



SEM RESOURCE

INCORPORATING DEI AND LEAN MANAGEMENT INTO SEM PLANNING



RESOURCES FOR TODAY'S
ENERGY **MANAGEMENT**

Developed by members of the Northwest SEM Collaborative, the following document describes principles of diversity, equity, and inclusion (DEI) and Lean Management that strategic energy management (SEM) participants can use to improve their energy management assessment plans.

Together, DEI and Lean Management best practices can ensure that facilities incorporate all voices and motivate full-team participation for more inclusive, synergistic, and comprehensive SEM programs.

DIVERSITY

Diversity is a broad array of differences in identity, perspective, skill, and style.

EQUITY

Equity is achieved when practices and policies are just, transparent, and consistent.

INCLUSION

Inclusion is achieved when all community members are actively welcomed, connected, and valued.

LEAN MANAGEMENT

Lean Management is a process improvement approach that uses a collaborative team effort to improve performance by systematically removing operational waste.

COMMITMENT

Clear organizational commitment is vital for programs to succeed.

POLICY AND GOALS

Set, frame, and communicate long-range objectives.

	VALUE TO SEM	THINGS TO CONSIDER
DEI	DEI enhances policies and goals by involving more voices in the process. Engaging a variety of staff drives equity and reduces the risk that stakeholders are left out of the conversation or otherwise negatively impacted.	• <i>Have you invited staff at all levels and backgrounds to provide input into your policies and goals?</i> • <i>Do your policies and goals affect certain staff members more than others? If so, have you engaged them as key stakeholders in your development and communication efforts?</i>
Lean	Lean Management enhances policies and goals by promoting a systematic and continuous improvement approach that focuses on eliminating waste, increasing efficiency, and aligning processes with strategic objectives to achieve greater effectiveness and agility.	• <i>How can you incorporate Lean Management principles into your policies and goals?</i>

RESOURCES

Ensure that initiatives are properly resourced for goal attainment, including by assigning responsibility or accountability to an individual champion or team, or by supporting employee engagement activities.

	VALUE TO SEM	THINGS TO CONSIDER
DEI	DEI can bolster SEM resources by creating a more diverse energy team, thereby strengthening efforts with a broader range of skill sets, experiences, organizational relationships, and business operations expertise. DEI can help ensure that everyone feels like they can participate and add value to teams that embrace a variety of perspectives, regardless of gender, gender identity, ethnicity, language, sexual orientation, disabilities, neurodiversity, socioeconomic status, age, religion, location, or veteran status.	• <i>Do you consider your audience's language(s), abilities, levels of understanding, locations, and other specifics of their lived experiences when creating content for awareness and communications?</i> • <i>Do you consider how to engage remote employees and disabled employees in awareness campaigns and energy team participation efforts?</i>
Lean	Lean Management enhances resource allocation, utilization, and management to minimize waste, improve efficiency, and maximize the overall value that resources deliver to an organization.	• <i>How can you maximize value and minimize waste by incorporating Lean Management principles into your resourcing processes?</i>

PLANNING AND IMPLEMENTATION

Energy champions and teams implement energy management assessment plans by translating plans into actions that work towards program goals.

ENERGY MANAGEMENT ASSESSMENT

Assess current energy management practices by using a facilitated assessment or performance scorecard.

	VALUE TO SEM	THINGS TO CONSIDER
DEI	Broaden the scope of your energy management assessment efforts by incorporating DEI considerations. This may include encouraging a diverse team to attend the energy management assessment and providing participation alternatives (e.g., online surveys) to accommodate diverse schedules, language barriers, and learning styles.	• <i>Who is missing from your energy management assessment?</i>
Lean	Both Lean Management and SEM enhance energy management approaches by emphasizing comprehensive evaluations, data analysis, and process optimization. While Lean Management focuses on broader operational efficiencies, SEM targets specific energy-related improvements to foster more sustainable and cost-effective energy management practices.	• <i>Does your SEM program encompass Lean Management's emphasis on broader operational efficiencies to foster more sustainable and cost-effective energy management practices?</i>

ENERGY MAP

Develop a breakdown or map of energy end-uses and costs across the company.

	VALUE TO SEM	THINGS TO CONSIDER
DEI	Ensure energy mapping is a clear and easy-to-understand process with tangible results. Invite input and feedback from a diverse array of stakeholders and utilize visual representations (with a mindfulness of color blindness and other visual impairments) to help a broad audience understand the biggest energy users.	• <i>Is your energy mapping easy to understand and effectively communicated across your organization?</i>
Lean	Lean Management enhances energy mapping through processes like value stream mapping, which helps an organization visually document and analyze the flow of energy and related processes to identify waste, inefficiencies, and opportunities for improvement.	• <i>Does your SEM program achieve more efficient energy usage by utilizing Lean Management processes like value stream mapping?</i>

METRICS AND GOALS

Establish clear, measurable goals for performance improvement based on one or more performance indicators.

