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| ***Instructions to complete the template for your Energy Management Plan***  *All grey italic text with borders are instructions to help you prepare the required BEST Practice for your building.*   1. *Replace all* [blue text in brackets] *in the document with building specific information.* 2. *Where required, complete the necessary tasks, or engage a third-party consultant to complete the tasks so that you are able to fill the relevant sections of the template with building specific information.* 3. *Delete all grey italic text when you have filled all relevant sections with building specific information.* 4. *Additional Resources[[1]](#footnote-2) can be found here:*  * [*Energy Management Best Practices Guide*](http://publications.gc.ca/collections/collection_2016/rncan-nrcan/M144-256-2014-eng.pdf) *(Natural Resources Canada)*  1. *Complete the Checklist below to confirm your Energy Management Plan meets the BEST Practice requirements.* |

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| ***Checklist***  *The Energy Management Plans must include:*  *Energy Conservation Measures (ECM) for the building (such as those provided in the Energy Assessment, as available).*  *For each measure, identify whether it will be implemented, the associated budget, a timeline for completion, and the person responsible for its implementation.*  *If a particular measure will not be considered for the building, indicate why this is the case.*  *Completed Energy Management Plan reviewed and updated in the last three (3) years from the date of current BOMA BEST verification.*  *In the case of Recertification, demonstrate which ECMs listed in the previous Energy Management Plan have been implemented since certification.*  *(Optional) Implementation is preferable though not required to demonstrate BEST Practice compliance.* |

**ENERGY MANAGEMENT PLAN**

[Insert Building Name and / or Address]

[Insert Name of Organization]

[insert Building Description – number of floors, tenants, parking spaces (underground or surface) and other distinguishing features]

[Insert date Plan was created / most recent date it was reviewed]

# Introduction and Purpose

Energy management is the continuous process of managing behavioural, organizational and technical change to improve the building’s energy performance. The Energy Management Plan identifies and documents building-specific measures to improve energy efficiency and reduce demand.

# Responsibilities

[Insert Name], Property Manager ([Insert Name of Organization]) of [Insert Building Name], is responsible for the following:

* Work with the relevant parties involved in the development of the Energy Assessment Report to identify energy conservation measures that are feasible to implement.
* Obtain necessary capital approvals to advance implementation of ECMs.
* Develop timeline for ECM implementation.
* Assign responsible parties who will oversee selected ECM implementation.

# Strategy

## Plan

[Outline the current energy management processes in place at the building and people that are managing the associated energy-using equipment and systems. Indicate the respective areas identified where improvements may be possible.]

*Review the scorecard in Appendix A and check off current status at your building. Refer to higher levels of performance descriptions to help define next step aspirations that you may consider implementing as part of the development of the building’s energy management plan.*

*If a particular measure will not be considered for the building, indicate why this is the case. Also indicated if a measure is deferred because it is considered a capital cost.*

Refer to **Appendix A** that indicates the building’s current energy management status.

## Energy Management Priorities

[Briefly describe the priority energy conservations measures identified at the building for implementation].

Refer to the attached **Appendix B** that shows all the ECMs identified, associated budget, estimated timeline for completion and responsible party.

*All energy conservation actions must be evaluated for their technical feasibility and expected results (estimated energy savings and pre-feasibility study) as well as financial feasibility (through an economic cost/benefit analysis such as simple payback or ROI). These actions mush be integrated into a timeline for completion.*

## Targets and Goals

Refer to **BEST Practice 4: Energy Reduction Target**.

*Once you have identified the energy conservation measures that you plan on implementing over the short term, consider the potential impact it may have on improving the building’s energy performance.*

*Liaise with your building’s energy management team and third-party consultant who assisted in the preparation of the recent Energy Assessment and determine a realistic energy reduction target (using quantifiable performance indicators) for the building, as well as the timeline projected to reach the target.*

# Time Period

This plan was implemented on [Insert Date] and will be reviewed and updated at least once every three (3) years.

