

April 2025

Service provider list

# Energy management plan

Guidelines



## Objectives

The objective of the service is to provide businesses with assistance to:

1. Overcome customers' barriers to implementing energy management systems and energy management plans.
2. Develop business cases to achieve cost-effective energy efficiency measures, at customers' sites.

## Role of registered service providers

1. **Developing an understanding** how energy is consumed within the customer's organisation and identifying appropriate solutions for reducing and/or managing the customer's energy use.
2. **Satisfying itself** that any potential project will identify sufficient energy savings opportunities and setting an energy savings target for the project for this purpose that warrants the businesses investment in the project.
3. **Providing cost quotations** to customers which include:
  - 3.1. A list of the Energy Management Plan project milestones (actions/deliverables to be achieved) including:
    - 3.1.1. Establishment of energy management team and staff with key accountabilities.
    - 3.1.2. Establishment of Energy Management System including the documentation and sign-off of an Energy Management Plan containing:
      - 3.1.2.1. An energy management policy.
      - 3.1.2.2. Energy savings targets.
      - 3.1.2.3. Action plans for achieving the energy management objectives and targets.
    - 3.1.3. The ongoing measurement and verification of energy savings.
  - 3.2. The expected timeframe for achieving each milestone.
  - 3.3. The anticipated costs of:
    - 3.3.1. The equipment and materials, if any, to be supplied by the service provider (including all details of service provider margins if requested).
    - 3.3.2. Labour for carrying out the Energy Management Plan project and each of the Energy Management Plan project milestones (including a break-down by hours and hourly rates).
    - 3.3.3. Any other services (if relevant) for the Energy Management Plan project.
4. **Agreeing and warranting** that:
  - 4.1. The price for each product and service covered by the cost quotation will be the lesser of:
    - 4.1.1. Its standard retail price.
    - 4.1.2. The best price then offered by the registered service provider to any other customer for each such product and service.
    - 4.1.3. The best price reasonably available in the market for each such product and service.
  - 4.2. Its personnel (including subcontractors):
    - 4.2.1. Are suitably qualified and experienced in Energy Systems Optimisation project work (such as industrial process, thermal system, BMS, HVAC, refrigeration, and lighting control systems as applicable to the project work they intend to do).
    - 4.2.2. Includes at least one person in the registered service provider's organisation has suitable energy audit accreditation and experience.

- 4.2.3. Includes at least one person in the registered service provider's organisation involved in the project is accredited in the application of International Performance Measurement and Verification Protocol (IPMVP). E.g. AEE accredited Certified Measurement and Verification Professional (CMVP); EVO accredited Performance Measurement and Verification Analyst or Expert (PMVA/PMVE), or similar.

## Services undertaken by registered service providers

The Service Provider will:

1. **Sign an agreement with the customer** to implement the Energy Management Plan project. The agreement must contain:
  - 1.1. A commitment by the customer to the formation and implementation of an energy management team which includes a top-level management representative (Chief Executive or a Board member) with appropriate skills and competence, who has authority to ensure the Energy Management System is established, implemented, maintained, and continually improved (in accordance with ISO 50001 or equivalent).
  - 1.2. A commitment by the Customer to provide and incentivise for the resources (human, technological, and financial) needed to establish, implement, maintain and improve an Energy Management System and improve energy performance.
  - 1.3. Where relevant, an agreement by the customer to enter agreements with tenants to implement cost-effective energy efficiency measures (i.e. measures that meet the tenants' investment criteria) in those aspects of the building/s that the tenants have control over
  - 1.4. A description of the services provided by the service provider
  - 1.5. The project costs
  - 1.6. An Energy Savings Guarantee to meet at least 50% of the Energy Savings Target by end of the agreed Guarantee Period
2. **Assist the Customer with establishing Energy Management System** and align the Energy Management System with the strategic fit of the customer. The Energy Management System must:
  - 2.1. Include the development an Energy Management Policy detailing the principles that the customer will adopt towards its energy use and management of energy which must:
    - 2.1.1. Be appropriate to the nature and scale of the customer's energy use and consumption.
    - 2.1.2. Include a commitment to continual improvement in energy performance.
    - 2.1.3. Include a commitment to ensure the availability of information and of necessary resources to achieve objectives and targets.
    - 2.1.4. Provide the framework for setting and reviewing energy objectives and targets.
    - 2.1.5. Encourage the purchase of energy-efficient products and services, and energy performance improvement design.
    - 2.1.6. Align with the customer's strategic drivers and objectives and written and communicated in a way that is related back to the company's strategic drivers and objectives.
    - 2.1.7. Be documented and communicated at all levels with the customer's organisation.
    - 2.1.8. Be regularly reviewed and updated as necessary.
    - 2.1.9. Be signed off by the energy management team, including the top-level management representative.
    - 2.1.10. Analyse baseline energy use by identifying current energy sources and evaluating past and present energy use and consumption.
  - 2.2. Based on the analysis of energy use and consumption, identify the areas of significant energy use, including:

