WORKSHEET 4.3

Stage 1: Readiness, and the Data That Does Not Yet Exist

Subchapter 4.3 · case in the book: Auckland

Count the months of measured data standing behind your energy baseline, and then check whether those months contain one complete cycle of your property's year: your fullest month and your emptiest, your heating season and your cooling season, the weeks when everything coincides and the weeks when nothing does. If they do not, no quantity of documentation will let you demonstrate improvement, because you do not yet have anything to improve against.

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
Start the metering and the recording on the first day of the project, before anything is written.		
Count the months of data and check them against your own calendar, not against the number twelve.		
For each indicator, write down the instrument behind it and the date it started recording.		
Arrange the internal audit so that it is not performed by whoever built the system.		
Hold the management review before stage two, with material it can decide on.		
Reconcile the boundary against the drawings, the meter schedule and the leases.		
If a date was promised to a client, go back to them early and say why you are waiting.		
Ask the stage one auditor directly whether stage two should proceed, and accept the answer.		
If you are told to wait, use the wait: the year is running whether or not anybody is watching it.		

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
«Our documentation is complete, so we are ready.»	In this standard readiness has a second component, and it is elapsed time with instruments running.	

What is commonly believed	What actually holds	Our position
«Eight months is nearly a year.»	It is not a cycle. A baseline that excludes your heaviest month describes a different hotel.	
«We have three years of bills.»	Of a site total. If your indicators concern significant energy uses, your record of those begins with the sub-meters.	
«The consultant performed the internal audit; he knows the system best.»	Which is the objection. Auditors must not audit their own work, and this cannot be argued away at a closing meeting.	
«The management review is booked for after stage two.»	The review is where the property determines whether its indicators and baseline represent it. A first certification needs it to have happened.	
«Let stage two go ahead and we will deal with the findings.»	The likely route is a major nonconformity, action, verification and a second visit: the same six months, with an extra bill.	
«The certificate was promised for April.»	To somebody who did not know that in this standard the calendar is a prerequisite rather than a constraint.	

Common mistakes: a self-check

Mistake (from the book)	Present here?	Action / owner
Treating readiness as a property of documents.		
Counting months of data without checking that they contain a cycle.		
Confusing a long record of a site total with a record of the significant uses.		
Building the certification programme backwards from a date promised to a client.		
Having the system's builder perform the internal audit.		
Scheduling the management review after stage two.		
Leaving the drawings, the meters and the leases to disagree.		
Asking for stage two to proceed with the concerns noted, and paying twice for the same six months.		
Postponing a property that could have demonstrated a cycle from evidence in an unexpected form.		

Operative synthesis

› **Readiness for certification is usually a question about documents, and in this standard it is also a question about time. A property can write a policy in a morning, an energy review in a**

fortnight and a competent set of documented information in a quarter, and none of it produces a year of measured history in a building whose year is the unit that matters.

- **Stage one therefore carries a question it carries nowhere else: is there enough measured history, over a period containing a cycle, at a resolution the indicators actually need, for improvement to be capable of being demonstrated. Eight months is not a cycle if it excludes the heaviest month. Three years of invoices is a long record of the wrong thing if the indicators concern the significant uses and the sub-meters were installed in November.**
- **The honest output when the answer is no is a postponement, offered plainly. It is a commercial disappointment and the cheaper of the two routes to the same month, and a stage one auditor who sets the arithmetic on a page will be believed more often than one who lists concerns.**
- **In Auckland the documentation was better than that of many certified properties, the consultant was good, and the property was six months short of being able to demonstrate anything, because a date had been promised to a client by people who did not know that in this standard the calendar is a prerequisite rather than a constraint. The property deferred, used the year that was running anyway, and certified cleanly in September.**
- **The next subchapter is what that property walked into in September. Stage two establishes that the system conforms and that it works, and in this standard the second half of that sentence has a specific meaning that no other stage two has to reach.**

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 4.3. 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.