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

|  |  |  |
| --- | --- | --- |
| [ ]  | We have defined the frequency of management reviews. | Management Review meetings occur semi-annually. |
| [ ]  | A schedule of these management reviews has been established and is located: | In our EnMS shared calendar |
| [ ]  | The frequency and duration of these reviews are: | These review meetings last between 1 and 3 hours depending on the season and year.  |
| [ ]  | 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. | We have flexibility to add meetings if needed.  |

Determine the means for accomplishing management reviews:

|  |  |  |
| --- | --- | --- |
| [ ]  | The means for accomplishing the management reviews are established by the organization and dictated by its needs. | Top management and the EnMS leader coordinate the logistics of these meetings and determine agendas. |
| [ ]  | We have a process in place to ensure key information is communicated to top management. | The EnMS leader sends briefings to top management and shares updates as requested |
| [ ]  | 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. | We clarify potential actions for findings presented in the meeting and include these as meetings briefs sent ahead of the event. |

Our management reviews are conducted via the following methods:

X[ ]  Face-to-face meetings

[ ]  Teleconferences

[ ]  Email exchanges

X[ ]  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: | Click here to enter text. |
| [ ]  | Energy management representative: | Click here to enter text. |
| [ ]  | Other: | Click here to enter text. |

Our energy management review team primary activities include:

|  |  |  |
| --- | --- | --- |
| [ ]  | Review of fact-based decision making (outputs) | We review audit findings and EnPI tool models, relevant suggestions from interested parties. |
| [ ]  | Analysis of the system and its performance based on specific information (inputs): | We verify that we are able to collect the needed data at the needed intervals |

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
 | EnMS team leader prints relevant information if needed from documentation sharing software.  | Click here to enter a date. |
| * Objectives, targets, action plans and their status
 | EnMS team leader prints relevant information if needed from documentation sharing software.  | Click here to enter a date. |
| * EnPIs and current energy performance data
 | Energy manager | Click here to enter a date. |
| * Past and projected energy performance data
 | Energy manager | Click here to enter a date. |
| * Significant energy uses and their performance
 | Facilities manager A | Click here to enter a date. |
| * Changes in what energy uses are identified as significant
 | Energy manager | Click here to enter a date. |
| * Results of evaluations of compliance to legal requirements
 | Compliance coordinator | Click here to enter a date. |
| * Results of evaluations of compliance to other energy related requirements subscribed to
 | Compliance coordinator | Click here to enter a date. |
| * Changes in legal requirements
 | Operations director and compliance coordinator | Click here to enter a date. |
| * Changes in other energy related requirements subscribed to
 | Compliance coordinator | Click here to enter a date. |
| * EnMS audit results
 | Internal audit leader | Click here to enter a date. |
| * Status of corrective actions and preventive actions
 | Energy team leader | Click here to enter a date. |
| * Recommendations and opportunities for improvement
 | Energy team leader | Click here to enter a date. |
| * Action items from previous management reviews
 | Energy team leader | Click here to enter a date. |

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: | Prepared by (name/position):EnMS team leader  |
| **Attendees (Names):** | **Title/Position** | **Organization/Department Represented** |
| Click here to enter text. | Energy Manager | Sustainability |
| Click here to enter text. | Facilities Director | Facilities and operations |
| Click here to enter text. | Communications Director | Communications and operations |
| 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. | 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. | Click here to enter text. |

| **Input** | **Covered in this management review?** | **Information attached?** | **Discussion/Decision Summary** | **Action Item(s)** | **Assigned to:** | **Due Date:** |
| --- | --- | --- | --- | --- | --- | --- |
| Previous management review action items | [ ]  Yes X[ ]  No | [ ]  Yes [ ]  No | n/a: this is the first management review after implementing most of the 50001 Ready guidelines | Click here to enter text. | Click here to enter text. | Click here to enter a date. |
| EnMS audit results | X[ ]  Yes [ ]  No | X[ ]  Yes [ ]  No | We briefly discussed process and efforts to ensure relevant voices were included. We then discussed trends and all identified non-conformities. Top Management agreed with proposed follow-up actions determined by the EnMS team prior to the meeting. | Re-design procurement and wet lab maintenance trainings with respect to monitoring and measurement procedure. | Communications Liaison | 4 months from now |

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

After completing the above steps, we considered changes to:

|  |  |
| --- | --- |
| X[ ]  | Energy policy |
| X[ ]  | EnPIs |
| X[ ]  | 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:

|  |  |
| --- | --- |
| X[ ]  | Still appropriate to the purpose of the organization, its culture, operations, and business systems?  |
| x[ ]  | Capable of continuing to meet the 50001 Ready Navigator guidance and the other EnMS requirements established by the organization? |
| X[ ]  | Achieving the planned results, including energy performance improvement and improvement in energy management? |
| X[ ]  | 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:

|  |
| --- |
| We do not have any barriers to carrying out our EnMS/50001 Ready requirements. We are undergoing some site development in the next two years and will pay special attention to ensure continued EnMS success during this transition period.  |

1. Maintain a record of the management reviews.

|  |  |  |
| --- | --- | --- |
| [ ]  | We maintain a record of the management reviews and they are located here: | We locally store all documents in our document-sharing software. |
| [ ]  | Person responsible for keeping reviews up to date is:  | EnMS team leader |

Top Management Approval

|  |  |  |
| --- | --- | --- |
| [ ]  | Date approved: | Click here to enter a date. |
| [ ]  | Who approved: | Click here to enter text. |

Comments

Click here to enter text.