

ISO 50001 first steps

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THE ENERGY MANAGER'S PLAYBOOK

"I was listening to an episode on my way home from work and I had to turn it off because I was getting too many ideas that I wanted to listen to it at home where I could take notes."

-Allison



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Expanded Energy Management (EEM) Program

- Offered for commercial, institutional and industrial facilities
- Offers support to improve energy performance with energy savings opportunities with the following:
- Energy manager support
- Expanded strategic energy management cohorts & curriculum
- Energy management information systems (EMIS)*
- Energy practitioners training*

**For industrial facilities only*

Finding the first steps toward ISO 50001

1. What ISO 50001 is and what is involved in implementation
2. How ISO 50001 connects to existing strategic energy management (SEM) practices
3. What practical first steps look like and how to move forward

Follow along in the participant workbook!



Watch for this icon to help follow along

Have the workbook open

Find the workbook:

- In the invitation
- In the chat



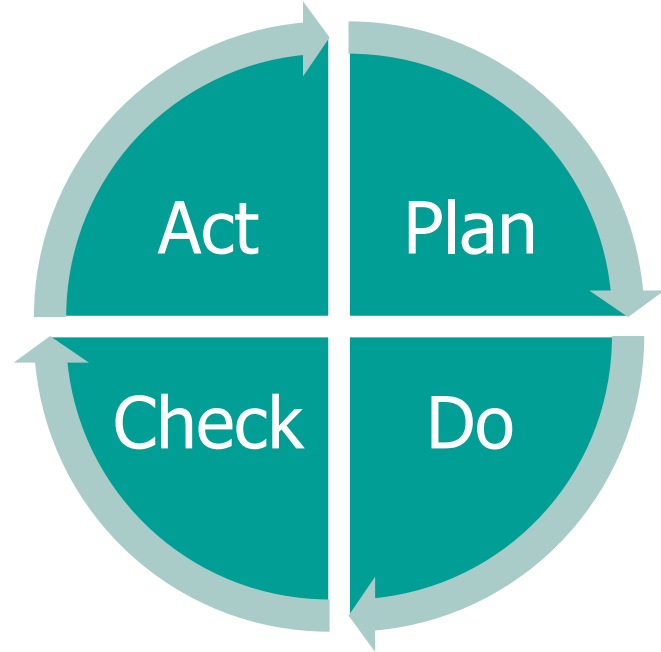
What ISO 50001 is (and is not)

- ISO 50001 is an international standard for managing energy.
- It supports systematic improvement of energy performance.
- It is a management system, not a single project or audit.
- It is not a technology list or one-time exercise.



The continual improvement cycle

- Progress happens through iterations, not perfection.
- Organizations move toward ISO 50001 at different speeds.



