Toolkit Overview

DOE has developed necessary tools and materials, collectively known as the Implementation Guidance Toolkit, to support energy efficiency projects implementation. The toolkit provides corporate energy managers tools to plan for projects, track progress, and get the accomplishments recognized after project completion.

Tools Before Energy Efficiency Commitment

Do Nothing Tool

Energy efficiency project implementation can bring demonstrated improvement in financial bottom-line but can sometimes be a “tough-sell” to upper management and investors. The Do Nothing Tool supports users to make the case for their energy management program commitment by showing the impact of implementing energy projects over a period of 10 years on their financial bottom-line on an annual basis. It can also help calculate emissions savings by using standard emission factors. It presents a method of comparing and contrasting when projecting a Business-as-Usual (BAU) - “Do Nothing” approach versus implementing energy projects over a selected project horizon.

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The calculator provides two ways to project impact of energy efficiency improvement in the long run. The simple method only considers total energy expense and energy requirements change along with annual projected savings rate. This data is used to project annual cost savings in the two scenarios of BAU – ‘Do Nothing’ and energy projects implementation.

The second approach provides more granularity by considering top energy sources along with their projected change and energy price escalation rates. With this data, the tool can provide comparison in energy cost as well as GHG reduction.

**Implementation Principles Checklist**

The energy opportunities identification phase is the backbone of an energy management program. The Implementation Principles Checklist is designed to allocate responsibility of each of the principles for an opportunity identification event. This checklist can create accountability and make it clear for the energy team as well as top management that each of the principles are adopted and acted upon.

**Plant Personnel Roles and Expectations**

Roles and responsibilities of everyone involved in energy projects, right from identification to commissioning of projects, is crucial for success of the endeavor. The Roles and Responsibilities Memoranda are templates that outline the communication for the involved personnel. This shows the top-down commitment behind the effort and establishes structure for responsibility assignment through proper channels.

The outline is provided for guidance purposes only and can be adopted to suit the projects and business involved. Top management will define senior management’s role and in-turn senior management will identify project managers and energy managers. The roles of communications, finance and accounting, procurement, and operations departments can also be identified through this process.

**Implementation Principles Resources List**

The Implementation Principles Resources List is aimed at enumerating relevant resources available from DOE to help understand and execute each implementation principle. This list is also helpful in illustrating associated subtasks from the principles for users.
Corporate Gap Analysis Tool

Finally, to identify gaps in energy management actions, i.e., identified reduction targets and identified / implemented projects, the Corporate Gap Analysis Tool can be used. The tool can also be helpful for tracking different types of opportunities classified in categories such as no cost – low cost, low cost – high return, and capital projects.

The tool can create an implementation follow up list of projects to determine the cost of delay from the date of identification. It generates a gap analysis chart to show current gaps in identified projects and target of energy reduction. It also produces an implementation tracking graph to visually show implemented savings versus in-planning and in-progress savings. The tool will be valuable for corporate energy projects planning.

Energy Survey Information Checklist

Energy survey teams need to make sure that certain requirements are met beforehand in order to make the energy projects identification phase easier and streamlined to form an implementation perspective. The Energy Survey Information Checklist will ensure that each of the requirements are executed and communicated if not met.

Opportunity Identification To-Dos

During the opportunity identification phase, to improve probability of project consideration and chances of implementation, the Opportunity Identification To Do’s (Implementation Checklist) should be followed. The checklist stresses the consideration of implementation issues even during the identification and discussion phases.

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Tools in Pre-Implementation Subphase

Project Implementation Tracker Tool

After the opportunity identification phase, to facilitate implementation, breaking down the project in sub-tasks is necessary. The Project Implementation Tracker Tool enables planning for each sub-task by assigning responsibility and tracking associated due dates. Green completion dates indicate on schedule tasks, while red dates indicate late or delayed tasks.

Prize Tool

The Prize Tool is valuable in making the business case for identified opportunities to management. This tool serves a dual purpose, as it can also be used to make a business case to top management for illustrating the value of an energy efficiency program. The tool illustrates a “What’s in it for me?” approach for corporate or plant level management by comparing energy savings with equivalent sales increase necessary to make the same difference in bottom-line profits.

Tools in Implementation Subphase

Project Tracker Tool

The Project Tracker Tool can be used by corporate energy managers at their different facilities to track the implementation status. This tool can also log information on identified savings, implemented savings, and additional implementation funds requested.

Tools in Post Implementation Subphase

Accomplishment Communication

Communicating accomplishments helps announce and publicize project achievements, contribution from involved personnel, and overall program success. This management communication can underscore benefits for stakeholders and help improve perception of the organization and their energy management efforts.

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Savings Thermometer Tool

The Savings Thermometer Tool allows users to visualize the progress made towards identified savings opportunities. The visualization can act as an incentive to fulfill the goal. This tool can also track the energy intensity savings in a user-defined unit.

Letter of Appreciation

The Letter of Appreciation is a draft letter to be used by senior management to recognize efforts of high contributing personnel who facilitated energy projects implementation. This letter will help senior management celebrate employee success and exemplify the achievements for stakeholders. This will also show employees that management is deeply committed to energy efficiency.

Completion Certificate

The facilities that prioritize implementation deserve appreciation. The Completion Certificate is a tool for management to recognize the achievements of a facility/plant for achieving a high implementation rate. This certificate will serve as an example for other facilities and can be perceived as an award for internal employees and facilities involved. This builds a strong foundation of energy efficiency program within the company.

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