



50001 Ready
U.S. DEPARTMENT OF ENERGY

U.S. DEPARTMENT OF
ENERGY

Energy Efficiency &
Renewable Energy



50001 Ready
Utility Network Series
May 2019

U.S. Department of Energy
Technical Partnerships
Advanced Manufacturing Office

Welcome + logistics

Welcome to the DOE 50001 Ready Utility Network Series meeting!

- Today's presenters
 - Sandy Glatt, US Department of Energy
 - Peter Therkelsen, Lawrence Berkeley National Laboratory
- Logistics
 - You are on mute by default; use the chat box to ask questions at any time
 - We will take breaks to solicit questions submitted through the chat box
 - Session is being recorded
 - Slides, recording, and transcription will be available through energy.gov/50001Ready
 - Double click screen or press escape to exit full screen view
 - Zoom webinar control bar is at the bottom or top of your screen

Today's agenda

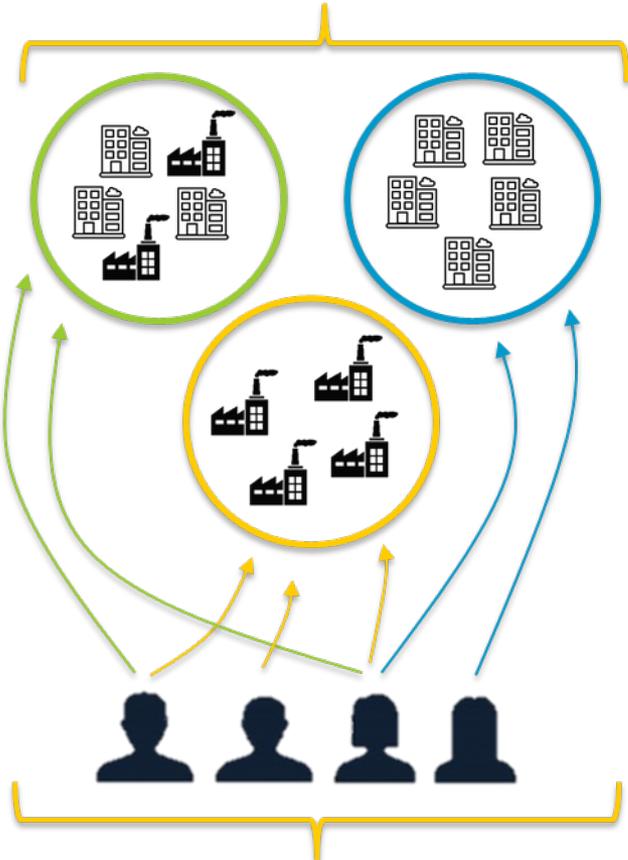
- 50001 Ready Navigator Partner Platform Functionality
 - Partner Platform functionality for utilities, implementers, and B2B energy service providers to co-brand Navigator and DOE recognition, customize guidance, and track progress
 - Multi-site and Partner Platform functionalities: working together for corporations, utilities, and energy service providers
- Walkthrough of Partner Platform Functionality
- Mini Demo of Partner Platform Functionality
- Other 50001 Ready and DOE updates

What/why is the partner platform?

- 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 support engagement with 50001 Ready by entering into a partnership with US based organizations to provide additional resources and capabilities when use the 50001 Ready resources.
- Partners may include the 50001 Ready assets as part of a for-profit service as long as disclaimers about the origin and availability of free services from DOE are provided.

What can you do with the partner platform?

1. Organize multiple facilities into cohorts.



Allow individuals from any organization access to track progress and provide custom guidance.

50001 Ready Facility 2019
U.S. DEPARTMENT OF ENERGY

Company Name

Is recognized for instituting global best practices in continuous energy improvement across its [facility name] in [location]

UNDER THE LEADERSHIP OF

Facility Level Energy Manager	Corporate (or Agency) Energy Manager
Facility Level Top Management	Corporate (or Agency) Top Management

Recognized by the U.S. Department of Energy [Date]

United States Department of Energy
PUBLIC PURPOSE PROGRAM NAME
Energy Efficiency and Renewable Energy

