

LAUNCH OF THE RESPONSIBLE PROPERTY MANAGEMENT TOOL KIT

SARAH RATCLIFFE

CEO, BETTER BUILDINGS PARTNERSHIP



Responsible Property Management Toolkit

1. **Welcome** – Sarah Ratcliffe, CEO, Better Buildings Partnership
2. **Opening Speech** – David O’Sullivan, Director of Occupier & Property Services, Great Portland Estates
3. **RPMT Background**– Nick Hobbs, Co-chair of the RPMT Working Group
4. **RPMT Demonstration**– Iain Groark, Better Buildings Partnership
5. **RPMT: Case Studies**
 - Vicky Cotton, ESG Director, Workman LLP
 - Mariana Goncalves, Sustainability Consultant, Savills
6. **Panel Discussion** – chaired by Sharon Brown, Co-chair of the RPMT Working Group
 - Carl Brooks, MAP Chair, Director – Head of Sustainability, Property Management UK, CBRE
 - Ben Notley, Asset Manager, LaSalle Investment Management
 - Danny Hall, Head of Engineering, The Crown Estate
 - Frankie Byron, Head of Sustainability, Lambert Smith Hampton
7. **Closing Comments, call to action** - Sarah Ratcliffe, CEO, Better Buildings Partnership

GREAT
PORTLAND
ESTATES



David O'Sullivan

DIRECTOR OF OCCUPIER & PROPERTY
SERVICES, GREAT PORTLAND ESTATES



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NICK HOBBS

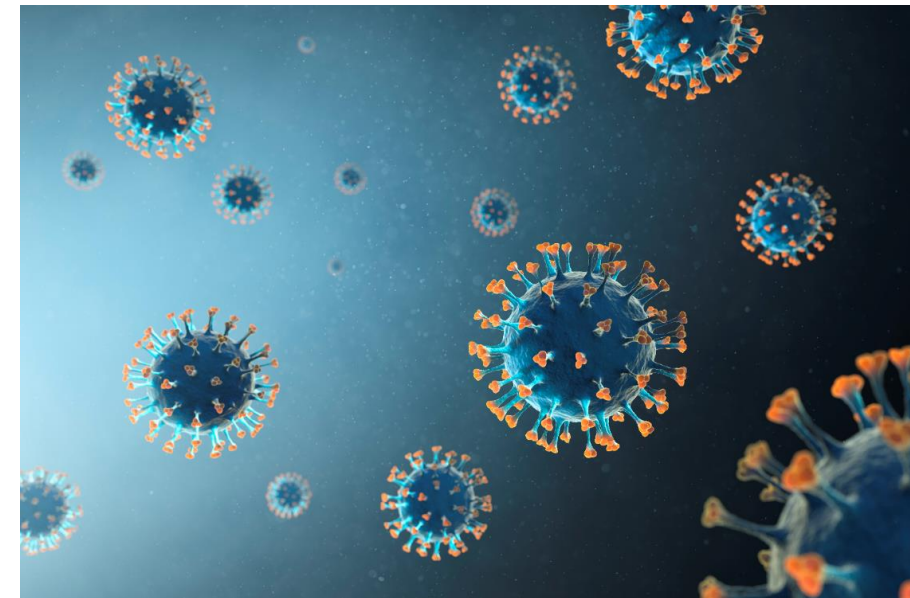
ASSOCIATE - CLIENT SUSTAINABILITY
LEAD, JLL

RPM Toolkit - Why it's important, the collaborative approach to its development and who should be using it



Why the RPM Toolkit Matters

The Time to Act is Now.



*“Emissions are still growing, even when whole economies were shutdown for pandemics. As a consequence, the carbon budget to limit temperature rises to below catastrophic levels is rapidly being exhausted”
(Carney, 2021)*

Source: Carney M. (2021). Value(s). William Collins.

Why is the tool kit important?



Property Owners need to ensure that their portfolios are managed in line with their sustainability and ESG commitments.



Property & Facilities Managers need clear and simple checklists and guidance that they can use to inform action.



Industry guidance helps to create a common understanding of the key issues and consistency across the sector.

