# RESPONSIBLE PROPERTY MANAGEMENT TOOLKIT
## CHECKLISTS

# MANAGING ENVIRONMENTAL RISK

Managing environmental risk is a central part of responsible property management. Environmental risks can be both negative and positive (opportunities) and involve potential legal, financial and reputation impacts.

Managing environmental risk involves understanding the environment related risks relating to a property, or across a portfolio, and implementing a rigorous control strategy.

It is important that clear responsibilities are identified for managing environmental risk, and that appropriate training is provided. Risks should be managed within a governance framework to enable effective monitoring and reporting.

## ALLOCATE LEADERSHIP RESPONSIBILITIES

A senior individual should be nominated to take overall accountability for environmental risk at the corporate level. In larger companies, accountabilities for environmental risk may be allocated across a number of roles or departments.

It is important that risk management responsibilities are also allocated through the company, at the property and portfolio levels. This allocation should reflect the structure of the framework adopted to govern environmental risk.

GN1.5: Environmental risk control and assurance

## INTEGRATE ENVIRONMENTAL RISK INTO CORPORATE GOVERNANCE

A framework for governing environmental risk should be documented at the corporate level. This framework should include environmental risk responsibilities, and the structure of meetings where environmental risk is reviewed.

Environmental risk may be integrated within a wider governance framework and should include the way in which risk related information transfers within a company, and between related asset, property and facilities managers.

GN1.5: Environmental risk control and assurance

## ESTABLISH AN ENVIRONMENTAL RISK REGISTER

An environmental risk register should be established at the level of the organisation at which environmental risks are managed. Whether this is at the company, portfolio or property level, it is important that the risks included in the register reflect the scope of management control.

The register should collate environmental risks from various sources, including those relating to compliance obligations, aspects and impacts and the organisation's wider context. It may be that the register is a single list, or a group of lists that are made available collectively.

While it is not always possible for risks to be evaluated using a common assessment method, the register should indicate environmental risks that are rated as 'significant', and should reference associated responsibilities and controls.

GN1.1: Collating and evaluating environmental risks

GN1.2: An environmental compliance register

GN1.3: Environmental aspects and impacts

GN1.4: Risk associated with the wider context

## PREPARE AN ENVIRONMENTAL COMPLIANCE REGISTER

An environmental compliance register references various types of environmental obligation, including legal and regulatory requirements, industry guidance adopted by each company, voluntary commitments, and the expectations of interested parties of significant importance.

An environmental compliance register should include a summary of each requirement and the way in which they affect the company.

Ideally, the register will be held corporately, but will involve interaction at all levels of the organisation to identify and collate all applicable obligations.

The relevance of compliance obligations for inclusion in portfolio or property risk registers is determined via an aspect and impact assessment.

GN1.2: An environmental compliance register

GN1.3: Environmental aspects and impacts

## ASSESS ENVIRONMENTAL ASPECTS AND IMPACTS

An assessment of environmental aspects and impacts associated with business activities should be undertaken, most likely at the property level. This will enable the identification of risks that should be incorporated in property risk registers and, where necessary, risk registers at the portfolio or company level.

An aspect and impact assessment reviews the way in which business activities interact with, and impact on, the environment, and evaluates the associated risks. The assessment considers the relevance of obligations within the compliance register as well as financial and reputation consequences of environmental impacts.

GN1.3: Environmental aspects and impacts

## UNDERSTAND THE WIDER RISK CONTEXT

The way in which the broader context of a company could influence how it achieves its environmental objectives is an important component of a risk register.

Most commonly undertaken at a corporate or portfolio level, an environmentally focused 'PESTLE' analysis is one option to horizon-scan for future risks relating to Political, Economic, Social, Technological, Legal and Environmental issues.

Risks associated with the company's wider context that are rated as 'significant' should be made available, along with the compliance register, at the portfolio and property level for consideration within respective risk registers.

GN1.4: Risk associated with the wider context

## CONTROL ENVIRONMENTAL RISKS

As accountabilities for managing environmental risk vary across a range of roles and seniority levels within a company, training and awareness material that is tailored to the competence requirements of specific roles should be made available.

Controls should be established for environmental risks rated as 'significant' and implemented at the appropriate level of the organisation.

Controls should reflect the strategic or tactical nature of risks at company, portfolio or property levels. They may include, for example, management initiatives, operational procedures or technology, and should be accompanied by monitoring and maintenance arrangements.

The process for property acquisition and disposal should include information relating to environmental risks and the associated controls.

GN1.5: Environmental risk control and assurance

## EVALUATE ENVIRONMENTAL RISK CONTROL EFFECTIVENESS

It is important to evaluate the effectiveness of environmental risk controls regularly. This involves checking whether compliance obligations are being met, determining whether controls are being implemented as planned, and confirming whether controls are having the intended effect.

The evaluation should be relevant to the nature of risks recorded in company, portfolio or property registers. At a property level, this evaluation typically involves site audits alongside the preparation of occurrence and non-conformance investigations and collation of performance trends.

GN1.5: Environmental risk control and assurance

## REVIEW THE EFFECTIVENESS OF RISK MANAGEMENT

A regular review of the outcome of environmental risk control evaluation should be undertaken within the governance framework at the company, portfolio and property levels. The focus should be on actions that will continually improve environmental risk management.

GN1.5: Environmental risk control and assurance

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### Guidance notes

GN1.1: Collating and evaluating environmental risks

GN1.2: An environmental compliance register

GN1.3: Environmental aspects and impacts

GN1.4: Risk associated with the wider context

GN1.5: Environmental risk control and assurance

### Related publications

BBP Acquisitions Sustainability Toolkit

MAP Core Provisions for Property Management: Handover Checklist

BBP Sustainability Bites? The Impact of Minimum Energy Efficiency Standards for Commercial Real Estate Lending

BBP Sustainability Benchmarking Toolkit

BBP Climate Change Commitment

Checklist: Managing environmental risk
Responsible Property Management Toolkit

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# OPERATIONAL MANAGEMENT

Operational management is a central part of responsible property management. It is important that up-to-date information about a property's characteristics, equipment and operating systems, and the way that these elements interact with the environment, is collated and acted upon.

Operational management includes integrating information management systems within a property's management, maintenance and monitoring strategies, and meeting the environmental data requirements of asset managers and occupiers.

### MAINTAIN RECORDS OF PROPERTY DOCUMENTS

A range of information about a property should be stored and accessible to stakeholders. This information may relate to, for example, a property's construction, installed equipment, operating systems and risks, and can inform asset and property management strategies.

