

EMA TOOL

Self Serve Quick Start Guide

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INTRODUCTION

The EMA Tool takes 10-20 minutes to complete, and provides you with an immediate report that:

- **Identifies your current energy management practices**
- **Highlights your next steps to continue to improve**
- **Compares your practices against your peers**
- **Supports an energy management program at your site**

The traditional approach to energy management has been to focus on energy projects, audits and technology upgrades. The EMA Tool takes a strategic approach based on proven principles to help you:

- **Identify low/no cost opportunities to reduce your energy bill**
- **Maintain energy savings through technology upgrades**
- **Integrate energy management into your businesses**

EMA PROCESS

Options to complete your EMA:

- 1 Start a self-assessment
- 2 Log in with an existing password
- 3 Group facilitated session (contact your utility)

EMA SECTIONS

1 Site Data

- Facility data
- Energy data
- Contact data



2 Assessment

- 12 topics
- Binary questions organized in levels



3 Reports

- Immediate report
- Best practice gap analysis
- Recommended actions

SECTION 1: DATA COLLECTION

Session Information

Is this session being facilitated? * Yes No

Enter your Session information

Are there additional attendees for this session?

Attendee Name

Attendee Job Title

Attendee Email



Site Information

Organization:

Organization Name *

Organization Type

Select an Option ▼

Enter your Site information

Site:

Site Name *

SECTION 1: DATA COLLECTION cont'd

Site Street Address	Site City	Site Zip Code
<input type="text"/>	<input type="text"/>	<input type="text"/>
Site annual electric consumption (kWh):	Site annual gas consumption (Therm):	
<input type="text"/>	<input type="text"/>	
<hr/>		
<h2>Program Administrator</h2>	Enter Program Admin information	What is your Program Administrator? ?
Who is your program administrator (PA)?		
Choose from the list:	Other (if not listed)	
<input type="text" value="- Select -"/>	<input type="text"/>	
Would you like to share your contact information with your PA?	<input checked="" type="radio"/> Yes	<input type="radio"/> No
Should we contact your PA when you've completed your assessment?	<input checked="" type="radio"/> Yes	<input type="radio"/> No

Hover over tooltip for information on Program Administrators

SECTION 2: QUESTIONS ON 12 TOPICS

- 1 Management Commitment Assessment** of the level of executive involvement in promoting and deploying energy management in your organization.
- 2 Resources Assessment** of your organization's current financial and human resources as required for energy management, including budgets and energy teams.
- 3 Energy Review and Analysis Assessment** of your organization's process for conducting energy consumption assessments.
- 4 Energy KPI's and Targets:** The degree to which your organization has established strategically relevant metrics of energy consumption and waste.

SECTION 2: QUESTIONS ON 12 TOPICS cont'd

- 5 **Action Plans Assessment** of your organization's specific plans related to energy management.
- 6 **Operations and Maintenance:** The degree to which your organization has integrated energy management into regular business operations.
- 7 **Monitoring and Analysis Assessment** of your organization's process for monitoring energy consumption and continually analyzing data.
- 8 **Employee Engagement:** The level of employees' awareness of and involvement in your organization's energy management policy, consumption and savings.

SECTION 2: QUESTIONS ON 12 TOPICS cont'd

- 9 **Reporting, Review and Reassessment Assessment** of how your organization manages flow of information and responds to assessment results.
- 10 **Procurement and Design:** The degree to which your organization includes energy in the design of purchasing policies for equipment and supplies.
- 11 **Documentation and Records Assessment** of how your organization documents energy-related operational processes and manages these records over time.
- 12 **Energy Management System Audits Assessment** of your organization's process for periodically evaluating your energy management practices as a whole.

SECTION 2: EXAMPLE QUESTION

ENERGY MANAGEMENT ASSESSMENT

1% **Assessment completion progress**

MANAGEMENT COMMITMENT, LEVEL 1 **Question category and level** ?

Our management has expressed verbal support for energy management. *


Definitely

Needs Improvement

Select best response for your business

NOTES

Session notes

Save and Continue  **Save and Exit** | **← Go Back**

SECTION 3: REPORT

Output report at end of session provides:

- **Your overall score**
- **A gap analysis diagram covering all 12 components**
 - **Highlights your development in each area**
 - **Identifies gaps**
- **Your top 10 recommended actions**
- **Links to resources for implementing your actions**
- **The ability to assign responsibilities and timeframes to implement your actions**
- **The ability to view session notes related to your actions**
- **Benchmarking against your peers**
- **A report that can be viewed on screen, printed and/or saved as a PDF file**

