The Objective That Survives the Budget

GUIDING QUESTION *Find the action plan for your current energy objective and check it against five questions: what will be done, what resources will be required, who is responsible, when it will be completed, and how the results will be evaluated. Most hotel action plans answer four of those. Then ask which of the five, if it were missing, would cause the objective to fail without anybody ever deciding to abandon it.*

Property: _____ Completed by: _____ Date: _____

How to use this sheet: work through the five parts with the people who own the process. The text in the left-hand columns comes from the book; the empty columns are for what is true in your property.

1. Verification Pact: what is commonly believed, what actually holds, and your property

What is commonly believed	What actually holds	In our property
«We have an objective and an action plan.»	The plan has five required elements. Four of five usually means the missing one is resources, and that is the one that reaches a budget.	
«The resource figure can be added when the quotations arrive.»	Nothing schedules its addition. A temporarily incomplete plan becomes a permanently incomplete one.	
«The objective was cut in the budget.»	It was never in the budget. Nothing was refused, because nothing was requested.	
«The status is in progress.»	In progress is true of anything not closed, including things never opened. Not started and not funded are different words and both were available.	
«Objectives should never be abandoned.»	They may be updated as appropriate, including deferred or withdrawn. What is untenable is lapsing without a decision.	
«Targets and objectives are the same thing.»	A target is a quantifiable objective of performance improvement. An objective may be qualitative, and a property needs both kinds.	

2. What the standard requires, and what demonstrates it

From Table 1.11.a. The third column of the book (what is method, not requirement) is left out here: write what your property actually holds as evidence.

What is required	What demonstrates it in a hotel	In our property
Objectives at relevant functions and levels	An objective held by a department, not only by the system	
Energy targets established	A quantified performance improvement with a date	
Consistent with policy; applicable requirements considered	A traceable line from the policy page to the objective	
Significant uses and opportunities considered	An objective that addresses the largest use, not the easiest one	
Monitored, communicated, updated as appropriate	A record of the moment one was deferred, and by whom	
Action plan: what, resources, who, when, how evaluated	All five present, with the resource line filled	
Methods for verifying performance improvement	The verification method written before the work, not after	
Integration into business processes considered	The plan visible in the budget submission that year	

3. The instrument: Table 1.11.b, The five elements, and what each one prevents

The instrument of this subchapter. Check a live plan against it before the next budget cycle.

Element	What it prevents if present	How it fails if missing
What will be done	Ambiguity about scope	The plan is an intention
What resources will be required	Silent non-funding	Nothing is refused, because nothing was requested
Who will be responsible	Diffusion	Everyone assumes somebody else
When it will be completed	Indefinite deferral	Always next quarter
How results will be evaluated	Unprovable success	The work happens and nothing is demonstrated
Methods for verifying improvement	Disputed attribution	Improvement claimed and challenged
Integration into business processes	Parallel documentation	The plan lives beside the machinery, not in it

The rows above are the book's; the empty rows are for lines your property needs to add.

4. Common mistakes: self-check

Common mistake	Present here? (Yes / Partly / No)	Where we see it
Writing an action plan with four of the five required elements.		
Leaving the resource line blank because the quotations have not arrived.		
Approving the plan on a cycle that never meets the budget cycle.		
Recording in progress for work that has never begun.		
Allowing an objective to expire without a decision, a date or a signature.		
Setting only quantified targets, so that no objectives exist in a year without capital.		

5. Action plan

Step from the book / gap found	Action in our property	Owner	Deadline
Check every live action plan against the five elements. Expect the resource line to be the gap.			
Never approve a plan with a blank resource line: use a range, an order of magnitude, anything but a blank.			
Approve plans on the budget cycle, not on the cycle of their own readiness.			
Attach the objective to a department that makes a budget submission.			
Replace the words in progress with one of three: running, not started, or stopped.			
Require a signature and a reason for any deferral or withdrawal.			
At each review, ask whether the work the verification method was written for has begun.			

Step from the book / gap found	Action in our property	Owner	Deadline
Keep at least one qualitative objective alongside the quantified target.			
Ask once a year, per objective: has anything been spent on this, and when was it last requested?			

In brief

An action plan has five required elements and each prevents a different failure. Four of the five are about the work: what, who, when, and how the result will be shown. The fifth is about the property: what resources will be required. It is the only element that converts a plan into a claim, and it is the one most often left for later.

Source: The Helm and the Lens, Volume 4a: The Helm, subchapter 1.11. This sheet does not reproduce the text of the standard; work with your own copy of ISO 50001:2018 from an authorised source.