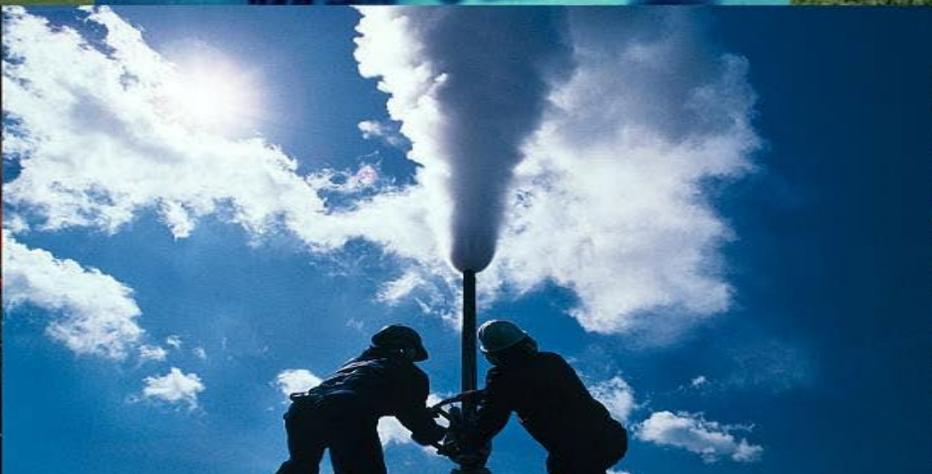




50001 Ready™

U.S. DEPARTMENT OF
ENERGY

Energy Efficiency &
Renewable Energy



50001 Ready
Utility Network Series
June 2020

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

50001 Ready Navigator Training Materials!

- Introductory presentations
- Task education presentations
- Implementation training materials

As time allows, review of:

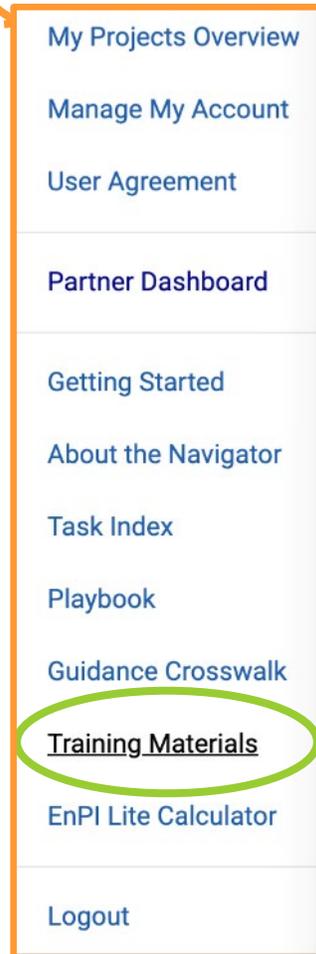
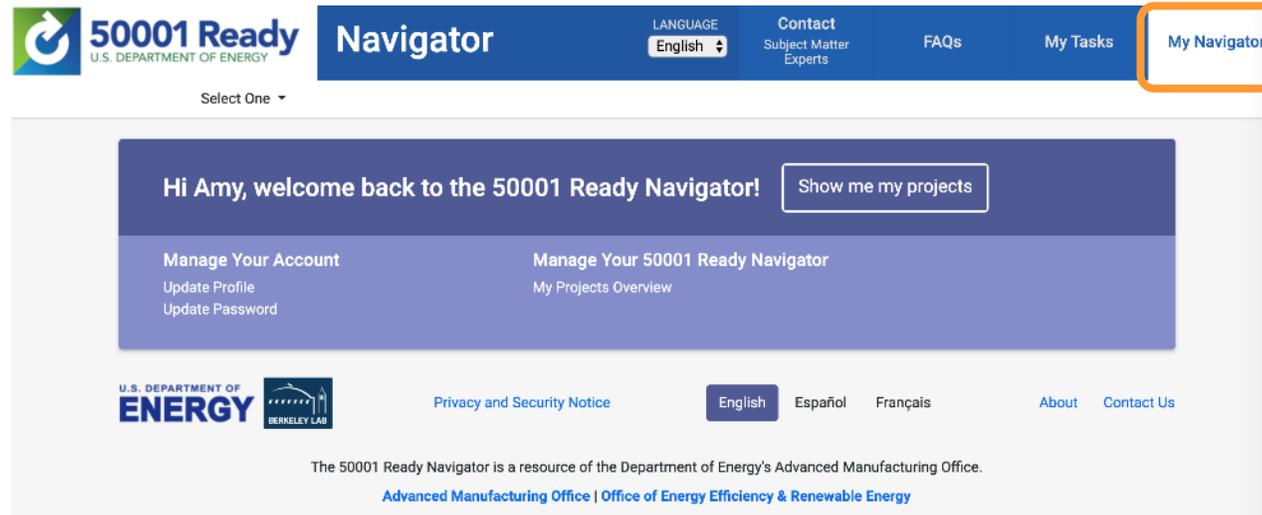
- *Recent Navigator updates including ISO 50001:2018 Transition, Playbook Resources, Multi-Site, Partner Platform and Multi-site*
- *50001 Ready Program offerings including showcases, partners, and US TAG to ISO TC 301*

- Navigator Training Portfolio

- Developed for and used by trainers and energy efficiency program staff
- Teaches the fundamental concepts of 50001 Ready and ISO 50001
- Targeted training for:
 - Energy managers and teams
 - Utility efficiency program administrators
 - General and U.S. federal sectors
- Topics include:
 - Energy management system and 50001 Ready introductions
 - 50001 Ready task education
 - 50001 Ready implementation