Ideally, this information will be included in a single Asset Register, however, the information may be stored in multiple locations. It's important that property managers have clarity about the information they are responsible for providing and the process for maintaining it.

GN2.1: An asset register

### IDENTIFY AND OBTAIN MISSING PROPERTY DATA

Property managers should identify information that is missing from a property's Asset Register and consider how such information could be obtained. When acquiring a property, it is important to check that a property manager has all necessary information from the vendor.

Through engagement between asset and property managers, an informed view can be made regarding the need for, and approach to, sourcing missing information types. This may involve, for example, commissioning surveys or installing monitoring equipment.

GN2.1: An asset register

### INTEGRATE AUTOMATED PROPERTY DATA

Property level data relating to, for example, utilities, waste, occupancy and ambient conditions, is becoming more accessible as a result of remote monitoring and interconnected systems.

Alongside improved efficiency and data integrity, this enables asset managers to integrate property information within centralised portfolio management processes. For example, energy management systems, planned preventative maintenance and accounting systems.

Property managers can support this by identifying opportunities for, and managing the installation and maintenance of, automated property data systems and platforms.

GN2.2: Automating property level data

### DEFINE CORPORATE REPORTING REQUIREMENTS

Property managers are often integral to the provision of information required by asset managers for corporate reporting. This may include data relating to, for example, waste, energy and water consumption.

Property and asset managers should undertake an annual review to agree the type, frequency and process for the provision of property data.

GN2.3: Sustainability reporting

### PREPARE A MONITORING AND MAINTENANCE STRATEGY

A monitoring strategy should be prepared to track performance against operational action plans and ongoing property reporting requirements.

A maintenance strategy should be prepared to identify maintenance requirements for installed assets, including informing relating to newly installed or modified equipment.

GN2.4: Maintenance, monitoring and the property management cycle

## AGREE HOW TO FUND IMPROVEMENTS

Sustainability improvement opportunities are identified through ongoing review and monitoring of operational action plans. These opportunities should be considered as part of the asset and property management cycle and annual budget process.

Property managers should engage asset managers and occupiers to discuss how improvement initiatives can be financed. For example, capital expenditure programmes or service charges.

GN2.4: Maintenance, monitoring and the property management cycle

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**Guidance notes**

GN2.1: An asset register

GN2.2: Automating property level data

GN2.3: Sustainability reporting initiatives

GN2.4: Maintenance, monitoring and the property management cycle

**Related publications**

BBP Acquisitions Sustainability Toolkit

MAP Core Provisions for Property Management: Handover Checklist

BBP Real Estate Environmental Benchmark: 2019 Energy Snapshot

BBP Establishing the Ground Rules for Property: Industry-Wide Sustainability Metrics

BBP Sustainability Benchmarking Toolkit

BBP Soft Landings: The Benefits To Commercial Property Owners

BBP Net Zero Carbon Pathway Framework

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# RATINGS AND CERTIFICATIONS

Rating and certifications are a central part of responsible property management.  A range of ratings and certification schemes are available to evaluate and benchmark the environmental, health and well-being attributes of a building.

Managing ratings and certifications involves understanding existing and proposed schemes relating to a property, and the actions required to maintain, improve or attain these.  It is also important to consider the potential impact of property management regimes.

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**REVIEW RE-CERTIFICATION REQUIREMENTS**

Information relating to environmental ratings and certifications should be included in a property's asset register.  This information should be reviewed by asset and property managers as part of wider, periodic management reviews.

GN3.1: Ratings and certifications

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**SUPPORT ASSESSMENT PROCESSES**

Asset, property and facilities managers should agree roles and responsibilities for new and on-going ratings and certifications.  This should include a review of changes to ongoing scheme requirements.

Responsibilities will vary by property and certification scheme.  For example, property managers may lead the certification process for BREEAM In-Use, while they may play a support role to asset managers by collecting data for Energy Performance Certificates.

GN3.1: Ratings and certifications

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**CONSIDER PROPERTY MANAGEMENT IMPACTS**

Asset, property and facilities managers should consider the way in which different property management regimes may affect different rating and certification schemes.  For example, in instances where a building has been acquired, various information may be required by an assessor for certain schemes, such as records of maintenance and description of the BMS.

GN3.1: Ratings and certifications

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**Related publications**

BBP Acquisitions Sustainability Toolkit

MAP Core Provisions for Property Management: Handover Checklist

BBP Acquisitions Sustainability Toolkit

MAP Core Provisions for Property Management: Handover Checklist

BBP Real Estate Environmental Benchmark: 2019 Energy Snapshot

BBP Low Carbon Retrofit Toolkit

BBP Landlord Energy Rating Documentation

BBP Establishing the Ground Rules for Property: Industry-Wide Sustainability Metrics

BBP Green Lease Toolkit

# ENERGY

Managing energy is a central part of responsible property management. Legal obligations relate to energy efficiency ratings, energy consumption incurs financial cost, and associated greenhouse gas emissions are often considered as part of a company's net-zero commitment.

Managing energy involves understanding the way in which energy is used within a property, and how energy consumption can be reduced. It is also important to consider the potential to utilise energy from renewable sources.

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### REVIEW ENVIRONMENTAL POLICIES AND OBJECTIVES

A company's environmental policy and objectives should set out its intentions in relation to energy management. In some cases, a company may have a bespoke energy policy statement, perhaps as part of a wider Energy Management System.

Environmental and energy policies and objectives provide a reference point for property managers when considering energy management at the property level. Reviewing this information can inform and guide the development of energy management plans and associated funding strategies.

GN4.1: An energy policy

### INCORPORATE ENERGY DATA WITHIN PROPERTY REGISTERS

A range of information, for example, design ratings, building and plant specifications, and recommendations from energy audits should be collated and incorporated within a property's asset and other registers.

Specific consideration should be given to the inclusion of renewable and low carbon energy related assets.

GN4.2: Energy performance standards

GN4.3: Air conditioning inspections

GN4.6: Undertaking an energy audit

GN4.10: Maintaining sustainable energy and water assets

### IDENTIFY METERING AND BILLING ARRANGEMENTS

Determining the arrangements for energy metering and billing is an important element of energy management. A Metering Plan should be developed to document metering arrangements for individual floors, units, common areas and critical services.

Improvement opportunities should be considered, for example, the installation of local and advanced meters and the inclusion of automated meter readings within property or portfolio level monitoring systems.

GN4.4: Advanced metering

GN4.5: Energy consumption profile

GN4.12: Energy performance monitoring

### ENSURE COMPLIANCE TO ENERGY STANDARDS

It is important that legal obligations relating to Energy Performance Certificates (EPCs), Display Energy Certificates (DECs) and Minimum Energy Efficiency Standards (MEES) are included in the property risk register.

