Today’s agenda - 50001 Ready Navigator Updated!

• Navigator guidance now aligns to ISO 50001:2018 Energy Management System
  
  – Project migration
  
  – Multi-site

• Additional Navigator Features:
  
  – Partner platform

• Q&A
50001 Ready and DOE Updates

1. 50001 Ready Navigator updates
   - Navigator 3.0 transition
   - Resource updates
   - 50001 Ready recognition and promotion
   - Utilities and partners engaged with 50001 Ready

2. Program participation

3. US TAG for ISO TC 301

4. 50001 Ready news and updates

https://navigator.lbl.gov/
The 50001 Ready Navigator has now been updated to reflect the changes made to the latest version of the ISO 50001 Energy Management System Standard — ISO 50001:2018

KEY CHANGES:

• Introduction of the “High-Level Structure”, (HLS): Provides common ISO structure, terms and definitions.
  – Increased compatibility across various ISO management system standards (including ISO 14001 and ISO 9001).

• Emphasis on business objectives: Incorporates an organization’s strategic direction.
  – Clarity of roles in top management and an increased integration with management practices.

• Normalization of energy performance improvement: Accounts for changes in energy variables
  – Employs an “apples to apples” comparison of energy improvement when calculating weather, production, and occupancy.
Navigator updates

The 50001 Ready Navigator still has 25 tasks, but they have been realigned to conform ISO’s High Level Structure (HLS)

- Refer to the Navigator’s Guidance Transfer Crosswalk for details!

- Search either by the tasks in the 2011 guidance or by the 2018 guidance

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### Guidance Transfer Crosswalk

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<th>NEW 50001:2018 Tasks</th>
<th>OLD 50001:2011 Tasks</th>
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The 25 tasks are grouped by the **seven** sections of the ISO 50001:2018 standard:

- Context of the Organization (tasks 1-3)
- Leadership (tasks 4-6)
- Planning (tasks 7-13)
- Support (tasks 14-16)
- Operation (tasks 17-19)
- Performance Evaluation (tasks 20-23)
- Improvement (tasks 24-25)

Track each section’s progress right from your dashboard.
Navigator resource updates

• 25 resource worksheets (plus two trackers) have been created to accompany each of the 25 tasks.
  – The multiple resources have been streamlined and realigned to the revised 2018 structure.

• We’ve done the editing for you
  – No more wading through 129 resources to determine which may or may not best support your needs, the most impactful resources are right where you need them.

• In the middle of a project in the older version or looking for a specific resource you used before?
  – Not yet ready to let go of the older resources?
    • Log in with your credentials to access all 129 of the old resource documents from the Resource Index page
    • Keep in mind: The old resources will not match up in content or structure!
Each optional task worksheet functions on its own, but all put together forms a living system and record of an organization’s EnMS.

- Multiple resources for each task have been streamlined to help you build your EnMS program one step at a time.
This update to the 50001 Ready Navigator affects projects rather than users.

- **Individual projects** will display either the original 50001 Ready Navigator or updated content depending on when the project was created and if it has been migrated yet.
- A Navigator user can be part of projects using the original content and projects using the updated content. As a Navigator user you do not need to take any action.
- Navigator project administrator’s have a choice to make when to migrate their projects from the old to current version.

As a project Administrator, if you have a:

- **Project in process** – You will have up to one year to migrate your project.
- **Project in process that is part of a multi-site** - All projects must be migrated at once and at the discretion of your multi-site’s central office administrator.
- **New project to create** - Any new projects will be created in the new version. No action is required on your part!
Migrating your single project

• Congratulations! You have decided to migrate your existing project... What next?

**Step 1:** If you are using the previous version, a banner will appear on your project’s dashboard at the top of your dashboard asking if you would like to migrate.

**Step 2:** Once you are ready to migrate your project select the “Migrate Project” button here.

**Tip:** Only 4 sections indicates you are using the older version. *Updated Navigator has 7 sections*
After selecting the “Migrate Project” button a new window opens up detailing out your task assignments and how transitioned tasks

**Step 3:** Confirm you are migrating the correct project.

**Step 4:** Confirm the assigned responsibilities of each transitioned task since the content has shifted.

**Step 5 (optional):** Selecting the Details button will highlight the primary responsibilities for each task.
Migrating your project (cont.)

