

TEMA AWARDS IN EXCELLENCE

Program Overview

This program recognizes the professionals, organizations, and partners who go beyond basic energy stewardship through a rigorous evaluation of the core 18 Roles & Responsibilities of an Energy Manager in 2025.

Final Selection Weighting

To ensure a balanced selection process that values both technical excellence and community impact, final scores are calculated as follows:

- 70% Merit Score: Determined by the judging panel's evaluation of the nomination worksheet.
- 30% Membership Vote: A TEMA membership-wide vote held after the nominees are announced.

Award Categories & Eligibility

Because different roles contribute to energy management in different ways, we provide four distinct award categories, addressed through three different nomination worksheets:

1. Energy Manager of the Year (Direct Execution Worksheet)
 - Eligibility: Individual TEMA member (non-corporate).
 - Focus: Display of individual leadership, technical mastery, and moral character that has positively impacted their organization or the industry in 2025.
2. Energy Program of the Year (Direct Execution Worksheet)
 - Eligibility: Public or Private Entity programs of TEMA members.
 - Focus: Display of organizational culture, internal/external partnerships, and long-term sustainability that has positively impacted their organization or the industry in 2025.
3. Energy Project of the Year (Technical Outcome Worksheet)
 - Eligibility: Completion or execution of any specific project by a Public or Private member of TEMA.
 - Focus: Display of specific efficiency gains, innovation, and technical implementation that has positively impacted their organization or the industry in 2025.
4. Energy Partner of the Year (Enabling Support Worksheet)
 - Eligibility: Corporate or Partner member of TEMA.
 - Focus: Display reliability, supporting the growth of TEMA members, and providing exceptional client experience that has positively impacted the industry in 2025.

The Evaluation Framework: The 18 Roles and Responsibilities

All nominations (excluding specific technical project metrics) are evaluated across 18 Roles and Responsibilities of an Energy Manager. To simplify the process, we have grouped these roles into four pillars:

- Pillar 1: Strategy & Governance – policy, committee, management plan, and future planning (Roles 1 – 4)
- Pillar 2: Technical Operations & Quality – audits, maintenance, commissioning, construction standards, and safety (Roles 5 – 9)



- Pillar 3: Financial & Resource Management – budgeting, contract negotiation, incentives, M&V, and resources (Roles 10 – 14)
- Pillar 4: Engagement & Education – facility programs, communication, evaluation, and education (Roles 15 – 18)

How to Nominate

1. Review the Standards: Read the 18 Roles and Responsibilities Standard for Excellence document to understand what constitutes a 5-point (Exceptional) score.
2. Select your Category: Apply through the appropriate form / worksheet (Direct Execution, Technical Impact, or Enabling Support)
3. Gather Evidence: Collect quantitative data (EUI, ECI, ROI, etc.) and qualitative stories (mentorship, safety culture, constructive feedback, etc.)
4. Submit: Ensure all 18 roles are addressed in your narrative.

UNDERSTANDING THE RUBRIC TO ENSURE ALIGNMENT

Nominee Checklist

This document contains the three distinct rubrics used to score TEMA awards. While all categories are rooted in the core 18 Roles and Responsibilities, they are weighted and phrased to match the nominee's specific function.

Each rubric is described below, with examples of what you may provide or how you may address the role within your narrative. A checklist is embedded, as well, for use to ensure your nomination package contains the evidence required to score in the "Exceptional" (5 pts) or "Strong" (4 pts) ranges according to the official rubrics.

The official rubrics are also provided in subsequent sheets.

DIRECT EXECUTION RUBRIC

Used for: *Energy Manager of the Year and Energy Program of the Year*

Focus: Proving direct stewardship and organizational implementation.

Perspective: How effectively does the nominee execute these roles within their own organization?

