

P-12 Schools Initiative

On-Site Energy Manager Energy Management Plan Reporting Template

This template is provided as a guide. The Energy Management Plan should be submitted as a deliverable at the end of the first quarter of engagement. All information should be included in some form in the report. The Energy Management Plan may be updated over the course of the engagement. If edits were made to the Energy Management Plan throughout the engagement, then the updated Energy Management Plan should be submitted as a final deliverable at the end of the engagement.

Overview of engagement and facility

This section should outline the purpose of the engagement, the background of the facility(ies)/district 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(ies) energy using systems, operation, and condition

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

- Facility(ies) square footage and function
- Catalog of major equipment, i.e. heating, ventilation, and air conditioning (HVAC) systems, service hot water, lighting, envelope, renewable energy systems, etc.
- 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:

- Minimum of 12 months of historic energy usage and costs of the facility(ies)
- 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, where applicable



Plan for remainder of engagement

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

- Quarterly reporting goals
- Meetings/calls completed and planned
- Case study
- Final report