



ISO 50001:2018 ENERGY MANAGEMENT SYSTEMS LEAD AUDITOR TRAINING COURSE

COURSE CRITERIA

UPON COMPLETION OF THIS COURSE, LEARNERS WILL BE ABLE TO:

- Describe the purpose of an EnMS, EnMS standards, EnMS audit and third-party certification;
- Explain the role of an auditor to plan, conduct, report and follow up an EnMS audit in accordance with ISO 19011 and ISO 17021-1 where appropriate;
- Plan, conduct, report and follow up an audit of an EnMS to establish conformity (or otherwise) with ISO 50001:2018 and in accordance with ISO 19011 (and ISO/IEC 17021-1 where appropriate).

Learners will need to demonstrate acceptable performance in all areas to complete the course successfully.

PRIOR KNOWLEDGE

This course is not intended to be an implementer's course, one that will create an expert in energy management legislation, or one that will train to an acceptable standard a learner with no prior knowledge of the standard or an EnMS. Before starting this course, learners are expected to have the following prior knowledge:

- Management systems
- The Plan, Do, Check, Act (PDCA) cycle;

– The core elements of a management system and the interrelationship between leadership and commitment, energy policy, planning, operation, performance evaluation, management review and continual improvement.

- ISO 50001: 2018
- An understanding of the requirements of ISO 5000:2018 and the commonly used energy management terms and definitions, as given in ISO 50001:2018, which may be gained by completing CQI/IRCA Certified ISO 50001 Foundation (EnMS) Training course (or equivalent).

- Energy Management
- The principles of fuel combustion, heat transfer and energy flow;
- The relevant sources of energy regulation, guidelines and standards;
- The typical methods and technologies for increasing efficiency;
- Energy measurement units, sources, costs, tariffs and scheduling;
- Energy use data analysis methods;
- Energy performance indicators, monitoring and performance measurement;
- The impact of organisational processes and equipment on energy efficiency;
- Electricity use: motors, drives, lighting, computers.

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COURSE DURATION: 5 days
DELIVERY METHODOLOGY: Face to Face
COURSE LANGUAGE: English
ACCREDITATION: SGS

COURSE DESCRIPTION

The objective of this course is to provide learners with the knowledge and skills required to perform first-party audits of Energy Management Systems (EnMS) against ISO 50001:2018, in accordance with ISO 19011 and ISO 17021, as applicable.



SGS

COURSE CONTENT

SESSION 1: INTRODUCTION TO ENERGY MANAGEMENT SYSTEMS

- The background and development of the EnMS standard
- The benefits of implementing the EnMS standard
- Compatibility between ISO 50001:2018 and other standards
- Difference between legislation compliance and adherence to management systems standards
- The Plan-Do-Check-Act cycle
- The benefits of certification

SESSION 2: ISO 50001:2018: OVERVIEW AND PLANNING CLAUSES

- Purpose of ISO 50001:2018
- EnMS system model
- Purpose of ISO 50001:2018
- Scope of ISO 50001:2018
- Clauses of chapters 4, 5 and 6

SESSION 3: ISO 50001:2018: REQUIREMENTS OF CLAUSES 7-10

- Identify the main requirements of clauses 7, 8, 9 and 10
- Understand the relationship between the requirements of the different clauses

SESSION 4: PROCESS-BASED ENMS

- Establishing an EnMS
- Processes
- EnMS documentation
- EnMS policy and objectives
- Documented procedures
- Records
- Control of documents and records
- Continual improvement
- The purpose of monitoring and improvement
- Implications for auditors

SESSION 5: ACCREDITATION, CERTIFICATION AND AUDITOR COMPETENCE

- Certification and registration of organisations
- Competence of auditors
- Personal characteristics of auditors

SESSION 6: AUDITS: DEFINITION, PRINCIPLES, TYPES

- Audit definition
- Principles of auditing
- Types of audits

SESSION 7: THE AUDIT PROCESS

- Certification process
- Planning the audit
- Audit roles and responsibilities
- Good practice at meetings

SESSION 8: STAGE 1 AUDIT

- Initial contact with the auditee
- Pre-audit visit
- Document review
- The audit plan
- Work documents

SESSION 9: DEVELOPING THE CHECKLIST

- The audit checklist, process review
- The "Turtle Diagram"

SESSION 10: STAGE 2 AUDIT: CONDUCTING THE STAGE 2 AUDIT

- Collecting and verifying information
- Opening meeting
- Roles and responsibilities of guides
- Conducting the audit
- Questioning techniques
- Controlling the audit
- Communication with the audit client and auditee

SESSION 11: STAGE 2 AUDIT: REVIEW OF FINDINGS

- Audit review meeting
- Audit findings
- Finding statements
- Corrective Actions Requests (CARs)
- Classification of CARs
- Opportunities for improvement

SESSION 12: STAGE 2 AUDIT: REPORT AND CONCLUSION

- Presenting the findings
- Reporting on the audit
- Audit completion
- Corrective action
- CAR status log
- Management review
- Follow-up and close out

COURSE CERTIFICATION

Learners who are in attendance for the full duration of the course will be issued with a "Certificate of Attendance".