

**Embedding Energy Management (EEM)**

**Facilitator runsheet - Module 1: Energy and business planning**

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# Purpose of a facilitator runsheet

A facilitator runsheet is provided for each module in the Embedding Energy Management (EEM) program.The runsheets provide a guide for the facilitator so that they can prepare and deliver a business planning session that maximises the engagement of the site leadership team. The facilitated forums capture the managers intelligence about the issues and ultimately informs a collaborative decision-making approach to this work. The processes described in these runsheets support a multidisciplinary approach, often reported as a hurdle for energy and sustainability initiatives, to be applied to this important business improvement work.

It is recommended that a member of the Site Leadership Team (SLT), not necessarily ‘the boss’ with the most refined facilitation skills, adopts the role of facilitator. Otherwise, an external facilitator could be contracted for this role.

The runsheets are structured as follows:

1. The project question that this forum is attempting to resolve. *Using a question rather than a title motivates a response.*
2. What are the outcomes the site is seeking from this work? *Important to start the session with the end in mind.*
3. What is the context? *Important for focussing the discussion and drawing on relevant information.*
4. Phase of the work? *Acknowledges that the work may be ongoing.*
5. When is the forum?
6. Purpose of the forum? *This forum may only progress the desired outcomes (Q2) to a particular stage.*
7. Who should be there – names/titles? *The right people must be present or else quality will suffer.*
8. What challenges/hurdles will we need to keep in mind with this group? *Acknowledges dynamics of the group that need to be managed.*
9. What are the working steps, i.e. questions that need to be discussed during this forum to achieve the stated purpose? *This is the key to the forum. Includes the information/analysis/data to be presented and the questions that will be discussed to achieve the purpose of the forum (Q6).*
10. What information do we have to present to stimulate thinking? *Highlights the preparation that must be undertaken and the information to be made available for the forum to be a success.*

# Sample agenda for the program

The following agenda is an outline of the sessions to conduct on-site to achieve learning and business outcomes OR in simulated environment to achieve learning outcomes only. The global trends planning session on the first day is critical and will influence the remaining activities on the other days. This agenda is offered in the suggested sequence; however, there may be sound reasons why you would change the sequence. As long as others follow that logic then modify as you see fit. Another critical consideration is the identification of appropriate individuals to attend training. It is recommended that at least two individuals be nominated to participate in each action learning (training) module.

| Suggested timing | Day 1 | Day2 | Day3 | Day 4 | Day 5 |
| --- | --- | --- | --- | --- | --- |
| 08:00–12.00 | Energy and business planning  Present global/ regional trends; discuss/plan response  Present high-level energy and carbon baseline, begin to recognise quick wins  (3.5 hr planning forum with SLT, with 30 minute break) | Carbon inventory and supply chain impacts  Present carbon inventory/ footprint; identify impacts on supply chain  (3.5 hr planning forum with SLT, with 30 minute break) | Energy procurement  Investigate potential cost savings via demand management and contract reviews  (3.5 hr planning forum with SLT, with 30 minute break) | Energy efficiency opportunities  Understand energy use  Identify, evaluate and facilitate implementation of resource efficiency opportunities (technical or management) (inc supply chain)  (3.5 hr planning forum with SLT, with 30 minute break) | Energy management systems  Expose gaps in management systems using diagnostic  Identify and implement enhancements to management systems  Monitor and report progress of plans  (3.5 hr planning forum with SLT, with 30 minute break) |
| 12:00-14:00 | Data gathering and investigation | Data gathering and investigation | Data gathering and investigation | Data gathering and investigation | Data gathering and investigation |
| 14:00–15:30 | M1: Training with champions  How to integrate global trends in resource management into your business planning process | M2: Training with champions  How to create and maintain your carbon inventory | M3: Training with champions  How to review your tariff and potentially reduce your energy bills | M4: Training with champions  How to engage staff and the SLT in decision-making processes to progress resource efficiency opportunities that make good business sense | M5: Training with champions  Workforce development skills matrix: Assessment of carbon proofing skills  Ongoing development plan |
| Ongoing | Data gathering and investigation | Data gathering and investigation | Data gathering and investigation | Data gathering and investigation | Data gathering and investigation |

