The Baseline, and the Year You Chose

GUIDING QUESTION *Find the year your property compares itself against and spend five minutes answering two questions about it. Was the building doing, in that year, everything it normally does: every wing open, every season run, every service in place? And who chose it, and why? If the answer to the first is no, or the answer to the second is that it was the most recent year with complete data, then every improvement you have reported since was measured against a building that was not behaving normally.*

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 used the last complete year; the data were good.»	Complete data and a suitable period are different tests. The requirement is a period demonstrating a full range of performance.	
«The baseline is a historical fact.»	It is a quantitative reference chosen by the organisation, from a period it judged adequate, under conditions it defined. It is a decision.	
«Moving the baseline is always manipulation.»	Revision is required in three named situations. What distinguishes it from manipulation is the reason, stated in advance, and the record.	
«The chart looks wrong, so the baseline must be changed.»	An unfavourable chart is not one of the three reasons. If the baseline is genuinely invalid, say why, and that reason existed before the chart did.	
«One baseline, one number, one comparison.»	The standard says one or more. Several baselines with stated conditions usually represent a hotel better, and are harder to move quietly.	
«We brought the laundry in house, so consumption went up. That is life.»	A significant use introduced into the scope is a reason to adjust the baseline. Without adjustment you are measuring the change in the building.	

2. What the standard requires, and what demonstrates it

From Table 1.7.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
Baseline established from the energy review	A reference that can be traced back to the review, not to a spreadsheet	
A suitable period, showing a full range of performance	A written note of why that period was chosen and what it contained	
Specified conditions recorded with the number	The wing closure, the season run, the services in place: written beside the figure	
Normalisation where relevant variables matter	The baseline normalised on the same basis as the indicator	
Revision in the three named situations	A note recording which of the three applied, and when it was decided	
Adjustment when a significant use enters or leaves scope	The laundry brought in house, and what was done to the baseline	

What is required	What demonstrates it in a hotel	In our property
Baselines, variable data and modifications retained	A file in which every change to the baseline is dated and explained	

3. The instrument: Table 1.7.b, When the baseline is revised, and when it is not

The instrument of this subchapter. Decide the middle column before any result is known.

Situation	Is this a reason to revise	What to do
The reported figure is unfavourable	No	Investigate the figure, not the reference
The reference year contained an abnormal closure	Yes: the period was never suitable	Revise, record why, restate the series
A significant energy use has entered the scope	Yes	Adjust the baseline to include it
A significant energy use has left the scope	Yes	Adjust the baseline to exclude it
Floor area or room count has changed materially	Yes: a major change in a static factor	Revise; normalisation is not enough
A mild or severe season	No	Normalise against the relevant variable
Occupancy has risen or fallen	No	Normalise; check the indicator is not a bare ratio
The indicators no longer reflect performance	Yes	Revise both the indicator and the baseline
The predetermined review date has arrived	Yes	Revisit as planned, and record the outcome either way

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
Choosing the reference period for data availability rather than for representativeness.		
Storing the baseline as a number with no record of the conditions that produced it.		
Moving the baseline because the chart is unfavourable, and calling it a technical correction.		
Refusing ever to revise, and comparing to a building that no longer exists.		
Failing to adjust when a laundry, a spa or a wing enters or leaves the scope.		
Deciding the revision rule after the first result rather than before it.		

5. Action plan

Step from the book / gap found	Action in our property	Owner	Deadline
Write down what the reference year actually contained: wings, services, seasons, outlets.			
Apply the full-range test, not the complete-data test.			
Decide and write the revision method before any result is known.			

Step from the book / gap found	Action in our property	Owner	Deadline
Record every change to the baseline with its date and its reason.			
Consider several baselines: seasons, periods, departments.			
Adjust promptly whenever a significant use enters or leaves the scope.			
Ask, at the first review of a new system, what the comparison year contains.			
Keep the rejected reasons on file as well as the accepted ones.			

In brief

A baseline is not a historical fact. It is a quantitative reference chosen by the organisation, from a period the organisation judged suitable, under conditions the organisation defined, and everything claimed afterwards rests on that judgement. In most hotels it is made in an afternoon, by whoever needed a starting figure, on the basis that the data were complete.

Source: The Helm and the Lens, Volume 4a: The Helm, subchapter 1.7. This sheet does not reproduce the text of the standard; work with your own copy of ISO 50001:2018 from an authorised source.