Pillar 1: Strategy & Governance (Weighted 20%)

- Energy/Sustainability Policy: Is there a formal, board-approved policy with clear, measurable goals?
[] Energy Policy: Copy of the formal, board-approved policy with measurable goals.
- Energy/Sustainability Committee: Is there a dedicated, cross-functional committee with a defined charter?
[] Committee: Committee charter, member list, and minutes from recent meetings.
- Management Plan: Is there a comprehensive plan with a detailed timeline and assigned responsibilities?
[] Management Plan: A formal document showing the timeline, assigned roles, and specific targets.
- Track & Plan for Future Possibilities: Does the nominee research new technologies and prepare long-term investment plans?
[] Future Planning: Documentation of research into emerging tech or a long-term investment roadmap.

Pillar 2: Technical Operations (Weighted 30%)

- Facility/Operational Audits: Are comprehensive audits conducted annually with corrective action plans?
[] Audits: Copies of the most recent comprehensive facility audit reports (ideally third-party).
- Active Preventative Maintenance: Is there a robust program with detailed schedules and verified tracking?



- Maintenance: Preventative maintenance (PM) schedules and verified tracking logs/CMMS reports.
- Balance Safety & Efficiency: Is safety fully integrated into every efficiency project with clear protocols?
 - Safety: Written safety protocols and records of safety training specific to energy projects.
- Guidelines for Efficient Construction: Are there mandatory guidelines for all new construction and renovations?
 - Construction: A copy of the mandatory efficient construction guidelines or standards.
- Commissioning: Is commissioning a mandatory, third-party process for all new/renovated systems?
 - Commissioning: Third-party commissioning reports for any new or major renovated systems.

Pillar 3: Financial & Resource Management (Weighted 25%)

- Technical & Financial Resources: Is there a dedicated budget and skilled staff for energy projects?
 - Resources: Budget line items for energy staff/consultants and professional development records.
- Prepare Current & Future Budgets: Do budgets focus on both short-term savings and long-term efficiency?
 - Budgeting: Multi-year capital plans showing energy efficiency as a core investment factor.
- Utility/Commodity Contracts: Does an expert negotiate contracts using market insights for best rates?
 - Contracts: Analysis of utility rate negotiations or commodity contract reviews.
- Incentives & Rewards: Is there a formal program to reward staff for meeting efficiency goals?
 - Incentives: Evidence of staff reward programs or internal recognition for efficiency goals.
- M&V Analysis: Is a formal process used to quantify and report energy savings?
 - M&V: Formal Measurement and Verification (M&V) reports (e.g., using IPMVP standards).

Pillar 4: Engagement & Education (Weighted 25%)

- Open/Transparent Communication: Is there regular public reporting on energy performance?
 - Communication: Samples of public performance reports or internal dashboards.
- Individual Facility Programs: Does each facility have a tailored energy program based on its needs?
 - Facility Programs: Documentation of tailored energy goals for specific, individual facilities.
- Program Evaluation: Is there a formal evaluation process with clear metrics for stakeholders?
 - Evaluation: Formal program review documents showing metrics vs. stakeholders' goals.
- Education: Are regular training and awareness programs offered to all staff?
 - Education: Training curricula, workshop attendance logs, and staff awareness materials.

DIRECT EXECUTION

Energy Manager of the Year and Energy Program of the Year

How effectively does the nominee execute these roles within their own organization?

Pillar 1: Strategy & Governance (weighted 20%)

	0	1	2	3	4	5	SCORE	NOTES
Energy / Sustainability Policy	No policy or stated commitment.	Occasional discussion of policy needs without any written documentation.	A verbal commitment or mention in another document.	An informal, documented statement of intent or a draft policy.	A formal policy exists with general goals but lacks specific metrics or a detailed action plan.	A formal, board-approved policy with clear, measurable goals and a defined action plan.		
Energy / Sustainability Committee	No committee or assigned responsibility.	Informal meetings occur between departments but no group is officially recognized.	A single individual is responsible or a group assigned without clear roles.	A working group or ad-hoc team, but without formal structure.	A committee exists but meets irregularly or lacks a formal charter.	A dedicated, cross-functional committee with a defined charter, regular meeting schedule, and documented progress.		
Energy / Sustainability Management Plan	No management plan exists.	Intent to create a plan is stated, but no documentation or project lists exist yet.	An informal list of ideas or a single-project plan.	A basic plan with a list of projects but no clear strategy or accountability.	A plan exists with general goals/responsibilities but lacks a detailed timeline or specific targets.	A comprehensive plan with a detailed timeline, assigned responsibilities, and specific targets for all key areas.		
Track & Plan for Future Possibilities	No planning for future possibilities is done.	Management is aware of new technologies but has no process for tracking them.	The organization reacts to new technologies or opportunities as they arise.	New opportunities are considered but not actively researched or planned.	Research is performed periodically to identify new technologies or projects.	A dedicated team/individual continuously researches new technologies and prepares a long-term plan for future investments.		