# Planning forum 1: Energy and business planning

| Forum design aspect | Description |
| --- | --- |
| The project question that this forum is attempting to resolve?  What are the outcomes the site is seeking from this work? | What is the business drivers behind this site’s desire to improve its energy and carbon footprint? |
| What is the context?  Phase of development? | This project is designed so that users can apply a set of practice guides and tools and action learning modules to support the development of their workforce to meet the challenges of a carbon constrained economy.  It is day 1 of a 5-day program. |
| When is the forum? | As scheduled (2 hours) |
| Purpose of the forum? | 1. To illuminate the energy and related industry trends affecting this site so a strategic response to these trends can begin to be developed. 2. Consider the risks and opportunities presented by these trends and decide what needs to be done (initiatives) to manage the risks and exploit the opportunities. 3. Create a list of activities to progress the initiatives to meet the overall goals of the program. 4. Optional (day 1 or day 5): conduct a management system diagnostic to illuminate the gaps in management systems that if left unchecked will stifle these carbon/energy efficiency initiatives. |
| Who should be there – names/titles? | SLT |
| What challenges/hurdles will we need to keep in mind with this group? | The aim of these planning workshops is to fairly rapidly begin to look at impacts for the site and opportunities and skills needs that will come in a carbon-constrained economy. The discussion and debate should ideally focus on these pragmatic aspects rather than become bogged down in debate about climate science or the political processes surrounding climate change. |
| What are the thinking steps, i.e. questions that need to be discussed during this forum to achieve the stated purpose?  Tip:  *Ask participants to respond to the questions on the charts and write their responses on the cards and then stick them on the charts. After each question debrief the responses adding further clarifying comments if needed.* | 1. Present the overall purpose of this program (10 mins)  * How and why has this site got involved? * What business, resource efficiency and skills outcomes are we expecting to achieve after this program?   ***Having confirmed the overall purpose of this program and the context for this site we can now commence Module 1 ‘Global Trends’.***   1. *Display and discuss purpose statements above (5 mins)*   ***Present the Global Trends presentation using a communication marketplace OR traditional PowerPoint***   1. What are the global and local trends of most significance for our business? *For clarity* *White rectangle (20 mins)*   ***Based on these responses the SLT should resolve the following questions by writing responses on cards, being displayed then discussed.***   1. What existing plans do we have for our business that may be affected by these trends? *Yellow rectangles (2 mins)* 2. What impacts (risks and opportunities) will these trends have on our business ? *Risk orange ovals oppos yellow ovals ( 5 mins)* 3. How big is the impact? When will the impact begin to take affect? *Impact/timeline matrix (10 mins)* 4. What is the current thinking that reflects our response (to these trends) so far? *Red sticker* Where should our thinking be? *Blue* *sticker maturity model (5 mins)* 5. Given this picture (from Q 5)what challenges/hurdles do we face in progressing a strategic response to these impacts? (*3 mins*) 6. What strategic questions when resolved will assist our business to meet manage these risks and exploit these opportunities ? *White strips*.Guidelines will be developed later based on the SLT’s response to these questions. These guidelines should reflect a strategic intent and will shape the site’s resource management policies and strategic response (*15 mins*) 7. What first activities should we now undertake to inform a response to these questions, i.e. conduct related research and analysis? (*15 mins*) 8. Who should be involved at the next forum to plan a response to these strategic questions? (2 mins) 9. Plenary discussion: How was this for you? Who would be responsible for planning and facilitation of this forum if you were to repeat this in 6 months or so…? Let’s meet this afternoon for a debrief (learning).   ***Conduct systems diagnostic if time and park actions arising till M5*** |
| What information do we have to present to stimulate thinking? | Purpose statement (documented)  Global trends presentation  Energy/carbon baseline tool  List of existing initiatives and potential savings |

# The *communication marketplace* methodology

An engagement tool for the SLT to promote innovation

This methodology is used to present information to the SLT at the beginning of each module. It’s an alternative to a traditional PowerPoint presentation with a number of advantages over the traditional PowerPoint method.

* All information is displayed at the same time so that participants can scan the content at their own pace.
* Information is left exposed so that participants can cross reference information make links and draw their own conclusions during the exposition (presentation) phase as well as the application (discussion) phase.
* Participants are encouraged to complete the picture by adding comments and questions so that they can engage with the content and are better informed.
* The process is highly visual and tactile and stimulates innovative thinking.
* The process is highly structured with open questions yet the group works informally with high levels of freedom.

The communication marketplace process

The marketplace approach typically has **4 phases**.

* **Phase 1** is the presentation of information referred to as the exposition phase. Participants familiarise themselves with the content presented. They may be asked to add comments or indicate where they would like more explanation. A plenary session follows where their comments and questions are clarified but not yet evaluated.
* **Phase 2** is the application of the knowledge presented. Participants may provide contextual information or respond to specific questions, e.g. what risks and opportunities do these global trends, presented here on this chart, have for your business?
* **Phase 3** is the evaluation phase where options are considered, and priorities may be identified.
* **Phase 4** is the action planning phase where participants take ownership of the outcomes and commit to action plans, e.g. activity/who/with whom/by when.

**Set-up and delivery**

The information can be handwritten word documents or produced as a PowerPoint presentation. Diagrams and pictures should dominate the presentation. The information should be displayed in a logical sequence yet in discrete chunks if practical. In the EEM modules there is a presentation for each module which can be displayed on walls or pin boards as shown below. Charts are set up around the room with the input data and information carefully presented in meaningful clusters. The following guide should be provided on a white board or chart paper to instruct the participants

1. Form pairs and wander around the room reading and responding to the cues placed on each chart.
2. Read and support a shared understanding with your partner.
3. Add comments on cards to complete the picture (information) provided and stick or pin them on the charts.
4. Indicate with a ‘?’ where you want more clarification.
5. Respond to questions as per instructions on the charts (see facilitators runsheet for more details).

 

This approach presents information in a meaningful, time efficient and productive manner that promotes engagement and facilitates informed decisions. The features of this methodology make it ideal for senior managers and the planning work performed in each module.