Appendix A: Energy Management Balanced Scorecard[[2]](#footnote-3)

*Review the scorecard below and check off current status at your building. Refer to higher levels of performance descriptions to define next step aspirations that you may consider implementing.*

| **Lvl** | **Commitment** | **Planning** | **Organization** | **Projects** | **Financing** | **Tracking** | **Communication** | **Training** |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **5** | € An energy policy exists that has clear targets, has the commitment of senior management and is communicated broadly. | € A comprehensive energy management plan covers all major practice categories, defines how targets will be achieved and is implemented by all departments with full support from senior management. | € Energy management is fully integrated into the management structure with clear delegation of responsibility for energy consumption. | € Identification of capital, behavioural, operational and maintenance projects, development of business cases and implementation are ongoing. | € Investment criteria, financing mechanisms and commitment to implement energy efficiency projects are clearly defined. | € An energy accounting system sets targets, forecasts use, monitors use against a baseline and the forecast, and identifies faults. Savings are tracked at a project and system level by using submeters. Performance is benchmarked. | € The value of energy efficiency and the performance of energy management are reported and marketed, both within the organization and outside, continuously. | € Senior management, building operators and staff or tenants are trained to fully support energy performance. |
| **4** | € A formal energy policy exists but lacks active commitment from senior management. | € All departments are represented on the planning team with some senior management support. | € An energy committee is used as the main channel of communications along with direct contact with major energy users. | € There is formalized but infrequent identification of energy opportunities, basic business cases and implementation. | € Life-cycle costing and/or internal rate of return investment criteria are used. | € Facility-level performance is monitored against a baseline and benchmarked by using key performance indicators. Results from major projects are measured. | € An ongoing program of staff and tenant awareness exists, and progress is reported through regular publicity campaigns. | € Senior management or staff and tenants have received ad hoc training. Building operators are fully trained to support energy performance. |
| **3** | € The energy policy set by the energy manager, energy committee or equivalent has not been adopted. | € Only technical people or technical managers are involved in developing an energy management plan. | € An energy manager is in place but has no clear responsibility or authority. | € Development of energy savings opportunities is ad hoc and infrequent. There is only selected implementation. | € Investments are based on short-term or simple payback criteria only, with no consideration for life-cycle costing. | € Facility-level performance is monitored against a baseline by using utility data with ad hoc use of findings. No benchmarking is done. | € Staff and tenant awareness is occasional only and ad hoc. | € Building operators are trained to maintain major energy-intensive systems. |
| **2** | € An undocumented set of guidelines or procedures exists. | € One person has been delegated to develop an energy management plan. | € An energy manager is a part-time responsibility that has limited authority. | € Only informal assessments are made with ad hoc resources to identify energy-saving opportunities. | € Only low-cost measures are implemented. | € Cost reporting is based on utility invoice data. No benchmarking is done. | € Only informal contacts are used to promote energy efficiency. | € Building operators receive ad hoc training in energy-efficient technologies and practices. |
| **1** | € No guidelines or procedures exist. | € No energy management plan exists. | € There is no energy-related responsibility or contact between management, staff and the occupants. | € There is no mechanism or resources to identify or develop energy-saving opportunities. | € Energy efficiency investments are not pursued. | € No energy data are being tracked or benchmarked. | € Energy efficiency is not promoted. | € There is no energy management or operational training. |

Appendix B: Energy Conservation Measures and Financial Savings Estimate

*Insert into the table below a prioritized list of the retrofit, operation, and maintenance energy conservation measures (ECMs) identified in the most recent Energy Assessment (BEST Practice 2). Estimate implementation timeframe and assign responsibility to each measure. Include dismissed measures and note reason for dismissal.*

*The column headings in the table below provide an example of minimum requirements that show the plan for implementing the energy conservation strategies identified. A more detailed table is strongly encouraged, especially one which allows for continuous energy-use tracking, so feel free to develop one for your building as appropriate.*

*Consider the higher levels of performance descriptions identified in Appendix A: Energy Management Balanced Scorecard to define next step aspirations that you may consider implementing and indicate estimated timeline for completion of these aspirations.*

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| **Potential Energy Conservation Measure** | **Estimated Net Capital Cost ($)** | **Estimated Payback Period (Years)** | **Estimated Timeline for Completion** | **Responsible Party** | **Notes** |
| *Example: Lighting Retrofit* | *$10,000* | *3.8* | *By 2023* | [Insert Name] | [Add] |
| [Add for your building] | [Add] | [Add] | [Add] | [Add] | [Add] |
| [Add for your building] | [Add] | [Add] | [Add] | [Add] | [Add] |

1. *The additional resources presented above are suggestions and not intended as an endorsement by BOMA Canada of any method, process or specific product* [↑](#footnote-ref-2)
2. Source: [NRCan’s Energy Management Best Practices Guide – For Commercial and Institutional Buildings](http://publications.gc.ca/collections/collection_2016/rncan-nrcan/M144-256-2014-eng.pdf), p.10 [↑](#footnote-ref-3)