



Participant Workshop Checklist: 50001 Ready Pilot

Requirements

- Participants are encouraged to have an energy champion (typically facilities, maintenance, or green initiative personnel), principal or delegate *and* one facilities maintenance staff member participate in the first workshop.
- Access to 24-36 months of monthly energy usage data will be required to participate, and preferably prior to the first workshop.
- One lap top computer per participating organization is needed so that documents can be completed and edited. (For those that do not have lap tops paper handouts will be provided for them to complete.)
- Bring in completed [school district information request form](#) or send to Ralie Kubat at r.kubat@StrategicEnergyGroup.com prior to 1st workshop

Workshop 1: Planning – May

- Discussion and introduction to DOE 50001 Ready
- Review of 50001 Ready energy management systems & identify energy management practices to adopt
- Understand importance of management support
 - Complete 50001 Ready Task 3
- A.M. Breakout Session: Create goals, scope, energy policy and effective teams
 - Complete 50001 Ready Tasks 1,2,4,5,11
- Working session: Build a Performance Tracking Model (enter baseline data to set up of 50001 ready)
- Understand Significant Energy Users, prioritizing energy opportunities – How to conduct a Treasure Hunt
- Discussion on use and variables
 - Complete 50001 Ready Task 9,12
- P.M. Breakout Session – Identify energy sources, Significant Energy Users (SEUs), SEU future energy estimate
 - Complete 50001 Ready Tasks 6,7,8
- Working Session: in 50001 Ready Navigator mark completed tasks or in-progress tasks with notes

**Follow Up: Complete or get approval for goals, scope, and energy policy. Establish energy team and schedule meetings. Conduct a treasure hunt.*

**Success: By end of workshop 1, participants will understand DOE 50001 Navigator and have gone into their own project. They will have their draft goals, scope and energy policy as well as determined who should be part of their energy team. Participants will understand their energy sources and Significant Energy Users (SEUs). They will have entered their baseline data.*

Workshop 2: Energy Date Review – July

**Participants come to workshop with laptop, all completed forms, published energy policy, results of Treasure Hunt, and Purchasing Policy*

- Participants report on their success to date and challenges
- Understand importance of culture, management and employee, and their involvement in program.
- Understand Treasure Hunts
- A.M. Breakout Session – Complete Energy Management Assessment Light (EMA), Identify Opportunities, Checklist of Potential & Energy Performance Indicator Lights (EnPI)
 - Complete 50001 Ready Tasks 10,13,22

- Working Session: Review tasks in 50001 Navigator – mark complete
- Understand Monitoring and Measurement, Operations Controls, Corrective Actions, Energy in Design
 - Complete 50001 Ready Tasks 14,15,16,17,18
- P.M. Breakout Session – Review Measurements and operations controls. Identify potential corrective actions, review purchasing procedure – update for energy considerations
 - Complete 50001 Ready Task 20, 22
- Working Session: in 50001 Ready Navigator mark completed tasks or in-progress tasks with notes

**Follow Up: Complete any outstanding items from Workshop 1. Enter energy data into EnPI Light, determine EnPIs, discuss change of purchasing policy*

**Success: By end of workshop 2, baseline data will be complete for participating districts. Each participating district will understand their SEUs and variables. Each participating district will have an Energy Awareness Action Plan.*

Workshops 3: 50001 Ready Energy Management System – October

**Participants come to workshop with laptop, all completed forms, actions on awareness plan, updates to EnPI, Training Plans for facilities employees*

- Understand importance of maintaining records, training for SEUs, review of system and management review.
- A.M. Breakout Sessions – Complete data structure, Internal Audit Schedule, Training Needs, Strategic Energy Management Plan
 - Complete 50001 Ready Tasks 19, 21, 23, 24,25
- Working Session: in 50001 Ready Navigator mark completed tasks or in-progress tasks with notes
- Understand process and how to submit for certification
- P.M. Breakout Session - Complete remaining tasks
- Discuss case study

**Success: By end of workshop 3 each participating school will have SEM documents in one location and compiled for review by management. They will also have a training matrix.*

Energy Champion Updates

- Monthly meetings to occur
- Each session will reinforce and continue progress on DOE 50001 Ready Tasks covered during previous workshop(s)
- Sessions will be interactive with participation by participants.

Evaluate, Measure and Verification – December 2019 – January 2020

- Review baselines for each school vs comparison to energy use at end of year 1
- Collaborate with SPEER to create 5 short case studies in LBNL format for schools who have submitted to receive DOE 50001 Ready certification

**Success: All participating schools have DOE 50001 Ready Accounts and are working toward completion of tasks.*