

On-site Energy Manager – Quarterly Reporting Template

This template is provided as a guide and is not required. However, all information here must be included in some form 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 identified 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
- 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

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 required tasks at a minimum should be reported:

- *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 corporate level*
- *Conduct walkthrough audits and reports*



- *Review Operations and Maintenance schedules and procedures*
- *Schedule at least one (1) employee training session to address energy awareness and operational issues*
- *Peer to Peer sharing, where applicable*

Supporting data (where applicable)

The following supporting data should be provided in the quarterly report 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
- Product literature
- Supporting documents for operation/maintenance training sessions or plans
- Supporting documents/minutes for energy team meetings

Final report

The final quarterly report will document the overall effort and progress against facility energy goal. It will also include the final deliverables:

- *Case study, including savings metrics, for online publishing*
- *Road map of the OsEM on-boarding process, for online publishing*
- *Last 12-month energy consumption for bonus baseline*