	VALUE TO SEM	THINGS TO CONSIDER
DEI	By reviewing your DEI goals alongside your energy goals, you can identify synergies and opportunities to involve stakeholders from both groups. When developing energy performance metrics and goals, consider investing in staff development, training, and resources to empower them to achieve the organization's goals. Strategies may include: • Promoting more BIPOC staff to leadership positions. • Investing energy savings or incentives into DEI efforts.	• <i>Have you reviewed DEI metrics and goals with your energy metrics and goals to identify possible synergies?</i> • <i>Have you considered investing in staff training or additional resources for BIPOC staff to help you achieve your energy and DEI goals?</i>
Lean	Lean Management enhances energy metrics and achieves goals by: • Incorporating specific processes, such as auditing and scoring methods, for each Lean Management methodology. • Employing tools such as quick changeover. • Utilizing Lean boards to establish clear and measurable energy efficiency metrics and goals. • Facilitating continuous improvement and performance tracking.	• <i>Does your SEM program incorporate specific Lean processes to enhance energy metrics and achieve goals?</i>

PROJECT REGISTER

Describe the actions to be undertaken over the course of one or more years.

	VALUE TO SEM	THINGS TO CONSIDER
DEI	Take a DEI approach to creating and implementing project registers to ensure that project lists will be not created in a vacuum. It's important to engage a variety of staff in this process, including staff impacted by the projects and those who may not be traditionally thought of as project owners or implementers. These efforts will ensure your organization considers best practices and risks, and that details are accurate, understandable, and actionable for all parties.	• <i>Do you have a variety of stakeholders from all levels, backgrounds, and skillsets involved in the process of identifying projects, creating project registers, and implementing them?</i> • <i>Does your organization create energy checklists that are specific to various equipment, departments, and work types that are formatted in a manner that is easy-to-use and understandable for a variety of audience types? Possible formats may include paper checklists, whiteboards, clipboards, mobile apps, and software programs in various languages.</i>

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	VALUE TO SEM	THINGS TO CONSIDER
Lean	Lean Management using the following processes to help organizations systematically identify, prioritize, and execute energy-saving projects with a data-driven approach: • Opportunity registers for each Lean Management methodology. • Kaizen events. • Regular monthly meetings to prioritize and implement improvements. • Root cause analysis.	• <i>Does your SEM program take a data-driven approach to energy-saving projects by incorporating specific Lean Management processes?</i>

EMPLOYEE ENGAGEMENT

Develop and implement a plan to educate employees about their impact, empower them to take improvement actions within their work areas, and solicit their ideas for solutions beyond their specific work areas.

	VALUE TO SEM	THINGS TO CONSIDER
DEI	Ensure that your employee engagement efforts are inclusive and understandable by considering various learning styles and languages. Encourage recognition of employee contributions from all levels of hierarchy and backgrounds, and celebrate all wins, big and small.	• <i>Do you seek out communications and marketing opportunities that celebrate and highlight the energy wins of BIPOC individuals?</i> • <i>Do you equitably reward and/or compensate employees for their energy conservation efforts at all levels of the organization?</i>
Lean	Lean Management fosters a more committed and motivated workforce by requiring engagement from all employees.	• <i>Does your SEM program require engagement from all employees?</i> • <i>Do you implement reward systems for energy efficiency contributions?</i>

IMPLEMENTATION

As you complete the measures documented in the project register, engage the employees affected by the measures to ensure persistent operational changes.

	VALUE TO SEM	THINGS TO CONSIDER
DEI	Coach your energy teams to use positive encouragement when asking employees to implement projects. To increase the likelihood that employees feel heard, it's important they are empowered to give their feedback during project implementation, and that management genuinely listens to their feedback when received. When making changes to work processes or physical surroundings, consider how disabled or neurodivergent employees may be impacted, and mitigate concerns and hardship with clear instructions and timelines. Further, promote the use of multiple languages in signage around the facility to communicate key energy communications.	• <i>Do employees feel empowered to give their feedback on project implementation? Are there improvements that could be made to the processes of encouraging, providing, receiving, and responding to feedback?</i> • <i>In what ways can you consider disabled or neurodivergent employees when making changes that impact their work processes or physical surroundings?</i>
Lean	Lean Management enhances implementation by utilizing detailed implementation roadmaps that compare the current state to the desired state, thereby emphasizing the importance of deadline adherence and ensuring a structured and effective approach to achieving goals.	• <i>How can your SEM program incorporate Lean Management principles to ensure a structured and effective approach to achieving energy management goals?</i>

REASSESSMENT

Periodically review performance and then reassess goals, metrics, and planned projects to ensure everything aligns with performance priorities.