A Comprehensive One Stop Shop



MANAGING ENVIRONMENTAL RISK

OPERATIONAL MANAGEMENT

RATINGS & CERTIFICATIONS

ENERGY

WATER

WASTE

TRANSPORT

SOCIAL VALUE

SUPPLY CHAIN MANAGEMENT

FIT-OUT & ALTERATIONS

OCCUPIER ENGAGEMENT

BIODIVERSITY

HEALTH & WELLBEING



Created Through Collaboration, Designed for Collaboration

- Developed from within the real estate sector, for the real estate sector
- Developed by sustainability professionals for non-specialists
- Developed to foster collaboration between asset managers, property managers and facilities managers



Who Should Be Using the RPM Toolkit?



Managing Agents



Fund Managers & Investors



Facilities Managers



Sustainability Professionals



Asset Managers



All Property Professionals

Thank you!



VICKY COTTON
ESG DIRECTOR, WORKMAN

Incorporating sustainability into the
procurement of property
management services

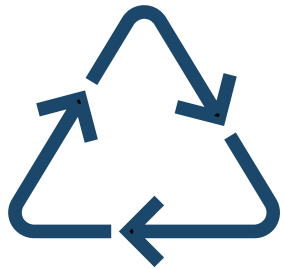


Supply Chain Management - Aim

- Integration of sustainability and best practice approach throughout the supply chain
- Practical guidance to create a consistent and aligned approach to embedding sustainability into core contracts for any property manager
- Ensure opportunities are not missed to drive the performance of the industry
- Simplify for contractors throughout the supply chain so that Property Managers are asking the same questions

Procurement Categories

Ensures sustainable practices are embedded into contracts – focus on key procurement areas:



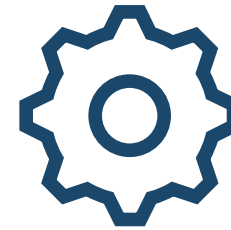
Waste
Management



Cleaning



Security



M&E



Landscaping

Aligned Approach Across all Procurement Categories

- **Procurement Practice** – sets out opportunities within the process to influence sustainability impacts (responsibilities within PM process, DD of supplier, contract)
- **General Approach** – setting out of detail such as products or legislation specific to procurement type
- **Training** - who, when and how - consideration of all those in the process and the challenges each group face
- **Integrating Environmental Performance** - typical KPI's and performance targets, wider impacts such as energy reduction opportunities or minimising waste
- **Ongoing Monitoring** – constant review to drive performance in the longer term
- **Supply Chain Management** – employment checks and engagement. Auditable processes on modern slavery and living wage.

How Does This Add Value?

- Highlights legislation and regulations
- Provides clear steps for non sustainability specialists
- Sets a core level of expectation for both Property Managers and contactors
- The Sustainable Procurement Guidance Notes provide a framework to develop - or reference - more detailed guidance.



For example, the BBP/MAP publication 'Improving Waste Management Practices: Procurement Specifications' which provides example wording for waste management tender documents and contracts.

Thank you!

The Savills logo consists of the word "savills" in a lowercase, sans-serif font, colored in a dark red or maroon hue. It is positioned on a solid yellow rectangular background.

MARIANA GONCALVES
SUSTAINABILITY CONSULTANT, SAVILLS

Social Value in Action.



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What is social value?

UKGBC

“In the context of the built environment, social value is created when buildings, places and infrastructure support environmental, economic and social wellbeing, and in doing so improve the quality of life of people. Exactly which environmental, economic and social outcomes create social value will depend on the best interests of the people most impacted by the project or built asset”

Tackling
inequality

Equal
opportunity

Health and
wellbeing

Community integration

Fighting
climate
change

Supporting COVID-19
recovery

The social value toolkit

GN8.1 What is social value?

GN8.2 Social value opportunities

GN8.3 Incorporating social value within the supply chain

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SOCIAL VALUE

RESPONSIBLE PROPERTY MANAGEMENT TOOLKIT

HOW TO USE THIS TOOLKIT

- MANAGING ENVIRONMENTAL RISK
- OPERATIONAL MANAGEMENT
- RATINGS & CERTIFICATIONS
- ENERGY
- WATER
- WASTE
- TRANSPORT
- SOCIAL VALUE**
- SUPPLY CHAIN MANAGEMENT
- FIT-OUT & ALTERATIONS
- OCCUPIER ENGAGEMENT
- BIODIVERSITY
- HEALTH & WELLBEING

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, the property.

Managing social impact 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.

Download checklist: "Social Value"

CHECKLIST

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

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GN8.1: What is social value?

