

*Setting a policy and plan for energy management will establish a formal commitment to energy efficiency. This document will facilitate goal-setting, assign roles, and lead to action. Use the template below to create your policy and plan. You may also attach your own policy and plan or use a different template.*

| ENERGY MANAGEMENT POLICY & PLAN |  |
|---------------------------------|--|
| PART I: PROPERTY INFORMATION    |  |
| <b>Basic information</b>        |  |
| Property name                   |  |
| Address                         |  |
| Age                             |  |
| Size                            |  |
| Property or facilities manager  |  |
| Onsite diagnostic equipment     |  |
| <b>HVAC System</b>              |  |
| Heating                         |  |
| Cooling                         |  |
| <b>Building Envelope</b>        |  |
| System description              |  |
| <b>Controls</b>                 |  |
| System description              |  |
| <b>Metering</b>                 |  |
| System description              |  |

| PART II: ENERGY MANAGEMENT POLICY  |  |
|--|--|
| Effective Date   |  |
| Approved By  |  |
|  |  |
| <p><i>Example:</i></p> <p><i>XYZ Company is committed to operating healthcare real estate in the most efficient manner possible—to reduce expenses, add value, and cut down on carbon emissions. As such, all employees, from leadership to site-level operations staff, are committed to and actively participate in sound energy management practices. Contractors must also abide by this policy.</i></p> <p><i>As much as possible, each building shall benchmark and track its energy consumption, using all available utility data. Each property shall have an energy management plan that includes measurable, achievable goals, with target dates for accomplishment of these goals. Facilities staff shall consider a combination of operational improvements and equipment retrofits in establishing goals, with consideration given to the costs and benefits of any action to be taken.</i></p> <p><i>Requests for additional resources or technology required to meet these goals shall be considered on a case-by-case basis and should be discussed with the Regional Engineering Director responsible for the building, in consultation with the Energy Management Team and Director of Operations.</i></p> |  |

| PART III: ENERGY EFFICIENCY GOALS |  |  |
|-----------------------------------|--|--|
| Goal #1                           |  | <i>Example: To reduce whole-property energy use by 20% in 5 years</i>  |
| Goal #2                           |  | <i>Example: To increase ENERGY STAR® score by 5 points in the next 12 months.</i>  |
| Goal #3                           |  | <i>Example: To work with tenants to identify energy savings opportunities in their spaces by May 31.</i>                     |
| Goal #4                           |  | <i>Example: To identify 3 energy-saving retrofits with paybacks of 2 years or less by July 15.</i>                           |
| Goal #5                           |  | <i>Example: To earn at least 15 points in the IREM® Certified Sustainable Property Energy category by July 31.</i>           |
| Goal #6                           |  | <i>Example: To obtain three quotes on an high-efficiency lighting retrofit for all non-medical lighting by September 15.</i> |

#### PART IV: ENERGY MANAGEMENT TEAM

*[Tip: Include people from throughout the organization—operations, facilities, finance, IT, etc.]*

|                |                   |  |
|----------------|-------------------|--|
| Team member #1 | Name:             |  |
|                | Title:            |  |
|                | Responsibilities: |  |
| Team member #2 | Name:             |  |
|                | Title:            |  |
|                | Responsibilities: |  |
| Team member #3 | Name:             |  |
|                | Title:            |  |
|                | Responsibilities: |  |
| Team member #4 | Name:             |  |
|                | Title:            |  |
|                | Responsibilities: |  |
| Team member #5 | Name:             |  |
|                | Title:            |  |
|                | Responsibilities: |  |
| Team member #6 | Name:             |  |
|                | Title:            |  |
|                | Responsibilities: |  |

| PART V: ACTIONS ALREADY TAKEN |  |
|-------------------------------|--|
| Action #1                     |  |
| Action #2                     |  |
| Action #3                     |  |
| Action #4                     |  |
| Action #5                     |  |
| Action #6                     |  |

| PART VI: ACTION PLAN  |  |                   |   |                    |
|---|--|-------------------|---|--------------------|
| Item  | Barriers                                       | Resources         | Responsible Staff   | Target Date        |
| <i>Example 1: Evaluate occupancy trends and consider adjusting setback schedules.</i>   | <i>Tenant A has evening and weekend hours.</i> | <i>Staff time</i> | <ul style="list-style-type: none"> <li>Property manager review leases and discuss occupancy periods with tenants</li> </ul> | <i>June 15</i>     |
| <i>Example 2: Obtain quotes on retrocomissioning according to the ASHE <a href="#">Health Facilities Commissioning Handbook</a> and <a href="#">Guidelines</a>.</i> | <i>Investment required</i>                     | <i>\$30,000</i>   | <ul style="list-style-type: none"> <li>Property manager</li> <li>Building engineering team</li> </ul>                       | <i>July 1</i>      |
| <i>Example 3: Upgrade efficiency of non-medical light bulbs.</i>  | <i>Investment required</i>                     | <i>\$25,000</i>   | <ul style="list-style-type: none"> <li>Building engineering team</li> <li>Lighting contractor</li> </ul>                    | <i>December 15</i> |
|   |  |                   |   |                    |
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### Alternative Documentation

Instead of this form, you may submit the following to IREM®:

- Copy of existing policy