DIRECT EXECUTION

Pillar 2: Technial Operations (weighted 30%)

	0	1	2	3	4	5	SCORE	NOTES
Facility / Operational Audits	No audits are performed.	Basic visual inspections are performed, but no energy-specific data is collected.	A simple walkthrough or checklist is used, but a formal technical audit is not conducted.	Audits are performed on an ad-hoc basis or in response to a problem.	Internal audits are performed annually, covering most facilities but lacking a formal third-party review or action plan.	Comprehensive, third-party audits are conducted annually for all major facilities with documented findings.		
Active Preventative Maintenance	No preventative maintenance is performed.	Maintenance is outsourced with no internal schedule or oversight of preventative tasks.	Maintenance is performed only when equipment fails (Run-to-fail).	A reactive maintenance program is in place, with some preventative tasks performed irregularly.	A PM schedule exists for critical systems, but it may not include all equipment or is not consistently followed/verified.	A robust program with a detailed schedule for all major systems, with tracking and verification.		
Actively Balance Safety & Efficiency	No consideration is given to the balance between safety and efficiency.	Basic safety rules exist, but there is no training on the intersection of safety and new energy tech.	Safety is treated as an afterthought or a separate compliance issue unrelated to efficiency projects.	Safety is a consideration, but efficiency is often prioritized over safety.	Safety is a high priority, but its integration into efficiency projects is not a formalized, documented process.	Safety is fully integrated into every project, with clear protocols and safety training for all staff.		
Guidelines for Efficient Construction	No guidelines or standards exist.	Standard building codes are followed with no additional efficiency targets.	Informal conversations are held with architects about efficiency, but no standards are documented.	Basic suggestions or a checklist are used for construction but are not mandatory.	Guidelines exist but are not always enforced or are incomplete regarding modern efficiency standards.	A comprehensive set of guidelines is mandatory for all new construction and major renovation projects.		
Institute & Oversee Commissioning	No commissioning is performed.	Equipment is turned on and tested for basic functionality only.	A basic startup check is performed by the installer, but no formal commissioning/verification is done.	Commissioning is performed on a few select systems but is not a standard practice.	Commissioning is performed internally on new or major systems to ensure they meet design intent.	Commissioning is a mandatory, third-party process for all new or major renovated systems.		

DIRECT EXECUTION

Pillar 3: Financial & Resource Management (weighted 25%)