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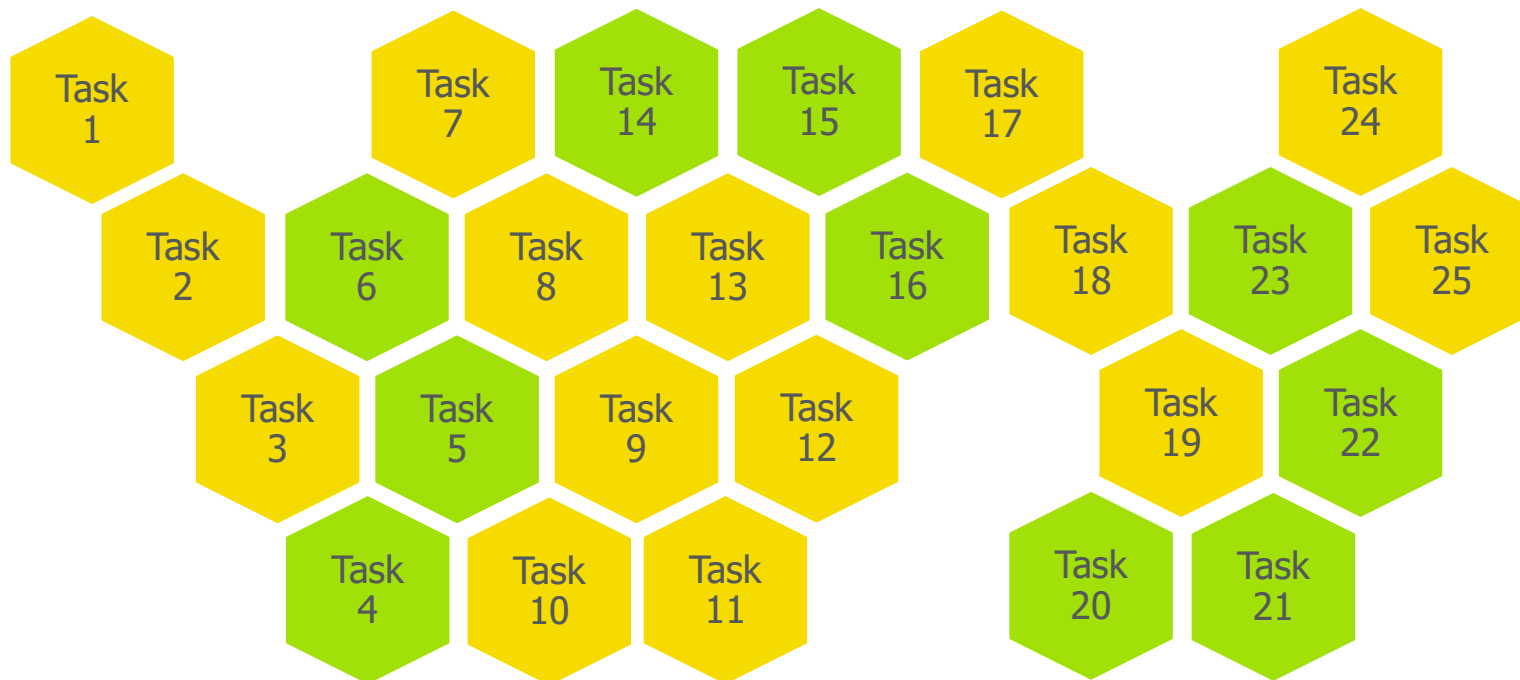
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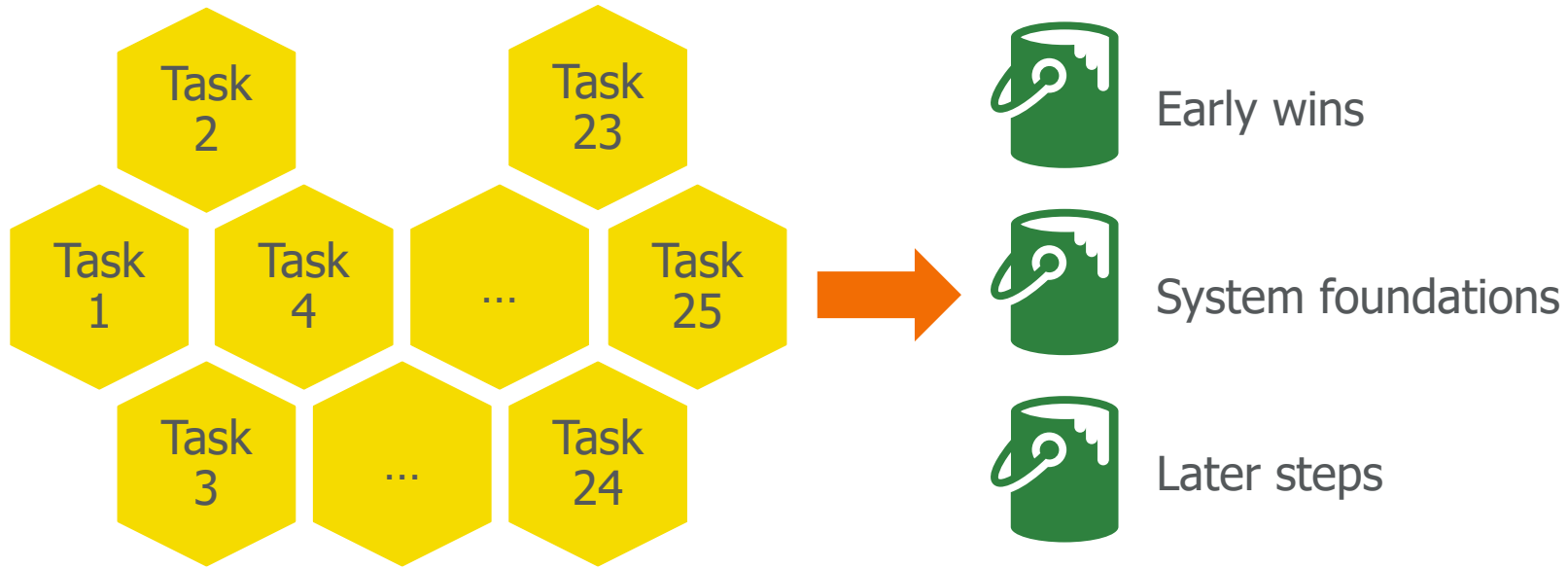
Moving from understanding to implementation

