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Background

The U.S. Department of Energy (DOE) is partnering with leading U.S. industrial and commercial organizations to assist them in becoming 50001 Ready™ to improve their competitiveness and reduce operational costs. 50001 Ready™ recognizes facilities across the commercial and industrial sectors that manage energy using the structure outlined by ISO 50001. This means an energy management system that closely tracks energy use, prioritizes energy efficiency opportunities, and helps continually improve energy performance, with demonstrated energy cost savings. 50001 Ready™ is a way to kick-start and build a leading-class energy management system.

DOE's voluntary 50001 Ready™ program centers on the 50001 Ready Navigator™ a free online tool providing guidance broken into 25 easy to follow tasks to establish an energy management system based upon ISO 50001. Upon completion of the tasks, the organization's energy team will self-attest to their achievement and DOE will recognize the facility as being 50001 Ready™.

The content of the 50001 Ready Navigator™ aligns with existing corporate business management systems and operating practices enabling companies to increase their energy productivity while also improving health, safety and comfort, reducing emissions, and creating energy management processes that endure even with staff turnover. The guidance of the 50001 Ready Navigator™ works alongside energy performance programs and measurement tools such as the U.S. Environmental Protection Agency's (EPA's) ENERGY STAR program and Portfolio Manager, DOE's Better Buildings and Better Plants programs and EnPI-lite Energy Performance Indicator tool and utility sponsored Strategic Energy Management (SEM) programs, allowing facilities to realize and monitor lasting energy performance improvements in concert with these other activities.

By joining 50001 Ready™, commercial and industrial facilities will realize the value of in structured energy management systems. They will become leaders in energy management and their experiences will help guide DOE as it supports the adoption of these systems across the U.S. economy. DOE seeks to partner with public and private companies, utilities, service providers, and municipalities to make use of the 50001 Ready Navigator™ and program as added value to their customers and their own objectives.

50001 Ready Partner opportunity

As interest in 50001 Ready™ accelerates, private and public organizations are incorporating the continual improvement practices from the 50001 Ready Navigator™ into their business-to-business and utility program offerings. DOE seeks to partner with US based organizations to expand the use and increase end-user benefits of 50001 Ready™ assets. Partners are encouraged to provide the 50001 Ready Navigator™ for free but may include it as part of a for-profit service as long as disclaimers about the origin and availability of free services from DOE are provided.

Purpose of this document

This 50001 Ready Partner Program Charter serves as an addendum to the terms of the "50001 Ready Navigator™ Partner Agreement" The guidance provided in this Partner Program Charter is intended to assist 50001 Ready Partners in meeting the terms of participation.



Partner program eligibility

US based private and public organizations that sign and abide by the terms of the "50001 Ready Navigator™ Partner Agreement" and this Partner Program Charter.

Partner advantages

- ▶ Portfolio view of 50001 Ready Navigator™, including birds-eye view of customer and cohort progress.
- ▶ Addition of Partner logo on customized 50001 Ready Navigator
- ▶ Addition of Partner logo on DOE 50001 Ready™ recognition certificate issued by DOE.
- ▶ Partner developed custom guidance for each 50001 Ready Navigator task.

Partner administration

Administration of 50001 Ready Navigator™ Partner Agreement is provided by LBNL on behalf of DOE. Communication with LBNL is available via email at 50001Ready@lbl.gov.

Initiate

Eligible organizations (as defined above) fill out and upload a "50001 Ready Partner Request" form located at the Better Buildings Solution Center for Utilities, Implementers, and Energy Service Providers [linked here](#).

Submissions include:

- ▶ Name of organization
- ▶ Name of organization's primary point of contact including email, phone, and physical address
- ▶ Name of organization's alternative point of contact with email, phone, and physical address
- ▶ Statement addressing how your organization as a potential Partner intends to use the 50001 Ready Navigator and other 50001 Ready assets
- ▶ Description of the organization's target sectors to be included as part of the Partner Program.

Confirm

LBNL staff at the 50001 Ready Help Desk will review the "50001 Ready Partner Request" form within one (1) week of receipt.

- ▶ If the request meets the eligibility requirements outlined in this document, the potential Partner main point of contact will be emailed a "50001 Ready Navigator™ Partner Agreement" for review.
- ▶ A phone call will be scheduled with the 50001 Ready Help Desk and potential Partner to review the "50001 Ready Navigator™ Partner Agreement", "50001 Ready Partner Program Charter" (this document), alternative energy performance improvement determination and reporting forms, and next steps.

Formalize

The agreement becomes finalized once the 50001 Ready Navigator™ Participation Agreement" form is signed by the partner, and acknowledged by the 50001 Ready Help Desk.

- ▶ Potential Partner submits a signed "50001 Ready Navigator™ Partner Agreement" to the 50001 Ready Help Desk (50001Ready@lbl.gov).
- ▶ 50001 Ready Help Desk acknowledges receipt of the "50001 Ready Navigator™ Partner Agreement" form - this serves as the formal start of Partnership.
- ▶ Partner term is valid three (3) years from receipt of acknowledgement of the "50001 Ready Navigator™ Partner Agreement" form.



