WORKSHEET 4.14

Change During the Cycle: Boundary, Baseline and Major Works

Subchapter 4.14 · case in the book: Belfast

List everything that changed in your property since your last audit: plant replaced, a wing closed, a service outsourced, an area let, an owner changed, a key person gone. Beside each, write the date you told your certification body. Where that column is empty, the certificate on your wall describes a building you no longer have, and the body has lost every option it had for dealing with it cheaply.

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
Send a one-page change notice within days, from one named person.		
Write the trigger list (what counts as major here) before anything triggers it.		
Decide permanence first: variable or static factor, recorded at the time.		
Restate the baseline whenever a service leaves, and keep the unrestated series.		
Treat a lost operational control as seven steps, not as one event.		
Update the energy review on major change, not at the next scheduled date.		
Put an energy performance criterion in every capital specification.		
Name the energy management system as a consultee at specification stage.		
Notify owner, entity and key personnel changes with the same discipline as plant.		
Read the scope sentence whenever a service starts or stops.		

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
«We will report the changes at the next audit.»	The duty is to inform without delay, and it exists so the body has options while the change is happening. By the audit, only the expensive ones are left.	
«We outsourced the laundry: consumption is down nine per cent.»	The work left the building. Restate the baseline or you are booking somebody else's meter as your improvement.	
«We closed a floor for the winter, so the baseline needs revising.»	That is a relevant variable and the normalisation handles it. Revise for it and you will be comparing yourself with a building you do not operate.	
«The spa is still in our building.»	The boundary follows operational control, not the walls. It has left the system, the baseline and the scope sentence, and the certificate needs reissuing.	
«Nothing physical changed, so there is nothing to report.»	A new owner, a new operating company or the loss of your only competent analyst all affect capability, and all are notifiable.	
«The refurbishment improved performance, so the design requirement is met.»	The requirement is that energy performance was considered at design. A good outcome is not evidence that it was, and the specification will say.	
«The energy review is done annually.»	And also in response to major change. A wing rebuilt in March is not covered by a review scheduled for November.	
«We can sort the baseline out at recertification.»	A revision is straightforward while the evidence is fresh and contested a year later, when the auditor is asking why it was made after the result.	

Common mistakes: a self-check

Mistake (from the book)	Present here?	Action / owner
Saving up changes for the opening meeting of the next audit.		
Treating every kind of change as though it required the same response.		
Booking an outsourced service as an energy performance improvement.		
Revising a baseline for a condition that will reverse by itself.		
Leaving a let or concessioned area inside the boundary because it is inside the walls.		

Mistake (from the book)	Present here?	Action / owner
Waiting for the scheduled energy review after a major plant change.		
Issuing a capital specification with no energy performance criterion in it.		
Assuming a good outcome proves the design requirement was applied.		
Overlooking changes with no physical component: owner, entity, key personnel.		
Notifying everything, until the body stops reading any of it.		

Operative synthesis

- **Change inside a cycle divides into four kinds and nearly everything follows from telling them apart. A boundary change, where operational control is gained or lost. A static factor change, where what the building is has altered. A relevant variable, which routinely changes and is handled by normalisation. And an organisational change with no physical component at all, which properties forget because nothing was installed.**
- **The distinction that does the most work is between a variable and a static factor, and the same event can be either. A floor closed for one winter is a variable and normally needs no baseline revision; closed permanently it is a static factor and needs one. What decides it is whether the change belongs to the building's routine and whether the model still represents it; intent recorded at the time is the strongest evidence of that, and a property that reconstructs that intent a year later will be asked why the reconstruction favoured its figures.**
- **A service that leaves the building produces the most flattering false number available in this standard: consumption falls, the indicator improves, and the work is simply being done on somebody else's meter and paid for in a contract price. The volume opened on exactly this shape, in Helsinki, and has met it since as a change of energy source and a change of emissions factor; the test is identical each time. Did the building use fewer units to do the same work, or did the work change?**
- **The duty to inform is contractual, broad, and cheap to meet while a change is current. It exists so the body can decide what it needs while options still exist: a question, an adjustment at the next visit, a scope change, a short-notice look. Told late, the body can only verify retrospectively, and whether that is possible depends entirely on how good the property's records happen to be. The requirement that expires soonest, though, is not that one. Energy performance must be considered in the design of a refurbishment, and that obligation is worth most before the specification is issued and loses value with every week after it, though it still applies to every change made to the design.**
- **In Belfast four changes were handled correctly and reported eleven months late, and the records were good enough that the certificate was reissued at the ordinary visit with a reduced scope. The finding that mattered was elsewhere: a hundred and forty pages of specification for a seventy-two room refurbishment, with thermal, acoustic, lighting, budget and programme criteria in it, and no energy criterion anywhere, so that a decision worth six figures across the life of the plant was taken by default. The next subchapter closes the volume by closing the cycle: three years on, the property is audited not against what it achieved but against what it has held, and the gains turn out to be the easy part.**

Action plan for our property

Action	Owner	Due	How we will know it worked

Source: Francesco Dore, The Helm and the Lens, Volume 4b «The Lens», subchapter 4.14. 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.