

ENERGY MANAGEMENT CHECKLIST



“Do you have an energy management focus in your properties?”

When asked this question, most office professionals respond with an emphatic “Yes.” But how does one define effective energy management? What specific actions represent a comprehensive program, and does this reflect your firm’s efforts?

While there is no single approach that applies to all companies, there are some best practices generally acknowledged to give the greatest chance of success. Detailed in The High Performance Portfolio Framework, you may already utilize some of these key strategies, while others may be quite new, or defined a little more explicitly.

Use the checklist below in thinking about your current practices, and consider the techniques you currently utilize. Each question examines a specific situation, reflecting whether or not a broader energy management strategy is really in use. If the answer is “Yes,” you are most likely effectively deploying that technique. If “No,” then this highlights an area to focus on in building your implementation plan:

FRAMEWORK STAGE	QUESTION	Y	N	NA	COMMENTS & IDEAS	FRAMEWORK REFERENCE
ASSESS	1) Can your president, CEO, or senior executive identify specific ways your firm is leveraging energy efficiency as a means to win business?					<i>Examine Mission and Methods, page 11</i>
	2) Name any two properties in your portfolio. Can you identify which uses less energy per square foot? Which has a better NOI?					<i>Collect Utility and Financial Data, page 15</i>
	3) If legislation were passed concerning a carbon cap and trade system, could you explain to your organization’s senior management the implications on building operations?					<i>Put your Portfolio in Context, page 16</i>
COMMIT	4) Do you have an energy efficiency goal or target that can be expressed in a specific number and/or date?					<i>Define Targets and Resources Required, page 21</i>
	5) Does your building or organization’s Web site articulate a stance on high performance buildings?					<i>Create and Adopt an Energy Management Policy, page 22</i>

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PLAN	6) Could your human resources professional name the specific individuals responsible for energy performance, at the portfolio and building levels?					<i>Establish an Energy Team, page 25</i>
	7) Hypothetically, if you had two identical properties, one in Phoenix and one in Seattle, could you tell which is operated more efficiently?					<i>Benchmark Buildings with Portfolio Manager, page 29</i>
	8) Have you ever surveyed tenants and their leases to identify opportunities to reduce a building's operating hours?					<i>Analyze Leases and Tenant Requirements, page 32</i>
	9) If you could get an operations analysis for a building, do you know who to call, and what to ask for?					<i>Conduct Scoping Studies, page 33</i>
	10) If asked, could any member of your energy team list three tasks they are required to complete by the end of this month?					<i>Create an Implementation Plan, page 35</i>
IMPLEMENT	11) Can an employee get a raise, promotion, or other reward by excelling in energy management within your firm - and are they aware of this?					<i>Establish Performance Incentives, page 40</i>
	12) Can you get a capital purchase approved even if it doesn't meet a traditional payback period number (e.g. payback must be less than 2 years)?					<i>Refine Purchasing Procedures, page 42</i>
	13) If a building owner wanted to see current energy performance figures, could he find them in your monthly reports?					<i>Establish Tracking and Reporting Procedures, page 43</i>
	14) Does your standard leasing template address energy management goals?					<i>Define a Strategic Leasing Approach, page 45</i>
	15) Do building engineers have the authority to veto a tenant improvement plan before signing?					<i>Leverage Tenant Improvement Projects, page 48</i>

FRAMEWORK STAGE	QUESTION	Y	N	NA	COMMENTS & IDEAS	FRAMEWORK REFERENCE
IMPLEMENT	16) Has your firm ever bought or sold a building based in part on anticipated energy costs?					<i>Adopt Energy-related Acquisition and Disposition Criteria, page 50</i>
	17) Do you have a systemic plan to tune-up your buildings every 2-5 years?					<i>Schedule Building Tune-ups, page 52</i>
	18) Could your on-site facility manager log in to your control system and look up the current status of a heating/cooling zone without calling an outside party?					<i>Enact an Enhanced O&M Plan, page 53</i>
	19) In your most recent new construction project, was the design engineer on contract and able to bill time in the programming and schematic design phases?					<i>Take an Integrated Design Approach, page 56</i>
	20) If someone asked for a reference on a good commissioning contractor, could you provide one?					<i>Guide and Verify Through Commissioning, page 58</i>
CAPITALIZE	21) If asked by a stranger why your building is better than another, could you give a compelling, 15-second answer?					<i>Craft Key Messaging, page 61</i>
	22) If someone looked up a space listing for one of your properties on CoStar, would he/she learn about high performance?					<i>Tell the Story, page 65</i>
	23) Have you ever explained your energy performance with an appraiser or a banker as part of negotiations for financing?					<i>Leverage Results in Market Transactions, page 68</i>
	24) If asked, could you produce an estimate of the energy and cost savings over the previous year?					<i>Assess Progress against Stated Targets, page 69</i>
	25) Have you endorsed or recommended an employee, service provider, or contractor to others in your company or another firm based on their successes in energy performance?					<i>Recognize and Reward Success, page 73</i>