50001 Ready
U.S. DEPARTMENT OF ENERGY

2. Use 50001 Ready logo on your website and materials

3. Your logo on Navigator and recognition certificate

Navigator

Tasks: Scope and Boundaries

Task 1: We have defined, documented and approved the Scope and Boundaries of our 50001 Ready energy management system

Not Started | In Progress | Ready For Review | Completed

Your roles for this task: Contributor & Approver

Partner Task Guidance From: Manage Energy!

no specific tip for this task

Detailed Guidance: Scope and Boundaries

Getting It Done

Getting It Done

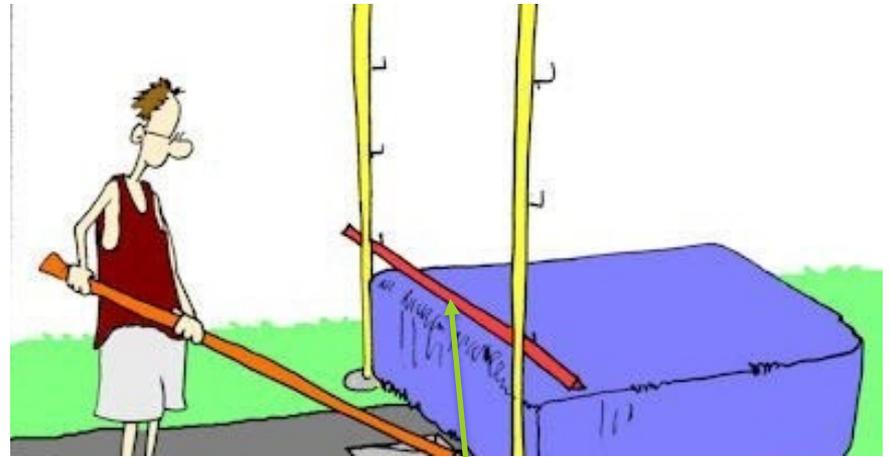
- With management input, complete the [Scope and Boundaries Worksheet](#) to define the scope and boundaries of the energy management

4. Add custom guidance for each task

Who can be a partner?



The only qualifier is that your organization must be based in the US – that's it!

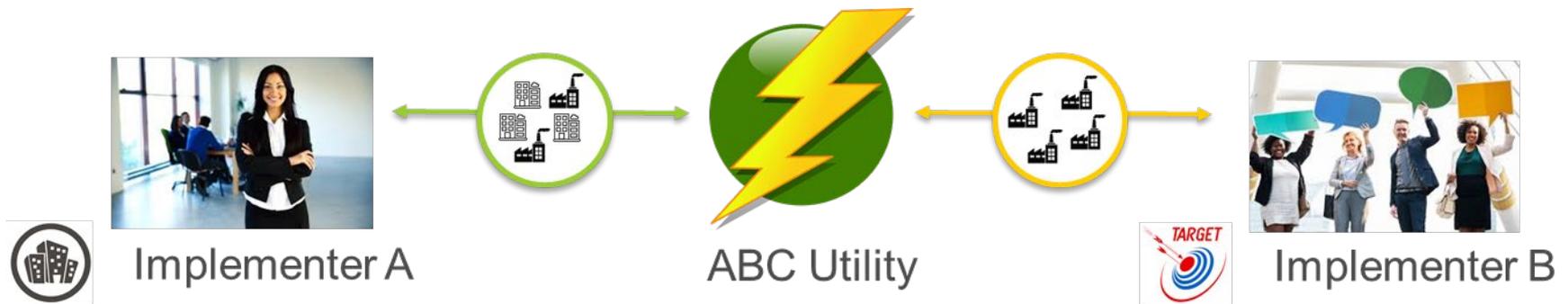


Bar = US based organization

sorry Canada (and others)...

Utility/implementer relationship: who should be a partner?

- Pop Quiz!
 - ABC Utility has an SEM program and wants to use Ready!
 - ABC Utility has two SEM cohorts, one run by Implementer A and the other by Implementer B
 - Implementer A is already a 50001 Ready Partner with DOE
 - Implementer B isn't a 50001 Ready Partner
- Questions:
 - Should ABC Utility be the Partner?
 - Does Implementer A have to give up their Partnership to work under ABC Utility's Partnership?
 - Why isn't Implementer B a Partner already?
- Answer: The Partner Platform allows for all to be Partners and custom manage cohorts and co-branding so any utility/implementer(s) relationship works!