	0	1	2	3	4	5	SCORE	NOTES
Technical & Financial Resources	No budget or resources allocated.	Occasional funding is found through grants, but no operational budget exists.	Minimal funding is allocated; staff lack the necessary skills to drive efficiency.	Funding is limited to reactive maintenance; staff are not specifically trained in energy efficiency.	Budget and staff are available but are shared with other departments or lack specialized energy training.	Dedicated budget and skilled staff for energy projects, including access to specialized consultants.		
Prepare Current & Future Budgets	No budgeting for energy efficiency.	Energy costs are tracked as a fixed expense with no attempt to budget for reductions.	Energy efficiency is not a factor in budget planning; budgets are strictly operational.	A small amount of funding is allocated for energy efficiency when available.	Budgets reflect some investment in energy efficiency, but it is not a primary driver of financial planning.	Budgets are prepared with a clear focus on both short-term savings and long-term investments.		
Coordinate Negotiations for Utility Contracts	No one is responsible for managing utility contracts.	The organization is unaware of its contract terms or renewal dates.	Contracts are not reviewed; standard utility rates are accepted as-is without question.	Contracts are renewed automatically or with minimal negotiation.	Utility contracts are reviewed annually, and some negotiation takes place with vendors.	An expert is dedicated to negotiating utility contracts, leveraging market insights to secure best rates.		
Manage & Offer Energy Incentives & Rewards	The topic is never discussed.	External incentives (rebates) are collected, but none are passed to staff/departments.	No incentives or rewards are offered; performance is expected but not incentivized.	Incentives are discussed but not formally implemented.	An informal program or ad-hoc recognition (e.g., "shout-outs") is given for energy-saving efforts.	A formal, public program rewards staff and departments for meeting efficiency goals.		
Identify Savings through Measurement & Verification (M&V)	No tracking or measurement of savings is conducted.	Total energy spend is tracked, but individual project impacts are unknown.	Savings are estimated or assumed based on equipment manufacturer claims rather than actual data.	Energy bills are tracked, but there is no formal process to measure savings.	Some form of data-driven measurement is in place, but it lacks a formal M&V methodology.	A formal Measurement and Verification (M&V) process is used to quantify and report on energy savings.		

DIRECT EXECUTION

Pillar 4: Engagement & Education (weighted 25%)

	0	1	2	3	4	5	SCORE	NOTES
Open / Transparent Communication	Communication is not a priority.	Energy data is kept siloed within the facilities or finance department and not communicated through the Energy Program.	Performance information is shared only when specifically requested by leadership or the public.	Ad-hoc internal communication, with limited public-facing information.	Internal reporting is consistent and detailed; some information is shared with external stakeholders.	Regular, public reporting on energy performance, including both successes and failures.		
Individual Facility Programs	No facility-specific programs exist.	Facilities are encouraged to save energy, but no specific programs exist.	A few "pilot" facilities have energy programs, but the majority do not.	A single program is applied across the organization without facility-specific customization.	A standardized program is applied to all facilities, with minor adjustments made based on facility type.	Each facility has a tailored energy program based on its unique needs with performance tracking.		
Conduct Evaluations of the program & Report Results	There is no process for evaluating the program.	Management asks for updates, but no data-backed evaluation is prepared.	A discussion of program status is held occasionally, but no formal evaluation is conducted.	The program is reviewed informally with limited reporting.	An evaluation is performed annually, but it lacks specific KPIs or a formal presentation to leadership.	A formal evaluation process is in place, with clear metrics and regular reporting to stakeholders.		
Education	No education or training is provided.	Energy education is mentioned during new hire orientation only.	A single informational session or "Lunch and Learn" is held once per year.	Ad-hoc information is provided via emails or newsletters.	A basic training program is offered, but it is not mandatory or regularly scheduled.	Comprehensive, regular training and awareness programs are offered to all staff.		

ENABLING SUPPORT RUBRIC

Used for: *Energy Partner of the Year*

Focus: Proving how your tools and expertise empowered your clients.

Perspective: How well does the partner provide the tools, expertise, and resources to help clients fulfill the 18 roles?

Pillar 1: Strategic Support (Weighted 25%)

[] **Strategic Evidence:** Samples of policy templates, compliance guides, or planning tools provided to clients.

- Policy Support: Does the partner provide policy templates, guidance, or compliance insights to help clients develop policies?
- Committee Support: Does the partner provide expertise or resources to support a client's energy committee?
- Planning Support: How effectively does the partner help clients build or update their energy management plans?

Pillar 2: Technical Support (Weighted 25%)

[] **Technical Evidence:** Copies of audits performed for clients or diagnostic tools shared with their staff.

- Audit Support: Does the partner perform audits or provide audit tools to identify deficiencies?
- Maintenance Support: How effectively does the partner support preventive maintenance (diagnostics, training, tools)?
- Safety & Construction Support: Does the partner provide guidance on safe implementation and efficient construction design?
- Commissioning Services: To what extent does the partner lead or enhance the client's commissioning process?

