**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. **Developed one or more energy performance indicators (EnPIs) for your organization. If relevant variables significantly affect energy consumption, normalized EnPIs.**
2. **Developed an energy baseline (EnB) for EnPIs in order to later determine energy performance improvement.**
3. **Communicated proposed EnPIs and EnBs to top management so they can ensure the EnPIs and EnBs are appropriate for the organization.**
4. **Recorded and regularly reviewed the method used to determine and update EnPIs and established the conditions under which adjustments to the baseline(s) will be made.**
5. **Compared EnPI values to their respective EnBs on a regular basis.**
6. **Implemented a process for ongoing monitoring, measurement and analysis of your EnPIs, EnBs, and energy performance improvement.**
* **If you are planning on seeking U.S. DOE 50001 Ready recognition for this project please refer to the, “Get Ready Recognized,” page of the 50001 Ready Navigator to ensure you select an EnPI, EnB, and method for demonstrating energy performance improvement allowed by the recognition program. To achieve Ready recognition energy performance improvement is demonstrated for the same scope and boundaries as your 50001 Ready EnMS.**
1. Develop energy performance indicators (EnPIs) for your organization including an EnPI for each SEU. If relevant variables significantly affect energy consumption, then normalize EnPIs.

[ ]  We have developed our energy performance indicators (EnPIs) using information from the energy review in the Energy Data Collection and Analysis task.

|  |  |  |
| --- | --- | --- |
| [ ]  | We have assigned responsibilities of EnPI development at our organization.  | Click here to enter text. |

|  |  |  |
| --- | --- | --- |
| [ ]  | Our **energy team** is responsible for developing our list of EnPIs. | Click here to enter text. |
| [ ]  | **Top management** is responsible for ensuring EnPIs appropriately represent energy performance, which can be accomplished through the management review process detailed in the Management Review task.  | Click here to enter text. |

|  |  |  |
| --- | --- | --- |
| [ ]  | We have assigned an EnPI for each significant energy use (SEU).  | Click here to enter text. |
| [ ]  | Each of the EnPI’s we have selected provide immediate value to key stakeholders.  | Click here to enter text. |

*Note: For 50001 Ready recognition specific EnPIs and EnBs are required. See program requirements on the “Get Ready Recognized” page of the 50001 Ready Navigator for more information.*

[ ]  We have established criteria for identifying EnPIs, detailed below:

Click here to enter text.

[ ]  We have established methods for determining EnPIs, detailed below:

Click here to enter text.

[ ]  We have established a process for recording and reviewing these methods on a regular basis.

Click here to enter text.

[ ]  We have created a list of EnPI(s) for our facility, and have detailed below:

| **EnPI** | **Energy Input, units** | **Description of intended use of EnPI**  |
| --- | --- | --- |
| 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. |

1. Develop an energy baseline (EnB) for EnPIs in order to later determine energy performance improvement.

Providing responses to the questions below can help in identifying the relevant EnBs for the established EnPIs:

|  |  |  |
| --- | --- | --- |
| [ ]  | How will each EnPI be used for evaluating energy performance? Is there a logical EnB for each? | Click here to enter text. |
| [ ]  | What are the historical changes to facilities, equipment, systems, processes, or organization that would change how energy performance is evaluated? | Click here to enter text. |
| [ ]  | What stakeholder interests should be considered when establishing EnB for the EnPI? | Click here to enter text. |
| [ ]  | Are there strategic initiatives that would be measured or influenced by one or more of the established EnPIs? Is there an EnB associated with these strategic initiatives? | Click here to enter text. |
| [ ]  | What are the historical periods that have reliable, consistent data for the established EnPIs? | Click here to enter text. |

1. Communicate proposed EnPIs and EnBs to top management so they can ensure the EnPIs and EnBs are appropriate for the organization.

[ ]  Identified EnPIs and EnBs have been approved by top management.

|  |  |
| --- | --- |
| Who approved? | Click here to enter text. |
| When approved? | Click here to enter a date. |

1. Record and regularly review the method used to determine and update EnPIs and establish the conditions under which adjustments to the baseline(s) will be made.

[ ]  We maintain documented information on the methods we use to determine and update our organization’s EnPIs.

|  |  |
| --- | --- |
| Who maintains the documented information? | Click here to enter text. |
| Where are these records maintained (e.g. energy manual or energy planning procedure)? | Click here to enter text. |

|  |  |  |
| --- | --- | --- |
| [ ]  | We evaluate any changes in facilities, equipment, systems, processes, operating procedures, materials, relevant variables, and many other factors. We adjust the EnPI as necessary. | Click here to enter text. |

1. Compare EnPI values to their respective EnBs on a regular basis.

|  |  |  |
| --- | --- | --- |
| [ ]  | EnPI values are reviewed and compared to their respective EnBs, as appropriate. | Click here to enter text. |
| [ ]  | Calculated EnPI values and their associated EnBs are retained as documented information and periodically reviewed to determine if adjustments are required.  | Click here to enter text. |
| [ ]  | We have a process in place where we make adjustments to an EnB in the following instances:* When the EnPIs no longer accurately reflect the organization’s energy performance
* When there are major changes to static factors, the process, operational patterns, or energy systems
* According to a predetermined method
 | Click here to enter text. |
| [ ]  | We maintain records of modifications and updates to EnBs to ensure energy performance measures remain relevant and meaningful. | Click here to enter text. |

1. Implement a process for ongoing monitoring, measurement and analysis of your EnPIs, EnBs, and energy performance improvement

|  |  |  |
| --- | --- | --- |
| [ ]  | Calculated EnPI values and EnBs are recorded and reviewed on a regular basis. | Click here to enter text. |
| [ ]  | The components of EnPIs that are measured or calculated are managed for accuracy and repeatability in the energy data collection plan (as addressed in the Energy Data Collection and Analysis task).  | Click here to enter text. |
| [ ]  | Top management’s review of energy performance includes a review of performance as determined by the EnPIs and the related EnBs.  | Click here to enter text. |
| [ ]  | Top management ensures changes are made when the above-mentioned metrics are no longer appropriate. | 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.