Multi-site functionality – what was that again?

- Create and manage multiple 50001 Ready projects under one umbrella project administered by a Central Office
- Complete, participate in, and/or review tasks for all sites at once
- Work with teams across multiple facilities
- Reduce time and effort for implementing 50001 Ready
- Individual sites are still recognized for 50001 Ready implementation



Multi-site or partner platform? Why not both?!

Multisite - Central office for one related EnMS

- Command and control of multiple projects
- Approve and complete tasks
- Part of the team at the central office level
- Co-branding of Navigator, not recognition



Partner Platform - Supporting, observing, and reporting of projects

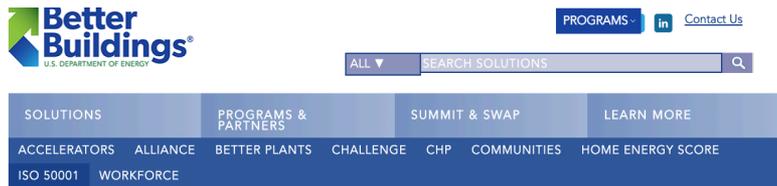
- Organize and track multiple projects
- No direct controls over projects
- Legal use of DOE 50001 Ready logos
- Co-branded Navigator & recognition

Companies with a multi-site can have individual facilities join any number of partner platforms.

50001 Ready Navigator partner platform

- Walkthrough: What we will highlight
 - Partner “dashboard”
 - Tips and customization
 - Cohorts
 - Partner dashboard and cohort administrator privileges
 - Reference codes and referral links

Partner Program – DOE Website



50001 READY FOR UTILITIES, IMPLEMENTERS, AND ENERGY SERVICE PROVIDERS

50001 Ready is an approach for facilities to establish a continuous energy improvement practice in conformance with the ISO 50001 voluntary standard for energy management systems in industrial, commercial, and institutional facilities. The standard is complementary to other professional benchmarks and certifications, such as ENERGY STAR® or LEED; implementation of an ISO 50001 structure can improve a facility's performance within other energy commitments.



The 50001 Ready program offers your customers:

1. A self-paced, no cost, do-it-yourself approach to implement ISO 50001 practices without certification
2. Improved guidance to identify facility-wide energy use and develop action plans for performance improvement
3. A means to quantify and track overall facility energy savings across all fuels, including the ability to separate capital projects from operations and maintenance improvements

DOE'S 50001 READY PARTNER PROGRAM

How can energy efficiency program administrators engage with the 50001 Ready program?

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 is seeking to partner with U.S.-based organizations to expand the use and increase end-user benefits of 50001 Ready assets.

IMPROVE COMPETITIVENESS AND REDUCE OPERATIONAL COSTS WITH 50001 READY'S FULL SUITE OF TOOLS

By joining 50001 Ready, commercial and industrial facilities 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.

PARTNER ADVANTAGES:

- Portfolio view of 50001 Ready Navigator, including bird's eye view of customer and cohort progress
- Partner logo added to customized 50001 Ready Navigator
- Partner logo included on DOE 50001 Ready recognition certificate issued by DOE.
- Partner developed custom guidance for each 50001 Ready Navigator task.

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.

SIGNING UP IS SIMPLE:

1. Submit a Partner Request form
Eligible organizations may submit a Partner request [here](#)
2. We'll review your submission, then set up call
LBNL staff at the 50001 Ready Help Desk will review the "50001 Ready Partner Request" form and provide next steps.
3. Agree to the program terms and formalize the partnership
We'll need a signature to confirm your intention of meeting the terms outlined in the Partner Agreement and Partner Program Charter - Partner term is valid for 3 years

INTERESTED IN PARTNERING WITH 50001 READY?

[SIGN UP TODAY >](#)

The Partner Program features an open and flexible system to work with your business structure and current set of offerings to support your customers with 50001 Ready and EnMS implementation.