50001 Ready Navigator Training Materials

Access Training Materials from the 'My Navigator' menu bar



<https://navigator.lbl.gov/>

Energy Management System and 50001 Ready Introduction Materials

50001 Ready Brief Introduction for End-Users

50001 Ready General Introduction for End-Users

Energy Management System Informative Training

Energy Management System Informative Training for Utility Program Administrators

50001 Ready Multi-Site Implementation Distance Learning for Central-Office Staff

50001 Ready Task Education Materials

50001 Ready Training for Utility Energy Efficiency Staff

50001 Ready In-plant Training for Manufacturers

50001 Ready Implementation Materials

50001 Ready Distance Learning Series for All Organizations

50001 Ready Distance Learning Series for Federal Organizations

50001 Training Categories

- Material Introduction
- Task Education
- EnMS Implementation

Introduction Materials

- Targets various audiences
- Designed to introduce participants to an EnMS and the 50001 Ready Navigator.
- Help you decide if an EnMS implementation is right for your organization.

Energy Management System and 50001 Ready Introduction Materials

50001 Ready Brief Introduction for End-Users

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Task Education Materials

- Targets various audiences
- Deep dive into 50001 Ready and the 25 Navigator tasks
- Can be passed on to others or used to manage an energy efficiency program that makes use of 50001 Ready.

50001 Ready Task Education Materials

50001 Ready Training for Utility Energy Efficiency Staff

50001 Ready In-plant Training for Manufacturers

Implementation Materials

- Targets various audiences
- Prepares participants to to put the concepts of a 50001 energy management system into practice.

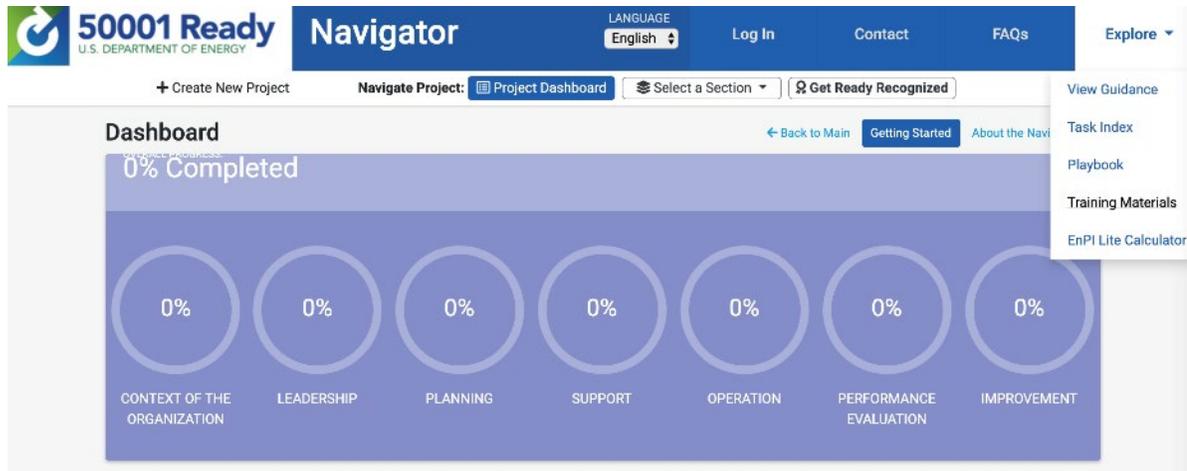
50001 Ready Implementation Materials

50001 Ready Distance Learning Series for All Organizations

50001 Ready Distance Learning Series for Federal Organizations

50001 Ready Navigator Training Materials

Training is viewable without being logged in, but in order to download the modules you must be logged into your Navigator account.



<https://navigator.lbl.gov/>

50001 Ready Training Materials

These training materials teach the fundamental concepts of 50001 Ready and are presented with varying levels of detail targeted to audiences spanning from end-user energy managers to utility efficiency program administrators. While all training material addresses the foundations of ISO 50001 based energy management systems, each training's objectives cover topics ranging from general energy management system introductions to step by step instructions on implementing the 50001 Ready Navigator's 25 tasks. The entire training portfolio has been developed and is used by certified trainers and program staff to teach various audiences about ISO 50001 and how to implement an energy management system with the 50001 Ready Navigator.

Energy Management System and 50001 Ready Introduction Materials

- 50001 Ready Brief Introduction for End-Users
- 50001 Ready General Introduction for End-Users
- Energy Management System Informative Training
- Energy Management System Informative Training for Utility Program Administrators
- 50001 Ready Multi-Site Implementation Distance Learning for Central-Office Staff

50001 Ready Task Education Materials

- 50001 Ready Training for Utility Energy Efficiency Staff
- 50001 Ready In-plant Training for Manufacturers

50001 Ready Implementation Materials

- 50001 Ready Distance Learning Series for All Organizations
- 50001 Ready Distance Learning Series for Federal Organizations

Login required to download training materials. [Login](#)

[Download Selected Trainings](#)

Make sure to select at least one training below.

To learn more about each training module and to download:

- Select the training to jump to its details lower on the page
- Or just scroll down to see them all!

50001 Ready Training Materials

These training materials teach the fundamental concepts of 50001 Ready and are presented in a variety of formats, spanning from end-user energy managers to utility efficiency program administrators. With 50001 based energy management systems, each training's objectives cover topics ranging from basic energy management to step by step instructions on implementing the 50001 Ready Navigator's 25 tasks. The end goal is to enable certified trainers and program staff to teach various audiences about ISO 50001 and how to use the 50001 Ready Navigator.

Energy Management System and 50001 Ready Introduction Materials

50001 Ready Brief Introduction for End-Users

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Energy Management System Informative Training for Utility Program Administrators

50001 Ready Multi-Site Implementation Distance Learning for Central-Office Staff

50001 Ready Task Education Materials

50001 Ready Training for Utility Energy Efficiency Staff

50001 Ready In-plant Training for Manufacturers

Download Selected Trainings

Make sure to select at least one training below.

