



Usually, the decision to invest in automated property level data is taken by an asset manager. The process of collecting and using property data is co-ordinated by a property manager within input from a range of property stakeholders.

The following elements should form part of considerations regarding the development of property-level data:



STEP 1: REVIEW THE ROLE OF PROPERTY MANAGERS IN FACILITATING AUTOMATED DATA

There are a range of important roles that a property manager can undertake in relation to automated property level data. These include, for example:

- **Holder.** A property manager can be the holder of the property level data, especially the data around the management practices.
- **Identifier.** A property manager can identify the data flows that are for automisation at the property or where data gaps are present.
- **Facilitator.** A property manager can facilitate the flow of data, ensuring the necessary stakeholders are engaged and the potential for optimisation and improvement is met.
- **Implementor.** A property manager can implement the actions that have come from the automisation of data, such as HVAC improvements, maintenance and monitoring regimes.
- **Reviewer.** A property manager can review the data flows, comparing and contrasting against trends to understand performance and identify areas for future consideration.



STEP 2: CONSIDER THE APPLICABILITY OF DIFFERENT AUTOMATED DATA TYPES

It is important that asset, property and facilities managers invest time to review the different types of automated data that could be adopted for a property. There are a range of property data types that can benefit from automation, for example:

Sustainability element	Example data types
Utilities Data.	Energy and water utility supply data, including: <ul style="list-style-type: none">• Manual and automatic meter readings.• Billing data.• Tenant on charges.
Environmental Management Systems.	Outcomes and findings from energy, environmental and sustainability audits, including: <ul style="list-style-type: none">• Action trackers.• Management action plans.• Sustainable travel plans.• Building user guides.• Health, safety and environmental procedures.

Waste.	<p>Key waste documentation and arrangements, including:</p> <ul style="list-style-type: none"> • Waste Transfer Notes. • Environmental Permits. • Waste management procedures.
Building Management System (BIM)	<p>Critical BIM documentation, including:</p> <ul style="list-style-type: none"> • Control strategy. • Temperature set points. • Run times. • Faults.
Maintenance and reporting.	<p>A range of information relating to asset maintenance and reporting faults or incidents, including:</p> <ul style="list-style-type: none"> • Operational & Maintenance Manuals. • Building Logbook. • Planned Preventative Maintenance Schedules. • Life Cycle Assessments. • Cleaning regimes. • Maintenance procedures and logs. • Contractor guides.
Internal Environmental Quality.	<p>Information relating to emissions and pollutants in the internal environment including:</p> <ul style="list-style-type: none"> • CO₂. • CO. • NO. • VOC. • Temperature. • Humidity. • PM2.5.
Leases	<p>Contractual requirements, services provisions and performance thresholds, including:</p> <ul style="list-style-type: none"> • Leasing arrangements. • Clauses. • Letters of Authority.
Acquisition, development and design documentation	<p>Documentation developed for the acquisition, development or refurbishment of the asset, including:</p> <ul style="list-style-type: none"> • Design briefs. • Design performance standards. • License to Alter.
Building Control & Planning	<p>Documentation used to confirm compliance with national and local Building Regulations and Planning Policy, including:</p> <ul style="list-style-type: none"> • Energy Performance Certificates. • Display Energy Certificates.
Environmental reporting & certification	<p>Documentation needed for assessments, including:</p> <ul style="list-style-type: none"> • GRESB. • BREEAM. • WELL. • NABERS.

STEP 3: UNDERSTAND THE PROCESS FLOW FOR AUTOMATING PROPERTY DATA

It is important that asset, property and facilities managers invest time to understand the process flow for automating property data.

This relates to taking an holistic and strategic approach to the use of data in managing the sustainability performance of a building, and considering how data is, and could potentially become, integrated into the property management operations and supply chain.

The process for automate data within a property, either for the first time or when reviewing existing practices, should consider the following elements:

Identify.

- What data points are available at the property?

Data flows.

- What is the frequency of data collection?
- How is data collected?
- Where is data stored?

Reporting requirements.

- What data needs to be automated?
- What is the data format?
- How frequently should the data be collated?

Outcomes.

- What are the desired outcomes from collating and reporting on the data?

Systems and financials.

- What systems are needed to achieve these outcomes?
- What financials are available to fund the process of data automation?

Contracts and processes.

- What contracts need to be in place to automate the data?
- What processes are needed to make the data available to property owners and other stakeholders?

