**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 SEEC Navigator Playbook is completed when you have:**

1. **Used your prioritized opportunities from Task 10 to select projects for implementation.**
2. **Applied any applicable criteria set by your organization to justify and gain approval of the project.**
3. **Developed action plans for meeting your organization’s objectives and energy targets identified in Task 12.**
4. **Communicated expectations to relevant positions and review action plan progress.**
5. **Use your prioritized opportunities from Task 10 to select projects for implementation.**

|  |  |  |
| --- | --- | --- |
| [ ]  | We use the opportunities tracker available in Task 10 to select projects for implementation. | Click here to enter text. |

1. **Apply any applicable criteria set by your organization to justify and gain approval of the project.**

|  |  |  |
| --- | --- | --- |
| [ ]  | We have included applicable criteria set by our organization to justify selecting the project for implementation. | Click here to enter text. |
| [ ]  | We have obtained approval to implement the projects. | Click here to enter text. |

1. **Develop action plans for meeting your organization’s objectives and energy targets identified in Task 12.**

|  |  |  |
| --- | --- | --- |
| [ ]  | We have used the Energy Management Action Plan Template below for each project approved for implementation | Click here to enter text. |
| [ ]  | The action plans developed will meet our organization’s objectives and energy targets | Click here to enter text. |

The following items have been detailed in each action plan:

[ ]  A project leader has been designated for each project

[ ]  Project leaders have assembled project teams for their respective projects and have communicated expectations and responsibilities

[ ]  Activities to be completed to implement the project and achieve energy targets(s)

[ ]  Resources needed to complete activities

[ ]  Time frame for completing activities

[ ]  Description of the method for verifying project results

[ ]  Description of the method for verifying the improvement in energy performance

[ ]  Process and procedure changes required by projects

[ ]  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 is sustained over time

[ ]  Communication of benefits to stakeholders

1. **Communicate expectations to relevant positions and review action plan progress.**

|  |  |  |
| --- | --- | --- |
| [ ]  | Everyone involved in energy projects knows their roles and responsibilities. | Click here to enter text. |
| [ ]  | We held a project kick off meeting for each project. | Click here to enter text. |
| [ ]  | We have regular meetings to review the action plan(s) to determine if implementation is progressing as expected | Click here to enter text. |

**Top Management Approval**

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

**Comments**

Click here to enter text.

Energy Management Action Plan Template

*Note: This template should be used to help define the specific actions needed to implement an energy management project (i.e., what will be done), the resources that will be required, and who will be responsible. Projects can be defined narrowly as individual energy efficiency improvements or more broadly as a group of related improvements. It is important that the definition of the project should allow for the effective tracking and verifying of energy savings.*

|  |  |
| --- | --- |
| **Project Objective/Target:**  Click here to enter text. | **Planned Completion Date:** |
| Click here to enter a date. |
| **Actual Completion Date:** |
| Click here to enter a date. |
| **Project Description:** Click here to enter text. |
| **Project Budget:** Click here to enter text. | **Project Leader:**  Click here to enter text. |
| **Actual Cost:** Click here to enter text. | **Management Review:** Click here to enter text. |
| **Project Planning** |
| Action Items | Responsible Position | Due Date | Required Resources/Comments |
| Click here to enter text. | Click here to enter text. | Click here to enter a date. | Click here to enter text. |
| Click here to enter text. | Click here to enter text. | Click here to enter a date. | Click here to enter text. |
| Click here to enter text. | Click here to enter text. | Click here to enter a date. | Click here to enter text. |
| Click here to enter text. | Click here to enter text. | Click here to enter a date. | Click here to enter text. |
| Click here to enter text. | Click here to enter text. | Click here to enter a date. | Click here to enter text. |
| Click here to enter text. | Click here to enter text. | Click here to enter a date. | Click here to enter text. |
| Click here to enter text. | Click here to enter text. | Click here to enter a date. | Click here to enter text. |
| Click here to enter text. | Click here to enter text. | Click here to enter a date. | Click here to enter text. |
| Click here to enter text. | Click here to enter text. | Click here to enter a date. | Click here to enter text. |
|  |
| **Project Results Verification** |
| **Describe the method(s) to be used to verify the results of the action plan and the energy performance improvement achieved:**Click here to enter text. |
| **Unit(s) of Measurement** | **Pre-Project Value** | **Post Project Value** | **Net Change** | **Source of Measurement****(e.g. meter ID, calculation formula, etc.)** | **Responsible Party** |
| 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. | Click here to enter text. | Click here to enter text. | Click here to enter text. |
| **Evaluation of Results:** Click here to enter text. |
| Energy Management Action Plan – Part 2 |
| **Communication/Training Plan** (Departments affected by the project. Mark the first column for departments involved/affected with the project implementation. Mark the second column for departments involved/affected with sustaining the project improvements.) |
| All Departments | [ ]  | [ ]  | Production | [ ]  | [ ]  | Lab | [ ]  | [ ]  |
| Sales/Marketing | [ ]  | [ ]  | Maintenance | [ ]  | [ ]  | Purchasing | [ ]  | [ ]  |
| Accounting | [ ]  | [ ]  | Transportation | [ ]  | [ ]  | Building/ Facility Operations & Management | [ ]  | [ ]  |
| Human Resources | [ ]  | [ ]  | Warehouse | [ ]  | [ ]  | Click here to enter text. | [ ]  | [ ]  |
| Customer Service | [ ]  | [ ]  | Custodial/Housekeeping | [ ]  | [ ]  | Click here to enter text. | [ ]  | [ ]  |
| Sustaining the project improvementsDocument the details for each responsibility necessary to sustain the energy savings achieved by the project’s implementation.  |
| Function | Tasks/Assignments for this Function |
| Roles | Click here to enter text. |
| Resources | Click here to enter text. |
| Communication | Click here to enter text. |
| Training | Click here to enter text. |
| Controls | Click here to enter text. |
| Monitoring & Measurement | 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. |
| Project Follow-up Notes/Lessons Learned |
| Click here to enter text. |

*©2017, The Regents of the University of California*

*Notice: This document has been authored by employees of the Regents of the University of California, and others, under Contract No DE-AC02-05CH11231 with the U.S. Department of Energy, for the management and operation of the Lawrence Berkeley National Laboratory. The United States Government retains a non-exclusive, paid-up, irrevocable, worldwide license to publish or reproduce the published form of this document, or allow others to do so for United States Government purposes.*

*In coordination with the U.S. Department of Energy, the Saudi Energy Efficiency Center has modified and reproduced the content of this document to best serve the market needs in the Kingdom of Saudi Arabia.*