Download trainings:

- Scroll through the list and select the training modules for download

Energy Management System and 50001 Ready Introduction Materials

The Energy Management System and 50001 Ready Introduction Training Materials are designed to introduce participants to an energy management system based upon ISO 50001 and the concepts, structure, and features of the 50001 Ready Navigator. After receiving the training, participants should be able to explain to others what the 50001 Ready Navigator is and make an informed decision on the approach for implementation at their organization.

SELECT: 50001 READY BRIEF INTRODUCTION FOR END-USERS

[Admin only download count: 23]

This presentation briefly introduces the fundamental concepts of an energy management system and the resources available in the 50001 Ready Navigator.

Audience: Those who may support or participate in implementation at their site

Duration: 15-30 minutes

Materials: 1 set of 16 slides

SELECT: 50001 READY GENERAL INTRODUCTION FOR END-USERS

[Admin only download count: 13]

This presentation introduces the concept of an energy management system, the 50001 Ready Program, and the 50001 Ready Navigator. It offers a high level understanding of the value of a 50001 Ready and highlights success stories of program participants.

Audience: Those interested in learning about energy management systems and how the 50001 Ready Navigator can help their organization

Duration: 30-45 minutes

Materials: 1 set of 30 slides

Must agree to license terms before downloading

**LAWRENCE BERKELEY NATIONAL LABORATORY
END USER LICENSE AGREEMENT FOR
Guidance Materials of the 50001 Ready Navigator**

IMPORTANT – READ CAREFULLY: This End User License Agreement (“Agreement”) is a legal agreement between you (in your capacity as an individual and as an agent for your PROFESSIONAL TRAINING ORGANIZATION (PTO), company, institution or other entity) (collectively, “you” or “PTO” or “Licensee”) and The Regents of the University of California, Department of Energy contract-operators of the Ernest Orlando Lawrence Berkeley National Laboratory (“Berkeley Lab”).

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(a) You may use the Material solely for the purposes of training individuals (including yourself) who wish to learn about and/or implement an energy management system using the guidance materials of the 50001 Ready Navigator;

(b) You must credit the Lawrence Berkeley National Laboratory wherever possible, and if reproduced in tangible form.

EXHIBIT A LICENSED MATERIALS DCEP TRAINING MATERIALS

Training Materials and Certification Scheme related to any of the following titled Materials:

- 50001 Ready Brief Introduction for End-Users
- 50001 Ready General Introduction for End-Users
- Energy Management System Informative Training
- Energy Management System Informative Training for Utility Program Administrators
- 50001 Ready Multi-Site Implementation Distance Learning for Central-Office Staff
- 50001 Ready Training for Utility Energy Efficiency Staff
- 50001 Ready In-plant Training for Manufacturers
- 50001 Ready Distance Learning Series for Federal Organizations
- 50001 Ready Distance Learning Series for All Organizations

EXHIBIT B

Specific Roles and Responsibilities of PTO under this Agreement

The following are the roles and responsibilities of the PTO:

(1) At the request of LBNL staff PTO will provide written feedback on the quality of the Materials and provide suggestions for improvement.

(2) At the request of LBNL staff PTO will provide written feedback on how the Materials have been used.

Close **Agree to License Terms and Download Selected Trainings**

Prior to downloading trainings, you will first need to review and agree to the terms of use.

Agree to the terms and download your selected trainings.

Download one, Download them all...

Name	Type	Compressed...
 50001 Ready Brief Introduction for End-Users	Adobe Acrobat Document	13,870 KB
 50001 Ready Distance Learning Series for All Organizations	Compressed (zipped) Fol...	101,523 KB
 50001 Ready Distance Learning Series for Federal Organizations	Compressed (zipped) Fol...	115,745 KB
 50001 Ready General Introduction for End-Users	Adobe Acrobat Document	12,174 KB
 50001 Ready In-plant Training for Manufacturers	Compressed (zipped) Fol...	162,328 KB
 50001 Ready Multi-Site Implementation Distance Learning for Central-...	Adobe Acrobat Document	22,931 KB
 50001 Ready Training for Utility Energy Efficiency Staff	Compressed (zipped) Fol...	120,947 KB
 Energy Management System Informative Training	Compressed (zipped) Fol...	17,269 KB
 Energy Management System Informative Training for Utility Program ...	Compressed (zipped) Fol...	87,030 KB

Example: Distance Learning Series for Federal Organizations



Name	Type	Compressed si...
 50001 Ready Distance Learning Series for Federal Organizations Session 1	Adobe Acrobat Document	11,917 KB
 50001 Ready Distance Learning Series for Federal Organizations Session 1 Speakers Notes	Adobe Acrobat Document	5,851 KB
 50001 Ready Distance Learning Series for Federal Organizations Session 2	Adobe Acrobat Document	15,935 KB
 50001 Ready Distance Learning Series for Federal Organizations Session 2 Speakers Notes	Adobe Acrobat Document	4,269 KB
 50001 Ready Distance Learning Series for Federal Organizations Session 3	Adobe Acrobat Document	8,751 KB
 50001 Ready Distance Learning Series for Federal Organizations Session 3 Speakers Notes	Adobe Acrobat Document	3,157 KB
 50001 Ready Distance Learning Series for Federal Organizations Session 4	Adobe Acrobat Document	12,140 KB
 50001 Ready Distance Learning Series for Federal Organizations Session 4 Speakers Notes	Adobe Acrobat Document	3,553 KB
 50001 Ready Distance Learning Series for Federal Organizations Session 5	Adobe Acrobat Document	10,736 KB
 50001 Ready Distance Learning Series for Federal Organizations Session 5 Speakers Notes	Adobe Acrobat Document	3,440 KB
 50001 Ready Distance Learning Series for Federal Organizations Session 6	Adobe Acrobat Document	22,231 KB
 50001 Ready Distance Learning Series for Federal Organizations Session 6 Speakers Notes	Adobe Acrobat Document	4,006 KB
 50001 Ready Distance Learning Series for Federal Organizations Session 7	Adobe Acrobat Document	7,421 KB
 50001 Ready Distance Learning Series for Federal Organizations Session 7 Speakers Notes	Adobe Acrobat Document	2,333 KB