These obligations should be accompanied by suitable operational controls, with clear responsibilities, and cross-referenced to the Energy Action Plan.

GN4.2: Energy performance standards

GN4.8: Template action plan

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## UNDERTAKE AN ENERGY AUDIT

An energy audit details the sources and quantities of energy consumption at a property and the effectiveness of energy management strategies. The audit should identify energy management improvement opportunities, along with associated cost savings.

GN4.6: Undertaking an energy audit

GN4.9: Energy efficiency opportunities

## CONSIDER RENEWABLE ENERGY

The procurement of energy from renewable sources provides an opportunity to reduce the intensity of a property's energy supply. This can contribute towards the net-zero aspirations of asset managers and occupiers.

GN4.11: Procuring renewable energy

## BENCHMARK ENERGY CONSUMPTION AND SET TARGETS

Available data can be used to benchmark a property's energy performance.  This can be done by establishing energy use via sub-meters, individual plant, and comparing this against industry benchmarks to inform future energy improvements.

Energy performance targets, informed by the findings from energy benchmarking and audit activities, should be developed for the property.

Energy performance targets should be specific, measurable, achievable, realistic and time-bound, and may cover both energy reduction and energy efficiency measures as well as carbon dioxide equivalent measures.

GN4.2: Energy performance standards

GN4.5: Energy consumption profile

GN4.6: Undertaking an energy audit

GN4.7: Benchmarking energy use and setting targets

GN4.8: Template action plan

GN4.9: Energy efficiency opportunities

GN4.12: Energy performance monitoring

## PRODUCE AN ENERGY ACTION PLAN

An Energy Action Plan requires collaboration between asset managers, property managers, facilities managers and occupiers.  The plan should document energy management arrangements, the actions that will contribute towards achieving the property's energy targets, and monitoring and maintenance arrangements.

The plan should be reviewed at least annually as a collective exercise by all stakeholders. Energy Action Plans can also be combined at the portfolio level to inform strategic improvements.

GN4.8: Template action plan

GN4.9: Energy efficiency opportunities

## PREPARE A MONITORING AND MAINTENANCE STRATEGY

A monitoring strategy should be prepared to track performance against Energy Action Plans and energy performance targets. This will enable the review and continual improvement of performance, and will contribute information for stakeholders' sustainability reporting initiatives.

A maintenance strategy should be prepared to identify maintenance requirements for energy related assets, including information relating to newly installed or modified equipment. Specific consideration should be given to renewable or low-carbon energy systems, as well as mechanical and electrical services.

GN4.8: Template action plan

GN4.5: Energy consumption profile

GN4.10: Maintaining sustainable energy and water assets

GN4.12: Energy performance monitoring

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## AGREE HOW TO FUND IMPROVEMENTS

Based on the review of an Energy Action Plan and progress towards energy performance targets, property managers should engage asset managers and occupiers to discuss how future energy improvement initiatives can be funded.

Specific consideration will be required to consider the procurement of renewable or low-carbon energy.

These discussions may be informed by the outcomes of energy benchmarking and audit activities and could be guided by the high-level intent set out with the asset manager's environmental and energy policies and objectives.

GN4.1: An energy policy

GN4.6: Undertaking an energy audit

GN4.9: Energy efficiency opportunities

GN4.11: Procuring renewable energy

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**Guidance notes**

GN4.1: An energy policy

GN4.2: Energy performance standards

GN4.3: Air conditioning inspections

GN4.4: Advanced metering

GN4.5: Energy consumption profile

GN4.6: Undertaking an energy audit

GN4.7: Benchmarking energy use and setting targets

GN4.8: Template action plan

GN4.9: Energy efficiency opportunities

GN4.10: Maintaining sustainable energy and water assets

GN4.11: Procuring renewable energy

GN4.12: Energy performance monitoring

**Related publications**

BBP Better Metering Toolkit.

BBP Real Estate Environmental Benchmark: 2019 Energy Snapshot

BBP Low Carbon Retrofit Toolkit

BBP Sustainability Bites? The Impact of Minimum Energy Efficiency Standards for Commercial Real Estate Lending

BBP Landlord Energy Rating Documentation

BBP Green Building Management Toolkit

BBP Establishing the Ground Rules for Property: Industry-Wide Sustainability Metrics

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BBP Soft Landings: The Benefits To Commercial Property Owners

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BBP Climate Change Commitment

BBP Owner Occupier Forum

BBP Design for Performance

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# WATER

Managing water is a central part of responsible property management. Water consumption incurs financial cost, and greenhouse gas emissions associated with water processing activities can also be considered as part of corporate net-zero commitments.

Managing water involves understanding the way in which water is used within a property, and how water consumption can be reduced. It is also important to consider the potential to utilise water from sustainable sources.

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| **REVIEW ENVIRONMENTAL POLICIES AND OBJECTIVES** | A company's environmental policy and objectives should set out its intentions in relation to water management.<br><br>Environmental policies and objectives provide a reference point for property managers when considering water management at the property level. Reviewing this information can inform and guide the development of water management plans and associated funding strategies. | ☐ |
| **INCORPORATE WATER DATA WITHIN PROPERTY REGISTERS** | A range of information, for example, design ratings, building and plant specifications, and recommendations from water audits should be collated and incorporated within a property's asset and other registers.<br><br>Specific consideration should be given to the inclusion of water from sustainable sources.<br><br>GN5.2: Undertaking a water audit<br><br>GN4.10: Maintaining sustainable energy and water assets | |
| **UNDERTAKE A LEAK INSPECTION PROGRAMME** | Leak detection and remediation offers considerable financial savings. A leak inspection process should be implemented, including frequency of inspections and responsibilities.<br><br>In many buildings, water is only used during normal working hours. A good way to check for leaks and unnecessary water use is to check water meters at the start and end of the period when the building is unoccupied.<br><br>GN5.1: Leak inspections | ☐ |
| **IDENTIFY METERING AND BILLING ARRANGEMENTS** | Determining the arrangements for water metering and billing is an important element of water management. A Metering Plan should be developed to document metering arrangements for individual floors, units, common areas and critical services.<br><br>Improvement opportunities should be considered, for example, the installation of local and advanced meters and the inclusion of automated meter readings within property or portfolio level monitoring systems.<br><br>GN4.4: Advanced metering | ☐ |
| **UNDERTAKE A WATER AUDIT** | A water audit details the sources and quantities of water consumption at a property and the effectiveness of water management strategies. The audit should identify water management improvement opportunities, along with associated cost savings.<br><br>GN5.1: Leak inspections<br><br>GN5.2: Undertaking a water audit<br><br>GN5.4: Water efficiency opportunities | ☐ |

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## BENCHMARK WATER CONSUMPTION AND SET TARGETS

Available data can be used to benchmark a property's water performance. This can be done by establishing water use via sub-meters, individual plant, and comparing this against industry benchmarks to inform future water improvements.

