**Date last modified/updated:** Click here to enter a date. **Internal audit:** Click here to enter a date.

**Who last modified/updated:** Click here to enter text. **Management review:** Click here to enter a date.

**For Task 1: This part of the Navigator Playbook is completed when you have:**

1. **Identified and recorded the interested parties relevant to your organization’s energy performance and EnMS using the Worksheet or similar document.**
2. **Determined the needs and expectations of these interested parties as they relate to your organization’s EnMS.**
3. **Identified the applicable legal and other requirements related to energy.**
4. **Assigned responsibilities and establish a frequency for reviewing and updating the completed matrix.**
5. **Implemented a process to periodically evaluate compliance with the identified requirements.**
6. Identify interested parties and
7. Determine their needs and expectations

|  |  |  |
| --- | --- | --- |
| **Interested Party** | **How Relevant to EnMS?** | **Needs/**  **expectations** |
| Facilities | Will implement projects and a lot of verification, hold significant system knowledge. Aware of the contractors relevant to the energy system | Management must be considered up front for project selection, and for adding or changing tasks managed by facilities team members |
| Maintenance Staff | Will be responsible for ensuring  continued savings; system knowledge | Management must be considered throughout to  ensure changes in responsibilities for the team  are acceptable |
| Procurement Professional | Impact product purchasing, longevity  of purchasing the best option tech | Training and collaboration to automate best  option tech purchasing |
| Technician Union Leadership | Impact what tasks are and aren’t ok to give to facilities, maintenance and contractors | Consulted with changing procedures followed by unionized functions |
| Lab Manager | Holds knowledge about technical requirements for equipment needed for the range of research conducted on site | Consulted when looking at retuning/replacing equipment and optimizing equipment scheduling; consulted for any changes in lab design/operation |

1. Identify legal and other requirements

|  |  |  |
| --- | --- | --- |
| Requirement | Issue date | Relation to energy and EnMS |
| 42 USC 8253 f | 1992 | Guides federal energy and water efficiency efforts |
| EO 13834 | May 2018 | Mandates efficiency and resilience in energy and water use, and environmental considerations in purchasing and operations |
| 42 USC 6834 | Click here to enter text. | Federal guidelines for energy consideration in design |
| Click here to enter text. | Click here to enter text. | Click here to enter text. |
| Click here to enter text. | Click here to enter text. | Click here to enter text. |

|  |  |  |
| --- | --- | --- |
| X | We have committed to meeting all of the above requirements | 1/25/2020 |

1. Assign responsibilities and establish frequency for reviewing and updating the interested parties and legal requirements tables

|  |  |  |
| --- | --- | --- |
|  | We have established a process for evaluating and updating requirements | Annual review meeting with compliance team and energy team liaison |
|  | We have established a schedule and assigned responsibilities | Click here to enter text. |
|  | We have a system to ensure records of results are maintained | Click here to enter text. |
|  | Who is responsible? | Click here to enter text. |

1. Implement a process to evaluate compliance with the identified legal requirements

|  |  |  |
| --- | --- | --- |
|  | We have established process for evaluating compliance | * Semiannual purchase review to assess efficient procurement policy—sample 25% of purchases * Annual review of performance improvement requirements relative to witnessed performance improvement * … |
|  | We have assigned evaluation and compliance roles and responsibilities | Click here to enter text. |
|  | Date legal requirements were last reviewed: | Click here to enter a date. |
|  | Who reviewed: | Click here to enter text. |

Top Management Approval

|  |  |  |
| --- | --- | --- |
|  | Date approved: | Click here to enter a date. |
|  | Who approved: | Click here to enter text. |

Top Management Approval

|  |  |  |
| --- | --- | --- |
|  | Date approved: | Click here to enter a date. |
|  | Who approved: | Click here to enter text. |

Comments

Click here to enter text.