Energy Management System and 50001 Ready Introduction Materials

50001 Ready Brief Introduction for End-Users

50001 Ready General Introduction for End-Users

Energy Management System Informative Training

Energy Management System Informative Training for Utility Program Administrators

50001 Ready Multi-Site Implementation Distance Learning for Central-Office Staff

Questions?

50001 Ready Task Education Materials

50001 Ready Training for Utility Energy Efficiency Staff

50001 Ready In-plant Training for Manufacturers

50001 Ready Implementation Materials

50001 Ready Distance Learning Series for All Organizations

50001 Ready Distance Learning Series for Federal Organizations

- Update to ISO's High-Level Structure
- Alignment of the Playbook and 25 Tasks
- Change from four to seven dials on the dashboard
- Multi-Site capability
- Partner Platform
- Showcases and Case Studies

The 50001 Ready Navigator is 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.

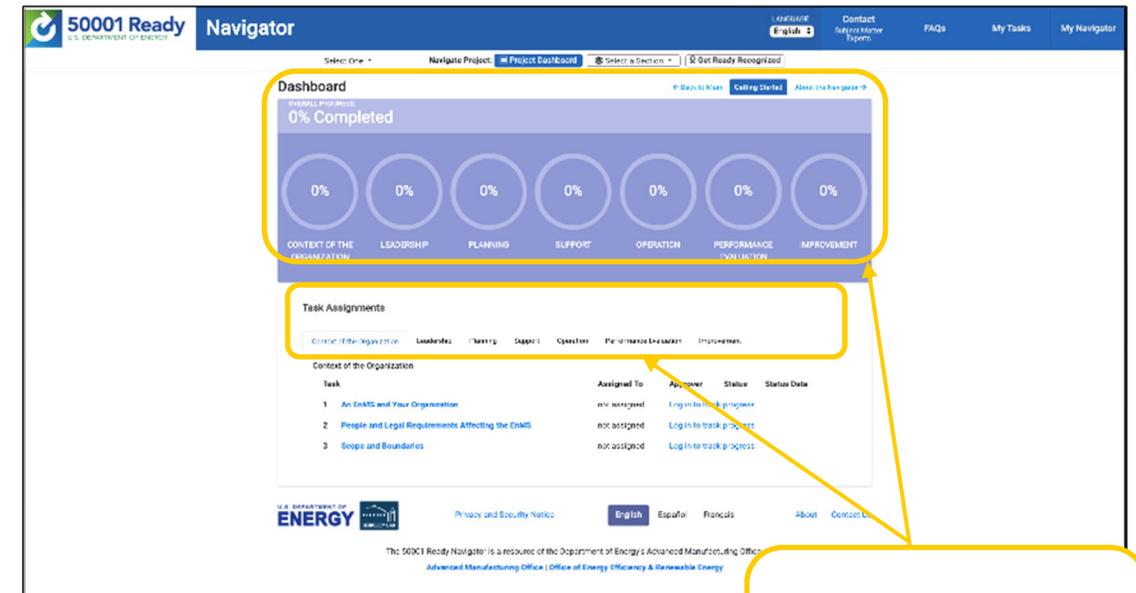
The 50001 Ready Navigator still has 25 tasks, but they have been realigned to conform ISO's High Level Structure (HLS)

- ✓ Refer to the Navigator's Guidance Transfer Crosswalk for details!
- ✓ Search either by the tasks in the 2011 guidance or by the 2018 guidance

Guidance Transfer Crosswalk		
New 50001:2018 from Old 50001:2011	Old 50001:2011 to New 50001:2018	
NEW 50001:2018 Tasks	Old 50001:2011 Tasks	Transfer Notes
1 An EnMS and Your Organization	<i>new 50001:2018 task</i>	
2 People and Legal Requirements Affecting the EnMS	<= 5 Legal Requirements	• Direct Transfer
3 Scope and Boundaries	<= 1 Scope and Boundaries	• Direct Transfer
4 Management Commitment	<= 3 Management Commitment	• Direct Transfer
5 Energy Policy	<= 2 Energy Policy	• Direct Transfer
6 Energy Team and Resources	<= 4 Energy Team	• Direct Transfer
7 Risks to EnMS Success	<i>new 50001:2018 task</i>	
8 Energy Data Collection and Analysis	<= 6 Data Collection 7 Data Analysis	• Merge Assignments
9 Significant Energy Uses (SEUs)	<= 8 Significant Energy Uses (SEUs) 9 Relevant Variables	• Merge Assignments • Task 9 Shared
10 Improvement Opportunities	<= 12 Improvement Opportunities	• Direct Transfer
11 Energy Performance Indicators (EnPIs) and Baselines (EnBs)	9 Relevant Variables <= 10 Performance Indicators (EnPIs) 11 Baselines, Objectives and Targets	• Merge Assignments • Task 9 Shared • Task 11 Shared
12 Objectives and Targets	<= 11 Baselines, Objectives and Targets	• Direct Transfer • Task 11 Shared
13 Action Plans for Continual Improvement	<= 13 Improvement Projects	• Direct Transfer
14 Competence and Training	<= 21 Training	• Direct Transfer
15 Awareness and Communication	<= 20 Communications	• Direct Transfer
16 Documenting the EnMS	<= 19 Documentation and Records	• Direct Transfer
17 Operational Controls	<= 16 Operational Controls	• Direct Transfer
18 Energy Considerations in Design	<= 18 Energy Consideration in Design	• Direct Transfer
19 Energy Considerations in Procurement	<= 22 Procurement	• Direct Transfer
20 Monitoring and Measurement of the EnMS	14 Monitoring <= 15 Measurement	• Merge Assignments
21 Monitoring and Measurement of Energy Performance Improvement	<= 24 Calculate Energy Savings	• Direct Transfer
22 Internal Audit	<= 23 Internal Audit	• Direct Transfer
23 Management Review	<= 25 Management Review	• Direct Transfer
24 Corrective Actions	<= 17 Corrective Actions	• Direct Transfer
25 Continual Improvement	<i>new 50001:2018 task</i>	