Water performance targets, informed by the findings from water benchmarking and audit activities, should be developed for the property.

Water performance targets should be specific, measurable, achievable, realistic and time-bound, and may cover both water reduction and water efficiency.

GN5.2: Undertaking a water audit

GN5.3: Benchmarking water use and setting targets

GN5.4: Water efficiency opportunities

GN4.8: Template action plan

## PRODUCE A WATER ACTION PLAN

A Water Action Plan requires collaboration between asset managers, property managers, facilities managers and occupiers. The plan should document water management arrangements, the actions that will contribute towards achieving the property's water targets and the monitoring and maintenance arrangement associated with assets.

The plan should be reviewed at least annually as a collective exercise by all stakeholders. Site Water Action Plans can also be combined at the portfolio level to inform strategic improvements.

GN5.4: Water efficiency opportunities

GN4.8: Template action plan

## PREPARE A MONITORING AND MAINTENANCE STRATEGY

A monitoring strategy should be prepared to track performance against Water Action Plans and water performance targets. This will enable review and continual improvement of performance, and contribute information for stakeholders' sustainability reporting initiatives.

The maintenance strategy should be prepared to identify maintenance requirements for water related assets, including information relating to newly installed or modified equipment. Specific consideration should be given to the maintenance of assets related to water from sustainable sources.

GN4.8: Template action plan

GN4.10: Maintaining sustainable energy and water assets

## AGREE HOW TO FUND IMPROVEMENTS

Based on the ongoing review of a Water Action Plan and progress towards water performance targets, property managers should engage asset managers and occupiers to discuss how future energy improvement initiatives can be funded.

Specific consideration will be required to consider the sourcing of water from sustainable sources.

These discussions may be informed by the outcomes from water benchmarking and audit activities, and could be guided by the high level intend set out with the asset manager's corporate environmental and water policies and objectives.

GN5.2: Undertaking a water audit

GN5.4: Water efficiency opportunities

GN4.8: Template action plan Link

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**Guidance notes**

GN5.1: Leak inspections

GN5.2: Undertaking a water audit

GN5.3: Benchmarking water use and setting targets

GN5.4: Water efficiency opportunities

GN4.4: Advanced metering

GN4.8: Template action plan

GN4.10: Maintaining sustainable energy and water assets

**Related publications**

BBP Better Metering Toolkit

BBP Real Estate Environmental Benchmark: 2019 Energy Snapshot

BBP Establishing the Ground Rules for Property: Industry-Wide Sustainability Metrics

BBP Design for Performance

# WASTE

Managing waste is a central part of responsible property management. Legal obligations relate to the storage, handling and disposal of waste, and financial cost results from waste disposal and the inefficient use of resources.

Managing waste involves understanding the type, source and final destination of waste generated within a property and options for handling and disposing of waste. It is also important to consider the ways in which waste generation can be reduced.

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**REVIEW ENVIRONMENTAL POLICIES AND OBJECTIVES**

A company's environmental policy and objectives should set out its intentions in relation to waste.

Environmental policies and objectives provide a reference point for property managers and other stakeholders when considering waste management at the property level. Reviewing this information can inform and guide the development of waste management plans and associated funding strategies.

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**INCORPORATE WASTE DATA WITHIN PROPERTY REGISTERS**

A range of information, for example, waste collection points, recycling facilities, on-site incinerators, plant specifications, and recommendations from waste audits should be collated and incorporated within a property's asset and other registers.

GN6.2: Undertaking a waste audit

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**ENSURE COMPLIANCE TO DUTY OF CARE REGULATIONS**

It is important that legal obligations relating to the production, storage, transportation and disposal of waste are included in the property risk register.

These obligations should be accompanied by suitable operational controls, with clear responsibilities, and cross-referenced to the site Waste Management Plan.

GN6.1: Duty of Care

GN6.3: Site Waste Management Plans

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**UNDERTAKE A WASTE AUDIT**

The audit may include a mapping a property's waste streams, i.e., the type, quantity, source, disposal method and destination off waste generated. An audit may also cover the effectiveness of waste management strategies, for example, storage and handling equipment and arrangements, service providers and the way in which waste data is collated and reported.

A waste audit should identify waste management improvement opportunities, along with associated cost savings.

GN6.2: Undertaking a waste audit

GN6.3: Site Waste Management Plans

GN6.4: Waste management opportunities

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**BENCHMARK WASTE PERFORMANCE AND SET TARGETS**

Available data can be used to benchmark a property's waste performance. This can be done by establishing a property's historic waste trends and comparing these against industry benchmarks to inform future waste management improvements.

Waste performance targets, informed by the findings from waste mapping, benchmarking and audit activities, should be developed for the property.

Waste performance targets should be specific, measurable, achievable, realistic and time-bound, and may cover both waste reduction as well as preferred disposal methods.

GN6.3: Site Waste Management Plans

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## PRODUCE A SITE WASTE MANAGEMENT PLAN

A Waste Management Plan requires collaboration between property managers, facilities managers, occupiers and waste management service providers. The plan should document waste management arrangements, the actions that will contribute towards achieving the property's waste targets and the monitoring and maintenance arrangements.

The plan should be reviewed at least annually as a collective exercise by all stakeholders. Waste Management Plans can also be combined at the portfolio level to support the ongoing development of waste contracts and to inform strategic improvements.

GN6.3: Site Waste Management Plans

GN4.8: Template action plan

## REDUCE WASTE ASSOCIATED WITH FIT-OUT WORKS

Alongside the day-to-day management of waste associated with a property's operations, specific arrangements should be prepared for fit-out works.

Fit-out works provide opportunities to design-out waste during the construction and in-use phases of a property. Fit-out plans also enable clear waste management expectations to be set for construction contractors.

GN6.5: Waste management during refurbishment and fit-out

## INCORPORATE SUSTAINABILITY WITHIN CONTRACTS

The arrangements for the segregation and disposal of waste, selection of waste management equipment and provision of waste data should be considered during the renewal of service provider contracts.

Specifications may be informed by the findings from the waste mapping, benchmarking and audit activities and should be documented in the Waste Management Plan.

