The Context You Did Not Choose

GUIDING QUESTION *Find the best energy result your property has ever reported, the year the consumption went down. Take five minutes and answer one question about it: how warm was that summer, compared with the one before? If nobody in the building can answer, then you do not know whether you achieved that result or whether the weather did, and you have been making investment decisions on the strength of it ever since.*

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
«Consumption went down, so we improved.»	Consumption is the sum of what you did and what happened to you. Unnormalised, it measures neither.	
«Normalising is what people do when the numbers are bad.»	It is what makes a number readable at all. Decided afterwards it is an argument; decided in advance it is a method.	
«The context is strategic background.»	It is the list of things that move your number and cannot be argued with. It belongs in writing before the first report.	
«We cannot change the building, so there is nothing to record.»	Constraints are recorded so that objectives stay reachable, not to be normalised away.	
«Degree days are for engineers.»	In a cooling-dominated property they are the difference between a result and a coincidence.	
«If a static factor changes we adjust the indicator.»	If a static factor changes substantially, the baseline itself has to be revised. Adjusting the indicator hides the change.	

2. What the standard requires, and what demonstrates it

From Table 1.2.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
External and internal issues determined	A one-page list, dated, naming climate, tariff, grid, fabric and constraints	
Relevant variables identified	The cooling season, rooms occupied and covers served, with the data source for each	
Static factors in the data collection plan	Floor area, room count, glazing, installed plant: recorded with the year	
Methods for determining performance established	A written rule for how consumption is normalised, agreed before the period	
Normalisation applied when variables change	A result reported both raw and normalised, in the same document	
Baseline revised when static factors change substantially	The note recording that the extension opened, and what was done about the baseline	
Improvement demonstrable	A series in which action and weather can be told apart	

3. The instrument: Table 1.2.b, The context page

The instrument of this subchapter. Written once, dated, revisited when something moves.

Factor	Variable or static	Who controls it	What the system does with it
Cooling season severity	Relevant variable	Nobody	Normalise against it
Heating season severity	Relevant variable	Nobody	Normalise against it
Rooms occupied	Relevant variable	Commercial	Normalise; watch the base load
Covers served	Relevant variable	Food and beverage	Normalise the kitchen use
Conference hours sold	Relevant variable	Commercial	Normalise the conference floor
Floor area and room count	Static factor	Ownership	Record; revise baseline if it changes
Glazing and building fabric	Static factor and constraint	Nobody, while protected	Record; set objectives accordingly
Installed plant and its efficiency	Static factor	Ownership, at the decision window	Record with the year of installation
Tariff structure	Constraint	Ownership, at renewal	Record; do not normalise against it
Grid capacity and reliability	Constraint	Nobody	Record; plan continuity around 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
Reporting raw consumption to an owner as though it were a performance result.		
Obtaining the climate series for the first time in the year you need to explain a rise.		
Choosing the normalisation method after seeing the outcome it will be applied to.		
Leaving the constraints undocumented, so that they get mistaken for unmet targets.		
Keeping the series running unchanged after a wing, a floor or a laundry has moved.		
Building a model with so many variables that no result remains attributable to anybody.		

5. Action plan

Step from the book / gap found	Action in our property	Owner	Deadline
Write the context page: what moves our consumption, what we cannot change. Date it.			
Obtain the local climate series for the years you already have, before you need it.			
Fix the normalisation method in one paragraph, in advance, and keep it unchanged.			
Report raw consumption and normalised performance in the same document, every time.			

Step from the book / gap found	Action in our property	Owner	Deadline
Put the constraints in front of the owner once, separately from the objectives.			
Record the static factors with their years, and declare it when one of them moves.			
Ask the weather question at every report, good or bad, so that asking is never a signal.			
Keep two or three normalising variables, not nine, and leave the residual visible.			

In brief

An unnormalised consumption figure is the sum of two things the property needs to keep apart: what it did, and what happened to it. Reported as a result, it will be believed, and it will mislead in whichever direction the weather happened to move. The error is symmetrical, which is why a property that never normalises will eventually pay both halves of it.

Source: The Helm and the Lens, Volume 4a: The Helm, subchapter 1.2. This sheet does not reproduce the text of the standard; work with your own copy of ISO 50001:2018 from an authorised source.