SECTION 3: EXAMPLE REPORT

ENERGY MANAGEMENT ASSESSMENT REPORT

Sample Organization Site A

05/07/2018

Organization Name: **Sample Organization**

Facilitator Name: **Kathryn Stevens**

Organization Type: **Hospital**

Attendee Names: **Anna Brooks
Gary Ruiz
Frank May
Teresa Castro**

Site Address: **123 Address Street
Portland, Oregon 97202**

**Report
overview**

 [Download PDF Report](#)

 [Download CSV Recommendations](#)

 [Amend Report](#)

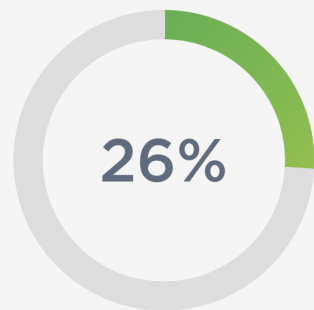
[← Back to Assessments](#)

SECTION 3: EXAMPLE REPORT cont'd

Executive Summary

Congratulations on completing your Energy Management Assessment (EMA)! In this report, you can review your assessment results and recommended priority actions to help you improve your organization's Strategic Energy Management (SEM) practices.

Your Overall Score



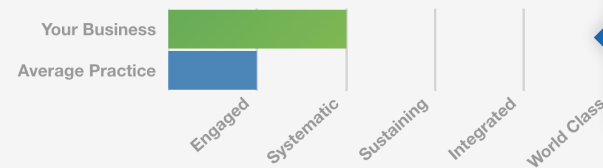
How well are you managing energy?

Your organization has scored 26% overall, which places you at the Systematic Level.

Your Overall Energy Assessment Score

Energy Management

How do your organization's practices compare?



Comparison against peer organizations

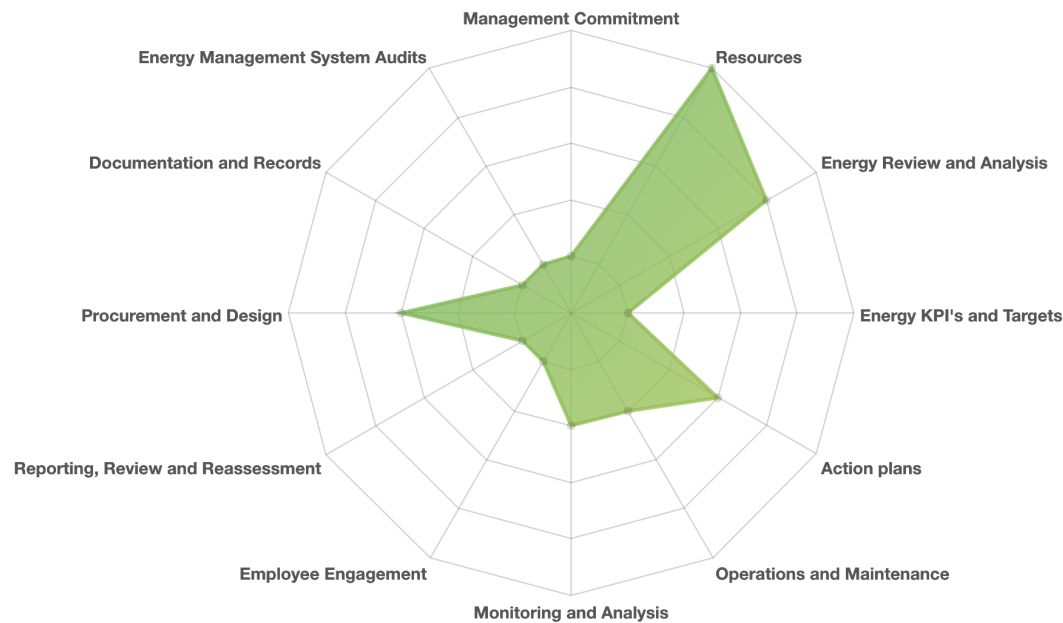
- Engaged** Your organization is aware of the importance of energy management, but has limited process in place.
- Systematic** Your organization formally manages energy using core process components.
- Sustaining** Your organization has a comprehensive system and is demonstrating improvement.
- Integrated** Your organization has embedded the value of energy management in its business decision-making.
- World Class** Your organization is going above and beyond existing standards requirements in all areas.

SECTION 3: EXAMPLE REPORT cont'd

Energy Management Ranking

Here are the results of your organization's performance in each of the 12 components of energy management. You can use the button at the bottom of the chart to toggle between two visualizations.