	VALUE TO SEM	THINGS TO CONSIDER
DEI	Reassess energy goals, metrics, and projects with a DEI lens to ensure staff empowerment and engagement. Then, broadly communicate the process and invite feedback from all employees, especially those from under-represented groups.	• <i>As you look to reassess your energy management program, are there individuals that were previously left out that should be involved?</i> • <i>How can you implement or improve stakeholder engagement efforts in the development and reassessment of energy goals and metrics?</i>
Lean	Lean Management ensures ongoing alignment with organizational goals and continuous improvement by incorporating an annual review of the value stream map to evaluate whether the desired state remains the focus.	• <i>Does your SEM program incorporate Lean Management principles to ensure ongoing alignment with organizational goals?</i>

SYSTEM FOR MEASURING AND REPORTING ENERGY PERFORMANCE

By regularly measuring and analyzing inputs and outputs, companies can better manage their operations and improve their performance over time.

MEASUREMENT

Regularly collect performance data.

	VALUE TO SEM	THINGS TO CONSIDER
DEI	A DEI lens can help identify barriers and challenges to energy performance measurement within the market, especially for small businesses or businesses located in at-risk communities.	• <i>What resources do you need to make energy performance measurement easier?</i>
Lean	Lean Management enhances energy performance measurement in alignment with the organization's energy goals by implementing specific processes, including: • 5S (Sort, Set in order, Shine, Standardize, Sustain) to organize and optimize workspaces. • Value stream mapping to identify and eliminate energy-related waste. • Kaizen events for continuous improvement. • Just-in-Time (JIT) production. • Takt Time to determine how long processes take from start to finish. • Standard Work (e.g., Visual SOP).	• <i>Does your SEM engagement incorporate Lean Management processes to enhance energy performance measurement in alignment with the organization's goals?</i>

DATA COLLECTION AND AVAILABILITY

Collect and store measurements and improvements in commonly available formats to facilitate data availability over time.

	VALUE TO SEM	THINGS TO CONSIDER
DEI	Explore data alternatives to mitigate participation barriers.	• <i>Consider whether streamlining data collection efforts reduce the burden of your energy management program without decreasing quality or effectiveness.</i>

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	VALUE TO SEM	THINGS TO CONSIDER
Lean	Lean Management ensures more reliable and readily available information for energy management and decision-making by streamlining data collection processes, reducing data errors, and improving data accessibility. These efforts include assigning each department manager with specific deliverables.	• <i>Do your SEM efforts incorporate Lean Management data collection processes to ensure more reliable and readily available information?</i>

ANALYSIS

Conduct analyses of data and establish a baseline.

	VALUE TO SEM	THINGS TO CONSIDER
DEI	Consider those who may be excluded in energy performance analysis conversations and aim to broaden the audience. This may result in uncovering previously unknown information that is valuable to your energy reduction efforts.	• <i>Is there anyone who is not currently involved in your energy analysis process who should be?</i>
Lean	Lean Management results in more informed and actionable strategies for energy optimization by enhancing energy data analysis, including by integrating value stream mapping, Kaizen events, and visual boards. These approaches work to systematically identify inefficiencies, optimize data collection, continuously improve analysis methods, and visualize insights.	• <i>Do your SEM efforts enhance energy data analysis by integrating Lean Management processes?</i>

REPORTING

Regularly communicate the results of performance improvements and achievements to internal and external stakeholders, as necessary.

	VALUE TO SEM	THINGS TO CONSIDER
DEI	Make the effort to celebrate and highlight SEM contributors at all levels, including by sharing stories and photos to inspire a diverse array of staff members to participate.	• <i>Does your organization share energy management accomplishments with all staff members?</i> • <i>Does your organization use storytelling or photos to inspire participation from a diverse array of staff members?</i>
Lean	Lean Management enhances energy reporting by implementing specific processes, such as 5S and Gemba Walks, across various departments. This approach ensures more transparent, accurate, and collaborative energy reporting throughout the organization by enabling standardized data collection, fostering a culture of continuous improvement, and encouraging each department to actively report on their energy progress and processes.	• <i>Do your SEM efforts incorporate Lean Management processes to foster more transparent, accurate, and collaborative energy reporting throughout the organization?</i>

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