

On-site Energy Manager – Energy Management Plan Reporting Template

This template is provided as a guide and is not required. However, all information here must be included in some form in the Energy Management Plan.

Overview of engagement and facility

This section should outline the purpose of the engagement, the background of the facility and team, and the goals and expected outcomes of the engagement. At a minimum, it should include:

- Function and purpose of the facility/facilities and processes therein
- Personnel involved
- Cross functional energy team identification
- Overall goals of the engagement including energy savings target
- Project approval process
- Energy policy or acknowledgement statement, where applicable
- Organizational cultures regarding energy management and employee engagement, if applicable

Description of facility energy using systems, operation, and condition

This section should provide a clear picture of the major existing systems at the facility and a discussion of their current operations and condition. At a minimum, it should include:

- Catalog of major equipment
- Discussion of the major energy consuming systems including age and condition
- Current control methods
- Systems and areas identified for further study/improvement potential

Description of energy usage and energy tracking and monitoring system

This section should show historic energy use and make clear the energy savings targets for the engagement. At a minimum, it should include:

- Historic energy usage and costs of the facility
- Energy usage by system
- Methods of tracking and monitoring energy use/performance for remainder of engagement
- Energy reduction goals versus baseline (historic energy usage)
- Key performance metrics to be monitored
- Strategy for Measurement & Verification

Plan for remainder of engagement

This section should discuss the planned timeline of the remaining goals and deliverables of the engagement:

- Quarterly reporting goals



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- Meetings/calls completed and planned
- Employee awareness plan status
- Case study
- Road map
- Final report