**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. **Developed and delivered an initial EnMS communication from top management that included the importance of energy management and the organization’s energy policy.**
2. **Developed the details for EnMS awareness training for specific personnel or departments.**
3. **Planned and implemented awareness training.**
4. **Conducted awareness training and retained records.**
5. **Planned and implemented internal communication processes of the EnMS, including a suggestion system.**
6. **Planned and implemented external EnMS communication processes.**
7. **Develop and deliver an initial EnMS communication from top management that includes the importance of energy management and the organization’s energy policy.**

|  |  |  |
| --- | --- | --- |
|  | We have developed content for an initial communication to the organization about our EnMS activities. | Click here to enter text. |
|  | We have communicated with top management the content we would like to communicate and they have agreed to deliver the message organization-wide. | Click here to enter text. |

1. **Develop the details for EnMS awareness training for specific personnel or departments.**

Awareness

We have ensured that communications address awareness of the following:

Conformance with the energy policy

The importance of following EnMS procedures and requirements

Roles, responsibilities, and authorities related to EnMS

Improved energy performance benefits

Impact of activities on energy consumption

1. **Plan and implement awareness training.**

We have used the awareness training forms shown on the following pages.

1. **Conduct awareness training and retain records.**

We have used the awareness training forms shown on the following pages.

1. **Plan and implement internal communication processes of the EnMS, including a suggestion system.**

We have established a process that will ensure that internal communications related to energy performance and the EnMS are carried out on a continual basis and have included the following topics:

Energy policy

The importance of energy management

Energy management responsibilities and authorities

Energy objectives

Energy performance of the organization

Other information about the EnMS, as appropriate

|  |  |  |
| --- | --- | --- |
|  | We have created a system for soliciting and recording suggestions from internal parties | Click here to enter text. |
|  | We have assigned responsibility for this to: | Click here to enter text. |

1. **Plan and implement external EnMS communication processes.**

We have developed an external communication policy and process for our facility and will retain records of all activities pertaining to external communication.

Click here to enter text.

We have decided if and how our facility will engage in external communication regarding the energy policy, energy management system, and energy performance.

Click here to enter text.

|  |  |  |
| --- | --- | --- |
|  | We have created a system for soliciting and recording suggestions from external parties | Click here to enter text. |
|  | We have assigned responsibility for this to the following: | Click here to enter text. |

|  |  |  |
| --- | --- | --- |
| EnMS Awareness Requirements Form | | |
| Check the appropriate box below to specify whether this form is being completed for an individual, a position, or a department/functional unit:  Employee: Click here to enter text.  Position: Click here to enter text.  Department: Click here to enter text. | | |
| Required Awareness | **Specific Requirements** | **Reference Materials** |
| Energy policy conformance | Click here to enter text. | Click here to enter text. |
| Relevant procedure conformance | Click here to enter text. | Click here to enter text. |
| EnMS requirements conformance | Click here to enter text. | Click here to enter text. |
| Role, responsibilities and authority in achieving EnMS requirements | Click here to enter text. | Click here to enter text. |
| Improved energy performance benefits | Click here to enter text. | Click here to enter text. |
| Actual and potential impact of activities on energy consumption | Click here to enter text. | Click here to enter text. |
| Activity contribution to energy objectives and targets achievement | Click here to enter text. | Click here to enter text. |
| Potential consequences of procedure deviation | Click here to enter text. | Click here to enter text. |

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| EnMS External Communications Log | | | | | | | | |
| **1** | Date Received:  Click here to enter a date. | Assigned To:  Click here to enter text. | Name of Requester:  Click here to enter text. | Affiliation/Organization:  Click here to enter text. | | | Contact Information:  Click here to enter text. | |
| Summary of information Requested:  Click here to enter text. | | Summary of Response:  Click here to enter text. | | Date of Response:  Click here to enter a date. | Follow-Up Required? (If yes, describe)  Click here to enter text. | | Date of Follow-Up:  Click here to enter a date. |
| **2** | Date Received:  Click here to enter a date. | Assigned To:  Click here to enter text. | Name of Requester:  Click here to enter text. | Affiliation/Organization:  Click here to enter text. | | | Contact Information:  Click here to enter text. | |
| Summary of information Requested:  Click here to enter text. | | Summary of Response:  Click here to enter text. | | Date of Response:  Click here to enter a date. | Follow-Up Required? (If yes, describe)  Click here to enter text. | | Date of Follow-Up:  Click here to enter a date. |
| **3** | Date Received:  Click here to enter a date. | Assigned To:  Click here to enter text. | Name of Requester:  Click here to enter text. | Affiliation/Organization:  Click here to enter text. | | | Contact Information:  Click here to enter text. | |
| Summary of information Requested:  Click here to enter text. | | Summary of Response:  Click here to enter text. | | Date of Response:  Click here to enter a date. | Follow-Up Required? (If yes, describe)  Click here to enter text. | | Date of Follow-Up:  Click here to enter a date. |

