**Date last modified/updated:** Click here to enter a date. **Internal audit:** Click here to enter a date.

**Who last modified/updated:** Click here to enter text. **Management review:** Click here to enter a date.

**This part of the Navigator Playbook is completed when you have:**

1. **Developed and recorded your organization’s objective and energy targets.**
2. **Obtained top management’s approval of the objectives and energy targets and communicate appropriately.**
3. **Communicated the energy objectives and energy targets appropriately to your organization.**
4. Develop and record your organization’s objective and energy targets.

|  |  |
| --- | --- |
| [ ]  | We have gathered a team to develop and record our targets.  |

|  |  |
| --- | --- |
| [ ]  | As appropriate, we supplemented our energy team with: |

[ ]  Individuals with energy expertise

[ ]  Personnel in specialized functions, such as accounting or finance

[ ]  Personnel familiar with operational or production equipment

[ ]  Management familiar with organizational plans and goals

[ ]  Suppliers or contractors that provide energy equipment or technical resources

|  |  |
| --- | --- |
| [ ]  | Our team consists of the following individuals: |

**Team member name Function represented**

|  |  |  |
| --- | --- | --- |
| [ ]  | *[Key Participant]* | *[Energy Team]* |
| [ ]  | Click here to enter text. | Click here to enter text. |
| [ ]  | Click here to enter text. | Click here to enter text. |
| [ ]  | Click here to enter text. | Click here to enter text. |
| [ ]  | Click here to enter text. | Click here to enter text. |
| [ ]  | Click here to enter text. | Click here to enter text. |

|  |  |
| --- | --- |
| [ ]  | We have provided our team with the inputs needed to develop relevant objectives and energy targets: |

|  |
| --- |
| **Our objectives and energy targets:** |
| [ ]  | Are consistent with our energy policy and effectively spur our energy policy commitments into action. | Click here to enter text. |
| [ ]  | Consider and fully incorporate the potential energy improvement opportunities identified, prioritized, legal requirements and those that can be realistically achieved in the energy review. | Click here to enter text. |
| [ ]  | Consider the significant energy uses (as identified in the Significant Energy Uses task and when identified we set an objective and/or energy target related to that improvement. | Click here to enter text. |
| [ ]  | Consider our organization’s business and financial situation, operating conditions, and constraints that are achievable, compatible, and align with your organization’s strategic business plans, and result in successful improvement of energy performance and the EnMS. | Click here to enter text. |

|  |
| --- |
| **Our objectives related to energy performance include:** |
| [ ]  | *[ex: “Reduce energy consumption 10 percent in five years from the 2019 baseline.”]* |
| [ ]  | Click here to enter text. |
| [ ]  | Click here to enter text. |
| [ ]  | Click here to enter text. |

|  |
| --- |
| **Our energy targets are quantitative and include:** |
| [ ]  | *[ex: “Reduce electricity consumption 5 percent compared to a 2019 baseline by the third Quarter of 2021.”]* |
| [ ]  | Click here to enter text. |
| [ ]  | Click here to enter text. |
| [ ]  | Click here to enter text. |

|  |
| --- |
| **We have established:** |
| [ ]  | A process for monitoring, reviewing and updating objectives and targets on a continual basis. | Click here to enter text. |
| [ ]  | Roles and responsibilities for monitoring and reviewing this progress. | Click here to enter text. |
| [ ]  | A practice of reporting objectives and energy target achievements to top management through the management review process introduced in the Management Review task. We issue revisions to objectives as needed.  | Click here to enter text. |
| [ ]  | We retain documented information on the objectives and energy targets.  | Click here to enter text. |

*The Energy Objectives and Targets Worksheet below can be useful to record objectives, energy targets and required inputs.*

Energy Objectives and Targets Worksheet

|  |  |
| --- | --- |
| **Objective:** Click here to enter text. | **Doc ID:**Click here to enter text. |
| **Target 1:** Click here to enter text. |
| **Target 2:**Click here to enter text. |
| **Target 3:**Click here to enter text. |
| **List the energy policy commitment(s) relevant to this objective:**Click here to enter text. |
| **Considerations** |
| Is this objective related to one or more legal, regulatory or other energy requirement(s)?[ ]  YES [ ]  NO**If yes, list the relevant legal or other requirements:**Click here to enter text. | **How were applicable legal and other energy requirements taken into account in the development of this objective and related targets?** Click here to enter text. |
| Is this objective related to one or more significant energy uses?[ ]  YES [ ]  NO**If yes, list the significant energy use(s):** Click here to enter text. | **How were significant energy uses taken into account in the development of this objective and related targets?** Click here to enter text. |
| **How has the prioritized list of opportunities from the energy review been considered in the development of this objective?**Click here to enter text. |
| **What technological options are feasible for this objective?** Click here to enter text. |
| **What financial requirements or conditions are relevant to this objective?** Click here to enter text. |
| **What source of funds will be utilized for this objective/target?** **[ ]  Capital budget** **[ ]  Maintenance budget** **[ ]  External loan** **[ ]  Performance contract** **[ ]  Guaranteed savings** **[ ]  Other**Click here to enter text. |
| **What business and operational conditions or constraints are relevant to this objective?** Click here to enter text. |
| **Who are the interested parties who have or may have views relevant to this objective and target(s)?**Click here to enter text. |
| **How have the views of interested parties been considered?** Click here to enter text. |
|  **Monitoring and Measurement** |
| How will the objective be monitored and measured?Click here to enter text. | How will the target(s) be monitored and measured?Click here to enter text. |
| What data will be collected or analyzed?Click here to enter text. | **Who will collect or analyze the data?** (Responsible Positions)Click here to enter text. | How often will monitoring and measuring be done? Click here to enter text. | What will be the record of monitoring and measurement?Click here to enter text. |
| **What monitoring and measurement equipment will be utilized?** Click here to enter text. | **Which equipment will require calibration?** Click here to enter text. | **Is this equipment already in the calibration system?**Click here to enter text. | What will be the record of calibration?Click here to enter text. |
| **What will be the EnPI (if any) that will be used to report this objective/target(s)?**Click here to enter text. |

