Defining roles, responsibilities

Energy Team Worksheet

[Organization Name] – [Facility Name]

You may create a formal energy team with multiple ‘champions’ for different systems or processes, or you may ask a few colleagues to commit their expertise to continuous energy improvement.

Whichever works best for your company, below are some suggestions to start documenting key people who can help your company successfully decrease costs and energy consumption.

The summary of steps to form an energy team identifies potential energy team members based on their area knowledge and expertise:

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| --- | --- |
| **Type of job responsibility** | **Requirements** |
| Production or maintenance | Production equipment and processes knowledge |
| Financial or accounting | Familiarity with bills, financial resources |
| Data handling | Work with spreadsheets, collect and analyze data |
| Leadership or personnel | Training and communications abilities |
| Facilities or maintenance | Understanding of energy requirements |
| Support in implementation | Enthusiasm for energy improvement |

With knowledge requirements in mind, record potential energy team members here:

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| --- | --- |
| **Energy team members** | **Skills and abilities** |
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You may wish to identify roles and responsibilities within the team for each member by building on other attributes or interests, such as good leadership or organizational skills. It can be helpful to designate the following roles:

1. **Energy Champion**: **­­­­­­­­­­­­­­­­­­­­­­­­ .**  
   The Energy Champion is responsible for developing and maintaining the focus for the Energy Management Team and is the main point of contact for managers and staff. The Energy Champion coordinates meetings, sets agendas, and manages and delegates tasks related to the Energy Team (like drafting an energy policy, drafting key performance indicators (KPIs), and measuring, tracking, and communicating progress toward goal). The Energy Champion will coordinate resources needed to implement strategic energy management, identify opportunities for improvement and ensure implementation. The Energy Champion should increase the visibility of energy management at the facility, which includes obtaining recognition for achievements.
2. **Communication champion or scribe:­­­­­­­­­­­­­­­­­­­­­­­­ .**  
   The Communications Champion or Scribe can be any Energy Team member, and may also fill other team roles. The Scribe coordinates the development and publication of meeting agendas prior to meetings, keeps notes and time at meetings, and publishes minutes from meetings for all team members.
3. **Monitoring & Reporting Champion: ­­­­­­­­­­­­­­­­­­­­­­­­ .**  
   The Monitoring & Measurement Champion should be someone with knowledge of monitoring equipment and controls at the facility. Knowledge of production metrics is important. The Monitoring & Measurement Champion is responsible for supplying the Energy Team with KPI data compiled from monitoring equipment, production numbers, and other sources to allow the team to evaluate current status and progress towards goals. The Monitoring & Reporting Champion assists other team members in establishing, monitoring, and reporting data at the process and/or equipment level on various systems.

Depending on the type and size of your organization, there are many other types of specific roles and responsibilities you can add if helpful:

**Data and Metrics Champion:** The Data and Metrics Champion should have knowledge of energy billing, energy costs, and production metrics, and should understand any controls and monitoring equipment at the facilities. The Data and Metrics Champion is responsible for the accuracy of the data that a Monitoring & Reporting Champion may use.

**Awareness Champion:** The Awareness Champion can be any Energy Team member with a passion for the task. The Awareness Champion has primary responsibility for developing, coordinating, and implementing general and job, or system-specific, employee awareness campaigns. Awareness may include presentations at meetings, posters, idea solicitation and reward programs, or scoreboard/dashboard progress tracking/reporting.

**Training Champion:** The Training Champion should be connected to the organization’s human resources management. The Training Champion is responsible for supporting and reporting on knowledge and capabilities development in the area of energy efficiency.

**Systems Champions** [electrical, compressed air, refrigeration, boilers, motors, pumps, water use etc.] Systems champions work with other champions to ensure the integrity of information and outcomes connected to their areas of expertise. Systems champions can often be more specific data champions.

**Adequate resources:** resources are needed for the team to fulfill its function. Take a moment to jot down rough estimates and ideas to enhance your Energy Team’s success in the following areas:

Time

Write down any large undertakings either organizationally, seasonally, or in production that are already scheduled and will require additional effort from key people documented above. How will these events affect your energy team’s initial work? What are some work-arounds?

Write down the minimum and maximum amount of time per person that is reasonable to invest in cost and energy reductions — .05 percent? 10 percent? More? Can this number be higher initially then taper off?

Money

A small budget is helpful to fund any data collection device purchases or rentals and to implement quick energy savings projects or behavior change awareness campaigns. What amount can you reasonably provide to get the team started?

Authority

Energy team members work with and collaborate with coworkers across the organization. Clear and regular senior leadership support provides credibility and importance to the team’s requests for information or assistance. How will you create an organization wide awareness of the importance of energy work?