

**ISO 50001:2018**

**Energy Management Systems Documentation**

**Energy Manual / Documented Information**

**Document No. EnMS-002**

**Street Address**

**City, State, Zip**

**Tel,**

**Cell Phone:**

**Email:**

**Web Site:**

**Instructions:**

This manual is used as a template in developing your ISO 50001:2018 Energy Management Systems.

- Methods and systems used in the development and operation of the EnMS vary widely from company to company.
- The blue text and suggestions displayed in the manual are intended to offer some options and to highlight the areas that need attention / update / replacement.
- Review the text and suggestions and at a minimum replace or update them to reflect the unique / customized information of your energy system requirements.
- Delete the blue text after each task is completed.
- Use replace function – enter “Your Company” in find space, enter your company name in replace space – system should make changes throughout the entire document.
- Additional details and instructions in the use of the EnMS-002 manual template is included in a separate file “EnMS-Template-Instructions”.

Additional documentation review.

- Similarly, the blue text and suggestions displayed in the EnMS documentation (that will follow) for the procedures, instructions, attachments, forms, and flow diagrams are intended to offer some options and to highlight the areas that require update or replacement.

TEMPLATE

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Section E Records Documentation Matrix

## Energy Objectives, Targets and Action Plans

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### 1.0 Purpose/Scope

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- 1.1 The purpose of this procedure is to describe the process of setting the energy objectives and targets at relevant functions and levels in **Your Company**.
- 1.2 This procedure provides for the development of the energy programs required to achieve the objectives and targets and outlines the process for developing action plans for the identified energy programs.

### 2.0 Responsibilities and Authorities

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- 2.1 The **Energy management team leader** has the prime responsibility and approval authority for this procedure.
- 2.2 The **Energy management team leader** in consultation with the **Energy management team** is responsible to coordinate activities associated with the implementation and the maintenance of this procedure covering the energy objectives, targets and action plans.
- 2.3 Additional responsibilities for other personnel are detailed in relevant paragraphs of section 5.0 below.

### 3.0 References and Definitions

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- 3.1 This document addresses clause 6.2 of the ISO 50001:2018 standard, covering objectives and targets.

### 4.0 Resources

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- 4.1 None

### 5.0 Instructions

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- 5.1 By setting objectives and targets at the relevant functions, levels, processes and facilities, **Your Company** can focus its efforts and resources on areas of greatest energy impact and/or greatest concern to internal and/or external stakeholders.
- 5.2 Objectives and targets are consistent with the energy policy. They are measurable, monitored, communicated and updated as needed.
  - 5.2.1 The objectives and targets become the drivers for the improvement in energy performance and consider legal and other applicable requirements, SEUs-significant energy uses, and energy improvement opportunities identified with the energy review.
  - 5.2.2 The energy objectives planning record, form F-620-001 is used to establish and document the objectives and targets. The form is a multi-section form where:
    - **Section 1** is used to restate the company's energy policy (as detailed in attachment A-520-001).
    - **Section 2** describes the primary objective(s) consistent with and as outlined in the energy policy.
    - **Section 3** describes the general objectives as identified in support of the primary objectives

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## 1.0 Purpose/Scope

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- 1.1 This procedure describes the process for internal and external communication regarding energy management at [Your Company](#)
- 1.2 The procedure applies to personnel whose work affects energy performance and the EnMS.

## 2.0 Responsibilities and Authorities

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- 2.1 The [Energy management team leader](#) has the prime responsibility and approval authority for this procedure.
- 2.2 Additional responsibilities for the [Energy management team leader, the human resources staff, the supervisors, and employees](#) are detailed in relevant paragraphs of section 5.0 below.

## 3.0 References and Definitions

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- 3.1 This document relates to clause 4.4 of the of the ISO 50001:2018 standard, covering communication.

## 4.0 Resources

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- 4.1 None

## 5.0 Instructions

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- 5.1 In support of the procedure P-720 for Competence, awareness, and training the [Energy management team](#) determines the method(s) for internal and external communication of energy matters.

- 5.1.1 The internal communication of dependable information is consistent with that generated with the EnMS and is provided through:

- Publication of the Energy policy, A-520-001,
- Communication of the Organization chart, A-530-001,
- Overview of the P-D-C-A, plan-do-check-act approach to continual improvement with guidelines, A-600-001.
- Overview of the Risk-based-thinking approach to improvement with the Risk and opportunities worksheet, form F-610-001.
- Overview of the process approach and risk-based thinking,
- Issue and access of the EnMS Manual, Procedures and Instructions as controlled documents, with the procedure P-750,
- Overview of the procedures & instructions, and the forms & attachments with Master documentation lists, F-750-003,
- Employee comment / suggestions (per par 5.1.2 below),
- [Daily production schedules/sheets,](#)
- [Crew meetings,](#)



# INSERT YOUR COMPANY LOGO/NAME HERE

F-750-005

## Document Change Request

|                 |                  |
|-----------------|------------------|
| Document Title: | Document Number: |
|-----------------|------------------|

Requestor: \_\_\_\_\_ Date Requested: \_\_\_\_\_

**Change Requested:** *Attach copy of document page with changes indicated.*

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Reason for Change:**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Approver Comments:**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Change Approved:  Yes  
 No