|  |
| --- |
| **Related Energy Management Action Plans**(List the Action Plans associated with achieving this objective and related targets) |
| Click here to enter text. | Click here to enter text. |
| Click here to enter text. | Click here to enter text. |
| Click here to enter text. | Click here to enter text. |
| Click here to enter text. | Click here to enter text. |
| **Controls** |
| **What operational controls are needed?** Click here to enter text. | **List any controls that are already in place:**Click here to enter text. |
| **Prepared by:** Click here to enter text. | **Date:** Click here to enter text. |

1. Obtain top management’s approval of the objectives and energy targets and communicate appropriately.

|  |  |  |
| --- | --- | --- |
| [ ]  | We have a process in place to report objectives and energy target achievements to top management using the management review process introduced in the Management Review task and issue revisions as needed.  | Click here to enter text. |

|  |
| --- |
| **Top Management Responsibilities:** |
| Objectives and energy targets have been established | Click here to enter text. |
| These objectives and energy targets align with our organization’s strategic direction. | Click here to enter text. |
| Resources needed to achieve objectives and targets are provided. | Click here to enter text. |
| Objectives and energy targets are either approved or direction is provided for any needed changes. | Click here to enter text. |

|  |
| --- |
| **Team Responsibilities:** |
| Objectives and energy targets are presented to management for review and approval in a clear and understandable format. | Click here to enter text. |
| Sufficient information is provided to justify the purpose of the objective(s) and energy target(s) and its relationship to the organization’s strategic direction and energy policy commitments. | Click here to enter text. |

|  |
| --- |
| **Top Management Approval:** |
| [ ]  | Top Management has reviewed and approved Baselines, Objectives and Targets, and have offered their support. |
| [ ]  | Who approved: | Click here to enter text. |
| [ ]  | Date approved: | Click here to enter a date. |

*The Energy Objectives and Targets Worksheet provided earlier in this task can be useful in communicating to management the proposed objectives and related targets, relevant inputs and in detailing the monitoring processes in place.*

1. Communicate the energy objectives and energy targets appropriately to your organization

**We have communicated our objectives and energy targets to the following groups:**

|  |  |  |
| --- | --- | --- |
| [ ]  | The energy team | Click here to enter text. |
| [ ]  | All personnel who can affect these objectives and targets or have a role in achieving them | Click here to enter text. |
| [ ]  | Employees and on-site contractors have been made aware of how they contribute to achieving the objectives and energy targets, | Click here to enter text. |
| [ ]  | Broadly across our organization’s improvement efforts to promote a culture of energy efficiency and support positive energy behavior. | Click here to enter text. |

|  |  |  |
| --- | --- | --- |
| [ ]  | Objectives and Targets have been incorporated into our organization’s EnMS Awareness Training | Click here to enter text. |

|  |  |  |
| --- | --- | --- |
| [ ]  | We periodically update personnel on progress made towards achieving the objectives and energy targets and celebrate success when they are achieved. | Click here to enter text. |

*The below table can be useful in helping to track your training and communication efforts:*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Communication / Training Event** | **Targeted Audience** | **Event Date** | **Responsible Party Name** | **Responsible Party Signature** |
| Click here to enter text. | Click here to enter text. | Click here to enter a date. | Click here to enter text. | Click here to enter text. |
| Click here to enter text. | Click here to enter text. | Click here to enter a date. | Click here to enter text. | Click here to enter text. |
| Click here to enter text. | Click here to enter text. | Click here to enter a date. | Click here to enter text. | Click here to enter text. |
| Click here to enter text. | Click here to enter text. | Click here to enter a date. | Click here to enter text. | Click here to enter text. |
| Click here to enter text. | Click here to enter text. | Click here to enter a date. | Click here to enter text. | Click here to enter text. |
| Click here to enter text. | Click here to enter text. | Click here to enter a date. | Click here to enter text. | Click here to enter text. |
| Click here to enter text. | Click here to enter text. | Click here to enter a date. | Click here to enter text. | Click here to enter text. |

Top Management Approval

|  |  |  |
| --- | --- | --- |
| [ ]  | Date approved: | Click here to enter a date. |
| [ ]  | Who approved: | Click here to enter text. |

Comments

Click here to enter text.