**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. **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 have used 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 project. | 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 Plant 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. |

A project leader has been designated for each project

Click here to enter text.

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

Click here to enter text.

The following details have been detailed in each action plan:

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

Method(s) to verify results of action plan and performance improvement

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

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