Roles and responsibilities

Partner

- ▶ Proactive and sustained engagement of associated projects with each facility participating through the recognition/re-recognition cycle.
- ▶ Participation in interviews with DOE and 50001 Ready Help Desk that may be used as the basis of case studies, research, and other communication and marketing materials.
- ▶ Acknowledgement that the 50001 Ready Navigator, 50001 Ready Help Desk and other DOE funded technical assistance, and DOE 50001 Ready recognition are all free services offered by DOE and its contractor Lawrence Berkeley National Laboratory (LBNL) and to not present themselves as a representative of DOE, LBNL, or of the 50001 Ready Program.
- ▶ Clearly and explicitly communicate the accessibility of DOE 50001 Ready assets and services (not limited to those listed above) as available and free for use on all communications, websites, media, and agreements with facilities. The language for this communication is provided in the “Co-branding disclaimer requirements” section of this document.
- ▶ Engage with DOE and its contractor LBNL as they seek to improve the 50001 Ready Program and technical assets.
- ▶ To maximize the benefits of 50001 Ready Program implementation, it is advisable that select Partner staff maintain valid Certified Practitioner of Energy Management Systems, EPI 50001 Lead Auditor, and Performance Verifier accreditation.
- ▶ It is recommended that Partners become a member of the US TAG for ISO TC 301, who are responsible for the development of ISO 50001 and supporting standards.

U.S. Department of Energy

- ▶ Upon request provide phone or web-based presentations and outreach supporting Partner Participation Agreement term.

50001 Ready Help Desk

- ▶ Upon request provide remote technical assistance to Partner and associated projects.
- ▶ Conduct normal DOE 50001 Ready recognition process including:
 - Required “green light call” with just the project administrator requesting recognition,
 - Optional “50001 Ready recognition interview” with at least one member from the project requesting recognition and optional staff from the Partner organization.
- ▶ Issue 50001 Ready recognition to facilities that have met the requirements of the 50001 Ready Program. Recognition certificate will include Partner logo provided by the Partner, if desired.
- ▶ Develop corporate level project showcase (case study) that encompasses all associated facilities achieving 50001 Ready status to be posted on appropriate DOE website.
- ▶ Availability to assist Partner in development of case studies showcasing success of Partner participation and projects.

All parties

- ▶ Consideration for future research collaboration including data sharing and report writing.

Maintaining 50001 Ready partnership

- ▶ Partner participation term is valid for three (3) years with a date starting when the 50001 Ready Help Desk acknowledges receipt of the “50001 Ready Navigator™ Partner Agreement” form. The Partner term naturally expires after this date. DOE and the Partner can create a new partnership at this time if so desired by both parties.



- ▶ The 50001 Ready Help Desk will schedule a six-month check in phone calls with Partner staff. These check-ins will confirm the validity of the Partnership and direction the Partner is taking with the 50001 Ready Navigator™ and other assets. Partners should use these calls to provide feedback to DOE and the 50001 Ready Help Desk. Partners are expected to discuss outreach to potential customers and application of any 50001 Ready promotion they have enlisted.
- ▶ DOE reserves the right to terminate the 50001 Ready Navigator™ Partner Agreement at any time.
- ▶ The Partner may terminate the 50001 Ready Navigator™ Partner Agreement at any time.
- ▶ Regardless of reason, when the Partnership ends, the Partner is expected to terminate use and remove all vestiges of use of the 50001 Ready logo and other DOE copyright materials and intellectual property within one (1) week of the Partnership ending.

Documentation

Alternative energy performance improvement determination and reporting forms

- ▶ Requests for DOE 50001 Ready recognition follows the same process for projects associated with a Partner as for those not.
- ▶ Partners may request that an energy performance improvement determination process and reporting form be used for Task 24. This request is issued from the Partner by sending an email to the 50001 Ready Help Desk that includes:
 - The document specifying the process for determining energy performance improvement.
- ▶ The form that will be used by facilities to request DOE 50001 Ready recognition.
- ▶ A call with the Partner and 50001 Ready Help Desk staff will be scheduled.
- ▶ Upon written approval of the use of the alternative energy performance improvement process and reporting form, the Partner would be allowed to provide guidance indicating the acceptability of its use for Task 24.
- ▶ Approved use of the alternative energy performance improvement process and reporting form ends when the Partnership is ended.

Co-branding disclaimer

The 50001 Ready Navigator and its associated resources were developed by LBNL with funding and direction from US DOE. LBNL is a DOE National Laboratory managed and operated by The Regents of the University of California, and led the development of the 50001 Ready Navigator™ in conjunction with the DOE Office of Energy Efficiency & Renewable Energy Advanced Manufacturing Office.

While non-exclusive external Partnerships have been established through this program, the software tools, resources, and technical assistance in its entirety are intended to be freely accessible to all. DOE recognition through the 50001 Ready program is available to any US-based facility free of charge. Any co-branded material or resources generated from any other source beyond the US DOE and LBNL are not supported or endorsed by its creators.

The following statement must be clearly displayed on all 50001 Ready co-branding material including websites, handouts, presentations, and other materials:

“The US DOE offers the LBNL developed and hosted 50001 Ready Navigator™ web-based tool, its resources, and LBNL supported technical assistance (50001Ready@lbl.gov) free of charge and accessible to all. US DOE provides recognition for US based facilities who complete the requirements of the 50001 Ready™ Program. US DOE and LBNL are not able to endorse or provide support for any language, materials, or technical assistance offered via official partnership agreements with US DOE beyond what is stated above.”