Pillar 3: Resource & Financial Support (Weighted 25%)

[] **Financial Evidence:** Case studies of rate negotiations or rebate administration performed on behalf of clients.

- Resource Support: Does the partner provide engineering support or feasibility analysis to help client decision-making?
- Budgeting Support: Does the partner assist clients with cost forecasting and multi-year capital planning?
- Contract Negotiation: How effectively does the partner help clients navigate or negotiate utility/commodity contracts?
- Incentive Management: Does the partner identify or administer incentives, rebates, or awards for the client?

Pillar 4: Capacity Building (Weighted 25%)

[] **Capacity Evidence:** Samples of "executive-ready" dashboards or training materials used to educate client teams.



- **Client Communication:** Does the partner maintain proactive and transparent communication regarding project challenges?
- **Tailored Solutions:** Does the partner create customized solutions for unique facility needs vs. one-size-fits-all?
- **Reporting & M&V:** Does the partner provide dashboards or performance summaries that are executive-ready?
- **Client Education:** Does the partner provide workshops or resources to build the client's internal capacity?

[] **Reliability:** Testimonials or proactive communication logs regarding project updates and challenges.

ENABLING SUPPORT

Energy Manager of the Year and Energy Program of the Year

How well does the partner provide the tools, expertise, and resources to help clients fulfill the 18 roles and responsibilities?

	0	1	2	3	4	5	SCORE	NOTES
Pillar 1: Strategic & Governance Support (Related Roles: Policy, Committee, Management Plan, Future Possibilities)	Very little or no support demonstrated in strategic governance.	Provides generic information only; does not tailor support to the client's strategic needs.	Minimal contribution to strategic planning; help is largely reactive or inconsistent.	Provides tools or analysis when requested; helps refine existing drafts or attends committee meetings occasionally.	Reliably contributes templates and planning resources that improve the client's strategic documents; provides consistent guidance for committees.	Proactively provides policy templates, guidance, and compliance insights that result in board-approved policies. Actively participates in client committees with high-level analysis and drives the creation of long-range innovation roadmaps.		
Pillar 2: Technical Operations Support (Related Roles: Audits, PM, Safety, Construction, Commissioning)	Does not assist in technical operations.	Occasional technical advice provided but no formal tools or oversight.	Technical help is minimal or limited to equipment sales/basic installation without operational depth.	Assists with walkthroughs or basic checklists; provides standard maintenance schedules or startup checks.	Supports operational audits and PM schedules with reliable data and expert training for client staff; provides clear design reviews for efficient construction.	Performs comprehensive audits with deep deficiency identification; provides advanced diagnostics and predictive maintenance tools; leads commissioning with third-party verification rigor. Fully integrates safety guidance into technical solutions.		

<p>Pillar 3: Financial & Resource Support (Related Roles: Resources, Budgeting, Contracts, Incentives, M&V)</p>	<p>Provides no assistance in financial or resource management.</p>	<p>Mention of financial benefits without detailed planning or negotiation support</p>	<p>Help is limited to simple cost-benefit summaries of own products/services.</p>	<p>Provides basic financial feasibility analysis or rebate application assistance when requested.</p>	<p>Assists significantly with budgeting and rate analysis; identifies reliable incentive opportunities and provides clear data for savings verification.</p>	<p>Provides expert multi-year capital planning and cost forecasting; secures major incentives/rebates; leads negotiations for utility contracts using deep market insights. Implements rigorous M&V methodologies (e.g., IPMVP).</p>		
<p>Pillar 4: Capacity & Engagement Support (Related Roles: Communication, Facility Programs, Evaluation, Education)</p>	<p>Does not support client engagement or education.</p>	<p>Occasional email updates with no formal reporting or training structure.</p>	<p>Communication is reactive; education is limited to product-specific manuals.</p>	<p>Provides standard reporting and ad-hoc educational materials or newsletters.</p>	<p>Maintains proactive communication; provides detailed performance summaries and regular training sessions that build client skillsets.</p>	<p>Provides "executive-ready" dashboards and transparent reporting tools; develops facility-specific customized solutions; leads high-impact training workshops and capacity-building resources for client staff.</p>		

TECHNICAL IMPACT RUBRIC

Used for: *Energy Project of the Year*

Focus: Proving technical rigor, innovation, and measurable results.