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)

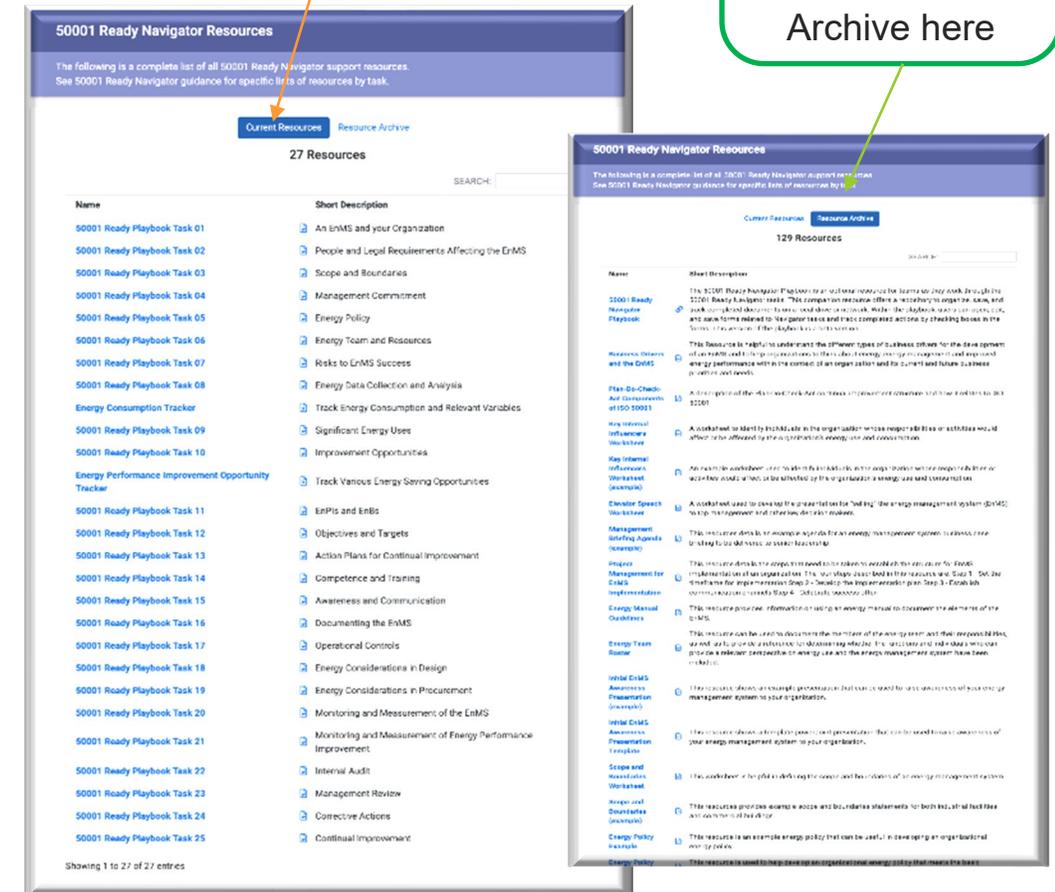


Resource Review: Navigator resource updates

- 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 of Navigator 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!