Guidance Note purpose

The purpose of this guidance note is to provide asset managers, property managers and facilities managers with information that will help them to understand what social value is, and how they can work with occupiers to align social value activities with a property's local context and the needs of its stakeholders.

Context

The concept of 'social value' is used by commercial real estate companies to measure the impact that properties have on local communities and society as a whole.

The UK Green Building Council's framework for defining social value focuses on wellbeing and quality of life improvements in relation to the interests of stakeholders impacted by a property:

"In the context of the built environment, social value is created when buildings, places and infrastructure support environmental, economic and social wellbeing, and in doing so improve the quality of life of people. Exactly which environmental, economic and social outcomes create social value will depend on the best interests of the people most impacted by the project or built asset."

These wider benefits can be described using a variety of acceptable alternative terms. Examples of these terms include:

- Socio-economic impact.
- Social impact.
- Social and relationship capital.
- True value.
- Planning gain.
- Community benefit.
- Social outcomes.
- Social outputs.

Social value outcomes include tackling economic inequality, driving equal opportunity, improving health and wellbeing, community integration, fighting climate change, reducing waste and, more recently, supporting COVID-19 recovery. Social value enables building owners, property managers and occupiers to understand and improve the impact of their buildings and activities, and enables investors to factor these benefits into their investment decisions.

Alongside asset managers, the occupiers of a property often have an interest in generating social value. Property managers can play a valuable role in ensuring that occupiers' social value activities align with the local context and stakeholder needs as well as, potentially, the social value programmes undertaken by the asset manager and other property stakeholders.

A process of materiality can be applied to determine the relevance and significance of various social issues to the building and to its stakeholders. An issue is considered to be material if it is highly relevant to the scope of services delivered through a property, and if there is a significant

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SOCIAL VALUE OPPORTUNITIES

Across the range of social value opportunities, the responsibilities and interest of asset, property and facilities managers are likely to have differ depending on local circumstances. The kinds of social value themes that a materiality exercise is likely to identify are generally covered within the operational TOMs framework (Themes Outcomes and Measures) which groups social value outcomes under the five headings below:

TOMs FRAMEWORK (THEMES OUTCOMES AND MEASURES)

- Jobs and skills
- Supporting growth of responsible business
- Healthier safer and more resilient communities
- Decarbonising our world and protecting our habitats
- Measuring the progress of a social value programme

1. JOBS AND SKILLS

Mentoring programmes

There are various ways to organise successful mentoring programmes. These include, for example:

- Working with local schools and colleges to understand what benefit young people would derive from a mentoring programme.
- Setting up a mentoring programme within your building for less experienced members of your occupiers' and facilities teams to be mentored by those with more or different experience.

Skills based volunteering

The people within a property likely possess many varied skills, from those they use as part of their day jobs, to those they use outside of work.

Many voluntary sector organisations operate with limited resources and don't always have the formal business skills they would ideally like. Conversely, individuals working within these sectors often have well developed attributes such as, for example, team building, motivation and partnership working.

Page 1 of 4 | Guidance Note 8.1: What is Social Value Opportunities Responsible Property Management Toolkit | BBP BETTER BUILDINGS PARTNERSHIP

SOCIAL VALUE

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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?](#)
[GN8.1: Overview social value measurement](#)

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 stakeholder's social and community needs. The plan should be reviewed at least annually as a collective exercise by all stakeholders.

[GN8.2: Social Value Opportunities](#)
[GN8.3: 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 hard-to-reach groups to access employment opportunities.

[GN8.4: Social Value Opportunities](#)
[GN8.4: 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.

[GN8.5: Social Value Opportunities](#)
[GN8.5: Incorporating social value within the property chain](#)

Page 1 of 2 | Checklist: Social Value Responsible Property Management Toolkit | BBP BETTER BUILDINGS PARTNERSHIP

White City Place: community engagement and biodiversity

“In January 2020, we launched a work experience programme to allow the students an opportunity to experience life at work. This has provided them the chance to trial different services across the property industry including reception, cleaning, security and landscaping”



Partnership with Jack Tizard school

Temporary art exhibition



Biodiversity education programme

Here East: community impact



“Collaborative by nature, innovative by design, at Here East we want to create positive change that benefits our friends and neighbours as much as it benefits us. In a relatively short time we’ve introduced thousands of new skilled jobs and fashioned a new cultural heartland in East London”

Thank you!