To learn more about the 50001 Ready Partner Program, visit the **Better Buildings Solutions** website at: [Energy.gov/50001Ready](https://energy.gov/50001Ready) → "50001 Ready for Program Administrators & Implementers" → "DOE'S 50001 Ready Partner Program" section at top of page

<https://betterbuildingsolutioncenter.energy.gov/iso-50001/50001Ready/50001-ready-program-utilities-admin-implementers>

To sign up, click the link to fill out a **Partner Requisition form**

Signing Up - Partner Requisition Form

50001 Ready Navigator™ Partner Requisition Form

My organization is committed to effective energy management, agrees to the terms outlined in this agreement, and wishes to become a 50001 Ready Partner.

Organization Details

ORGANIZATION NAME GENERAL PHONE NUMBER

STREET ADDRESS -LINE 1 STREET ADDRESS -LINE 2

CITY STATE / PROVINCE ZIP CODE / POSTAL CODE

Primary Contact

FIRST NAME	LAST NAME	EMAIL	PHONE NUMBER	ZIP CODE
<input type="text" value="Amy"/>	<input type="text" value="Pevzner"/>	<input type="text" value="arp@lbl.gov"/>	<input type="text"/>	<input type="text" value="94720"/>

Alternate Contact

FIRST NAME	LAST NAME	EMAIL	PHONE NUMBER	ZIP CODE
<input type="text" value="optional"/>	<input type="text" value="optional"/>	<input type="text" value="optional"/>	<input type="text"/>	<input type="text" value="optional"/>

STATEMENT OF HOW YOUR ORGANIZATION INTENDS TO USE THE 50001 READY NAVIGATOR AND OTHER 50001 READY ASSETS.

DESCRIPTION OF TARGET SECTORS THAT WOULD BE INCLUDED UNDER YOUR 50001 READY NAVIGATOR™ PARTNER PARTICIPATION COHORT.

Link found on the Better Building Solution site or <https://navigator.lbl.gov/partnerEnrollmentForm>

*You'll want to set up an account in the Navigator first.

Just complete this form and the 50001 Ready Help Desk will contact you with next steps!

Partner Dashboard

Select One ▾



Partner: ABC Utility

Partner Dashboard

Partner Information

Contact: **Peter Therkelsen**

Email: ptherkelsen@lbl.gov

Phone: **5104865645**

Reference Code: **ABC Utility**

[Partner Instructions, Guidance, and Referral Links](#)

[Update General Information](#)

[Manage Associated Users 4](#)

Partner Task Tips Tips connecting partner activities to Navigator tasks. Default tips appear for all cohorts unless specific cohort tips provided.

[Update Default Partner Tips](#) [Download](#)

Total Connected Projects: 4 | Related Activity

	New Projects	Tasks Ready	Tasks Completed	DOE Recognition
TOTAL	3	6	32	-

[View More Details](#)

Project Not Assigned to a Specific Cohort: **1** Related Task Progress: 100% [filter projects](#)

Partner Cohorts (sub groupings) [+ Add Cohort](#)

Internal Title	Public Title	Reference Code	Projects	Task Tips
ABC Cohort Pilot Program	Manage Energy!	ABC SEM Pilot	1 0%	Add Cohort Tips Download filter projects
ABC Cohort 2019	Manage Energy!	ABC SEM Cohort 2019	2 14%	Update Cohort Tips Download filter projects

⚠ Important Note: Add custom contact information and/or task tips to cohorts to override the general contact information and tips, otherwise general information will be provided for connected projects in that cohort. "unassigned" projects always see the general information.

[Click HERE to Update Cohort Assignments \(unsaved cohort assignments will be lost.\)](#)

Project	Task Progress	Cohort (internal title)	Last Action
Comical Classroom K-12	16% 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25	ABC Cohort 2019	05/10/2019 Notes 0
CT Plant	100% 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25	Not Assigned to Cohort	05/08/2019 Notes 1
Super Steel Smelter Site Seven	0% 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25	ABC Cohort Pilot Program	09/26/2018 Notes 0
Wastewater Works	12% 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25	ABC Cohort 2019	05/14/2019 Notes 1

Banner indicates your location within the tool

Add or Update General Tips

Add or Update Cohort Tips

Track projects, task progress, cohort assignments and notes

Partner Dashboard - Update General Information

Partner Contact Details



Partner: ABC Utility General Contact Information

[← Back to Partner Dashboard](#)

TITLE

ABC Utility

REFERENCE CODE

ABC Utility

▲ Navigator projects can enter this Reference Code during setup or on the Manage Project page to immediately connect with this Cohort. Changing this Reference Code will automatically update project already connected.