ISO 50001 implementation includes 25 tasks



Implementation does not have to be overwhelming

4



Tasks cluster into a few big categories, which allows organizations to focus and sequence work

A simplified roadmap for implementation



- 1 Understand ISO 50001 components
- 2 Map current practices against requirements
- 3 Prioritize components to work on
- 4 Implement selected components
- 5 Repeat steps 3 and 4 until you have an ISO 50001 compliant EMS
- 6 Apply for certification

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Understanding what is already in place

2

Map current practices against requirements

A focused gap analysis:

- Demonstrates what exists and what is missing
- Can be carried out internally or with external support



- Use the SEM to ISO 50001 Ready as a tool
- See where existing practices are already aligned with ISO 50001 tasks

Share in the chat

How many tasks did you rate as partially or fully implemented?

Did you rate more tasks higher or lower than you expected?

Example: energy team and resources (task 6)

The screenshot displays the 50001 Ready Navigator web application. At the top, there's a navigation bar with the 50001 Ready logo, a 'Navigator' tab, and links for 'LANGUAGE' (English), 'Log In', 'Contact', 'FAQs', and 'Explore'. Below this, a 'Project Dashboard' section shows 'Leadership' as the selected project. A 'Task Status' bar allows jumping between tasks 1 through 25, with task 6 currently selected. The main content area for 'Task 6: Energy Team and Resources' includes a description: 'We have an energy team authorized by top management to oversee the energy management system. Responsibilities and authorities are assigned and communicated, and processes are in place to identify and provide resources.' It also features a 'Get Help' button and a 'Log in to track progress' button. Below the description is a 'Detailed Guidance: Energy Team and Resources' section with a list of six steps: 1. Form an energy team and obtain authority from top management for it to oversee the energy management system (EnMS) and carry out assigned responsibilities. 2. Document who the energy team leader is. 3. Schedule regular energy management team meetings. 4. Assign and communicate EnMS responsibilities and authorities within the organization. 5. Address and communicate responsibilities for other relevant roles. 6. Identify, communicate to top management, and allocate the resources needed for the EnMS. At the bottom, there's a footer with logos for 'ieso', 'Canada', and 'Natural Resources Canada', along with contact information and a language selector (English/Français).

Detailed questions for task 6:

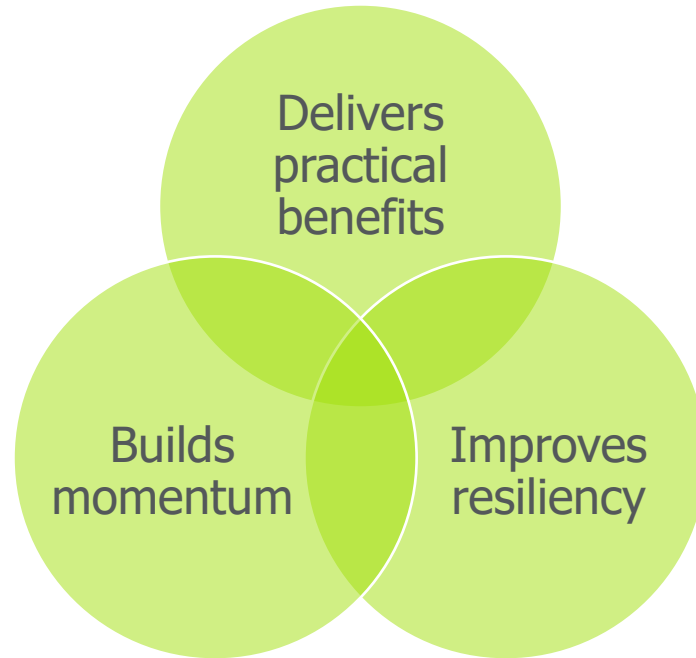
- Have you formed an energy team?
- Have you obtained authority from top management for your energy team to oversee the EMS and carry out assigned responsibilities?
- Have you identified, authorized and documented an energy team leader?
- Have you scheduled regular energy management team meetings?

