



ISO 50001 : 2018

What can you expect from the certification process?

Energy Management System Checklist

This checklist will provide you with a detailed understanding of what you can expect to have in place, and be doing, by the time you complete the ISO 50001 certification process. If you don't have any of this in place already, don't panic; QMS are happy to provide you with the necessary templates and guidance, during the QMS certification process, until you do.

Context Of The Organisation

This means: understanding external and internal issues, as well as the needs and expectations of interested parties, and where you sit in all of this.

- We have thought about and set out the external and internal issues that are relevant to our organisation's vision, purpose and strategic direction, including the energy-related factors under which the organisation operates.
- We've set out a way of reviewing and checking these as well as timescales for doing so.
- We understand which parties have an impact on the ISO 50001: 2018 Energy Management System, and the needs and expectations that they have.
- Our Energy Management System addresses the external and internal issues, the needs and expectations of all parties, as well as our strategic vision, objectives, products and services.
- We've carefully set out the processes, actions and requirements at each stage within our Energy Management System.
- We've also set out how each of these stages will be managed, who is responsible, how they need to action things and how success will be measured.
- We understand how to adjust our Energy Management System as the context of our organisation changes.

Leadership

This means: the role your top management will play in leading, not just managing, your Energy Management System and actions required during the certification process.

- Our top management have understood the certification process and have taken responsibility for the effectiveness of our Energy Management System.
- Our Energy Management System is structured to reflect the strategic vision and priorities of our organisation. This has been communicated throughout the organisation so that everyone understands how it is relevant to overall success.

- We have a framework for communicating our objectives clearly at all levels of the organisation – strategic, functional, departmental and individual.
- We are able to integrate the policies and procedures set out in the Energy Management System into our day-to-day way of working.
- Our managers understand the importance of communicating the processes set out in the Energy Management System and the role that risk-based thinking will play in our success.
- Throughout our organisation, customer, statutory and regulatory requirements are considered, set out, met and communicated.
- We have clearly set out who is responsible for making each part of the Energy Management System a success, as well as who is responsible for making decisions.

Planning

This means: evaluating success, measuring risks and opportunities and planning the steps needed to increase desirable effects, prevent unwanted effects and achieve improvements.

- We have a framework for identifying the risks and opportunities that affect our processes and the Energy Management System.
- Our managers undertake a regular evaluation of the risks and opportunities that have been documented in order to determine trends and appropriate actions to be undertaken as a result.
- We have planned what we need to do to meet our Energy Objectives in the form of Energy Management Action Plans.
- We have integrated the steps that need to be taken into our day-to-day practices and systems and not just treated them as 'one-off' tasks.
- We've conducted a full Energy Review and have identified and prioritised opportunities for improving Energy Performance.
- We've identified and implemented appropriate Energy Performance Indicators.
- We've established an Energy Baseline and have planned the collection of energy data.

- We've thought about the ways in which we might need to change the Energy Management System, over time, to ensure it stays effective.

Support

This means: making sure you have the resources and tools you need to run and continually improve your Energy Management System.

- We understand what resources (people, infrastructure, working environment etc.) we need in order to establish, implement and maintain our Energy Management System.
- We have also set out a plan for reviewing resources on a regular basis, to make sure we continue to provide sufficiently trained staff and the right equipment and materials to meet our energy needs.
- We recognise that accurately measuring and monitoring the ways in which our Energy Performance meets the requirements of the Standard are essential, so we've identified the resources required to provide valid, reliable results.
- We have made sure that we have a good infrastructure in place to ensure that conformance to the Management System Standard and legal compliance is met, both now and in the future.
- We recognise the levels of understanding we must have, to ensure that our processes can work effectively, and our Energy Performance conforms to the expected criteria set out in our Energy Management System.
- We have taken steps to ensure that the people impacting on our Energy Management System are appropriately trained or that training needs have been identified to help them achieve the required qualifications.
- We've made sure that each person in our organisation understands how they can contribute to making this Energy Management System a success.
- We've planned internal and external communications to make sure everyone knows about the Energy Management System.
- We understand what documented information needs to be provided – both to satisfy the requirements of the Standard and to ensure the requirements continue to be implemented effectively.

Operation

This means: the steps you need to take to get going on your Energy Management System.

- We have clearly set out operational processes to ensure that our overall Energy Performance meets the requirements specified by the Standard.
- Any changes that need to take place will be considered carefully, within the structure of our Energy Management System, and carried out in a way that will ensure continuing relevance and success.
- Design and development activities fundamentally ensure that every opportunity to improve Energy Performance is considered and, where feasible, taken.
- Energy efficiency is a prime consideration in the procurement of all energy-consuming equipment, machinery, raw materials and services.

- We are committed to selecting, monitoring and evaluating external providers, using a clearly defined process.
- We have clearly-defined processes for communicating with our Interested parties (and gaining their feedback) in relation to all relevant aspects of our Energy Performance.
- We make sure that, when providing products and services, documentation is made available which sets out the characteristics and what we plan to achieve from an energy usage perspective and is made available to others.
- Activities are monitored and measured, at appropriate stages, to ensure that agreed standards for processes, outputs and acceptance have been met and all people involved in the process have been proven to be competent.
- Should any product or service not conform to the standard expected, then we will manage this to make sure that it is not used or delivered.

Performance Evaluation

This means: using your experience and knowledge to monitor, measure and analyse processes and changes, to consistently seek out ways to improve Energy Performance.

- We understand what we need to monitor and measure and have set out the ways in which we will do this, to get useful, valid results.
- We have agreed when we need to analyse and evaluate these results.
- We have defined and implemented an Energy Measurement Plan.
- We will evaluate the effectiveness of Action Plans in achieving Energy Objectives and Targets and will evaluate actual against expected energy consumption.
- We have evaluated our compliance obligations.
- We have agreed a formal structure for evaluating our Energy Management System, through an internal audit programme.
- We will agree any areas for potential improvement and development, within the Energy Management System, and how we will include these in management reviews.
- We have set out a structure for management reviews and are committed to implementing it, to regularly monitor and evaluate the implementation of our Energy Management System.

Improvement

This means: using the results from your evaluation and analysis to identify ways to enhance the Energy Management System that serve to improve Energy Performance.

- We have identified areas for improvement that focus on enhancing Energy Performance. We have also taken the steps necessary to put these changes into action.
- We have a process for managing the ways in which we do not conform to the Standard, and the steps we need to take to correct this.
- We have agreed how we will prioritise the continual improvement of the suitability, adequacy and effectiveness of our Energy Management System.