If yes, is training required?  Yes  No  
Individual Training   
Group Training

**Training Notes:**

\_\_\_\_\_  
\_\_\_\_\_

**Authorized Staff Signature** *(Principal signature(s) needed for procedures)*

\_\_\_\_\_  
Energy Management Team Leader

\_\_\_\_\_  
Date

\_\_\_\_\_

\_\_\_\_\_  
Date

SAMPLE

**INSERT YOUR COMPANY LOGO/NAME HERE**

**F-1010-001**

**Corrective Action Request - CAR**

**CA**  **IA**

(Check appropriate box to indicate Corrective Action or Improvement Action)

**Corrective Action # \_\_\_\_\_ or Improvement Action # \_\_\_\_\_ Date: \_\_\_\_\_**

|                | Date Due | By/Assigned to | Completed Initials & Date |
|----------------|----------|----------------|---------------------------|
| Investigation  |          |                |                           |
| Implementation |          |                |                           |
| Audit          |          |                |                           |
| CAR closed     |          |                |                           |

Description of Issue

**SAMPLE**

Investigation Finding / Root Cause

| <b>WI-620-002 Example – ACTION PLAN &amp; PROJECT TIMING CHART - DEVELOPMENT OF ENERGY PROGRAM</b>                    |                                |                                                                                                      |
|-----------------------------------------------------------------------------------------------------------------------|--------------------------------|------------------------------------------------------------------------------------------------------|
| <b>COMMITMENT and POLICY</b>                                                                                          | <b>PLANNING</b>                | <b>PROCESS</b>                                                                                       |
| Energy Policy Commitment 1                                                                                            | Program Instruction WI-620-002 | Conserve Energy Resources                                                                            |
| Reduce energy use per unit of production by 20% in 5 years in manufacturing operations.                               | Objective 1                    | Achieve increased energy awareness for contractors.                                                  |
|                                                                                                                       | Target 1                       | Provide energy awareness training to all contractors – to be completed in 5 months.                  |
|                                                                                                                       | Energy Program                 | Energy awareness                                                                                     |
| Date started:                                                                                                         | Action                         | Human resources, Technical services and Purchasing departments to set up relevant training programs. |
| <b>PROGRAM – ACTION PLAN</b> PROJECT: _____ LEADER: _____                                                             |                                |                                                                                                      |
| <b>Action Plan is relevant to objectives as defined in the Energy Planning record, F-620-001:</b>                     |                                |                                                                                                      |
| Primary Objectives: _____                                                                                             | General Objectives: X          | Energy review Objectives: _____                                                                      |
| Legal and Other Requirements: _____                                                                                   | Relevant Functions: _____      | Other: _____                                                                                         |
| <b>Other Action Plan Considerations:</b>                                                                              |                                |                                                                                                      |
| Are there financial requirements associated with this objective? ___ No, X Yes Training resources are required        |                                |                                                                                                      |
| Is funding available? ___ No, X Yes Funds allocated in training budget                                                |                                |                                                                                                      |
| Are there business and operational conditions relevant to this objective? ___ No, ___ Yes Not applicable              |                                |                                                                                                      |
| Are the views of interested parties considered? ___ No, ___ Yes _____                                                 |                                |                                                                                                      |
| Are there feasible technological options available for this objective? ___ No, ___ Yes _____                          |                                |                                                                                                      |
| Are there alternative energy sources available for use for this objective? ___ No, ___ Yes _____                      |                                |                                                                                                      |
| Will operational controls be needed? ___ No, ___ Yes _____, _____, _____                                              |                                |                                                                                                      |
| Will an EnPI be used to report on this objective / target(s)? ___ No, ___ Yes, If yes what is the EnPI metrics? _____ |                                |                                                                                                      |

|                                                     |                |                     |
|-----------------------------------------------------|----------------|---------------------|
| <b>GUIDELINES FOR ASSESSING ENERGY SIGNIFICANCE</b> | Date Approved: | DATA Form A-630-001 |
|-----------------------------------------------------|----------------|---------------------|

With reference to **Column 4 of the Energy Assessment Worksheet**, F-630-001 a simplest method of assessing / quantifying the significance of energy use / consumption is to use the letters **H or M or L** to indicate whether the Severity and Occurrence are high or medium or low.

**H = High**

**M = Medium**

**L = Low**

In general:

**When both Severity and Occurrence are High, the energy use is significant, and the process step requires improvement action**

**When one or both the severity and the likelihood are indicated as medium, additional reviews are required to identify existing conditions that reduce or eliminate the energy use.**

Below is a method to quantify the energy assessment.

**S = Severity of the Outcome**

High = 10, 9, 8

Medium = 7, 6, 5, 4

Low = 3, 2, 1

**L = Likelihood of the Occurrence**

High = 10, 9, 8

Medium = 7, 6, 5, 4

Low = 3, 2, 1

**(L x S) = Significance of energy use,**

High = 100 to 50 range

Medium = 49 to 16 range

Low = 15 to 1 range

**Significance of Use and Consumption**

A variation in the method to analyze the Severity and Likelihood and assess the significance or energy performance associated with the process step.