GN6.3: Site Waste Management Plans

## PREPARE A MONITORING AND MAINTENANCE STRATEGY

A monitoring strategy should be prepared to track performance against Waste Management Plans and waste performance targets. This will enable the review and continual improvement of performance, and will contribute information for stakeholders' sustainability reporting initiatives.

A maintenance strategy should be prepared to identify maintenance requirements for waste related assets, including information relating to newly installed or modified equipment. management equipment.

GN6.3: Site Waste Management Plans

## AGREE HOW TO FUND IMPROVEMENTS

Based on the ongoing review of the site Waste Management Plan and progress towards waste performance targets, property managers should engage asset managers and occupiers to discuss how future waste improvement initiatives can be funded.

These discussions may be informed by the outcomes from waste mapping, benchmarking and audit activities, and could be guided by the high-level intent set out with the asset manager's environmental policy and objectives.

GN6.2: Undertaking a waste audit

GN6.3: Site Waste Management Plans

GN6.4: Waste management opportunities

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**Guidance notes**

GN6.1: Duty of Care

GN6.2: Undertaking a waste audit

GN6.3: Site Waste Management Plans

GN6.4: Waste management opportunities

GN6.5: Waste management during refurbishment and fit-out

GN4.8: Template action plan

**Related publications**

MAP Industry Insight on 'Improving UK Waste Management Practices: Standardised Reporting Framework'

MAP Industry Insight on 'Improving UK Waste Management Practices: Procurement Specifications'

BBP Real Estate Environmental Benchmark: 2019 Energy Snapshot

BBP Transactional Agents Sustainability Toolkit

BBP Establishing the Ground Rules for Property: Industry-Wide Sustainability Metrics

BBP Responsible Fit-Out Toolkit: Offices

BBP Soft Landings: The Benefits To Commercial Property Owners

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# SUSTAINABLE TRANSPORT

Transport is a central part of responsible property management.  Building users' mode of transport and transport arrangements at a property can affect corporate net-zero commitments, as well as impacting on congestion and air quality in local communities.

Managing transport involves influencing the transport choices of building users through the provision of facilities and incentives. It is also important to consider how vehicle movements and parking arrangements can contribute towards occupiers' environmental objectives.

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| **REVIEW ENVIRONMENTAL POLICIES AND OBJECTIVES** | A company's environmental policy and objectives should set out its intentions in relation to sustainable transport.  In some cases, a company may have a bespoke sustainable transport policy statement.  Environmental policies and objectives provide a reference point for property managers when considering sustainable transport at the property level.  Reviewing this information can inform and guide the development of sustainable transport plans and associated funding strategies. | ☐ |
|---|---|---|
| **REVIEW OCCUPIERS' NEEDS** | The transport needs of a property's occupiers should be established to identify sustainable transport improvements.  Engagement with occupiers can be undertaken through discussions at property management meetings, for example, or a commuter survey.  The ability to support occupiers will vary, depending on the property's characteristics and the level of sustainable transport activities already undertaken by the occupier. <br><br> GN7.1: Sustainable transport opportunities <br> GN7.2: Electric vehicle charging facilities | ☐ |
| **PRODUCE A SUSTAINABLE TRANSPORT PLAN** | A Sustainable Transport Plan requires collaboration between asset, property and facilities managers and occupiers.  The plan should be informed by the evaluation of occupiers needs balanced against the availability of funding for initiatives.  Sustainable transport initiatives may include, for example, car park planning, shared transport provision and electric vehicle charging points.  The plan should be reviewed at least annually as a collective exercise by all stakeholders. <br><br> GN7.1: Sustainable transport opportunities <br> GN7.2: Electric vehicle charging facilities <br> GN4.8: Template action plan | ☐ |
| **PREPARE A MONITORING AND MAINTENANCE STRATEGY** | A monitoring strategy should track performance against Sustainable Transport Plans and associated environmental performance.  This will enable the review and continual improvement of performance, and can contribute information for stakeholders' sustainability reporting initiatives.  A maintenance strategy should be prepared to identify maintenance requirements for transport related assets, including information relating to newly installed or modified equipment.  Specific consideration should be given to the maintenance of assets related to electric vehicle charging facilities. <br><br> GN7.2: Electric vehicle charging facilities | ☐ |

## AGREE HOW TO FUND IMPROVEMENTS

Based on the ongoing review of the Sustainable Transport Action Plan, and progress towards environmental targets, property managers should engage asset managers and occupiers to discuss how future energy improvement initiatives can be funded.

These discussions may be informed by the availability of third-party funding and could be guided by the high-level intent set out with the asset manager's corporate environmental and utilities policies and objectives.

GN7.1: Sustainable transport opportunities

**Guidance notes**

GN7.1: Sustainable transport opportunities

GN7.2: Electric vehicle charging facilities

GN4.8: Template action plan

**Related publications**

BBP Net Zero Carbon Pathway Framework

Checklist: Sustainable Transport
Responsible Property Management Toolkit

BBP | BETTER BUILDINGS PARTNERSHIP

# SOCIAL VALUE

Social value is a central part of responsible property management.  A building has the potential to make a positive social impact within its local community, as well as for individuals working at, or visiting, a property.

Managing social value involves property managers and occupiers understanding stakeholder's social needs, and considering how to contribute towards these through a building's facilities, employee activities and service procurement.

## UNDERSTAND THE SOCIAL LANDSCAPE

Identifying a building's stakeholders and understanding their social and community needs is the foundation for shaping and delivering a property's social value.

A property's stakeholders can be wide-ranging.  These may include, for example, occupiers and other building users, and local residents, community groups and businesses.

Stakeholders' needs can be mapped by, for example, reviewing company sustainability reports and community initiatives, surveying occupiers and other building users, and contacting third party organisations such as local authorities, charities and community groups.

GN8.1: What is social value?

## PRODUCE A SOCIAL VALUE ACTION PLAN

A Social Value Action Plan requires collaboration between asset, property and facilities managers to identify opportunities relating to the property that may provide value to its stakeholders.

Opportunities will depend on the property's characteristics, facilities and contracted services, and should be reviewed for alignment with stakeholders' social and community needs.  The plan should be reviewed at least annually as a collective exercise by all stakeholders.

GN8.2: Social Value Opportunities

GN4.8: Template action plan

## ENHANCE SOCIAL VALUE IN THE SUPPLY CHAIN

A property relies on a range of services to function on a day-to-day basis.  These may include, for example, office and window cleaning, and catering services.

Opportunities to enhance social value involves making tender opportunities available to local businesses, as well as partnering with community organisations to participate in initiatives that support harder-to-reach groups to access employment opportunities.

