



# Building an energy program that survives turnover



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# Agenda



- 1. Critical elements for sustained success**
- 2. Don't do it alone**
- 3. Start with the foundation: your data**
- 4. Standardize the work**
- 5. Share the knowledge**
- 6. Pressure test your work**
- 7. Artifacts**
- 8. Empower the next person**

# Critical elements for sustained success

**The strongest energy programs are not built around one person**



# Don't do it alone

## Foster strong relationships

- Executive leadership
- Facilities and operations
- Custodians
- Building staff
- Facility occupants
- Get to know your utility providers

## Nurture an energy-conscious culture

- Establish and Energy Committee
- Communicate consistently
- Focus on behavior change
- Recognize behavior change takes time and patience
- Highlight benefits beyond energy savings to gain organization-wide buy-in
- Ensure continuous engagement for sustained improvements

# The energy manager trap

Over time, the energy manager becomes:

- The historian
- The data analyst
- The utility expert
- The project tracker
- The keeper of passwords
- The person who remembers why decisions were made

**That may work today, but it does not scale, and it does not survive transition.**

# Programs change. People change



**Your program should have institutional memory even when the institution changes.**

# What would happen to your energy program if you left tomorrow?

Would the next person know:

- Where the utility data lives?
- How the utility data gets into EnergyCAP?
- Which meters serve which buildings?
- Why certain projects were prioritized?
- How savings are calculated?
- Who the key utility contacts are?
- Which reports leadership expects?
- What “normal” looks like at each facility?

# What are we really trying to preserve?

You are not simply preserving utility bills. You are preserving **context**.

Future team members need to understand:

- What happened
- Why it happened
- What was decided
- Who decided it
- What assumptions were made
- What worked
- What didn't
- What should happen next

**Data tells you what happened. Documentation tells you why.**

# Start with the foundation: your data

At minimum:

- Utility vendors
- Accounts
- Meters
- Buildings
- Commodities
- Rate information
- Billing history
- *Building square footage*
- *Occupancy*
- *Major mechanical systems*
- *Relevant historical facility information*



Critically Important for long term success

**If the foundation is scattered, the knowledge is scattered. Someone unfamiliar with the organization should be able to follow the structure.**

# Document the physical world too

## Document:

- Meter location
- Building served
- Areas served
- Main / submeter relationships
- Meter number
- Utility account
- Commodity
- Photos
- Site maps
- Known exceptions

**Field verification matters. The next person should not have to rediscover the campus.**

## Standardize the work – repeatable workflows

Ask yourself: What happens every month?

Examples:

- Bills arrive
- Data is entered or imported
- Bills are audited
- Exceptions are investigated
- Missing bills are identified
- Accounts are reconciled
- Usage anomalies are reviewed
- Reports are distributed
- Savings are updated
- Projects are tracked

**Trigger → Owner → Action → Review → Escalation → Documentation**

# Document decisions, not just processes

Why did we do this?

For major decisions, capture:

- Problem
- Alternatives considered
- Data reviewed
- Assumptions
- Decision
- Expected outcome
- Responsible parties
- Date
- Follow-up criteria

# Define your KPIs before someone else does

Define the KPIs now so future teams know what success means.



# Build relationships into the program

## Document your key contacts:

- Utility account representatives
- Finance
- Accounts payable
- Facilities leadership
- Controls contractors
- Mechanical contractors
- Engineers
- Sustainability staff
- IT
- Procurement

## Capture:

- Role
- Organization
- Contact information
- What they help with
- Important history

## Share the knowledge

Build a rhythm for sharing information:

- Monthly energy review
- Quarterly energy committee
- Annual program review
- Dashboards
- Newsletters
- Project summaries
- Training
- Cross-training
- Leadership updates

**The more people who understand the program, the less vulnerable the program becomes.**

## The succession test

Ask someone who is **not** responsible for your program to find:

