The Management Review That Reads a Curve

GUIDING QUESTION *Take the minutes of your last three management reviews and read only the conclusions. Spend four minutes marking every sentence that records a decision: something the property will now do, or stop doing, or allocate. Not a finding, not an observation, not a confirmation that the system remains suitable. If you finish with nothing marked, the reviews took place and the requirement did not.*

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
«The review concluded the system is suitable and effective.»	That is the purpose of the review, not its output. The outputs must be decisions across seven named areas.	
«All the required inputs were tabled.»	Tabling discharges the input requirement and produces nothing. A chart placed without a question is an exhibit.	
«Resource allocation is a budget matter.»	It is a named output of the management review. This meeting is one of the places the standard expects it to be decided.	
«The action plans are progressing.»	The review must decide the actions to be taken where objectives and plans have not been achieved. Progressing avoids triggering that.	
«Everything has to be covered in one meeting.»	The whole scope must be covered; not all elements at once, and the process may run over a period.	
«The minutes are our evidence.»	The evidence required is of the results, which are decisions. Minutes of a verdict evidence a verdict.	

2. What the standard requires, and what demonstrates it

From Table 1.14.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
Review at planned intervals by top management	The owner present, not represented	
The general inputs	Each one tabled with a question attached, not merely tabled	
The three energy performance inputs	Objectives met or not, the indicators, the status of the plans	
Outputs are decisions, not conclusions	Minutes in which somebody will now do something	
Decision on resource allocation	A sum, a quantity of time or an instrument agreed in the meeting	
Decision on actions where objectives were not met	A recorded decision to defer, revise or withdraw, with a reason	
Whole scope covered, not necessarily at once	A schedule showing which element is reviewed when	
Documented information on the results retained	A record of what was decided, with owners and dates	

3. The instrument: Table 1.14.b, The seven outputs, and what a decision looks like

The instrument of this subchapter. Use these as the agenda headings, not the inputs.

Required output	What a decision sounds like	What minutes usually say
Opportunities to improve energy performance	We will meter the backup heat generator before February	Opportunities were discussed
The energy policy	The procurement line moves onto the requisition form	The policy remains appropriate
The indicators or the baselines	We add a night-floor indicator and revise the baseline	The indicators were reviewed
Objectives, targets, plans (and if not achieved)	The roof is deferred to next year; the reason is recorded	The action plans are progressing
Integration with business processes	Energy joins the monthly heads of department agenda	Integration was noted
Allocation of resources	One day a month, protected, and one sub-meter	Resources were considered adequate
Competence, awareness and communication	The pool technician's contract gains two lines	Training is up to date

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 agenda from the inputs, which produces a discussion of inputs.		
Offering suitable, adequate and effective as an output rather than as the purpose.		
Tabling charts as evidence of monitoring, with no question attached to any of them.		
Never deciding anything about an objective that has not been achieved.		
Omitting resource allocation, which is a named output of this meeting.		
Filling the minutes with decisions nobody owns, so the next review begins in debt.		

5. Action plan

Step from the book / gap found	Action in our property	Owner	Deadline
Read your last three sets of minutes and mark the decisions. Expect to mark none.			
Rebuild the agenda around the seven required outputs instead of the inputs.			
Attach a written question to every chart in the pack.			
Put somebody in the room who does not know the building well.			
Make resource allocation an explicit item with a stated outcome, even if the outcome is nothing.			
Where something was not achieved, choose one of four words: continue, revise, defer, withdraw.			
Spread the review across the year if that suits you; the guidance allows it.			

Step from the book / gap found	Action in our property	Owner	Deadline
Open every review with the previous decisions, their owners and their dates.			

In brief

The purpose of a management review is to ensure the system remains suitable, adequate and effective. That is not its output. The outputs must be decisions, across seven named areas, and a review that ends in a verdict has stopped halfway through its own requirement, which is why so many properties conduct the meeting faithfully for years and change nothing as a result of it.

Source: The Helm and the Lens, Volume 4a: The Helm, subchapter 1.14. This sheet does not reproduce the text of the standard; work with your own copy of ISO 50001:2018 from an authorised source.