

NOTE: Text in blue contains instructions, examples, or explanations for each applicable section. This text should be removed prior to completion & submission.

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Subject: General guidance template for creating an Energy Management Plan

Purpose: This document is intended to be a framework for energy management planning in relation to the requirements of the Clean Buildings Performance Standard.

Intended Audience: Building Owner, Authorized Representative, Energy Manager, Qualified Person, and General Public

Reference: Clean Building Performance Standard, CBPS 037- Energy Management Plan and Operations and Maintenance Guidance

Background: The energy management plan (EMP) is a living document that outlines an organization's goals for their building's energy performance, tracks actual energy use of the building, reports historical energy use intensity (EUI) metrics compared to the building's energy use intensity target (EUI_t) and incorporates operations and maintenance (O&M) protocols to ensure the building is operating as efficiently as possible.

As a living document, this report will change with the building. Goals may need to be adjusted; energy use fluctuates and priorities in energy management and capital planning may shift in time. Updates to an organization's EMP must account for these changes year to year.

[Organization Name]

[Building Picture (optional)]

[Building Name]

[Commerce Building ID]

[Building Address]

Energy Management Plan

Plan adoption date: [Date when plan was implemented]

Last Updated: [Date of last update]

Table of Contents

A table of contents is not required for CBPS compliance; however, it may assist with accessibility for occupants and other document viewers.

Please reference the [Clean Buildings Performance Standard](#) integrated document for all requirements pertaining to the standard. For more information, visit the official Clean Buildings website at <https://www.commerce.wa.gov/cbps/> or email questions to buildings@commerce.wa.gov.

Building Summary

5.1 An Energy Management Plan has been established and maintained in accordance with the standard.

This section should provide a very basic overview of the building, including the address, description of the facility, and weekly hours. Commerce has a guidance document to help with [calculating weekly hours](#).

Building Information

	Building Information
Site Name:	123 Generic Building
Address:	100 Building St., Olympia, WA 98501
Construction Year:	1990

Facility Description:	Constructed in 1990, the 123 generic building is a K-12 school with centralized DDC HVAC controls, LED lights with localized lighting control, Domestic hot water is supplied from electric boilers. In addition, the building has 6 on-site EV chargers.
Weekly Operating Hours:	35 annual average weekly hours (September-May used M-F 7am-3pm and June-August used 9am-1pm)

Building Activity Type

This section should reflect the building activity types identified on Form B in the portal. Below we have an example of an office building which contains a retail space. For more help determining/classifying building activity types, please reference [CBPS 018 - Building Activity Types, Definitions, Targets, and Shift Normalization](#).

Building Activity	Gross Floor Area (Square Feet)
Office	70,000 Sq. Ft.
Retail Store	20,000 Sq. Ft.
Total GFA	90,000 Sq. Ft.

Energy Analysis

5.1.2.6: If applicable, recommended energy efficiency measures (EEMs) were identified in the energy audit report(s) for this building.

5.1.2.7: If applicable, EEMs were implemented to ensure compliance with the standard. Include a list of EEMs that have been implemented and dates of implementation, including the following: An operations and maintenance (O&M) program as defined in Section 6 for the EEMs, An implementation plan for EEMs, including EEM commissioning Staff training plan for EEMs Ongoing commissioning plans for the EEMs

The standard does not require energy audits for every building, but when an energy audit is performed, the EMP must include a copy of the energy audit report and documentation of the recommended EEMs.

The standard does not dictate format for this documentation. The audit report with recommended EEMs may be an appendix of the document, or the EMP itself may list recommended EEMs and summarize the results of the energy audit. The below table is one example of an acceptable way to document compliance with this section.

If applicable, the EMP must include a list of all EEMs implemented to ensure the building's compliance with the standard, along with the dates of EEM implementation. The O&M program must be updated accordingly to account for each of the newly implemented EEMs.

These O&M updates must include:

- An implementation plan that includes commissioning of the new system(s) or equipment
- Updated staff training plan to ensure proper operation and management of the new EEMs
- Ongoing EEM commissioning plans for the new EEMs.