PARTNER PUBLIC CONTACT NAME

Peter Therkelsen

PARTNER PUBLIC E-MAIL ADDRESS

ptherkelsen@lbl.gov

PARTNER PUBLIC PHONE

5104865645

PARTNER PUBLIC WEBSITE

www.lbl.gov

ADDITIONAL PUBLIC INFORMATION ABOUT PARTNER SUPPORT

this is the general update

PARTNER LOGO (DISPLAYED AT THE TOP OF THE PAGE)

SELECT LOGO FILE

BROWSE

Update Contact Information

The 50001 Ready Navigator is a resource of the Department of Energy's Advanced Manufacturing Office.



Partner: ABC Utility Manage Users

[← Back to Partner Dashboard](#)

[+ Add New Associated User](#)

Name	Email	Access Level		
Peter Therkelsen	ptherkelsen@lbl.gov	Full Administrator Access	update access levels	remove
Sandy Glatt	sandy.glatt@ee.doe.gov	Full Administrator Access	update access levels	remove
Amy Pevzner	arp@lbl.gov	ABC Cohort 2019: Full Access	cannot modify self	remove
Michael B Muller	michael.b.muller@analyticalenergy.com	ABC Cohort Pilot Program: Full Access	update access levels	remove

Manage Associated Users Access Levels
*We'll demonstrate this functionality later



Partner: ABC Utility Update Access Levels

[← Back to Associated Users Table](#)

Associated User: Peter Therkelsen
email: ptherkelsen@lbl.gov

Full Administrator Access: **ON**

[Remove Full Administrator Access to Partner](#)

Click on the Access Level Below to Activate It
Full Access - can update cohort contact info and tips

Cohort	Access Level		
ABC Cohort Pilot Program	Full Access	Read Access	No Access
ABC Cohort 2019	Full Access	Read Access	No Access

The 50001 Ready Navigator is a resource of the Department of Energy's Advanced Manufacturing Office.

[Contact Us](#) | [Advanced Manufacturing Office](#) | [Office of Energy Efficiency & Renewable Energy](#) | [Privacy](#)

Tips and Customization - General Tips



Partner: ABC Utility General Task Tips

[← Back to Partner Dashboard](#)

Section: Planning

ID	Short Title	Task	Partner Tip	
1	Scope and Boundaries	Task 1: We have defined, documented and approved the Scope and Boundaries of our 50001 Ready energy management system	This tip goes to all cohorts - Welcome to the cohort! Please bring your last 12 months worth of energy bills to your kick off workshop.	Update Tip
2	Energy Policy	Task 2: We have developed an energy policy statement, which has been approved by top management	This is a partner tip - it will appear for projects if there is not cohort specific tip - other wise the cohort specific tip will show up.	Update Tip
3	Management Commitment	Task 3: Our top management has expressed its commitment to the 50001 Ready system, and are aware of their roles and responsibilities	<i>no specific tip for this task</i>	Update Tip
4	Energy Team	Task 4: We have established an energy team that meets regularly and includes a management representative. Roles and responsibilities have been defined for the energy team and all affected personnel.	<i>no specific tip for this task</i>	Update Tip
5	Legal Requirements	Task 5: We have identified energy-related legal requirements that apply to our operations, have a process to evaluate and update these over time, and evaluated our compliance with them	<i>no specific tip for this task</i>	Update Tip

Section: Energy Review

ID	Short Title	Task	Partner Tip	
6	Data Collection	Task 6: We have identified all our energy sources and uses and accurately collected the related energy consumption data	<i>no specific tip for this task</i>	Update Tip
7	Data Analysis	Task 7: We have analyzed our energy consumption data at the system/equipment level	<i>no specific tip for this task</i>	Update Tip
8	Significant Energy Uses (SEUs)	Task 8: We have determined our Significant Energy Uses (SEUs) and determined their energy performance, estimated future consumption and have a plan for reviewing and updating them.	<i>no specific tip for this task</i>	Update Tip
9	Relevant Variables	Task 9: We have determined the relevant variables that affect energy consumption of each SEU and collected the associated data.	<i>no specific tip for this task</i>	Update Tip
10	Performance Indicators (EnPIs)	Task 10: We have identified energy performance indicators (EnPIs) and developed a methodology for determining and updating them.	<i>no specific tip for this task</i>	Update Tip
11	Baselines, Objectives and	Task 11: We have established an energy baseline(s), approved objectives and energy	<i>no specific tip for this task</i>	Update Tip

Partner tips are seen by all projects associated with the partner.
They are only overwritten by cohort specific tips.

