



PRODUCTS

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IMPROVEMENT

NEW HOMES

BUSINESS  
IMPROVEMENT

PARTNER  
RESOURCES

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## STEP 6: Evaluate Progress

Evaluating progress includes formal review of both energy use data and the activities carried out as part of the action plan as compared to your performance goals.

Evaluation results and information gathered during the formal review process is used by many organizations to create new action plans, identify best practices, and set new performance goals.

### Key steps involved include:

6.1

[Measure results](#) - Compare current performance to established goals.

6.2

[Review action plan](#) - Understand what worked well and what didn't in order to identify best practices.

Regular evaluation of energy performance and the effectiveness of energy management initiatives also allows energy managers to:

- Measure the effectiveness of projects and programs implemented
- Make informed decisions about future energy projects
- Reward individuals and teams for accomplishments
- Document additional savings opportunities as well as non-quantifiable benefits that can be leveraged for future initiatives.

## STEP 6.1: Measure Results

Gather energy use data and compare results to goals to determine accomplishments.

Key steps in measuring results include:

### Gather tracking data

- Review energy use and cost data (capital and operating expenses).
- Organize reports and data from tracking and monitoring efforts.
- Analyze energy efficiency achievements based on your established performance metrics. (See earlier [Assess Performance](#) and [Set Goals](#) sections.)

### Benchmark

- Compare energy performance to baselines.
- Compare performance against established goals for:
  - environmental performance
  - financial savings.
- Compare energy performance to peers and competitors to establish a relative understanding of where your performance ranks.

Use [Portfolio Manager](#) or the ENERGY STAR [Energy Performance Indicators \(EPIs\)](#) to rate the current energy performance your facility against similar facilities. Or, if you've built a new building, compare your design's target energy performance from [Target Finder](#) with the building's actual energy performance score.

## STEP 6.2: Review Action Plan

After reviewing performance data, the next step is to understand the factors affecting the results as well as the additional benefits of the improved energy performance.

This review should look at the effectiveness of your action plan. Where activities and projects were successful, document best practices to share throughout the organization. Where goals were not met, many organizations determine the cause and decide what corrective or preventive actions should be taken.

Key steps in reviewing the action plan include:

- **Get feedback** — Solicit feedback and ideas on the plan from the energy team, implementation staff, and other departments.
- **Gauge awareness** — Assess changes in employee and organizational awareness of energy issues.
- **Identify critical factors** — Identify factors that contributed to surpassing or missing targets.
- **Quantify side benefits** — Identify and quantify, if possible, side benefits arising from energy management activities such as employee comfort, productivity improvement, impact on sales, reduced operation and maintenance expenses, or better public/community relations.

Action plan review involves a commitment of resources, but also has many advantages:

- Creates insight for new actions (technologies/practices/programs).
- Avoids repeating failures by identifying activities that were not as effective as expected.
- Assesses the usefulness of the tracking system and other administrative tools to ensure better management and evaluation.
- Provides staff the opportunity to contribute to and understand the process of energy management.
- Provides specific success stories and financial results to communicate to stakeholders inside and outside the organization.