WORKSHEET 3.3

# The Checklist That Goes to the Plant Room

*Subchapter 3.3 · case in the book: Kraków*

Take the checklist your last internal energy audit was conducted with and count two things. How many of its questions can be answered without leaving a desk, and how many require somebody to open a panel, read a value aloud and say when it was last changed and why. If the second number is zero, the audit has never been to the place where this property's energy is actually decided, and no amount of rigour applied to the first number will take it there.

This worksheet turns the tools of the subchapter into a form you can fill in. The texts come from the book; the empty columns are for your own property. Adapt it before use: an unadapted checklist is exactly what the book warns against.

## Practical application: what to do in your property

| Step (from the book) | Done? | What we found / owner |
|---|---|---|
| Rewrite the checklist by significant energy use, in the words the maintenance supervisor uses, at a length that can be carried. | | |
| Ask the same six questions of every use, without adapting them to the use. | | |
| For each use, read the value actually set and compare it with the documented criterion in front of the equipment. | | |
| Record, for each value, who can change it and when it was last changed. | | |
| Add a constraint line to every use: what cannot be changed here, and on whose authority. | | |
| Open a one-line register for changes to any value governing a significant energy use. | | |
| Take the person who has been in the building longest, and let him open the panels. | | |

These steps are the book's method, not requirements of ISO 50001. Evidence can take whatever form suits the property; a separate document is needed only where an applicable requirement, or the property's own system, makes it necessary.

## Verification Pact: what is believed, tested against the standard

| What is commonly believed | What actually holds | Our position |
|---|---|---|
| «The operating criteria are documented, so operational control is verified.» | The requirement has two halves. The second is that operations are controlled in accordance with them, and that half can only be verified where the value is set. | |
| «Our checklist covers every clause of the standard.» | Complete coverage of the clauses distributes attention evenly across requirements of very unequal importance in a hotel. | |

| What is commonly believed | What actually holds | Our position |
|---|---|---|
| «The plant room is maintenance's area.» | It is where the evidence is. An audit that never enters it is auditing a description of the building. | |
| «Nothing has changed since the last audit.» | What changed is what nobody had a reason to record: a curve lifted to stop a complaint, a temperature raised on hygiene advice. | |
| «The roof cannot be insulated, so there is nothing to write.» | A constraint that is not written down produces objectives that cannot be met and findings that cannot be closed. | |
| «A longer checklist is a more thorough audit.» | Length decides location. A sixty-page instrument can only be used at a desk. | |

## Common mistakes: a self-check

| Mistake (from the book) | Present here? | Action / owner |
|---|---|---|
| Building the checklist from the clauses and discovering, three audits later, that every finding is about retention periods. | | |
| Verifying that operating criteria are documented without verifying what is set. | | |
| Recording a criterion as a reference to a manufacturer's document instead of as a value. | | |
| Treating the plant room as somebody else's territory. | | |
| Leaving constraints out of the audit, and then setting objectives that ignore them. | | |
| Carrying an instrument too long to be used anywhere but a desk. | | |
| Crossing from auditing the decision to judging the decision, and losing the room. | | |

## Operative synthesis

- **A checklist decides where an audit happens. Organised by clause, it holds the auditor at a desk and returns findings about documents, year after year, in a property whose consumption is being governed by two values that appear in no document at all. Organised by significant energy use, with six questions of which four cannot be answered sitting down, it takes her to the substation, and the substation is where the answer has been for nine years.**
- **The six questions are the whole method. What does the document say. What is actually set. Who can change it, who did, when and why. What would tell us if it drifted. What happened the last time it did. What cannot be changed here, and on whose authority. They are system questions and they are asked in a physical place, which is the only combination that works in this discipline.**
- **Nothing in Kraków was done badly. A supervisor solved a real problem on a cold night and told his general manager. A hygiene contractor gave correct advice and it was followed. A**

**consultant built a thorough checklist from the standard. Three competent acts, none of them recorded in a way that let anybody evaluate them, and a property that for nine years could not have told an auditor, an owner or a buyer what temperature its own heating was running at.**

› **The next subchapter stays in the same territory and changes the object. The constraints that appeared here as a line on a checklist (a protected roof, a hygiene temperature, a network limit) belong to a wider class of things the property is obliged to observe, and the internal auditor cannot audit compliance with them without inheriting the property's own reading of what they require.**

## Action plan for our property

| Action | Owner | Due | How we will know it worked |
|---|---|---|---|
| | | | |
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Source: Francesco Dore, The Helm and the Lens, Volume 4b «The Lens», subchapter 3.3. Edizioni Effedore, 2026. Clause references are paraphrased; this sheet does not reproduce the text of ISO 50001, ISO 50003 or ISO/IEC 17021-1. It is not legal advice: energy law is that of the place where the property operates.