Energy Analysis (If applicable)				
EEM Name	Useful Life of EEM (yrs)	Total Project Cost	Total Savings	Measure Implementation Date
Adjust temperature setbacks	5	\$1,800	\$6,000	07/22/24
Replace Air Handler	12	\$12,000	\$9,500	11/15/24

Energy Manager

5.1.1 The building owner has designated an energy manager (EM) to develop and maintain an energy management plan for the building.

Energy Manager: The individual, identified by the building owner, who is responsible for ensuring that energy use in the building is minimized without compromising the indoor environmental quality (building indoor air quality, thermal comfort, visual acuity and comfort, sound quality). The EM may be the building owner, a tenant, an employee of the owner or tenant, or a contractor retained by the owner or tenant.

Energy Manager's name: Example Exampleson

Energy Manager's association with the building: Facilities Manager

Energy Accounting

5.1.2.2 WNEUI and EUI from the initial year of compliance for building.

5.1.2.3 Documented annual updates of net energy use, WNEUI and EUI.

5.1.2.4 Documented annual comparison of the net WNEUI and EUI to the energy target.

This portion of the EMP should provide a snapshot of the building's annual energy use metrics. This is best accomplished using tables and/or graphs to demonstrate energy use year to year and how it compares to the building's EUI, as applicable. The report must include:

- annual updates of the building's net energy use
- annual updates of the site EUI and WNEUI including the initial compliance year
- If applicable, the building's EUI as calculated on Form B of their CBPS compliance application or (for Tier 2 buildings without targets in accordance with the standard) the National Median site EUI as reported in ESPM.

This provides a summary of the building's energy performance over time and can help demonstrate changes in building energy use year to year. Buildings complying through the investment criteria that cannot develop an EUI and/or EUI are only required to record them in the EMP when measurable. The below table & screenshots from Energy Star Portfolio Manager are examples of energy accounting that building owners may use.

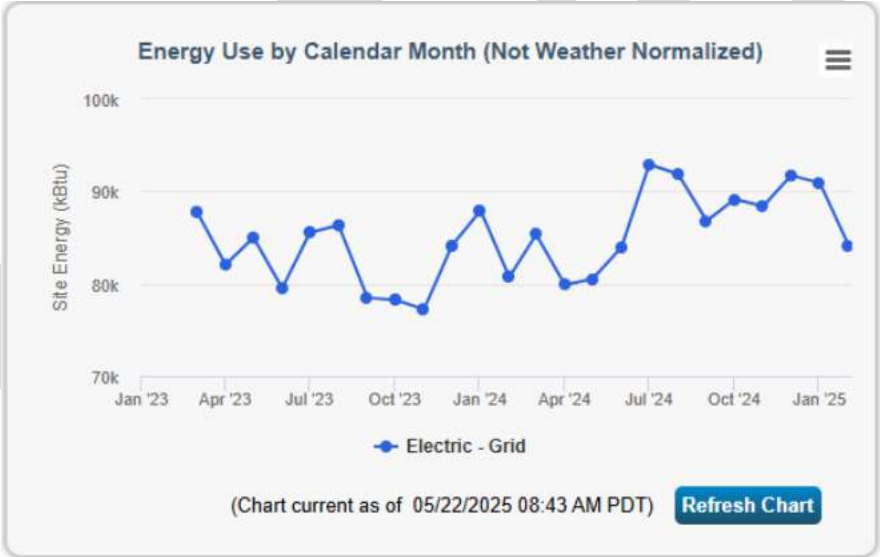
Some exceptions may apply:

- Non-target buildings as defined within the standard, do not need to document an EUI.
- Buildings complying through the investment criteria without a measurable EUI do not need to provide WNEUI/EUI metrics, though it may still be valuable to track energy use using the building's current metering configuration.

Our building's net energy is monitored and recorded in accordance with sections 5.1.2.2, 5.1.2.3 & 5.1.2.4.