Tips and Customization - Cohort Specific Tips



Partner: ABC Utility | Cohort: ABC Cohort 2019

Manage Energy! Task Tips

[← Back to Partner Dashboard](#)

Section: **Planning**

ID	Short Title	Task	Partner Tip	
1	Scope and Boundaries	Task 1: We have defined, documented and approved the Scope and Boundaries of our 50001 Ready energy management system	<p>Currently Providing This General Partner Tip: This tip goes to all cohorts - Welcome to the cohort! Please bring your last 12 months worth of energy bills to your kick off workshop.</p>	Update Tip
2	Energy Policy	Task 2: We have developed an energy policy statement, which has been approved by top management	<p>This Cohort Tip currently overrides the General Tip: Many organizations have policies that could be augmented to be a full energy policy! Bring to the June workshop any sustainability, environmental, or other policy statements you think might serve as the basis for an energy policy.</p>	Update Tip
3	Management Commitment	Task 3: Our top management has expressed its commitment to the 50001 Ready system, and are aware of their roles and responsibilities	<p>This is a Cohort Specific Tip (no General Tip): Commitment can be verbal, email, or other. The energy policy we are working on in June should help solidify and document commitment.</p>	Update Tip
4	Energy Team	Task 4: We have established an energy team that meets regularly and includes a management representative. Roles and responsibilities have been defined for the energy team and all affected personnel.	<i>no specific tip for this task</i>	Update Tip
5	Legal Requirements	Task 5: We have identified energy-related legal requirements that apply to our operations, have a process to evaluate and update these over time, and evaluated our compliance with them	<i>no specific tip for this task</i>	Update Tip

Section: **Energy Review**

ID	Short Title	Task	Partner Tip	
6	Data Collection	Task 6: We have identified all our energy sources and uses and accurately collected the related energy consumption data	<i>no specific tip for this task</i>	Update Tip
7	Data Analysis	Task 7: We have analyzed our energy consumption data at the system/equipment level	<i>no specific tip for this task</i>	Update Tip
8	Significant Energy Uses (SEUs)	Task 8: We have determined our Significant Energy Uses (SEUs) and determined their energy performance, estimated future consumption and have a plan for reviewing and updating them.	<i>no specific tip for this task</i>	Update Tip
9	Relevant Variables	Task 9: We have determined the relevant variables that affect energy consumption of each SEU and collected the associated data.	<i>no specific tip for this task</i>	Update Tip
10	Performance Indicators (EnPIs)	Task 10: We have identified energy performance indicators (EnPIs) and developed a methodology for determining and updating them.	<i>no specific tip for this task</i>	Update Tip

Optimize efforts and accelerate progress using **tips** for each task

Cohort tip page highlights when a tip is being provided from the **Partner Tips** or **Cohort Tips**

Tips and Customization – Cohort View

Tasks: Scope and Boundaries

← BACK TO DASHBOARD 1 2 3 4 5 NEXT →

Task 1: We have defined, documented and approved the Scope and Boundaries of our 50001 Ready energy management system

Not Started × In Progress ⚙ Ready For Review 🔍 Completed ✓

Your roles for this task: **Contributor & Approver**

Partner Task Guidance From: **Manage Energy!**

Cohort Specific Tip HERE

Get Help

- Contact Manage Energy!
- 50001 Ready Help Desk
- View Learning Module

Detailed Guidance: Scope and Boundaries

Getting It Done Task Overview Full Description **Notes 1** Resources History Assignments

Use this Notes section to save information for communication with other members of your project team, they will be able to see these Notes when they are logged in to the 50001 Ready Navigator. Notes examples include dates of meeting with relevant personnel for completion of a portion of the task, decisions that have been made about task implementation, or perhaps a link to a file in your organization's shared drive that contains a completed worksheet or template. Please note, do not enter any information in here that you would not want shared with any members of the project team or the site's administrative staff.