|  |  |
| --- | --- |
| EnMS External Communication Record | |
| Date Received: Click here to enter a date. | Assigned To: Click here to enter text. |
| Name of Requester: Click here to enter text. | |
| Affiliation/Organization: Click here to enter text. | |
| Contact Information (address/telephone/e-mail): Click here to enter text. | |
| Information Requested: Click here to enter text. | |
| Summary of Response (Attach documents as appropriate): Click here to enter text. | |
| Date of Response: Click here to enter a date. |  |
| Is follow-up needed? (circle one) YES / NO | If yes, when is follow-up needed (date)?  Click here to enter a date. |
| If yes, describe what follow-up is needed:  Click here to enter text. | Follow-Up Assigned To:  Click here to enter text. |
| Date Follow-Up Completed:  Click here to enter a date. |

EnMS Training Needs Planning Matrix

**Location**: **Click here to enter text.**

**Date**: **Click here to enter text.**

**Completed by**: **Click here to enter text.**

| **WHAT TRAINING IS NEEDED?** | **WHO NEEDS THE TRAINING?** | **WHAT INFORMATION IS NEEDED? WHAT EnMS DOCUMENTS (if any) ARE INVOLVED?** | **WHO IS RESPONSIBLE FOR CONDUCTING THE TRAINING? (Position Title)** | **HOW/WHERE WILL THE TRAINING BE DONE?** | **WHEN WILL THE TRAINING BE DONE?** | **WHAT WILL BE THE TRAINING RECORD?** |
| --- | --- | --- | --- | --- | --- | --- |
| 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 a date. | 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 a date. | 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 a date. | 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 a date. | Click here to enter text. |

External Communications Planning Worksheet

| **Who is the target audience?** | **What is the purpose (goal) of the communication?** | **What will be communicated?** | **Who will communicate it? (responsible position)** | **How will it be communicated? (mechanism or media)** | **How often will the communication occur? (frequency)** | **When will the communication start?** |
| --- | --- | --- | --- | --- | --- | --- |
| 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. | 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. |

Internal EnMS Communications Planning Worksheet

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Internal EnMS Communications Planning Worksheet** | | | | |
| **Communicate to whom?** | **Communicate what?** | **Who will do the communication?** (Responsible Position) | **What media will be used to communicate?** | **How often will the communication occur?** |
| 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. | 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. |

Responsibility and Authority Matrix for Energy-Related External Communications

|  |  |  |  |
| --- | --- | --- | --- |
| **Potential External Interested party** | **Frontline Responsibility/Authority**  **(position title)** | **Back-Up Responsibility/Authority (position title)** | **Ultimate (Top-Level) Authority**  **(position title)** |
| Customers | Click here to enter text. | Click here to enter text. | Click here to enter text. |
| Shareholders | Click here to enter text. | Click here to enter text. | Click here to enter text. |
| Utility Companies | Click here to enter text. | Click here to enter text. | Click here to enter text. |
| Contractors | Click here to enter text. | Click here to enter text. | Click here to enter text. |
| Suppliers | Click here to enter text. | Click here to enter text. | Click here to enter text. |
| Insurers | Click here to enter text. | Click here to enter text. | Click here to enter text. |
| Government Regulators | Click here to enter text. | Click here to enter text. | Click here to enter text. |
| Local Officials | Click here to enter text. | Click here to enter text. | Click here to enter text. |
| Emergency Responders | Click here to enter text. | Click here to enter text. | Click here to enter text. |
| Media (crisis) | Click here to enter text. | Click here to enter text. | Click here to enter text. |
| Media (non-crisis) | Click here to enter text. | Click here to enter text. | Click here to enter text. |
| Neighbors | Click here to enter text. | Click here to enter text. | Click here to enter text. |
| Community | Click here to enter text. | Click here to enter text. | Click here to enter text. |
| General Public | Click here to enter text. | Click here to enter text. | Click here to enter text. |
| Environmental Groups | Click here to enter text. | Click here to enter text. | Click here to enter text. |
| Other: | 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. |

**Top Management Approval**

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

**Comments**

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.*