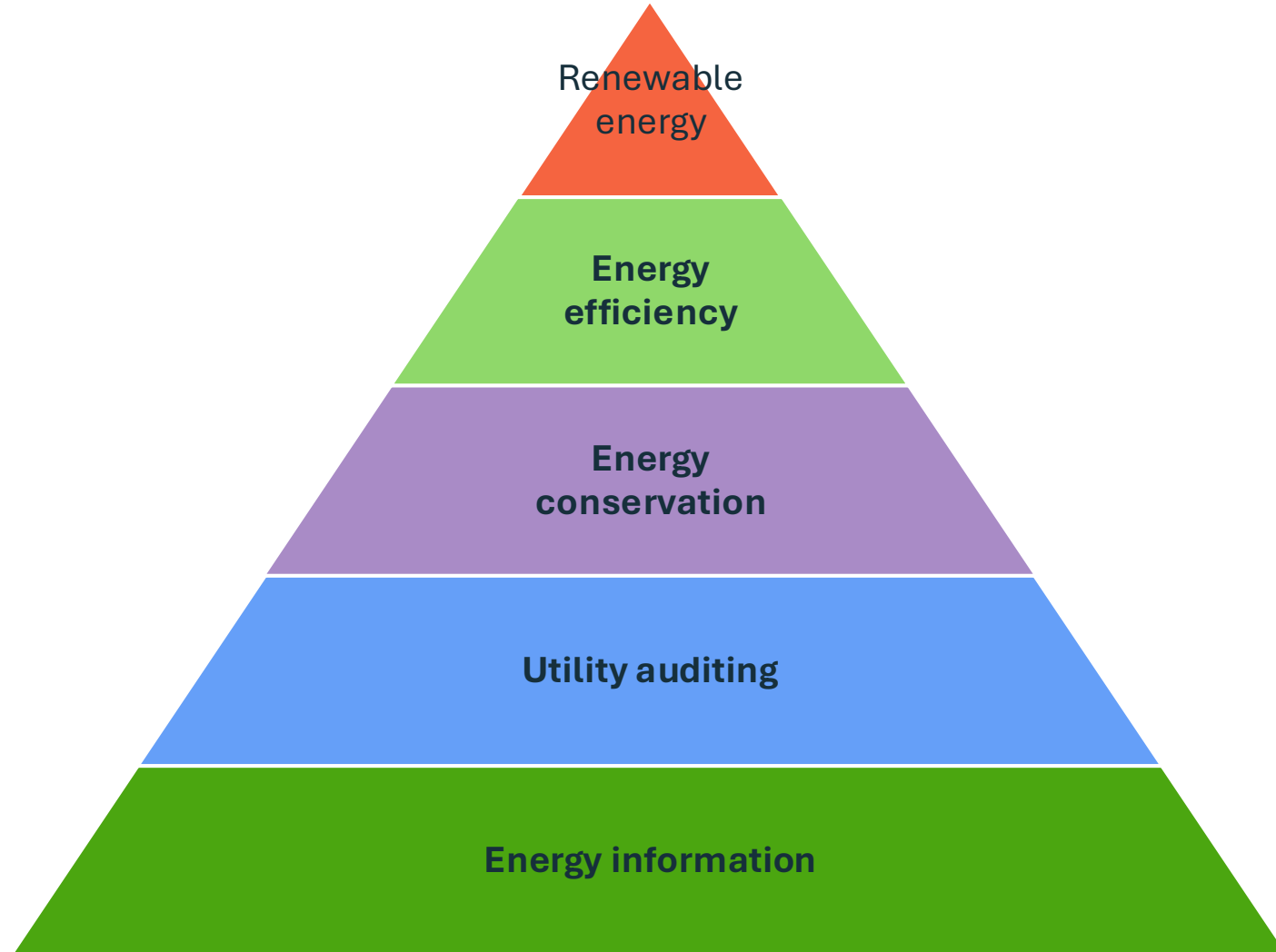
- Last month's electric bill
- Three years of historical usage
- The meter serving Building 12
- Your current energy policy
- Your top five energy-consuming buildings
- The baseline for your latest project
- Your utility representative
- Your current energy KPIs
- Your five-year project list
- The calculation supporting last year's savings

**How many could they find without calling you?**

# Build something the next person can improve

| Artifact                     | Purpose                       | Owner/Department      | Update Frequency   | Note                                |
|------------------------------|-------------------------------|-----------------------|--------------------|-------------------------------------|
| Energy Policy                | Accountability                | Facilities Manager    | Annually           | Signed by top Management            |
| Energy audit reports         | Identify savings              | Energy Manager        | Monthly            | Use ASHRAE                          |
| Recognition & awards         | Motivation                    | HR                    | Annually           | ENERGY STAR, ...                    |
| Employee training records    | Staff engagement              | HR                    | Annually           | Onboarding                          |
| Strategic energy plan        | Roadmap to achieve targets    | Sustainability Office | 3-5 years          | Includes baselines & timelines      |
| Smart controls inventory     | Document installed technology | Facilities            | After installation | Smart thermostats, sensors, ...     |
| Awareness campaign materials | Promote conservation culture  | Communications        | As needed          | Posters, email blasts, ...          |
| KPIs dashboard               | Monitor Performance           | Energy Analyst        | Monthly/quarterly  | EUI, % savings, kWh reductions, ... |

# Energy pyramid



## Empower the next person

### **Centralize the data.**

Create one reliable source of truth.

### **Standardize the work.**

Make critical processes repeatable.

### **Document the decisions.**

Preserve the reasoning behind the program.

### **Share the knowledge.**

Build organizational ownership.

### **Measure what matters.**

Give future teams a clear definition of success.

**Build the program so the next person can build on it — not rebuild it.**

# Questions