- 2.2.1. Identifying the facilities, equipment, systems, processes, and personnel working for, or on behalf of, the customer that significantly affect energy use and consumption.
- 2.2.2. Identifying other relevant variables affecting significant energy uses.
- 2.2.3. Determining the current energy performance of facilities, equipment, systems and processes related to identified significant energy uses.
- 2.2.4. Estimating future energy use and consumption
- 2.3. Identify, prioritise and record opportunities for improving energy performance including:
  - 2.3.1. Identifying the main areas of opportunities for improving energy performance, with reference to the appropriate audit standards (e.g. a Type 1 or Type 2 energy audit as defined by AS/NZS 3598:2014).
  - 2.3.2. Identifying those areas of potential where a Type 3 Audit / in-depth review as necessary.
- 2.4. Set revised energy savings targets based on the energy savings opportunities identified.
- 2.5. Establish action plans for achieving the energy management objectives and targets, including:
  - 2.5.1. The means and timeframe by which individual energy savings targets are to be achieved.
  - 2.5.2. Designation of responsibility for achieving the targets
  - 2.5.3. The method by which energy performance improvement will be measured, verified and reported, which may include identifying a need for a comprehensive measurement and verification system.
  - 2.5.4. The method by which energy savings will be achieved on an ongoing basis, such as a continuous commissioning process.
  - 2.5.5. The means by which energy savings will be reinvested into future energy efficiency initiatives.
- 2.6. Document the above findings in an Energy Management Plan for the customer to approve.
3. **Compile a business case** which must:
  - 3.1. Identify the energy efficiency opportunities that meet the customer's investment criteria and budgets, and cover at least the next twelve-month period, including:
    - 3.1.1. The Energy Management Plan Project scope.
    - 3.1.2. Description of each opportunity, how it will be implemented (including any procurement process that may be necessary) and implementation timeframes and responsibilities.
    - 3.1.3. Costs of each opportunity, which might include (where required) the estimated costs of carrying out a Type 3 audit, implementing a measurement and verification system, carrying out continuous commissioning, and installing the appropriate technology solutions.
    - 3.1.4. Benefits of each opportunity (including estimated energy savings and operational savings).
    - 3.1.5. A timeframe of the Energy Management Plan project
  - 3.2. Provide an investment analysis, including:
    - 3.2.1. Cash flow analysis, showing the timing of costs and benefits.
    - 3.2.2. Return on investment for the total package of measures (including NPV and ROI).
  - 3.3. Provide evidence that the recommended actions meet the customer's investment criteria.
  - 3.4. Provide a reporting plan, detailing when the outcomes of the business case will be reported back (including the energy savings measurement methodology to be applied), the regularity of reporting and the information that will be contained in the reports.
  - 3.5. Be in the appropriate format for the customer (e.g. using the customer's own template for business cases, if available and appropriate) and include any other information required by the customer to obtain approval and sign-off by the customer.

- 3.6. Be presented to the customer's decision-makers to approve and sign off.
4. **Measure and verify** the energy savings over the measurement and verification period (which must be no less than the guarantee period) by monitoring energy consumption of each site post-implementation against baseline energy consumption using the IPMVP.
  - 4.1. Measurement and verification activities include:
    - 4.1.1. Undertaking measurement and verification activities required by the appropriate option (options A, B or C) of the IPMVP.
    - 4.1.2. Data analysis.
    - 4.1.3. Periodic facility walk-throughs as proposed under the project funding application.
    - 4.1.4. Equipment monitoring and control.
    - 4.1.5. Identification of additional energy savings measures.
  - 4.2. Measurement and verification activities must be undertaken by a person or persons that have received appropriate training and accreditation in the IPMVP standard (refer 3.2.2).
5. **Reporting** the identified opportunities, estimated cost/energy/carbon benefits, and once implemented the measured outcomes is to be provided to the customer. Where a project has received EECA co-funding the report will be provided to EECA.

## Contact us

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