ENGAGING OCCUPIERS

Usually, occupier engagement is coordinated by the property manager with input from the asset manager and facilities manager when required.

As the level of engagement in a large multi-tenanted building will be different to that of a single let building, it is important that the approach is tailored to this. In the case of multi-let properties, it is important to consider the collective view of all occupiers and that a fair and balanced approach is taken to decisions.

Engagement can be broken down into the following steps, which will generally be coordinated by a property manager with input from an asset manager and facilities manager, as required.

STEP 1: ASSESS OCCUPIERS' REQUIREMENTS

Some of the key elements involved in assessing occupiers' requirements are listed below:

Lease requirements

It is important to understand an occupier's lease terms relating to sustainability. This can help to ensure that occupier's sustainability expectations and plans are in line with the terms of their lease, and to facilitate occupiers' ongoing adherence to the lease and in line with service charges

This can be either done by reviewing a lease when an occupier first joins a property, and engaging occupiers at any stage when plans for alterations are developed. It is important that occupier requirements continue to be reviewed and understood, and that services and charges are adapted accordingly.

Sustainability service requirements

It is important to understand the extent to which sustainability facilities and services provided onsite are aligned to the occupier's requirements, and to work with the occupier and the asset manager to renew or update these, if necessary.

Gaining an understanding of an occupier's main business and operational activities is a useful way to gain an insight into their sustainability service and facility requirements. For example:

- Occupiers with business activities that incur significant waste generation or energy consumption may have a requirement for on-site waste segregation or renewable energy provision.

- Occupiers with large numbers of on-site employees, or employees who travel meaningful distances to work, may have a requirement for health and wellbeing initiatives or sustainable travel options.

In multi let properties, a property manager will be able to pool the views of all occupiers to make appropriate decisions based on collective requirements.

Sustainability reporting requirements

The sustainability reporting requirements of an occupier may include, for example, waste generation, recycling and energy consumption.

It is important to understand an occupier's on-going or future sustainably reporting needs, so that data collation arrangements can be established to provide information in a timely manner.

Depending on an occupier's needs, this may involve the provision of an annual statement for annual sustainability reporting, or a more detailed and frequent scorecard of key performance indicators to facilitate regular performance management.

Sustainability information and training requirements

It is important to assess whether education or awareness support could be provided to help occupiers to make use of the sustainability services onsite and to understand the important role an occupier can provide in enabling the sustainability performance of a property.

Information or training may include, for example:

- Basic information relating to the utilisation of core services, such as heating, ventilation and air conditioning systems.

- Specific information relating to sustainability services, for example electric vehicle charging points, local transport or on-site gyms.

- Enhanced information relating to specific sustainably features, for example biophilic design or green roofs.

- General awareness training on sustainability good practice, for example energy efficiency and waste minimization.

- Specific training on bespoke services, such as first aid or the use of on-site defibrillators.

Bespoke engagement may also be beneficial. For example, an asset or property manager to provide occupiers with a workshop where information regarding a new sustainability strategy or the intention to pursue a sustainability rating scheme could be communicated.

STEP 2: PLAN THE APPROACH TO ONGOING OCCUPIER ENGAGEMENT

It is important to be clear about the intended outcome from occupier engagement and have the communication methods and audience in mind. For example, when planning the approach to ongoing occupier engagement, it is important to understand:

- An occupier's sustainability objectives relating to a property. For example, whether the occupier's focus is to achieve efficient business operations, enhance employee wellbeing.

- An occupier's working arrangements to enable maintenance and improvement work to be planned in a way that minimizes disruption.

It may be helpful to consider the following questions when planning the approach to occupier engagement:

- Do occupiers have any expectations or required outcomes, for example, waste recycling rates or the coordination of donations for a charity?

- Which relationship elements with an occupier work well and which could be further developed in terms of, for example, formality, level of seniority or willingness to engage in sustainability?

- Is budget required to help meet occupiers' sustainability needs? And, if so, it is service charge recoverable?

- What communication method(s) are likely to be most appropriate to the level of occupier engagement, for example, to inform, consult, or collaborate. And what is the appropriate timing and duration of communication?

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Responsible Property Management Toolkit

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When selecting the communication method, it is important to consider the time and resource required to deliver it so that it aligns with resources available. Example methods of engagement include:

– Letters and e-mail. Useful to inform occupiers, or may be appropriate where formal recognition is required, for example, consent to access utility data.

– Tailored reports and website posts. A passive form of communication that can be useful to share sustainability report or strategy updates.

– Posters or stickers. Signage is effective in high footfall areas, for example, tea points, break out spaces and toilets, to highlight initiatives that could be of interest to occupiers. This is particularly relevant in time limited campaigns, for example, Recycle Week or World Environment Day, to encourage action and participation.

– Occupier engagement survey. Encourages feedback direct from building users which can be used to understand priorities and further shape engagement.

– Building User Guide. An information pack for building occupants and visitors which offer a brief and simple way to locate general information regarding the operation of the building, for example, details around cycle parking, shower provision and communal break-out spaces.

– Building occupier meetings. Regular building meetings are useful to share information with occupiers, for example, energy, water and waste performance. They are also a forum to encourage feedback from occupiers on their priorities and success of initiatives, and for multi-tenanted buildings they help create a sense of community amongst different occupiers.

– Smartphone apps or building intranet or web-based portals. Integrated building apps can be used to provide real time data to occupiers for example building energy consumption or calendar of activities. They can also provide a library of additional relevant sustainability information, for example, Building Sustainability Policy and Building User Guide.

– Competitions or internal sustainability award. Can be effective in multi-tenanted buildings to encourage competitive behaviour aimed at improving building performance, for example, which floor or department can recycle the most waste.

– Events. Activities in communal building areas can raise awareness of key dates, for example, Earth Hour and/or local charitable causes.

Communication methods for occupier engagement

Letters and e-mail

Tailored reports and website posts

Posters or stickers

Occupier survey

Building User Guide

Building occupier meetings

Smartphone apps or online portals

Competitions or sustainability award

Events

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STEP 3: MAKE PREPARATIONS FOR ONGOING OCCUPIER ENGAGEMENT

It is important to prepare for occupier engagement by putting in place arrangements that will contribute towards a successful outcome. It may be helpful to consider the following aspects when preparing for to occupier engagement:

- Gain approval for an occupier communication and engagement plan, including costs and other resources, for example, time if necessary.

- Consider all outcomes associated with the plan, including any risks. For example:

  - Is there any potential for challenging feedback for which communications can be prepared in advance?

  - Has data privacy been considered to ensure confidentiality of all individuals involved?

- Depending on the purpose and desired outcome from the communication, it may be beneficial to check if any 'green lease' clauses exist within the lease agreement with target occupiers. For example:

  - This could include requirements for the asset manager and occupier to work together to improve the energy intensity or recycling performance of the building.

STEP 4: IMPLEMENT, REVIEW AND IMPROVE OCCUPIER ENGAGEMENT

It is important to implement any planned occupier engagement and communication activities within an agreed timetable. Similarly, resisting the temptation to extend the scope of engagement and communication activities can help to prevent 'scope creep' with associated budget increase and potential impact dilution.

Following implementation, it is important that the output and impact of engagement is reviewed. This will help to ascertain whether the results were as expected, for example, or whether the required response rate was achieved.

Ongoing feedback from occupiers on the effectiveness of communication can contribute towards and inform the development of, a two-way sustainability communication plan.

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