WORKSHEET 2.3

Purpose, Values and Policy

Subchapter 2.3 · case in the book: Lisbon

If you laid your hotel's sustainability policy next to a competitor's, how would a client tell which one belongs to you? And who in your hotel could say tomorrow which sentence in it applies to their own work?

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
Purpose first: The mission statement opened with a sentence that fits no other hotel, naming the ballroom, the pavilion and the corporate evenings, followed by one sentence for each guiding principle that can be checked in the house.		
The fourteen-line check sheet: Each line of 5.2 received a sentence, and each sentence an owner: management for purpose and legal requirements, sales for access information in proposals, the events team and kitchen for figures after each event. Every department tested each sentence: does it apply to us, and what do we do tomorrow?		
Contradictions resolved, the future written as a plan: The inclusivity sentence now promises advance information and an alternative evening for every group. "Climate-neutral" disappeared; three main objectives with measures the hotel can collect today took its place.		
Signed, dated and distributed: Ricardo Almeida signed as managing director and Joaquim Almeida for the family. The policy hangs in the staff room, the pavilion kitchen and the sales office, accompanies every corporate proposal, and seasonal staff hear it at induction (2.14).		

These steps are the book's method, not requirements of ISO 20121. 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 policy must contain a dated climate target	No. Commitments and, where applicable, a framework for objectives are required (5.2 b); no target value is set	
Mission statement and policy are the same	No. The mission statement incorporates the principles (4.5; 3.42); the policy refers to it (5.2)	

What is commonly believed	What actually holds	Our position
A ten-year vision is mandatory	Only partially true. Where applicable, over three to ten years (5.2)	
The policy must be on the website	No. It must be available to interested parties (5.2); the route is free	
A well-written policy is enough	No. Mission and values frame objectives and operational plans (4.5)	
The policy commits the hotel to lead by example	Only partially true. A.8 names this commitment as guidance, not as a requirement	

Common mistakes: a self-check

Mistake (from the book)	Present here?	Action / owner
Ordering the policy from an agency, so that it is well written and fits every hotel.		
Mixing mission statement and policy in one text, so that either purpose or commitment is missing.		
Writing a climate target without a plan, which is no commitment and a legal risk in some regions.		
Claiming inclusivity where there are steps; a refuted sentence costs more than a missing one.		
Publishing without date or signature, so that nobody answers for the text.		
Hanging the policy only outside, where those who must work by it never see it.		
Treating the welcome sentence as marketing rather than as a promise someone must keep on the night.		
Never revisiting the texts at the management review once they are signed.		

Operative synthesis

- **Does our mission statement open with a purpose that fits only our hotel?: A text that fits any hotel fits no purpose**
- **Does each guiding principle have its own sentence?: Clause 4.5 requires the principles in the mission statement**
- **Does the policy cover a) to f) and the requirements on content and form?: Clause 5.2 sets fourteen points that must all be met**
- **Does every sentence of the policy have an owner in the house?: Without an owner a sentence binds nobody**
- **Does any sentence contradict a fact in our hotel?: A refuted sentence costs more trust than a missing one**
- **Is the policy dated, signed by top management and known to pavilion and seasonal staff?: Those who must work by it need to know it**

- **Act on immediately. Withdraw any policy sentence that contradicts a fact in the house or promises a future result without a plan, and tell clients who received it.**
- **Plan for. Write the mission statement and the policy with the departments, check them line by line against 4.5 and 5.2, give every sentence an owner, and have top management sign and date them.**
- **Monitor going forward. Post the policy where staff work, include it in induction and proposals, and review mission statement and policy at every management review.**

Action plan for our property

Action	Owner	Due	How we will know it worked

Source: Francesco Dore, The Helm and the Lens, Volume 8a «The Helm», subchapter 2.3. Edizioni Effedore, 2026. Clause references are paraphrased; this sheet does not reproduce the text of ISO 20121. It is not legal advice: the law that applies is that of the place where the property operates.