A Policy That Can Be Refused

GUIDING QUESTION *Find your energy policy (it will take you a few minutes, which is itself an answer) and read it once. Then spend five minutes on a single question: name the last decision in which this document made somebody choose the more expensive option, or the slower one, or the one they did not want. If no such decision comes to mind, the policy has never cost anything, and a commitment that has never cost anything has never been tested.*

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 policy is signed, posted and communicated.»	Those are requirements about reach. None of them puts the document at the point where a decision is taken.	
«We comply with our policy.»	A commitment that has never cost anything has not been complied with; it has not been exercised. The two look identical from outside.	
«The procurement and design commitments are boilerplate.»	They are the two hooks by which the policy reaches the decisions that set consumption for a decade.	
«A good policy is comprehensive.»	A good policy can be readily understood and applied by the people in the building. Thresholds and classes belong in the purchasing specification.	
«The policy is appropriate: it is well written.»	Appropriate means somebody reading it here could tell it was written about this building.	
«We reviewed it when we wrote it.»	It must be reviewed periodically and updated as necessary. A season extended or an area converted is a reason to reopen it.	

2. What the standard requires, and what demonstrates it

From Table 1.5.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
Appropriate to the purpose of the organisation	A page that names this building's season, fabric and largest use	
A framework for setting and reviewing objectives	Objectives that can be traced back to a line on the page	
Commitment on information and resources	A budget line that existed before the objective was set	
Commitment on legal and other requirements	The lease clause and the client condition held with the policy	
Commitment to continual improvement	A performance series long enough to show whether it happened	
Support for energy-efficient procurement	A consumption field on the requisition, traceable to the policy line	
Support for design activities	An energy paragraph in the brief given to the architect	
Documented, communicated, available, reviewed	A review date that has passed at least once, with a record of what changed	

3. The instrument: Table 1.5.b, The refusal test, commitment by commitment

The instrument of this subchapter. The third column is the one that tells you whether you have a policy.

Commitment on the page	Where it would have to be applied	Last decision in which it cost us something
Availability of information and resources	The budget meeting, before the objective is set	
Legal and other requirements	The lease, the client contract, the loan conditions	
Continual improvement of performance	The management review, against the baseline	
Procurement of energy-efficient products and services	The requisition and the quotation comparison	
Design activities considering performance	The brief to the architect or contractor	
Framework for objectives and targets	The meeting where objectives are set	
Appropriate to the purpose of the organisation	Anywhere somebody reads it and recognises the building	

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
Treating the procurement and design commitments as boilerplate rather than as the working half.		
Posting and inducting the policy and assuming that is the end of the obligation.		
Writing a page that could describe any hotel anywhere.		
Putting efficiency classes and thresholds in the policy instead of in the purchasing specification.		
Reviewing on a date rather than when something in the building actually changes.		
Never asking whether any decision has ever been made more expensive by the document.		

5. Action plan

Step from the book / gap found	Action in our property	Owner	Deadline
Run the refusal test: name the last decision in which each commitment cost you something.			
Put the procurement line beside the requisition field and the design line in the architect’s brief.			
Keep the figures out of the policy and hold them in a separate purchasing specification.			
Name this building in the page: the season, the fabric, the largest use.			
Attach the review to events (season extended, service moved, area converted), not to a date.			

Step from the book / gap found	Action in our property	Owner	Deadline
Trace at least one objective back to one line on the page, and be able to say it in a sentence.			
Ask four people who take decisions where they would have read it.			
Keep it to one page that somebody can apply without interpreting.			

In brief

An energy policy is a framework for setting and reviewing objectives, and a framework that never frames anything is decoration. The standard prescribes its contents precisely, and two of those contents, support for efficient procurement and support for design, are the hooks by which the page reaches the two decisions that set a building’s consumption for years at a time.

Source: The Helm and the Lens, Volume 4a: The Helm, subchapter 1.5. This sheet does not reproduce the text of the standard; work with your own copy of ISO 50001:2018 from an authorised source.