GN8.2: Social Value Opportunities

GN8.3: Incorporating social value within the supply chain

## SET SOCIAL VALUE TARGETS

Social value performance targets, informed by the review of review of social value landscape and supply chain review, should be developed for the property.

Social value performance targets should be specific, measurable, achievable, realistic and time-bound, and may cover both energy reduction and energy efficiency measures as well as carbon dioxide equivalent measures.

GN8.2: Social Value Opportunities

GN8.3: Incorporating social value within the supply chain

## COMMUNICATE SOCIAL VALUE ACTIONS

Social value actions may contribute towards the sustainability reporting needs of asset managers and occupiers.  It is also important that those with an interest in, or who may benefit from, a property's social actions are aware of the initiatives and resources that are available.

Existing forums and communications enable engagement with occupiers and other building users. For community stakeholders, it may be beneficial to work with local authorities, community groups and schools, for example, alongside local press and media, to raise awareness of support provision.

## PREPARE A MONITORING STRATEGY

A monitoring strategy should be prepared to track performance against Social Value Action Plans and energy performance targets. This will enable review and continual improvement of performance, and contribute information for stakeholders' sustainability reporting initiatives.

GN8.1: What is social value?

GN8.2: Social Value Opportunities

GN4.8: Template action plan

**Guidance notes**

GN8.1: What is social value?

GN8.2: Social value opportunities

GN8.3: Incorporating social value within the supply chain

GN4.8: Template action plan

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# SUPPLY CHAIN

Supply chain management is a central part of responsible property management. Legal obligations and voluntary commitments relate to way in which people are employed by suppliers and contractors. A range of financial and operational benefits are also possible by considering sustainability within key service contracts.

Supply chain management involves understanding the sustainability risks and opportunities associated with the goods and services provided to a property. It is also important to specify the requirements that will control these risks within contracts and agreements.

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|---|---|---|
| **REVIEW COMPLIANCE WITH THE MODERN SLAVERY ACT** | It is important that obligations relating to the Modern Slavery Act are considered by asset, property and facilities managers. Modern Slavery related to exploitive practices including servitude, forced and compulsory labour, child labour and human trafficking.<br><br>Modern Slavery presents a growing risk to the property management sector, particularly in relation to waste management, cleaning, security, landscaping and ground maintenance services. These risks should be addressed by reviewing controls within directly managed services and services provided by the supply chain.<br><br>GN9.1: Modern Slavery Act | ☐ |
| **DELIVER LIVING WAGE FOUNDATION CERTIFIED SERVICES** | The Living Wage Foundation calculates an annual living wage (above the government's legal minimum wage) based on evidence about living standards in the UK. Companies that adopt the Living Wage may enhance reputation and can experience improved employee motivation, retention and relations.<br><br>Delivering Living Wage Foundation certified services involves assessing the viability of paying a Living Wage in relation to property management services. Where feasible, Living Wage certified services should be included in the tendering process for new or revised contracts.<br><br>GN9.2: Living Wage Foundation certified services | ☐ |
| **EMBED SUSTAINABILITY INTO PROPERTY MANAGEMENT SERVICES** | It is important that a company's sustainability requirements are incorporated into the products and services provided by suppliers and contractors.<br><br>Tender documentation should be reviewed by colleagues with appropriate sustainability knowledge to identify sustainability impacts relevant to the contract.<br><br>Sustainability specifications should be incorporated within contracts, along with the requirement for suppliers and contractors to provide related sustainability performance data.<br><br>Key contract types for which sustainability should be considered include:<br><br>• Waste management services<br>• M&E services<br>• Cleaning services<br>• Security services<br>• Landscaping services<br><br>GN9.3: Embedding sustainability within waste management services<br><br>GN9.4: Embedding sustainability within M&E services<br><br>GN9.5: Embedding sustainability within cleaning services<br><br>GN9.6: Embedding sustainability within security services<br><br>GN9.7: Embedding sustainability within landscaping services | ☐ |

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A monitoring strategy should be prepared to track supply chain management performance. This will enable the review and continual improvement of performance, and will contribute information for stakeholders' sustainability reporting initiatives.

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**Guidance notes**

GN9.1: Modern Slavery Act

GN9.2: Living Wage Foundation certified services

GN9.3: Embedding sustainability within waste management services

GN9.4: Embedding sustainability within M&E services

GN9.5: Embedding sustainability within cleaning services

GN9.6: Embedding sustainability within security services

GN9.7: Embedding sustainability within landscaping services

# FIT-OUT AND ALTERATIONS

Managing fit-out and alterations is a central part of responsible property management. Legal obligations relate to various energy standards, and a range of cost-saving and reputation benefits are possible by considering sustainability at difference stages of the fit-out and alterations process.

Managing fit-out and alterations involves understanding the way in which sustainability can be incorporated into the design and renewal of properties, and ensuring that sustainability is appropriately reflected in key processes for alterations, dilapidations and reinstatement.

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## REFLECT SUSTAINABILITY IN FIT-OUT WORKS

Assets undergo refurbishment over the property lifecycle. Ensuring this is undertaken in sustainable way provides an opportunity to mitigate property risks and enhance property value, alongside controlling operational costs and improving the experience of building users.

Incorporating sustainability within fit-out involves understanding the purpose of the fit-out and the occupiers' needs. It is important that these requirements are included within the fit-out design specification and that the Asset Register is updated following fit-out works.

GN10.1: The fit-out process

BBP Fit-out Toolkit

## SUPPORT COMPLIANCE WITH ENERGY PERFORMANCE STANDARDS

Fit-out and alterations provide an opportunity to contribute towards a range of energy performance compliance obligations and voluntary objectives.

For example, the required Energy Performance Certificate requirements within the Minimum Energy Efficiency Standards in England and Wales (and similar Climate Change Scotland Act requirements in Scotland).

## REFLECT SUSTAINABILITY IN THE LICENSE FOR ALTERATIONS PROCESS

The license for alterations process involves the asset manager consenting to the request from an occupier to undertake alterations to a property. It is important for the sustainability impact of these alterations to be understood, in particular for key elements such as energy efficiency.

The design stage for proposed alterations may involve the review of potential Energy Performance Certificate rating impacts by suitably qualified building surveyor and energy assessor. Alongside this, the asset manager may encourage enhanced sustainability performance through sustainable design standard or a green lease.

GN10.2: Alterations and dilapidations

BBP Green Lease Toolkit

## REFLECT SUSTAINABILITY IN THE DILAPIDATIONS AND REINSTATEMENT PROCESS

A Schedule of Dilapidation is generally prepared by a Chartered Building Surveyor and identifies relevant breaches to tenancy obligations and proposed remedial works. They are typically prepared towards the end of a lease term and can result in the tenant undertaking an agreed scope of repair and reinstatement works.