Step 6: Select the migration details button to see what assignments may have changed and re-assign your task approvers appropriately.

Step 7 (optional): Select these boxes to open up pop-up details.

Step 8: Once you are happy with the assignments, the final step is to “Confirm the Migration.”
Resource Review: Navigator Multisite

✓ Reduce time & cost of implementing 50001 Ready across multiple facilities
✓ Enter and manage multiple sites in one portal
✓ Allows for ‘central office’ review, communications or completion of tasks
✓ Usable by agencies, sites, utilities, ESCOs etc.
Migrating your Multi-Site project

Multi-sites can only be updated by the multi-site administrator – Not on an individual project basis.

Note the banner stating the multi-site is currently using the older 50001:2011 guidance here.

Once a project is ready to migrate, just select the "Migrate Multi-Site" button to initiate the request. 50001 Ready Help Desk staff will work with you from there.
Navigator Transition Resources

- **ISO 50001:2011 to 2018 Transition Guide** Created by the DOE, LBNL, and the US TAG to navigate this revision including:
  - Section by section comparison of changes
  - Explanation of High Level Structure (HLS) as found in other popular ISO standards (14001 / 90001)

- **ISO 50001:2018 standard** is available through the Georgia Institute of Technology


- **Key changes in 2018 version**: Free recorded webinar that highlights key changes in ISO 50001.

Learn more at: [energy.gov/50001ready](http://energy.gov/50001ready)
Resource Review: Navigator Partner Platform

- Support, observe, and report on multiple projects
- No direct controls over projects
- Legal use of DOE 50001 Ready logos and Co-branded Navigator & recognition
- Usable by agencies, sites, utilities, ESCOs etc.
- Partner platform supports individual projects in both the 2011 and 2018 version of the Navigator.
DOE will help you promote your 50001 Ready success!

50001 Ready Partners and Facilities receive:

- DOE facility certificates of recognition
- Promotional package tailored to your needs:
  - Your company logo featured on DOE 50001 Ready sites
  - Project showcase to highlight your achievements
  - Access to customizable press material and resources
Utilities and Implementers: Increase SEM Program Participation

• Through 50001 Recognition, increase attention, reach, and recognition for participating utilities and implementer programs

• When facilities self attest to the completion of 50001 Ready, DOE helps to promote the success of the facility, implementer, and utility through project showcases and implementer case studies.

Links to latest Project Showcases and Case Studies

go.lbl.gov/50001Ready/SEG

go.lbl.gov/50001Ready/Tronox

go.lbl.gov/50001Ready/ArcelorMittal
How do energy efficiency program administrators use 50001 Ready?

✓ 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.

Utilities and Partners already engaged with 50001 Ready:
If you use ISO 50001, then you should drive its future!

Interested in making global impact to the further advancement of energy management?

The US Technical Advisory Group (TAG) to ISO Technical Committee (TC) 301 is the official ANSI TAG responsible for representing US positions on energy management, efficiency, and savings standards being developed internationally.

Why Join the US TAG to ISO TC 301?

Gain a better understanding of, and influence over, new and upcoming energy-related standards:

- **Technical Influence** - Represent the US position in working groups developing ISO standards in TC 301
- **Early Access** – Provide input to evolving standards
- **Professional Development** - Interact and learn from other technical experts, create a personal network, and hear global perspectives on important issues.
- **Leadership** - Develop experience in teamwork and in the art of consensus building.

To learn more contact Deann Desai, TAG Administrator, at deann.desai@innovate.gatech.edu

ISO Technical Committee 301, 2019 Plenary Meeting, Vienna, Austria

*US TAG to ISO TC 301 is not a DOE program, but a professional membership offered on a fee-based structure with multiple levels of entry options available.*
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 ethan.rogers @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?