Year	Net Energy Use (kBtu/yr)	WNEUI	EUI	EUI	Difference between WNEUI and EUI	Difference between EUI and EUI
2022	5,028,655	50.6	50.2	52.3	-1.7	-2.1

Metrics Summary			
Metric	Feb 2024 (Energy Baseline)	Feb 2025 (Energy Current)	Change
ENERGY STAR Score (1-100)	97	97	0.00 (0.00%)
Site EUI (kBtu/ft²)	28.4	29.9	1.50 (5.30%)
Weather Normalized Site EUI (kBtu/ft²)	28.4	29.9	1.50 (5.30%)
Target Site EUI (kBtu/ft²)	30.9	32.0	1.10 (3.60%)



Building Changes

5.1.2.5: Documentation of original, current, and changes in number of occupants, weekly operating hours, or time of day scheduled for occupancy, production rates, and energy using equipment that would have caused change in the measured WNEUI and EUI.

Document baseline occupancy numbers and time of day schedules that correlate directly with the annual EUI metrics tracking in Sections 5.1.2.2 through 5.1.2.5 and adjust as changes occur year to year.

Be sure that the building's current weekly operating hours align directly with the average weekly operating hours selected for the building on Form B.

Date of Change	Description of Building Change	Impact of Change
4/1/25	Leased 7th floor (previously empty)	Increased occupancy from 60% to 70%

Occupant and Stakeholder Communication

5.1.2.8: Method developed to inform occupants about the benefits of efficient energy use and to instruct them in the use and adjustment of operable windows, HVAC system controls, and lighting system components and controls. This shall include materials (electronic or printed) as appropriate.

5.1.3: The Energy Manager has provided access to the energy management plan for building occupants and other stakeholders on an annual basis.

- On an annual basis, the Energy Manager (EM) must notify building occupants and stakeholders to provide access to the EMP.
- The energy management plan (EMP) must address the requirements for communication with the occupants.
- The communication plan must be included in the EMP whether the building owner takes responsibility to develop it or delegates the responsibility by including in the tenant agreements.
- The EMP must state how the occupants will be informed about the benefits of energy-efficient building operation ensuring their awareness and how they will be provided with the user interface instructions for the efficient operation of such items as operable windows, HVAC system controls, and lighting system components or controls.

This provides occupant education in an effort to reduce building energy consumption. For example, a memo or guide might be distributed annually to the building occupants in electronic or printed form, with the EMP linked or attached.

Intended Recipient(s)	Communication	Method	Frequency
Example: Building Staff	Energy Conservation Tips	Posters hung in break room	Ongoing
All occupants	Energy Management Plan	Email	Annually
Facility staff	Energy best management practices	In-person training	Quarterly

Training Plan

5.1.2.9: Training plan developed for the O&M personnel to operate the building systems to achieve established indoor environmental targets with optimum energy efficiency.

- The operations and maintenance (O&M) program must include an energy-related training plan focusing on how to operate the building systems to optimize energy efficiency without compromising the quality of the indoor environment or the system functionality.
- The training is required for staff responsible for building operations and maintenance, including but not limited to the building operator and the maintenance personnel.

The Energy Manager is responsible for administering and maintaining training including developing, documenting and distributing procedures to the building personnel for energy-efficient operation of building components, such as exterior doors and windows. Training can be provided in house by qualified personnel, through equipment and systems manufacturer training, building efficiency training programs, etc. Evaluate training opportunities annually and document and incorporate training strategies.

Audience	Training	Cadence	Details
Facilities manager, admin staff and HVAC technician	Clean Buildings Best Practice Review	Annual training program every year	Annual workshop covering best practices for maintenance, tracking, recordkeeping.
All facilities staff	Preventive maintenance safety	Quarterly	Lock out, tag out, fall protection, etc.

Capital Management Plan

5.1.2.10: Capital management plan identifies equipment for replacement with energy efficient and ENERGY STAR rated equipment in case of failure.