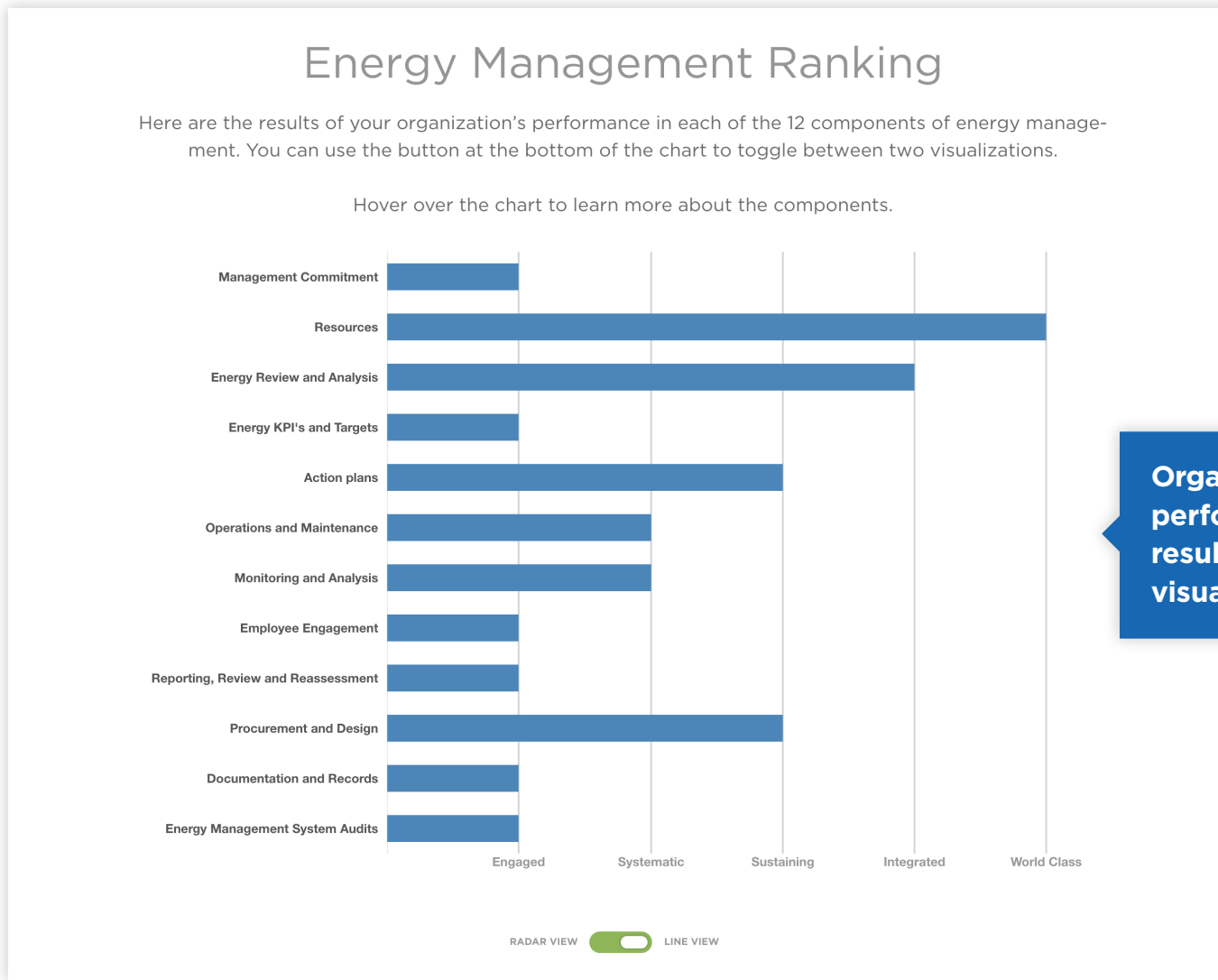
Hover over the chart to learn more about the components.



Organization's performance results: radar visualization

RADAR VIEW LINE VIEW

SECTION 3: EXAMPLE REPORT cont'd



SECTION 3: EXAMPLE REPORT cont'd

Recommendations For Your Business

Through your responses in the assessment, you identified aspects of your current energy management business practices that need improvement. The following recommended actions are prioritized for you based on your level of performance in each of the 12 components of energy management. Assign an owner and target completion date for each action, then click the "Save Implementation Plan" button to create a custom implementation plan for improving your organization's SEM practices.

 Save Implementation Plan



MANAGEMENT COMMITMENT

1

Recommendation: Engage with your management team to develop support for improving your energy performance. This could include preparing a directive or developing an energy policy that has buy-in and support from top management.

[Related Tools](#)

Implementation Plan

Owner Name

Target Date

 Choose Date

Priority actions for your business

Links to implementation resources

Enter by whom and when action will be implemented



RESOURCES

2

Recommendation: Assign at least one staff member responsibility for energy performance within your organization, as part of their role.

[Related Tools](#)

View Notes: OFF

Implementation Plan

Owner Name

Target Date

 Choose Date

View or hide session notes related to your priority actions