Activity (1 Comments)

Amy Pevzner delete 05/14/2019

Use blueprints provided at the meeting to define scope and boundaries

Add a Note

Write a note...

Save

Need assistance? [Contact the 50001 Ready Help Desk](#) [Download as PDF](#) [BACK TO TOP](#)

Provide immediate client support to your customer every step of the way.

Tips distributed to all cohorts display in the bar above the detailed guidance for each task.

Customers can still add their own notes for each task.

Tips and Customization – Customer View

Customer sees the Partner's logo and tips.

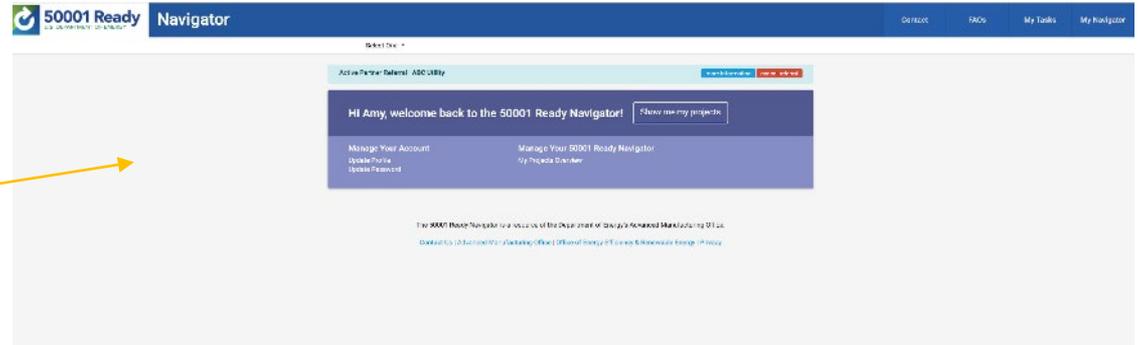
Logo defaults to Partner logo – can be replaced with cohort specific logo.

The tools customizable interface helps you and your customers with **supporting, observing, and reporting** on your EnMS progress

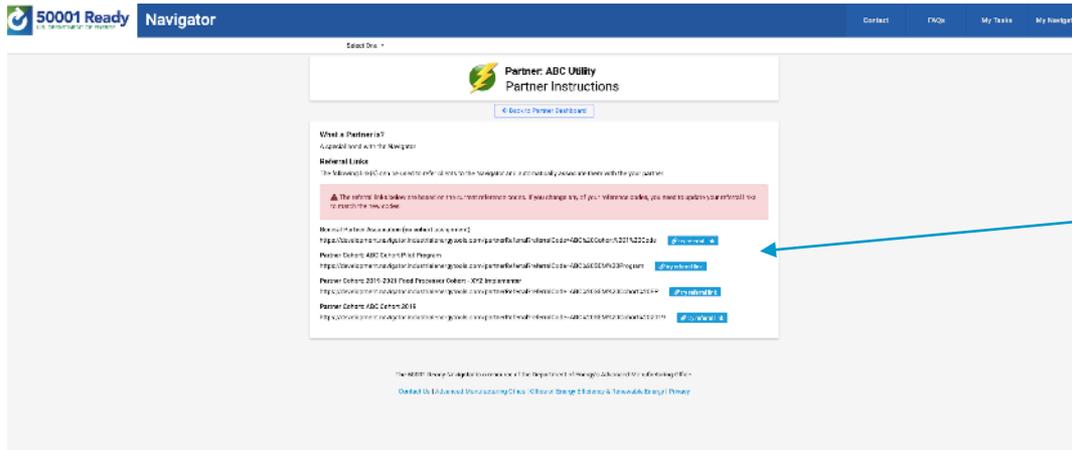
The screenshot shows a user interface for editing a task tip. At the top, there is a dropdown menu labeled "Select One". Below it, a header bar displays the partner logo (a blue ant) and the text "Partner: Amy's Amazing Army of Acrobatic Ants | Cohort: Anteaters". A button labeled "Edit Task Tip" is next to the partner name, and a blue arrow points from the callout box above to this button. Below the header is a "Back to Task Tips" button. The main content area is titled "Short Title: Scope and Boundaries" and contains a task description: "Task 1: We have defined, documented and approved the Scope and Boundaries of our 50001 Ready energy management system". Below the task description is a text input field with the placeholder "TASK TIP - SHOULD CONNECT PARTNER RELATED ACTIVITIES TO TASK GUIDANCE" and an "Update Task Tip" button. The bottom section is titled "Additional Task Guidance (for reference)" and includes sections for "Getting It Done", "Task Overview", and "Full Guidance". The "Getting It Done" section lists three bullet points: "With management input, complete the Scope and Boundaries Worksheet to define the scope and boundaries of the energy management system (EnMS).", "Develop an EnMS Scope and Boundaries Statement.", and "Have top management approve the Statement and communicate it across the organization." The "Task Overview" section explains that top management defines the scope and boundaries of the organization's energy management system (EnMS). The "Full Guidance" section contains three expandable items: "Identify the extent of activities, facilities, and decision structures to be included in your EnMS", "Define site limits and/or organizational limits of your EnMS", and "Develop a scope and boundaries statement for your EnMS".