A capital management plan is a mechanism for building owners to better understand their building's future operational needs and help with planning and budgeting for eventual replacement of systems. The intent is to assist owners in forecasting required maintenance, help in scheduling to avoid emergency situations and to better predict the upcoming needs to allow for fund acquisition. A good capital management plan will outline immediate building needs and identify necessary tasks which can be scheduled for later, as time and funding allows.

The capital management is directly tied to the implementation of the Operation and Maintenance program. A well-developed O&M program will identify building systems that may be underperforming or nearing the end of their useful life. For example, a routine maintenance inspection may identify unacceptable condition indicators for a piece of equipment or system, the issue gets logged and triggers a repair or workorder request to remedy the findings. If that equipment continues to perform poorly or is determined to be nearing its end of useful life, the organization can then move the equipment into their capital management plan and start planning and budgeting for more substantial repairs or full replacement of the asset.

Additionally, any EEMs targeted for later implementation, such as those EEMs marked for delayed implementation, should also be included in the Capital Management Plan with a scheduled date of replacement.

If including a standardized life expectancy table, a description of how that table corresponds to the Capital Management Plan should be included. This should explain how equipment beyond the life expectancy of the table is evaluated for replacement.

Below is an example of what this may look like: buildings may use this format or attach/screenshot their own developed capital management plans in this space.

			Budget				
Current Equipment	Remaining Useful Life (years)	Energy Efficient Replacement Option	2025	2026	2027	2028	2029
T8, T12 Lighting Floors1-5	2	LED retrofit		\$60,000	\$20,000		
RTU-1,2,3	3	(3) 6 Ton HP Packaged Units			\$40,000		
Roof Membrane	1	Re-roof, new TPO w/rigid insulation	\$75,000				
Existing BAS	4	Upgrade BAS software				\$50,000	
		Total Budgeted:	\$75,000	\$60,000	\$60,000	\$50,000	

Contact List

5.1.2.11: A contact list of suppliers and manufacturers' local representatives of energy efficient equipment, qualified energy auditor, the Energy Manager, and the building owner.

This list is intended to provide readily accessible contacts to qualified personnel who have current expertise at hand when decisions on maintaining or obtaining energy efficiency in your buildings equipment and systems.

Below is an example of what this may look like: buildings may use this format or submit their own contact/vendor list in this space.

The contact list for our energy management staff, preferred energy auditors and other contractors, and local suppliers can be found in the table below.

Energy Management Staff			
ROLE	ORGANIZATION	CONTACT NAME	CONTACT INFO
Building Owner	Example Inc.	Example Exampleburg	(000)-000-0000
Energy Manager			
Contractors			
SCOPE OF WORK	COMPANY	CONTACT NAME	CONTACT INFO
Energy Audit			
Manufacturer/Suppliers			
EQUIPMENT	COMPANY	CONTACT NAME	CONTACT INFO
HVAC			
Electrical			

Lighting

5.1.2.12 The current lighting schedule and the calculated lighting power density along with the potential savings from any potential EEMs.

5.1.2.13 The current lighting satisfaction survey and lighting checklist as described in Appendix D of Performance Measurement Protocols for Commercial Buildings 1 or as approved by the AHJ.

This section is NOT required for buildings that fit any of the following parameters:

1. Buildings and grouped buildings that meet the EUI.
2. Buildings that have implemented a utility program lighting upgrade covering 75% of the building's GFA through a utility program within the previous five years.
3. Tier 2 covered buildings
4. Buildings not meeting the definition of covered building.

If none of the criteria above apply to your building, the law requires your EMP to document both lighting Performance and Occupant Satisfaction. A free excel-based workbook for meeting this requirement is available via the [Smart Building Center](#).

Signature

5.1.4: The building owner has reviewed and signed the energy management plan annually.

This plan was prepared by [Name of preparer] for [Name of building owner/client] in order to demonstrate compliance with [Tier 1/Tier 2] covered building reporting requirements of the Washington State Clean Buildings Performance Standard.

Building Owner/Authorized Representative:

Printed Name: _____

Signature: _____

Date: _____

Appendix 1.

Use this section to attach documents from each applicable section that may be longer or include external links