

## STEP 4: Create Action Plan

With goals in place, your organization is now poised to develop a roadmap to improve energy performance.

Successful organizations use a detailed action plan to ensure a systematic process to implement energy performance measures. Unlike the energy policy, the action plan is regularly updated, most often on an annual basis, to reflect recent achievements, changes in performance, and shifting priorities.

While the scope and scale of the action plan is often dependent on the organization, the steps below outline a basic starting point for creating a plan.

### 4.1 Define technical steps and targets

### 4.2 Determine roles and resources

Get buy-in from management and all organizational areas affected by the action plan before finalizing it. Work with the Energy Team to communicate the action plan to all areas of the organization.

### Suggestion

Creating an inclusive strategy that establishes roles and actions throughout the organization can help to integrate good energy management practices. When developing an action plan, consider:

- Brainstorming with various departments to identify ways they can contribute.
- Holding a competition to seek ideas for energy efficiency from across the organization.
- Gathering recommendations from the Energy Team and other key personnel.

## 4.1: Define Technical Steps and Targets

### Define Technical Steps

- **Evaluate technical assessments and audit results** - Identify gaps between current performance and goals, by reviewing the results of the technical assessments and audits or progress evaluations.
- **Determine technical steps**- Identify the steps necessary for upgrading and moving facilities from current performance to the desired level of performance as defined by the goals.

See the **ENERGY STAR Building Upgrade Manual** for more guidance on developing a systematic approach to building upgrades. To find information about reducing energy use in an industrial plant, see the suite of **ENERGY STAR Industrial Energy Guides**.

Appendix 5  
discusses  
these  
resources

### Define Targets

- **Create performance targets** - For each facility, department, and operation of the organization to track progress towards achieving goals.
- **Set timelines** - For actions, including regular meetings among key personnel to evaluate progress, completion dates, milestones and expected outcomes.
- **Establish a tracking system** - Create a system to track and monitor the progress of action items. This system should track and measure energy use and project/program activities.

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## 4.2: Determine Roles and Resources

### Determine Roles

#### Identify internal roles

Determine who should be involved and what their responsibilities will be. Depending on your organization and action plan, this might include departments such as:

- Facility and operations management
- Financial management — capital investments, budget planning
- Human resources — staffing, training, and performance standards
- Maintenance
- Supply management — procurement procedures, energy purchasing and equipment and materials

- Building and plant design
- Engineering
- New product/process development teams
- Communications Marketing
- Environmental, Health, and Safety

#### Identify external roles

Determine the degree to which consultants, service providers, vendors, and other product providers will be used. Some organizations may choose to outsource entire aspects of their action plan while others may only want to contract with specific vendors for limited projects.

Find outside expertise through the ENERGY STAR Service & Product Provider Directory.

#### Establish performance metrics for contractors

If contractors will be used, determine what standards will be used to evaluate bids and incorporated these metrics into agreements with contractors.

#### Determine Resources

##### Define resources needs

For each project or program in the action plan, estimate the cost for each item in terms of both human resources and capital/expense outlay.

##### Secure resources

Develop the business case for justifying and gaining funding approval for action plan projects and resource needs.

#### Suggestion

Using outside help to implement parts or all of an action plan does not mean outsourcing responsibility for aspects of an energy management strategy. The other steps in the energy management strategy still need to be managed internally to ensure success and realize sustained energy performance.