Anyone can join as a team member! |

Energy Team (Note: for smaller organizations, the energy team can be a single individual)

|  |  |  |
| --- | --- | --- |
| [x]  | We have completed the Following Energy Team Roster | 8/1/20 |

\*Note: Rows may be added or deleted to align with number of team members

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Name** | **Department** | **Position** | **Team Responsibility/Role** | **Phone** | **Email** |
| Jane Doe | Maintenance | Head Maintenance Manager | Leader | 800-555-5555 | Email@company.com |
| Jim Doe | Engineering | Process Engineer | Member / Tech Assistance | 800-555-5556 | Email@company.com |
| Jill Doe | Operations | Supervisor | Member / Operational Awareness and Communication | 800-555-5554 | Email@company.com |
| John Doe | Corporate | Accountant | Member / Financial Insight | 800-555-5557 | Email@company.com |
| Jack Doe | Procurement | Head Procurer | Member | 800-555-5558 | Email@company.com |

1. Document who the energy team leader is

Energy Team Leader:

|  |  |  |
| --- | --- | --- |
| [x]  | Energy Team Leader: | Jane Doe |
| [x]  | Appointed by: | Tom Doe |
| [x]  | Date appointed: | 8/1/20 |
| [x]  | Management has approved | Approved. |
| [x]  | Roles and responsibilities for energy team leader have been established and communicated to the potential energy team leader | Energy Team leader is the head liaison between the Energy Team and top management. Their responsibilities include, but are not limited to, maintaining documentation and records, briefing management on on-going energy improvement processes and projects, recruiting for and maintaining the Energy Team, and keeping an open channel of communication with all facility personnel. |
| [x]  | Appointment has been documented andcommunicated | Roles and responsibilities were constructed by Energy Team and were accepted by Jane Doe on 8/1/20. They are included in Google Drive Folder under “Team Lead Documentation” |

1. Schedule regular energy management team meetings

|  |  |  |
| --- | --- | --- |
| [x]  | We have established when the energy team will meet | 1st and 3rd Monday of each month |
| [x]  | We have established where the energy team will meet | Meeting Rm A |
| [x]  | We have established who should be present | All Energy Team members |
| [x]  | We have established team roles and responsibilities | All team roles and responsibilities are documented in Google Drive folder under “Team Responsibilities”. |
| [x]  | We have planned to meet on a regular scheduled basis | Confirmed, see above. |

1. Assign and communicate EnMS responsibilities and authorities within the organization

|  |  |  |
| --- | --- | --- |
| [x]  | We have assigned EnMS responsibilities and authorities to appropriate individuals within the organization | We have included a rep from each department in the facility to ensure appropriate and thorough representation. |
| [x]  | We have communicated these responsibilities and authorities within the organization | Confirmed – Email sent 07/15/2020 |

Energy team leader has committed to:

|  |  |  |
| --- | --- | --- |
| [x]  | Ensure the EnMS is established implemented, maintained, and continually improved | This is a major priority of the Energy Team. |
| [x]  | Keep top management informed on EnMS performance | Bi-weekly emails to management and including an “Energy Team Report” during monthly facility meetings. |
| [x]  | Report to top management on energy performance | Energy Performance is included in bi-weekly emails and monthly facility meetings. |
| [x]  | Identify energy team members, with the approval of management | Top management are made aware of all new team members. |
| [x]  | Plan and direct energy management activities through the energy team | All energy management and improvement activities are discussed and evaluated by energy team. Ensure that top management has provided the resources (time) for the team members to actively participate with the energy team. |
| [x]  | Define and communicate responsibilities and authorities | All responsibilities and authorities are developed by the Energy Team and approved by management. These can be found in the Google Drive under “Team Responsibilities” |
| [x]  | Promote the energy policy and energy objectives across the organization | Updated Energy Policy was distributed to all facility personnel on 8/1/20 and is reiterated in all monthly facility meetings. |
| [x]  | Make sure processes are in place to ensure EnMS effectiveness | Processes developed by energy team and reviewed every six months. |

1. Address and communicate responsibilities for other relevant roles

|  |  |  |
| --- | --- | --- |
| [x]  | We have determined other relevant roles for implementing the EnMS | We have at least one representative from all departments and have communicated each department’s role in maintaining and implementing an energy management program. |
| [x]  | We have communicated responsibilities for these roles | Each department rep communicated to respective department. |

1. Identify, communicate to top management, and allocate the resources needed for the EnMS

Resources Allocated

|  |  |  |
| --- | --- | --- |
| [x]  | Resources are identified for the EnMS | Management approved interim budget proposal 7/15/20 |
| [x]  | Resource needed have been communicated to top management | Management was made of resource requirement for complete and effective implementation of EnMS. |
| [x]  | Resources are allocated for the EnMS | Confirmed. |

Top Management Approval

|  |  |  |
| --- | --- | --- |
| [x]  | Date approved: | 8/1/20 |
| [x]  | Who approved: | Jenn Doe |

Comments

Click here to enter text.