With an increasing focus on energy efficiency and Energy Performance Certificate ratings, the dilapidation process needs to take account of the impact of any repair and reinstatement works. Whilst Energy Performance Certificate obligations fall to the asset manager, it is important to consider potential diminution valuations resulting from the reinstatement process.

GN10.2: Alterations and dilapidations

BBP | BETTER BUILDINGS PARTNERSHIP

**Guidance notes**

GN10.1: The fit-out process

GN10.2: Alterations and dilapidations

**Related publications**

BBP Fit-out Toolkit

BBP Green Lease Toolkit

BBP Acquisitions Toolkit

BBP Low Carbon Retrofit Toolkit

BBP Green Lease Toolkit

BBP Sustainability Benchmarking Toolkit

BBP Responsible Fit-Out Toolkit: Offices

BBP Soft Landings: The Benefits To Commercial Property Owners

BBP Design for Performance

**BBP** | BETTER BUILDINGS PARTNERSHIP

# OCCUPIER ENGAGEMENT

Occupier Engagement is a central part of responsible property management. Constructive relations between property and facilities managers and occupiers contributes towards meeting compliance obligations and the achievement of wider sustainability objectives.

Occupier engagement involves clarifying the needs and expectations of occupiers and aligning these with the asset manager's objectives for a property. It is also important to establish communication and engagement methods that can be used to share information and evaluate the way in which these needs can be met.

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|---|---|---|
| **UNDERSTAND LEASE REQUIREMENTS** | It is important for property managers to take responsibility for the promotion, management and oversight of sustainability requirements within leases.<br><br>Property managers should be familiar with the sustainability content of leases, which may vary between occupiers. Arrangements should be developed to monitor adherence to these requirements on a regular basis. | ☐ |
| **PROVIDE A BUILDING USER GUIDE** | Property managers should ensure that occupiers are provided with a building user guide as their tenancy agreement commences.<br><br>Information in the building user guide should be kept up-to-date, reflecting the on-going, shared aspirations of the asset manager and occupier.<br><br>GN11.1: Building User Guide | ☐ |
| **PROVIDE FIT-OUT GUIDE TO OCCUPIERS** | Property managers should ensure that occupiers are provided with a fit-out guide at the commencement of their tenancy agreement.<br><br>Information in the fit-out guide should be kept up-to-date, reflecting the on-going shared aspirations of the asset manager and the occupier. | ☐ |
| **DOCUMENT OCCUPIER NEEDS** | Understanding the sustainability requirements of building users is critical in providing a property management service that is valued by occupiers.<br><br>Occupiers' needs can be determined through a range of methods, including reviewing the lease, undertaking surveys and conducting post-occupancy reviews. Requirements should be documented and reviewed on a regular basis in order to contribute towards the shared sustainability aspirations of property owners and occupiers.<br><br>GN11.2: Engaging occupiers | ☐ |
| **ENGAGE WITH OCCUPIERS** | To support occupiers' on-going satisfaction and contribute towards occupier retention, it is important to maintain effective ways to communicate with, and receive feedback from, occupiers. This will enable property managers to keep up-to-date with occupier needs and experience.<br><br>There are different methods for engaging occupiers, including both one-way information provision, such as newsletters, as well as two-way engagement, such as property sustainability forums.<br><br>GN11.2: Engaging occupiers | ☐ |
| **REVIEW RE-CHARGE OPPORTUNITIES** | It is important to review opportunities to re-charge for sustainability related services as an incentive to encourage responsible behaviour. For example, charging for an occupier's actual energy and water consumption or waste generation, rather than applying a flat fee.<br><br>The fair apportionment of costs for utilities and other sustainability initiatives helps to provide transparency, accountability and continual improvement, as well as aligning with the 'polluter pays principle.'<br><br>GN11.3: Service charge considerations | ☐ |

**BBP** | BETTER BUILDINGS PARTNERSHIP

**Guidance notes**

GN11.1: Building User Guide

GN11.2: Engaging occupiers

GN11.3: Service charge considerations

**Related publications**

BBP Responsible fit-out Toolkit

BBP Green Lease Toolkit

BBP Low Carbon Retrofit Toolkit

BBP Green Building Management Toolkit

BBP Green Lease Toolkit

BBP Soft Landings: The Benefits To Commercial Property Owners

BBP Owner Occupier Forum

BBP Design for Performance

# BIODIVERSITY

Managing biodiversity is a central part of responsible property management. Legal obligations may exist in relation to preservation orders, protected specifies or valuable habitats. Well-managed biodiversity can also contribute towards positive community engagement and employee wellbeing.

Managing biodiversity involves understanding the biodiversity characteristics of a property, and the associated stakeholder interests. This will shape the development of appropriate measures to enhance biodiversity and can help to secure the funding these measures require.

## REVIEW BIODIVERSITY RISKS

It is important that biodiversity risks are documented in the property risk register and, where necessary, included in the corporate compliance register.

Risks and compliance obligations could include, for example, preservation orders or protected species and habitat, reporting requirements relating to invasive species, and biosecurity considerations within procurement.

Some biodiversity risks may require periodic review by suitably qualified ecologists on a seasonal basis.

GN12.1: Biodiversity baseline

## MAP STAKEHOLDER NEEDS

Reviewing the biodiversity related needs of local, regional and national stakeholders is important when developing a strategic approach to biodiversity management.

This may involve, for example, a review of Biodiversity Action Plans, or engagement with local authorities or community groups.

GN12.1: Biodiversity baseline

## UNDERTAKE AN ECOLOGICAL SURVEY

An ecological survey can contribute towards establishing current wildlife habitats and other green infrastructure, and to identifying and prioritising species. The outcomes from such a survey can enable opportunities to enhance biodiversity to be assessed.

Ecological surveys should be undertaken in alignment with stakeholders' biodiversity strategies and can focus on internal or external property spaces.

GN12.1: Biodiversity baseline

## SET BIODIVERSITY TARGETS

Biodiversity performance targets, informed by the review of stakeholder needs and biodiversity mapping, should be developed for a property.

Biodiversity performance targets should be specific, measurable, achievable, realistic and time-bound, and may cover both energy reduction and energy efficiency measures as well as carbon dioxide equivalent measures.

GN12.1: Biodiversity baseline

## PRODUCE A BIODIVERSITY ACTION PLAN

A Biodiversity Action Plan requires collaboration between asset managers, property managers, facilities managers and other stakeholders.

