FACILITATOR INFORMATION

The EMA Tool is built to enable SEM coaches and energy management consultants to facilitate assessments for their customers. Follow these simple steps to learn more about what it means to be a facilitator and prepare for an EMA session.

1. Review the quick start guide. This guide provides an overview of how the EMA Tool works and what a user can expect in completing an assessment.
2. Review the facilitator information below. The following information outlines the EMA process, options for conducting sessions, and how to manage EMA reports.
3. Create a facilitator account. From your facilitator account, you will be able to begin new assessments and manage EMA reports from completed sessions.

What to expect

The EMA Tool is an online assessment tool consisting of three main parts: site information collection, the assessment itself, and a report of the assessment results.

Site Information

- Before answering questions about their energy management, customers provide some basic facility and contact information.

Assessment

- The assessment consists of a series of binary questions related to 12 different components of energy management.
- Within each component, questions are organized in levels.
- The assessment typically takes about 60 minutes to complete with a facilitator.

Report

- When the session is completed, the EMA Tool will immediately generate a report of assessment results.
- Report data can be downloaded as a PDF or CSV file to share with customers.
- Reports from all completed sessions are saved within your EMA Tool account.

The assessment and consequent report provide a framework for continuous improvement, helping your customer achieve long-term energy performance through effective management.

It is recommended the customer reassess their energy management on a regular basis, typically once a year.

How to prepare for an EMA session

1. **Understand your customer.** Research energy usage profiles, past projects implemented, business strategy and culture, corporate directives, likely energy intensive equipment and processes.
2. **Prepare an introduction presentation.** Prepare a few slides and/or an agenda to facilitate introductions at the beginning of your session.
3. **Organize for appropriate customer representatives to attend.** See below for a list of recommended representatives.

Who should attend an EMA session and why?

Site manager – Best positioned to provide organizational direction and set responsibility and accountability for energy management

Finance manager – Needs thorough understanding of how effective energy management can deliver results to the bottom line

Operations manager – Needs thorough understanding of how the reliability and quality of energy supply may impact production. Best positioned to implement improvements to operating practices to drive significant reductions in energy costs.

Maintenance manager – Best positioned to implement improved maintenance of energy intensive processes and equipment to achieve reductions in energy costs

Procurement manager – Best positioned to implement improvements to both energy procurement practices and purchasing procedures for new/replacement equipment

Facility manager – Key role in implementing an energy management system. Can benefit from increased awareness and understanding of energy based on group interaction and communication.

EMA Process

As the facilitator, your role is to guide the customer through the following session sequence, providing additional structure and value to the EMA process.

1. **Introduce people and session**
    1. Facilitate a round of introductions for all attendees to share their name, position, familiarity with SEM and/or the EMA Tool, and their goals for the session
    2. Review the EMA process and what your customer can expect from the assessment and resulting report
    3. Provide any other introductory information you deem relevant for your customer, for example: some background on traditional vs strategic approaches to energy management; what your customer can expect from you and your role; guidelines for achieving group consensus; etc.
2. **Clearly explain how to respond to questions**
    1. Answer “Definitely” if the practice is in place today and consistently conducted across organization
    2. Answer “Needs Improvement” if the practice is implemented in only some areas, is a work in progress, can be improved, or is not in place today
3. **Walk customer through the assessment questions**
    1. Questions are categorized into 12 different components of energy management
    2. Within each component, questions are organized in levels. Answering “Needs Improvement” sets the level of development for that component and moves the customer on to questions in the next component
    3. Components with low levels of development will influence the recommended actions in the session report
4. **Walk customer through the assessment report upon session completion**
    1. Discuss the overall energy management score and level, which are based on the customer’s answers throughout the assessment
    2. Compare the level of development across all 12 components
    3. Review the recommended actions as they relate to key components of energy management

Options for Conducting Sessions

Option 1. Enter customer data prior to assessment (recommended)

1. Start a new assessment, enter customer data and click “Start Your Assessment”. On next page, click “Save and Exit” to save the session.
2. Once at customer site, log in to your EMA Tool account and locate your saved session from your list of reports. Click “Amend” to continue the session.
3. After completing a session, provide report while at customer site or at a later time.

Option 2. Conduct full session at customer site

1. Start a new assessment, enter customer data, conduct assessment and provide report at customer site.

Report

When a session is completed, the EMA Tool will immediately generate a report that provides:

- Overall score
- Benchmarking against peers

- Gap analysis diagram for 12 topics
  - Highlights customer development in each area
  - Identifies gaps
- Action plan with top 10 recommended actions
- Fields for assigning a point person and timeframe for implementing each priority action
- Option to view notes taken during the session
- Option to download report as a PDF or CSV file (CSV includes notes)
- Click here to view an example report.

Retrieving EMA Session Reports

Reports from all completed sessions are saved within your EMA Tool account. Simply log in using your email address and password to view a full list of session reports filterable by customer name and year completed. Reports can be amended within a 90-day period. After 90 days, reports can only be viewed and/or downloaded.

Customers with Multiple Sites

To accommodate customers with multiple sites, each new EMA session asks for both the customer's organization name and a specific site name. Reports from all completed sessions are listed in your EMA Tool account with both the organization and site names.

Additional FAQ

What materials and/or resources are required to complete a session?

- A functional internet connection
- A laptop, tablet or other connected device

What are the 12 components of energy management?

1. **Management Commitment**
   This EMA component assesses the level of executive involvement in promoting and deploying energy management in an organization.
2. **Resources**
   This EMA component assesses an organization's current financial and human resources as required for energy management, including budgets and energy teams.
3. **Energy Review and Analysis**
   This EMA component assesses an organization's process for conducting energy consumption assessments.
4. **Energy KPI's and Targets**
   This EMA component assesses the degree to which an organization has established strategically relevant metrics of energy consumption and waste.
5. **Action Plans**
   This EMA component assesses an organization's specific plans related to energy management.
6. **Operations and Maintenance**
   This EMA component assesses the degree to which an organization has integrated energy management into regular business operations.
7. **Monitoring and Analysis**
   This EMA component assesses an organization's process for monitoring energy consumption and continually analyzing data.
8. **Employee Engagement**
   This EMA component assesses employees' awareness of and involvement in an organization's energy management policy, consumption and savings.
9. **Reporting, Review and Reassessment**
   This EMA component assesses how an organization manages flow of information and responds to assessment results.
10. **Procurement and Design**
    This EMA component assesses the degree to which an organization includes energy in the design of purchasing policies for equipment and supplies.
11. **Documentation and Records**
    This EMA component assesses how an organization documents energy-related operational processes and manages

these records over time.

12. **Energy Management System Audits**
    This EMA component assesses an organization’s process for periodically evaluating your energy management practices as a whole.

What are the 5 levels of energy management?

Engaged – An organization is aware of the importance of energy management, but has limited process in place.

Systematic – An organization formally manages energy using core process components.

Sustaining – An organization has a comprehensive system and is demonstrating improvement.

Integrated – An organization has embedded the value of energy management in its business decision-making.

World Class – An organization is going above and beyond existing standards requirements in all areas.