

**Embedding Energy Management (EEM)**

**Facilitator runsheet - Module 4: Energy efficiency opportunities**

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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 (SLT). 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 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 4: Energy efficiency opportunities

| 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 (from survey) | What energy is used at this site? Where is it used? How much is used?  What efficiency opportunities exist, including new and existing ideas?  How can they be best progressed?  What immediate savings can be made?  What is the best strategic opportunity given thee strategic intent of this sites resource management plan and other business goals?  For the SLT to better understand energy use at this site. |
| 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 4 of a 5 day program. |
| When is the forum? | As scheduled |
| Purpose of the forum? | To reflect on our current energy use baseline, including existing efficiency ideas so that we can:   1. Generate any additional ideas as informed by the baseline study. 2. Decide which ideas represent the most worthwhile opportunities. 3. Assign responsibility to Implement quick wins. 4. Progress business plans for strategic and other worthwhile opportunities.   … and during the follow-up training session later in the day participants will:   1. Reflect on the skill sets (demonstrated) required to better understand energy use so that they (site champions) better understand these processes and tools and can plan their ongoing application at their site as part of their overall sustainability journey. |
| Who should be there names/titles? | SLT, business improvement system owner and site engineers |
| What challenges/hurdles will we need to keep in mind with this group? | An important aspect of this process is the solicitation of efficiency ideas from across the business that reflects a range of energy user knowledge experience and needs. It is important to accept and capture all ideas and all inputs initially before beginning to prioritise these to those that offer the greatest benefit. |
| Forum design aspect | Description |
| What are the thinking steps (questions that need to be discussed) to achieve the stated purpose? | ***Present the opportunities presentation using a communication marketplace OR traditional PowerPoint. Based on this:***   1. Welcome and scene setting. Context: What are our strategic intent, goals and targets?  What are the efficiency opportunities we want to progress to meet our goals?  Present reporting context i.e. Energy Efficiency Opportunities/Environment and Resource Efficiency Plan (EREP)/Sustainability Advantage or other programs, as applicable. 2. Read out workshop purpose statements then do introductions. Acknowledge who is in the room and their authority to make decisions. 3. What is our track record like when progressing new ideas (list strengths and weaknesses)? 4. Present workshop process. 5. Present baseline – highlight areas that inform opportunities. Discuss understanding by pointing to board; e.g. we see here a significant base load after shutdown …any comment about that? Refer to any existing list of opportunities. 6. Raise additional opportunities using silent brainstorm, OR simply add ideas as they arise during presentation of the baseline. 7. Introduce an opportunities screening tool, explaining the criteria to be used. As an example screen ideas using IMPACT and EFFORT criteria, which will allow all ideas to be grouped for further prioritisation and decisions: 8. IMPACT = cost savings, emissions reduction or meets some other objectives 9. EFFORT to get project up = resources, skills required, alignment to objectives, cost of implementation, capex hurdles, and so on. 10. Which ideas (if any) should now be moved into another quadrant so that they can be progressed appropriately? 11. Which ideas represent the best opportunities that we should progress? By group vote or consensus discussion select the top five or so opportunities. 12. Priority opportunities are now actioned planned either as actions to be progressed by individuals with the delegated authority; OR as a project using a project brief template. 13. Group takes idea and moves it to project foundation template (tool supplied) or equivalent, where available. 14. Revisit purpose of the workshop and document outcomes. The overall outcomes/plan should be included in 12 month budget plans. |
| Forum design aspect | Description |
| What information do we have to present to stimulate thinking?  What processes and tools shall be demonstrated? | Opportunities presentation – ‘how to’ guide for running an opportunities workshop  List of opportunities with cost savings estimates and other benefits data, if available  List of resource use policies, business goals and targets from resource management plan.  Business case information available for each existing opportunity.  Generic cost savings, data and case studies, where specific savings are unavailable, so that relative merits of ideas can be considered.  Business improvement systems major project system and related action plan templates. |

# 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.