Perspective: What were the specific outcomes, innovation, and technical rigor of this project?

Note: This award uses the specific criteria defined in the project evaluation worksheet.

Core Impact Metrics (Weighted 60%)

- Energy Impact: The absolute and relative energy savings achieved (kWh, % reduction).
[] **Energy Data:** Clear "before and after" data showing kWh, Therms, or % reduction.
- Utility Cost Savings: ROI, payback period, and direct cost reductions in utility bills.
[] **Financial Data:** ROI calculation, simple payback period, and utility bill cost-reduction reports.
- Sustainability Impact: Broader environmental impact (emissions reduction, water waste).
[] **Sustainability:** Documentation of emissions (CO2) reduction, water savings, or waste diversion.
- Measurement & Verification: Rigor of the measurement plan and verification of results.

Strategic Implementation (Weighted 40%)

- Innovation & Technology: Use of advanced technology, creative design, or novel processes.
[] **Innovation Narrative:** Description of the novel technology or process used and why it is unique.
- Scalability / Replicability: The potential to replicate the project in other facilities or divisions.
[] **Scalability Plan:** A brief explanation of how this project could be replicated at other sites.
- Safety & Risk Management: Adherence to safety protocols and risk mitigation during the project.
[] **Safety Records:** Project-specific safety plans and risk mitigation logs.
- Stakeholder Leadership: Collaboration and communication across teams (engineering, finance, operations).
[] **Stakeholder Map:** List of cross-functional teams involved (e.g., Finance, Maintenance, IT).
- Budget Management: How well the project was budgeted and managed regarding cost overruns.
[] **Budget Report:** Final "Budget vs. Actual" report showing fiscal responsibility.

TECHNICAL IMPACT

Energy Project of the Year

What were the specific outcomes, innovation, and technical rigor of this project?

Core Impact Metrics (weighted 60%)

	0	1	2	3	4	5	SCORE	NOTES
Energy Impact (Furthers Role 14: M&V)	Negligible or no energy impact.	Minimal impact observed; project barely shifted the energy baseline.	Limited energy impact; results are significantly below projected baseline targets.	Moderate savings; meets basic goals with minor variances.	Strong impact; meets all projected savings goals.	Very high impact; significantly exceeds project goals or achieves >20% reduction in EUI.		
Utility Cost Savings (Furthers Role 11 & 12: Budgeting / Contracts)	No cost savings achieved.	Very low savings; financial benefit does not offset maintenance or installation costs.	Minimal cost savings; ROI is marginal and financial benefits are difficult to quantify.	Moderate ROI; justifiable payback period.	Good ROI; payback matches industry standards (3-5 years).	ROI extremely favorable; payback <3 years; maximizes utility contract terms.		
Sustainability Impact (Furthers Role 1: Policy)	No measurable environmental benefit.	Project mention of sustainability without data-backed results.	Minor environmental benefit observed; impact is difficult to replicate or measure.	Moderate environmental impact; energy-focused only.	Strong outcomes in multiple sustainability categories.	Very strong outcomes; major reductions in carbon emissions, water, and waste aligned with board policy.		
Measurement & Verification Rigor (Furthers Role 14: M&V)	No verification of results performed.	Minimal tracking; equipment is monitored but savings are not calculated.	Inconsistent measurement; data points are scattered and rely on assumptions.	Basic utility bill tracking with simple savings estimation.	Good measurement plan with verified performance data.	Full, formal M&V using IPMVP or third-party verification; high data integrity.		