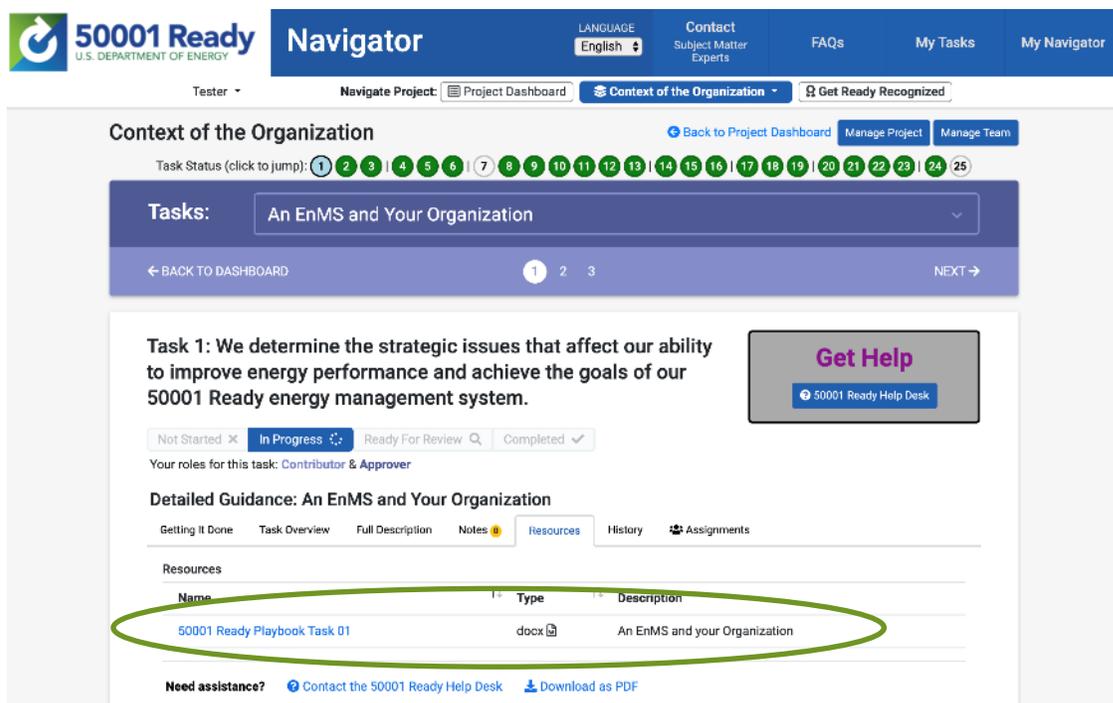
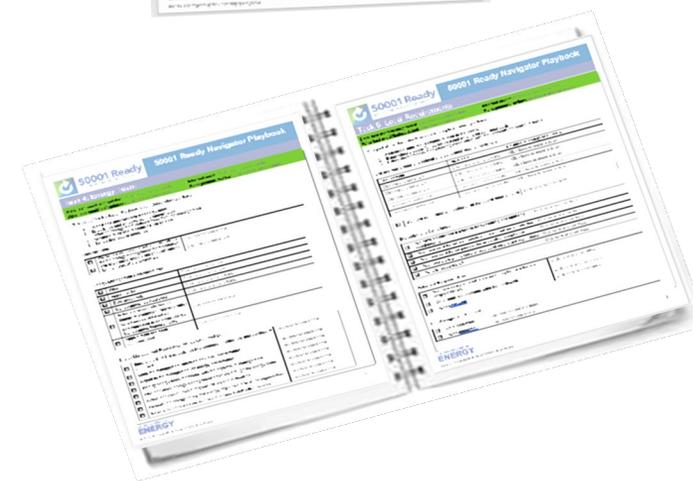
New resources are available on the Resource page!

If needed, the old resources can be found on the Resource Archive here



Resource Review: Navigator Playbook updates

- 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.



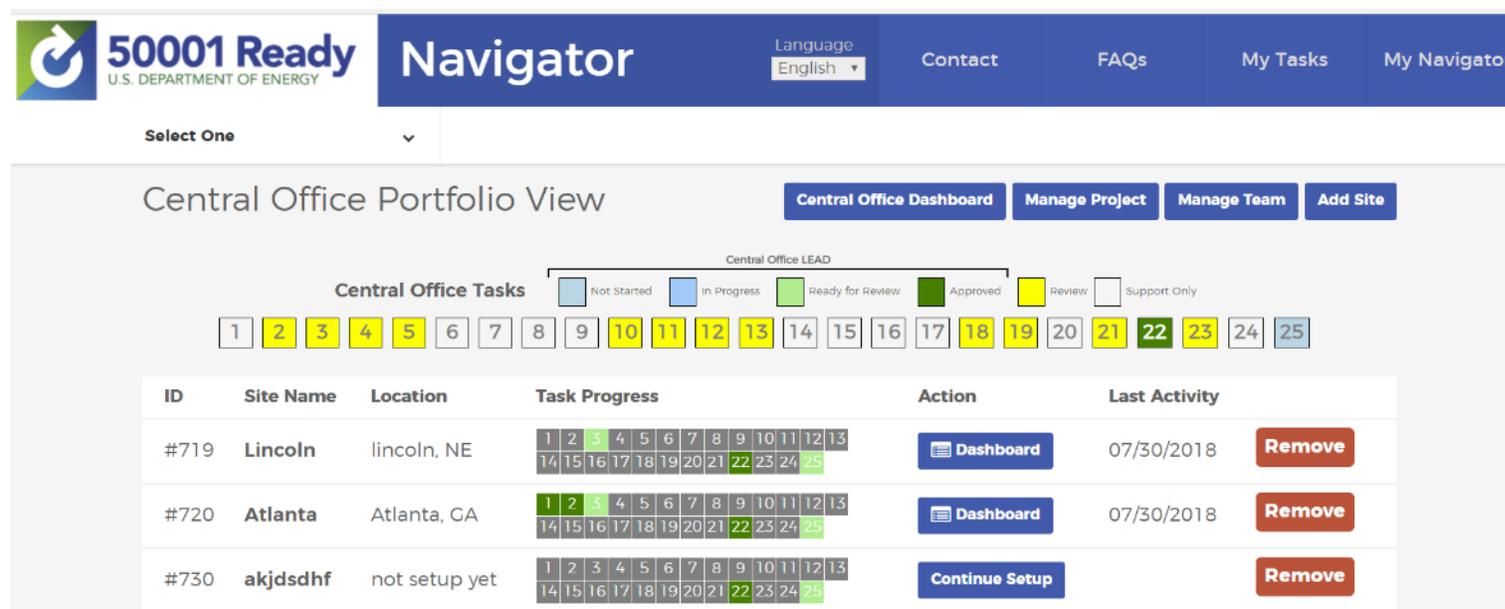
The screenshot shows the 50001 Ready Navigator web application. The header includes the logo, language selection (English), and navigation links like 'Contact Subject Matter Experts', 'FAQs', 'My Tasks', and 'My Navigator'. The main content area is titled 'Context of the Organization' and features a task status bar with 25 numbered items. A dropdown menu shows 'An EnMS and Your Organization'. Below this, there's a task description for 'Task 1: We determine the strategic issues that affect our ability to improve energy performance and achieve the goals of our 50001 Ready energy management system.' A 'Get Help' button is visible. The 'Resources' section contains a table with one entry circled in green:

Name	Type	Description
50001 Ready Playbook Task 01	docx	An EnMS and your Organization

At the bottom, there are links for 'Need assistance?' and 'Download as PDF'.

