



P-12 Schools Initiative

On-Site Energy Manager Quarterly Reporting Template

This template is provided as a guide. All information should be included in each quarterly report.

Overview of quarterly activities and plans for next quarter

This section should provide an executive summary of the quarterly report, highlighting activities and results of the previous quarter. It should include a table showing identified and installed projects as well as progress toward site goal (please see OSEM Project Summary Sheet for format).

Operation and maintenance issues

This section should describe low-cost or maintenance items (if identified during the current quarter) that can be addressed immediately. It should include the following:

- Items identified so far
- Recommended corrective actions
- Discussion of benefits of corrective action
- Estimated costs and savings associated with corrections
- Results from recommendations already implemented
 - Including previous description, actual costs, and monitored results (if applicable)
- Ongoing preventive maintenance plan
- Plans for further investigation during next quarter

Capital improvement items (ECMs)

This section should describe capital improvements identified and implemented during the quarter. It should include the following:

- Items identified so far (both recommended and not recommended)
- Description of existing conditions
- Estimated installation cost and energy/cost savings
- Discussion of ancillary benefits, such as water savings, carbon reduction, preventive maintenance, health and safety, etc., where applicable
- Results from recommendations already implemented
 - Including previous description, actual costs, and monitored results (if applicable)
- Plans for further investigation during next quarter

Updates on energy management plan progress, if applicable

This section should discuss which plan items were addressed and provide updates on milestones, meetings, or deliverables that were addressed during this quarter. Progress toward the following tasks should be reported, where applicable:

- *Develop energy tracking & monitoring system*
- *Develop a cross functional energy team and hold monthly meetings*



- *Develop a strategy for energy savings M&V at a district level*
- *Conduct walkthrough audits and reports*
- *Review Operations and Maintenance schedules and procedures*

Supporting data (where applicable)

The following supporting data should be provided where it applies to the current quarterly report:

- Energy monitoring data
- Logs of operational readings
- Capital cost estimates or records (for installed items)
- Assumptions and energy savings calculations
- Supporting documents for operation/maintenance training sessions or plans
- Supporting documents/minutes for energy team meetings

Final report – submitted once at the conclusion of the OSEM engagement

The final report will document the overall effort and progress against facility(ies)/district energy goal. It should include the following:

- Overall narrative on how the engagement went, final results, progress towards targets, and post-engagement plans
- Descriptions of all measures identified over the course of the engagement (per above) and any new measures identified since the last quarterly report
- Final OSEM Project Summary Sheet
- For projects receiving Clean Energy Educational and Professional Development Activities funding, the following should be included in the final report:
 - i. Milestone 1 deliverable
 - ii. Milestone 2 deliverable
 - iii. Milestone 3 deliverable
 - iv. Milestone 4 deliverable

The final report should also be accompanied by the following the final deliverable:

- Case study, including savings metrics, for online publishing