TECHNICAL IMPACT

Strategic Implementation (weighted 40%)

	0	1	2	3	4	5	SCORE	NOTES
Innovation & Technology (Furthers Role 4: Future Possibilities)	Traditional/standard project only.	Traditional approach; relies on outdated or basic replacement-in-kind strategies.	Standard implementation; uses common off-the-shelf technology without creative adaptation.	Somewhat new; standard tech used in an updated fashion.	Very innovative; creative use of modern established technology.	Breakthrough or highly innovative; first-of-its-kind application of advanced tech or creative design.		
Scalability / Replicability (Furthers Role 6: Individual Facility Programs)	One-off project; not replicable.	Unique one-off project with very little application elsewhere.	Limited replication potential due to highly site-specific technical constraints.	Replicable in a few specific scenarios.	Replicable with minor adjustments in most similar facilities.	Easily replicable broadly; establishes a template for other facilities/divisions.		
Safety & Risk Management (Furthers Role 7: Safety/Efficiency)	Safety was compromised or risk poorly managed.	Safety mentioned only in passing; minimal documentation.	Basic safety followed but with no specific risk mitigation or project safety plan.	Adequate safety management meeting all basic requirements.	High safety standards; clear risk planning and documentation of safety checks.	Exemplary safety protocols; proactive risk mitigation; zero incidents during execution.		
Stakeholder Leadership (Furthers Role 2 & 18: Committee / Education)	Siloed implementation with poor leadership.	Limited involvement from stakeholders outside the immediate project team.	Moderate engagement; led primarily by one department with secondary support.	Moderate engagement; led primarily by one department.	Strong collaboration between two or more major departments (e.g., Finance and Facilities).	Broad cross-functional engagement and leadership; provides clear educational value to the organization.		
Budget Management (Furthers Role 10: Technical / Financial Resources)	Significant unjustified cost overruns.	Budget was exceeded significantly with no financial oversight.	Significant cost overruns that were poorly documented or managed.	Moderate budget variance; costs were justified.	Managed strictly within budget with clear tracking of expenditures and variances.	On or under budget; demonstrates excellent capital planning and financial stewardship.		

THE 18 ROLES & RESPONSIBILITIES STANDARD FOR EXCELLENCE

Reference this guide to understand the criteria for an “Exceptional” (5-point) rating. These criteria form the basis for the 70% Merit portion of the final award score.

Pillar 1: Strategy & Governance:

1. Energy / Sustainability Policy: A form, board approved policy with clear, measurable goals.
2. Energy / Sustainability Committee: A dedicated, cross-functional committee with a defined charter and documented progress.
3. Management Plan: A comprehensive plan with detailed timelines, assigned responsibilities, and specific targets.
4. Future Possibilities: A dedicated process for researching new technologies and preparing a long-term roadmap towards innovation.

Pillar 2: Technical Operations & Quality

5. Operational Audits: Comprehensive, third-party audits conducted annually for all major facilities with corrective action plans.
6. Active Preventive Maintenance: A robust program with detailed schedules for all major systems and verified maintenance tracking.
7. Commissioning: A mandatory, third-party process for all new or major renovated systems.
8. Efficient Construction: Mandatory, written guidelines for all new construction and major renovation projects.
9. Balance Safety & Efficiency: Full integration of safety protocols and training into every efficiency project.

Pillar 3: Financial & Resource Management

10. Technical & Financial Resources: Dedicated budget and skilled staff specifically for energy projects.
11. Budgets: Clear focus on both short-term savings and long-term investments in efficiency.
12. Commodity Contracts: Active negotiation of utility / commodity contracts leveraging market insights.
13. Incentives & Rewards: A formal, public program rewarding staff and participants for meeting efficiency goals.
14. Measurement & Verification: A formal M&V process (e.g., IPMVP standards) used to quantify and report savings.

Pillar 4: Engagement & Education

15. Individual Facility Programs: Tailored energy programs for each facility based on unique needs and data.
16. Transparent Communication: Regular, public reporting on performance, including successes and failures.
17. Evaluation & Reporting: A formal evaluation process with clear metrics and regular stakeholder reporting.
18. Educate: Comprehensive, regular training and awareness programs offered to all staff and participants.