Selecting your starting point

3

Prioritize components to work on

A strong first step



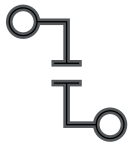
Practice scenario: Mapleview University (context)



- Mid-sized university campus
- Energy managed by facilities
- Decisions involve multiple stakeholders



- Centralized utility tracking
- Past efficiency projects
- Motivated energy lead



- Foundational elements not defined
- Core energy management processes missing
- Governance gaps



- Limited leadership attention and no dedicated budget
- Facilities team at capacity
- Need visible progress to maintain support

Core task:

- Review the list of identified ISO 50001 task gaps
- Select one task that would be a strong place to start for Mapleview University
- Be prepared to explain your reasoning using the prioritization criteria

Stretch task:

- Briefly think about, “what are one or two actions you could take to begin closing this gap?”
- Keep actions high level and realistic

Group share (type in the chat or unmute)

What is your chosen first step in this practice scenario and why?

Task 9 can be a strong starting point

Task 9 requires you to:

- Identify SEUs within your boundaries
 - Define criteria for what makes something significant
 - Assign responsible personnel
 - Establish how performance will be monitored and reviewed
- **Delivers practical benefit**
 - Identifies SEUs to focus efforts and deliver savings
 - **Builds momentum**
 - Builds awareness and gets people involved in energy efficiency
 - **Improves resiliency**
 - Defines and distributes ownership of energy performance

Program integration for Task 9

- **Delivers practical benefit**

- Identifies SEUs to focus efforts and deliver savings

- **Builds momentum**

- Builds awareness and gets people involved in energy efficiency

- **Improves resiliency**

- Defines and distributes ownership of energy performance

This task can help focus efforts that lead to incentives!



EEM



Retrofit



EBCx

Making an action plan to progress

A good 30-day action plan



Focused on a few concrete steps



Has a clear owner



Defines what success looks like



Is realistic within existing constraints and data

Four types of actions you can start with



Context-setting

Making sure you understand what you are working on, who is involved, and where the boundaries are before you act



Leadership commitment

Getting the right people to agree this matters and to support the effort



Planning

Deciding what you are going to focus on and how you will approach it



Implementation

Actually doing the work and putting the decision into practice

Examples of actions that can fit into a 30-day plan (1)

1

Understand ISO 50001 components

- **Context-setting:** use 50001 Ready Navigator to clarify tasks and requirements
- **Leadership commitment:** get confirmation that leadership is interested in implementing aspects of ISO 50001

Examples of actions that can fit into a 30-day plan (2)

2

Map current practices against requirements

- **Context-setting:** learn about conducting a gap assessment and identify who should be involved
- **Implementation:** hire a consultant to conduct a gap assessment

Examples of actions that can fit into a 30-day plan (3)

3

Prioritize components to work on

4

Implement selected components

- **Context-setting:** define system boundaries and identify key stakeholders
- **Leadership commitment:** confirm management commitment, draft basic energy policy content and initiate an energy team
- **Planning:** identify priority SEUs, define simple energy performance indicators (EnPIs) for key systems and set initial objectives and targets
- **Implementation:** draft energy-related requirements for design and procurement



- Developed basic understanding of ISO 50001
- Completed gap assessment with external support
- Identified key task gaps
- Now prioritizing next steps
- Received list of potential actions, but not all are strong 30-day starting points



- Facilities manager: oversees operations; limited time
- Energy lead: coordinates SEM; no formal authority
- Capital planning representative: focused on long-term projects; limited execution role
- Senior administrator (VP): interested in results; expects concise updates

