

## Upstate PHA Pathway – Energy Management Plan Reporting Template

All information here must be included 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
- 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
- Beneficial Electrification Feasibility

### 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 engagement

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

- 12 month engagement timeline



**NYSERDA**

- Meetings/calls completed and planned
- Capital plan road map
- Final Energy Management Report Deliver Date