Competence Where the Decisions Are Actually Made

GUIDING QUESTION *Put two lists side by side for five minutes. The people your energy review identified as influencing your significant uses, and the people in your competence records. Count how many names appear on both. Then ask a harder question about the names on neither: who in this property approves the purchase of equipment, and what would they have to know to approve one well?*

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
«Our competence matrix covers the technical roles.»	The requirement covers persons whose work affects energy performance. Build the list from the uses, not from the job titles.	
«Contractors are their employer's responsibility.»	Persons under the organisation's control include contracted, part-time and temporary staff: most of a seasonal workforce.	
«Competence requirements are for staff.»	The guidance states they apply to top management too, and the largest energy decisions are taken there.	
«Competence means qualification.»	It is the ability to apply knowledge and skills to achieve intended results. A certificate is evidence of a basis, not of the ability.	
«If competence is lacking, we train.»	Training is one of four routes. Mentoring, reallocation and hiring or contracting are the others, and reallocation usually solves it faster.	
«The training was completed, so the action is closed.»	The requirement is to evaluate the effectiveness of the action. Completion and effectiveness are different observations.	

2. What the standard requires, and what demonstrates it

From Table 1.12.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
Competence determined for persons affecting performance	A list built from the significant uses, not from the organisation chart	
Scope includes contracted, part-time and temporary staff	The spa technician and the seasonal intake named	
Scope includes top management	A competence requirement written for whoever approves equipment	
Competence on the basis of education, training, skills or experience	Eleven seasons recorded as the basis, where that is the truth	
Actions taken to acquire competence where applicable	One reallocation or one mentoring arrangement, not only courses	
Effectiveness of those actions evaluated	Evidence that what the person could not do is now being done	

What is required	What demonstrates it in a hotel	In our property
Documented information retained as evidence	A file that states the basis, not only the attendance	

3. The instrument: Table 1.12.b, From the use to the person to the ability

The instrument of this subchapter. Start at the left column; never start from the organisation chart.

Significant use	Who actually affects it	What they decide	What they need to be able to do
Heating or cooling	Housekeeping	Whether a window opens on a heated floor	Air a room without defeating the plant
Heating or cooling	Night reception	The lobby set point at three in the morning	Know the band and when to leave it alone
Kitchen	Chefs and the first person in	What is switched on, and when	Know each machine's real warm-up time
Pool and spa plant	Contracted technician	Set points and run hours	Know the agreed band and who to tell if it moves
Irrigation and pumping	Gardener	When and how long it runs	Match the schedule to the season
Laundry	Housekeeping supervisor	Load sizes and machine selection	Know the cost of a part-filled load
All of them, once a decade	The owner	What equipment is bought	Ask on what hours a payback was calculated

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
Building the competence matrix from job titles instead of from the significant uses.		
Excluding contracted, part-time and seasonal staff from the requirement.		
Never writing a competence requirement for the people who approve purchases.		
Filing certificates as though they evidenced ability rather than a basis for it.		
Reaching for training when reallocation or mentoring would be faster and better.		
Closing a competence action on completion without evaluating its effectiveness.		

5. Action plan

Step from the book / gap found	Action in our property	Owner	Deadline
Put the two lists side by side: people who affect the uses, and people in the competence file.			
Write a four-line competence requirement for whoever approves equipment purchases.			
Name the result first, then the ability needed to achieve it.			
Record experience as the basis where experience is the truth.			

Step from the book / gap found	Action in our property	Owner	Deadline
Consider reallocating an authority before building a capability.			
Put the competence requirement for contracted specialists into the contract.			
Three months after any action, ask whether the thing is now being done.			
Ask the people whose hands are on the plant what they already know, before teaching anything.			
Keep the file to one line per person: what they must be able to do, and on what basis.			

In brief

Competence is the ability to apply knowledge and skills to achieve intended results, which makes it a capability directed at a result and not a qualification held in the abstract. Once the result is named, the question of who has to be competent answers itself, and it answers differently from the organisation chart, which is where almost every competence matrix in the industry begins.

Source: The Helm and the Lens, Volume 4a: The Helm, subchapter 1.12. This sheet does not reproduce the text of the standard; work with your own copy of ISO 50001:2018 from an authorised source.