

**Embedding Energy Management (EEM)**

**Facilitator runsheet - Module 5: Energy managment systems**

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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 5: Energy management systems

| 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 are the management systems that underpin the success of our sustainability initiatives? |
| 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 5 of a 5-day program. |
| When is the forum? | As scheduled |
| Purpose of the forum? | To redefine the priority actions from the diagnostic using ‘systems thinking’ so that a brief to direct the necessary changes to these systems can be delegated to the owner of that system. |
| Who should be there names/titles? | SLT |
| What challenges/hurdles will we need to keep in mind with this group? | Good management diagnostic sessions usually get input and debate from multiple stakeholders. It is important that the session is consensus-based, and that decisions on current status and management priorities are not made by one or a small number of individuals. |
| What are the thinking steps (questions that need to be discussed) to achieve the stated purpose? | ***The group should review current resource management systems using an appropriate framework (e.g. sustainability advantage, BRECSU, One2Five®, EEO). Based on the outputs (priority areas, or systems where current performance is low), discuss:***   1. What are our strategic intent, goals and targets, and what are the efficiency opportunities we want to progress to meet our goals? 2. What are the critical actions arising from the management diagnostic? 3. What business systems control these critical actions? 4. Who is accountable for the outcomes of these systems? Map management system elements to the site’s management structure (if possible) to assist with identifying responsible persons. 5. Where in our system should we address the necessary changes to support progress and maintain each opportunity? For this exercise it is useful to work in pairs with the non-owner acting as scribe; then denote the process that most needs to be adjusted or added to. Identify any hurdles to making these changes. 6. What guidelines or actions can you now offer to progress the necessary improvements given our overall goals, the opportunities we have before us and the hurdles we have identified? Owners and collaborators from the group should complete the project brief template. 7. What first activities should we now undertake to progress these briefs for each system? Consider sequence of events and any interdependencies. |
| What information do we have to present to stimulate thinking? | Strategic intent, goals and targets  Critical actions arising from the management diagnostic  Management diagnostic tool  Project brief template |

# 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.