The plan could include the installation of habitats and green infrastructure that will encourage wildlife and enhance biodiversity. This can range from simple bird boxes to green roofs.

Certain types of green infrastructure may require planning permission, which should be considered during the design phase. Structural surveys are also advised for infrastructure such as green roofs or living walls.

Actions may also include internal biodiverse spaces and biophilic design, which can contribute towards occupiers' health and wellbeing.

GN12.2: Valuable green spaces

GN4.8: Template action plan

## PREPARE A MONITORING AND MAINTENANCE STRATEGY

A monitoring strategy should be prepared to track performance against Biodiversity Action Plans and biodiversity performance targets. This will enable review and continual improvement of performance, and can contribute information for stakeholders' sustainability reporting initiatives.

A maintenance strategy should be prepared to identify maintenance requirements for biodiversity related asset, including information relating to newly installed or modified equipment. Specific consideration should be given to significant structures, such as green walls and living roofs.

GN12.3: Maintaining and monitoring green infrastructure

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## AGREE HOW TO FUND IMPROVEMENTS

Based on the ongoing review of the site Biodiversity Plan and progress towards biodiversity performance targets, property managers should engage asset managers and occupiers to discuss how future biodiversity improvement initiatives can be funded.

These discussions may be informed by the outcomes from biodiversity baseline findings, and could be guided by the high level intend set out with the asset manager's corporate environmental policies and objectives.

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**Guidance notes**

GN12.1: Biodiversity baseline

GN12.2: Valuable green spaces

GN12.3: Maintaining and monitoring green infrastructure

GN4.8: Template action plan

**Related publications**

BBP Soft Landings: The Benefits To Commercial Property Owners

BBP Design for Performance

**BBP** | BETTER BUILDINGS PARTNERSHIP

# HEALTH AND WELLBEING

Health and wellbeing is a central part of responsible property management.  In addition to health and safety obligations, asset managers and occupiers may have health and wellbeing obligations that relate to certification schemes.  Health and well-being can also contribute to employee engagement, lower absence levels and enhanced motivation.

Managing health and wellbeing involves understanding the way in which a property's characteristics have the potential to influence the physical and emotional wellbeing of its occupiers.  A range of tools are available to identify improvement opportunities, which should be reviewed regularly by the property's stakeholders.

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**REVIEW CORPORATE COMMITMENTS**

Property managers should consider whether the asset manager or occupiers have any health and wellbeing commitments within wider sustainability strategies that may require action.

Such commitments may be included within relevant certification schemes, such as WELL Buildings Standard, RESET, Fitwel, BREEAM In-use.  Alternatively, they may be set out within a lease, particularly in relation to in-door environmental quality.

GN13.1: Assessing stakeholder requirements

GN13.2: Health and wellbeing opportunities

**IDENTIFY AND IMPROVE MONITORING ARRANGEMENTS**

A range of monitoring equipment and activities may exist within a property which can help track health and wellbeing performance against stakeholder requirements.  It is important to collate, review and identify opportunities to improve such resources.

This may involve, for example equipment to monitor indoor environmental conditions, such as carbon dioxide monitors or particulate levels connected to Buildings Management Systems.  Alternatively, this may involve management processes such as occupier satisfaction surveys.

GN13.3: Occupier satisfaction surveys

GN13.4: Reviewing health and wellbeing

**REVIEW HEALTH AND WELLBEING AT A PROPERTY**

Reviewing health and wellbeing enables the understanding of health and wellbeing performance within a property and contributes to the identification of improvement opportunities.

Reviews can provide quantitative based outputs through installed monitoring devices or specialist equipment.  Alternatively, they can provide qualitative outputs, through the use of occupier satisfaction or health and wellbeing surveys.

GN13.3: Occupier satisfaction surveys

GN13.4: Reviewing health and wellbeing

**DEVELOP HEALTH AND WELLBEING TARGETS**

Health and wellbeing performance targets, informed by the findings from health and wellbeing benchmarking and audit activities, should be developed for the property.

Health and wellbeing performance targets should be specific, measurable, achievable, realistic and time bound.  They may cover quantifiable targets, such as reductions in absence levels, for example, as well as qualitative targets, such as occupier satisfaction.

GN13.2: Health and wellbeing opportunities

GN13.4: Reviewing health and wellbeing

## DEVELOP A HEALTH AND WELLBEING ACTION PLAN

A Health and Wellbeing Action Plan requires collaboration between asset managers, property managers, facilities managers and occupiers.

The plan should document health and wellbeing management arrangements, the actions that will contribute towards achieving the property's health and wellbeing targets and the monitoring and maintenance arrangements.

The plan should be reviewed at least annually as a collective exercise by all stakeholders. Health and Wellbeing Action Plans can also be combined at the portfolio level to inform strategic improvements.

GN13.2: Health and wellbeing opportunities

GN13.4: Reviewing health and wellbeing

GN4.8: Template action plan

## DEVELOP HEALTH AND WELLBEING COMMUNICATIONS

A health and wellbeing communications plan can help to engage occupiers in understanding the benefits available through proactive management of health and wellbeing, as well as the resources available for their use.

There are different methods for engaging occupiers, including both one-way information provision, such as newsletters, as well as two-way engagement, such as property sustainability forums.

## PREPARE A MONITORING AND MAINTENANCE STRATEGY

A monitoring strategy should be prepared to track performance against Health and Wellbeing Action Plans and health and wellbeing performance targets. This will enable the review and continual improvement of performance, and can contribute information for stakeholders' sustainability reporting initiatives. One way of doing this is through self-assessment schemes such as RESET.

A maintenance strategy should be prepared to identify maintenance requirements for health and wellbeing related asset, including information relating to newly installed or modified equipment.

## AGREE HOW TO FUND IMPROVEMENTS

Based on the ongoing review of the Health and Wellbeing Plan and progress towards health and wellbeing performance targets, property managers should engage asset managers and occupiers to discuss how future health and wellbeing improvement initiatives can be funded.

These discussions may be informed by the outcomes from health and wellbeing benchmarking and audit activities, and could be guided by the high-level intent set out within the asset manager and occupiers' corporate sustainability commitments.

GN13.2: Health and wellbeing opportunities

GN13.4: Reviewing health and wellbeing

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**Guidance notes**

GN13.1: Assessing stakeholder requirements

GN13.2: Health and wellbeing opportunities

GN13.3: Occupier satisfaction surveys

GN13.4: Reviewing health and wellbeing

GN4.8: Template action plan

Checklist: Health and Wellbeing
Responsible Property Management Toolkit

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