Cohorts

Clients can join a cohort using **Referral Links** for quick registration



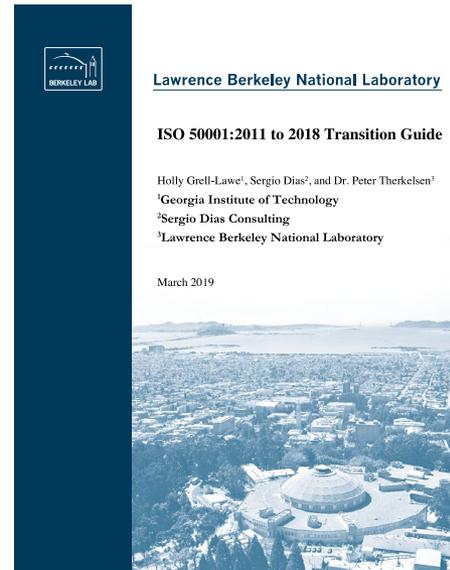
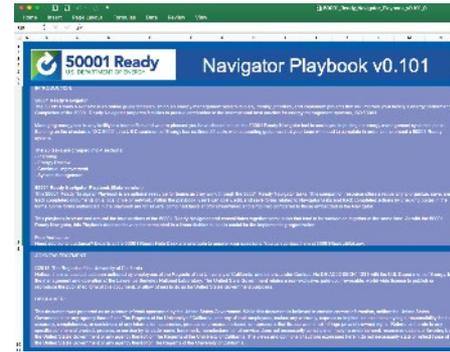
Reference Codes can be customized to your preferences



Mini-Demo

Other 50001 Ready updates

- Efforts to update ready resources to reflect ISO 50001:2018 update
 - Targeting Navigator 3.0 launch at end of the calendar year
 - Additional details coming this fall
- Playbook – beta version – feedback wanted!
 - <https://betterbuildingssolutioncenter.energy.gov/iso-50001/50001Ready/resources/50001-ready-navigator-playbook>
- ISO 50001 2011 to 2018 certification transition guide
 - https://betterbuildingssolutioncenter.energy.gov/sites/default/files/attachments/50001_2018_Transition_Guide_2019.03.25.pdf
- See you in Portland! We are excited to meet you at:
 - SEM Summit – Monday, August 12
 - ACEEE Summer Study, Tuesday, August 13 – Thursday, August 15
- Manufacturing Energy Assessment Software For Utility Reduction (MEASUR)
 - Integrated software suite to aid manufacturers as they improve the efficiency of energy systems and equipment within a plant



Questions + what's coming up

Visit the 50001 Ready website at energy.gov/50001Ready

- Download sample utility partner profiles and program implementation guides
 - Find links to the Navigator and EnPI Lite
-

Stay informed

- Contact sandy.glatt@ee.doe.gov to add others to this utility network distribution list
 - Sign up at energy.gov/50001Ready for email updates about ISO 50001 and related DOE programs
-

Questions?