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.

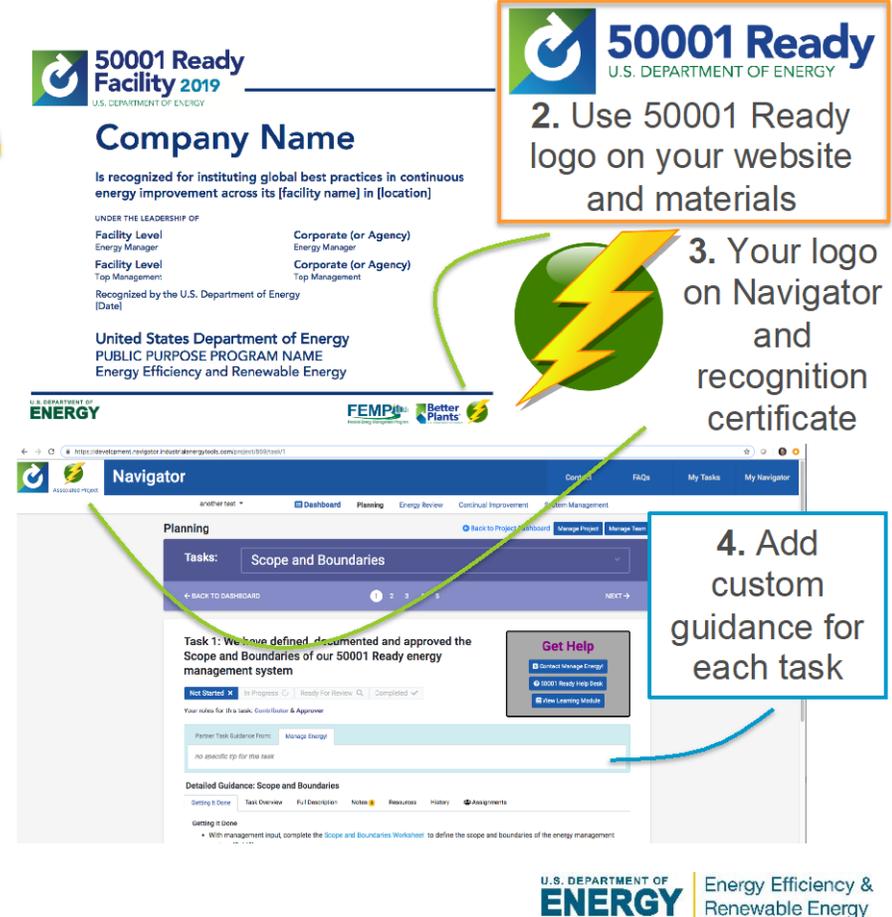
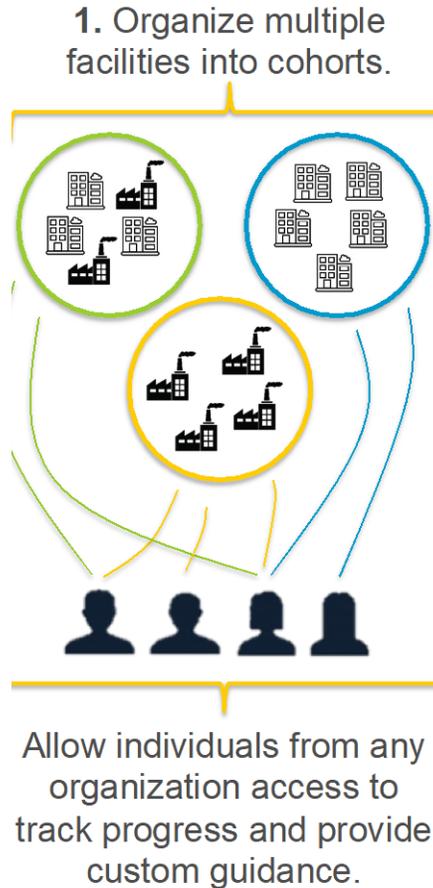


The screenshot shows the '50001 Ready Navigator' interface. At the top, there is a navigation bar with the logo, '50001 Ready U.S. DEPARTMENT OF ENERGY', and 'Navigator'. A language dropdown is set to 'English'. Navigation links include 'Contact', 'FAQs', 'My Tasks', and 'My Navigator'. Below this is a 'Select One' dropdown menu. The main content area is titled 'Central Office Portfolio View' and includes buttons for 'Central Office Dashboard', 'Manage Project', 'Manage Team', and 'Add Site'. A 'Central Office LEAD' section shows a progress bar for 'Central Office Tasks' with a legend: Not Started (light blue), In Progress (medium blue), Ready for Review (green), Approved (dark green), Review (yellow), and Support Only (white). A task progress bar shows tasks 1 through 25, with 1-5 in yellow, 6-10 in green, 11-13 in dark green, 14-16 in light blue, 17-19 in medium blue, 20 in white, 21-23 in yellow, 24 in light blue, and 25 in medium blue. Below this is a table with columns: ID, Site Name, Location, Task Progress, Action, and Last Activity.

ID	Site Name	Location	Task Progress	Action	Last Activity
#719	Lincoln	lincoln, NE	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	Dashboard	07/30/2018 Remove
#720	Atlanta	Atlanta, GA	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	Dashboard	07/30/2018 Remove
#730	akjdsdhf	not setup yet	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	Continue Setup	Remove

- ✓ 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.

What can you do with the partner platform?