Practice scenario: Mapview University (actions)

10

Identify priority SEUs

Clarify pilot boundaries

Document all 25 ISO 50001 tasks

Develop full operational controls

Purchase new monitoring hardware

Map key energy stakeholders

Align procurement policies with ISO 50001

Confirm leadership commitment

Draft basic energy policy

Define one simple EnPI

Establish management review calendar

Set initial objectives

Draft minimum energy requirements for design/procurement

Core tasks:

- From the list of possible actions, select 3–5 actions you would include in a 30-day plan
- For each selected action, identify which category it falls under (context-setting, leadership commitment, etc.)
- Briefly explain why these actions are good choices for the 30-day plan and which ones could help your organization better identify or advance energy efficiency projects?

Stretch tasks:

- For each selected action, who at Mapleview would be the most appropriate owner?
- What support would they need to move this forward?

Group share (type in the chat or unmute)

What type of action did you include?

Who should be the owner?

What support do they need?

Getting the buy-in you need

A short one-pager helps:

- Keep thinking clear
- Make work traceable
- Make it easy to revisit later

Potential questions to answer:

- Why does this matter?
- What is happening now?
- What are you asking for next?

Practice scenario: Mapleview University (continued)

Mapleview University is planning to define, select and begin developing energy performance criteria for SEUs.

How would you communicate the importance of implementing this task to the people who are impacted or involved?

Key takeaways

- ISO 50001 is proven to drive continuous energy performance improvement, but it can be daunting at first.
- Not all ISO 50001 tasks need to be done at the same time.
- Choosing a first step that delivers practical benefits, builds momentum and improves resiliency helps you deliver results quickly.
- Implementing these tasks can lead directly to energy-saving projects.

How the EEM Program Supports ISO 50001

- ISO 50001 implementation can be accelerated through the EEM program
- EEM provides funding to support energy manager capacity covering up to **50% of salary costs to a maximum of \$100,000 per facility per year.** Additional support from an energy manager would help identify and prioritize SEUs and strengthen their energy management capacity.
- Through the Strategic energy management (SEM) stream, Maplevue could benefit from expert-led coaching to help formalize campus-wide energy management practices

Energy Management Information Systems (EMIS)

EMIS incentives are available through Save on Energy's Expanded Energy Management Program

Industrial facilities can receive incentives up to 50% of the eligible costs to implement an EMIS:

1. \$50,000/facility with $\leq 400,000$ GJ annual baseline consumption (all fuels)
2. \$250,000/facility with $> 400,000$ GJ annual baseline consumption (all fuels)

An EMIS includes measurements, networks, data storage, energy management information, people and management processes.

Projects must be completed before **March 2027** while funding is available. To start your application process, **please email** SEM@ieso.ca.

Financial support for industrial facilities participating in the Expanded Energy Management Program is provided by Natural Resources Canada (NRCan) as part of its Green Industrial Facilities and Manufacturing Fund.

Join the energy management community!

- **Peer learning** opportunities
- **Spark** bulletin with news, events and community updates
- Access to the **Energy Manager Learning Platform**
 - Online courses
 - Resources
 - Discussion forum
- **Free expert support** on improving energy management practices and energy efficiency projects

Registration is free!



For more information:
trainingandsupport@ieso.ca

Stay connected with tools and resources

- Virtual one-on-one coaching: [post-webinar support intake form](#) for tailored support for organizations to manage energy resources effectively
- Monthly bulletin: [sign up](#) to receive monthly training updates on all Save on Energy training and support for new tools and resources
- [Live training calendar](#): visit this page to easily register for upcoming events and workshops
- [Training and support webpage](#): visit this page to access all training and support materials

Save on Energy's Capability Building Program

- Save on Energy's Capability Building program helps increase awareness about energy-efficiency opportunities, enhance knowledge and develop skills in organizations and communities across Ontario so they can undertake energy-efficiency actions and participate in Save on Energy programs.
- The program includes tools such as workshops, [webinars](#), training courses, coaching, peer learning and information resources, including guides and videos.



Learn more at
<https://saveonenergy.ca/Training-and-Support>
Register at
www.saveonenergytraining.ca

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