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

4. Add custom guidance for each task

Navigator

Tasks: Scope and Boundaries

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

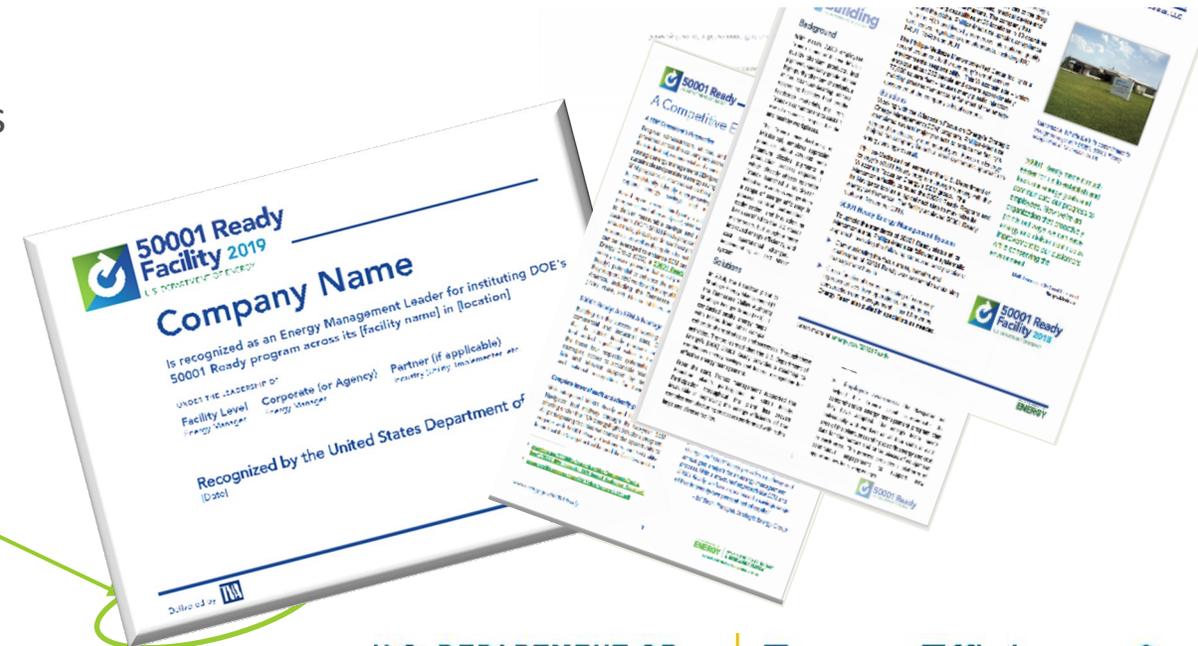
Get Help

U.S. DEPARTMENT OF ENERGY Energy Efficiency & Renewable Energy

DOE will help you promote your 50001 Ready success!

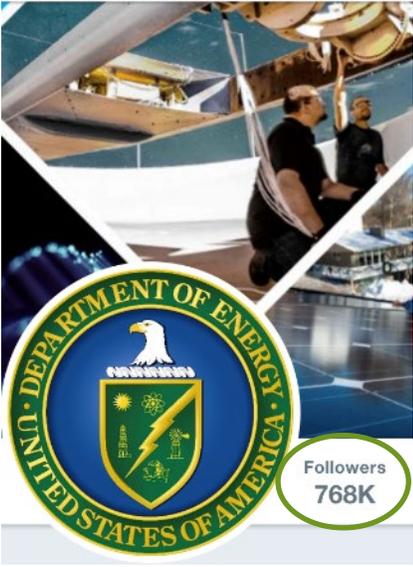
50001 Ready Partners and Facilities receive:

- ✓ 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



Your logo here!

- 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.

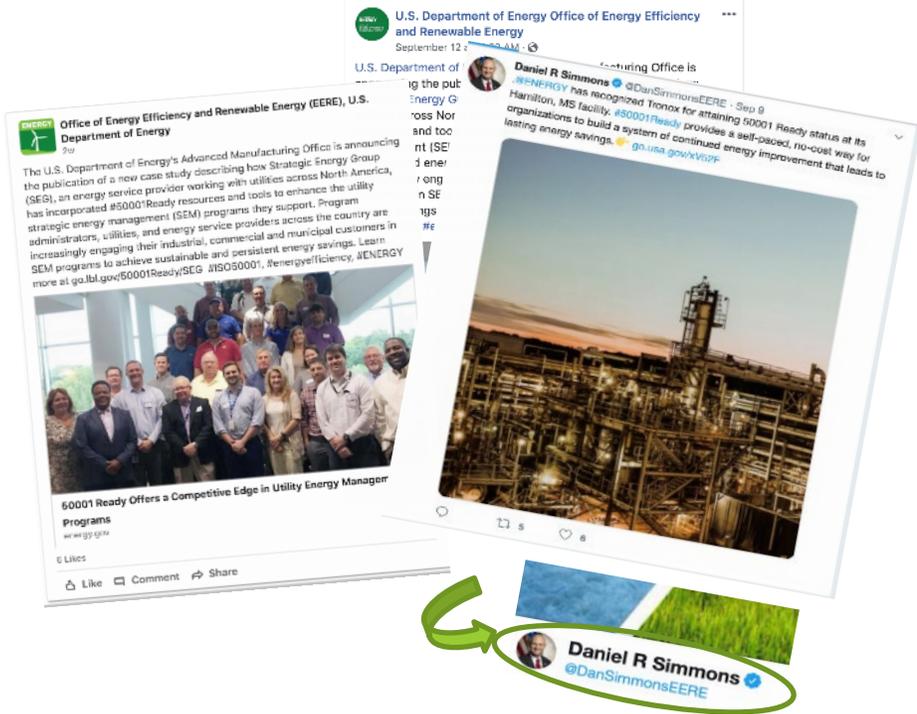


Followers
768K



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:



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](mailto: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?