Panel Discussion



Sharon Brown
Co-chair, RPMT
Working Group



Carl Brooks
Chair, MAP
Director, Head of
Sustainability, Property
Management UK, CBRE



Danny Hall
Head of
Engineering, The
Crown Estate



Frankie Byron
Head of Sustainability,
Lambert Smith
Hampton



Ben Notley
Director, Retail Asset
Management, LaSalle
Investment
Management

CALL TO ACTION

SARAH RATCLIFFE

CEO, BETTER BUILDINGS PARTNERSHIP



We are calling on ...

Property Owners

1. To use the Tool Kit to allocate key responsibilities for responsible property management.
2. To incorporate the checklists into asset management plans.
3. To use the checklists to monitor progress, identify actions and inform investment decision-making.
4. To use the Tool Kit to inform the procurement and management of property and facilities managers.

Property & Facilities Managers

1. To use the Tool Kit to integrate responsible property management into service provision.
2. To use the Tool Kit help upskill property and facilities management teams.
3. To use the Tool Kit to identify actions and engage with owners to secure investment in improvements.
4. To integrate the Tool Kit checklists and guidance notes into property management platforms.

Advisors & consultants

1. To promote the use of the Tool Kit to your clients.
2. To integrate the Tool Kit into your service offerings to clients.
3. To utilise the checklists and guidance notes when advising clients.
4. To integrate the Tool Kit checklists and guidance into property management platforms.

Thank you.



RESPONSIBLE PROPERTY MANAGEMENT TOOLKIT LAUNCH

“The importance of ongoing improvement in sustainability within the Facilities management world cannot be understated. The FM industry has a huge role to play in the changes that are needed over the coming years, and this toolkit will form a foundation for this work.”

Vaughan Williams, Shaftesbury
Head of Group Property & Facilities Management

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RESPONSIBLE PROPERTY MANAGEMENT TOOLKIT LAUNCH

“With drivers as diverse as climate change, health and wellbeing, social value, as well as a global pandemic, it's never been more important to have a dynamic approach to managing client assets to tackle these issues and their impacts. This toolkit, developed in collaboration with the wider industry, draws on a vast amount of experience and knowledge. JLL is proud to have been a major contributor to its revision and we look forward to continuing to be at the forefront of delivering sustainable real estate.”

Gregg Taylor, JLL
Head of Sustainability – Managed Services

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RESPONSIBLE PROPERTY MANAGEMENT TOOLKIT LAUNCH

“Too often social value is approached in silos so it has been great to be part of an industry wide move to create some consistency to make it more accessible to more organisations, therefore delivering more impact for more people in our communities.”

Deborah Clark, The Crown Estate
Senior Social Sustainability Manager

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RESPONSIBLE PROPERTY MANAGEMENT TOOLKIT LAUNCH

“Responsible property management has a key role to play in the creation of environmental and social value for occupiers and the community. This is a fantastic resource that will support collaboration, consistency and improvement across the industry.”

Jess Kennedy, Arup
Associate Director – ESG Advisory

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RESPONSIBLE PROPERTY MANAGEMENT TOOLKIT LAUNCH

“I am looking forward to seeing the industry adopt a responsible approach to property management. The toolkit will hopefully encourage businesses to progress its current approach to social value and embed it in the decision-making process. Or at least, bring social value to the forefront of conversations.”

Syreeta Bayne, JLL
EMEA Head of Social Value

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RESPONSIBLE PROPERTY MANAGEMENT TOOLKIT LAUNCH

“From achieving net zero aspirations through to supporting the health and wellbeing of our occupiers, property management continues to become an increasingly important piece of the puzzle. The Responsible Property Management toolkit is a useful, open source guide which can be used by anyone to deliver best practice against all these areas when managing their buildings.”

Georgina Gunn, The Crown Estate
Sustainability Analyst

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RESPONSIBLE PROPERTY MANAGEMENT TOOLKIT LAUNCH

“I'm really pleased to have been a part of the steering group to develop BBP's Responsible Property Management Toolkit along with other sustainability practitioners. It will be an invaluable tool for property, asset and facility managers seeking to deliver sustainability aspirations. Minimising and recycling of waste must be a central part of any buildings' management. It's more important than ever that we deliver on our sustainability goals and this guide is the perfect starting point. I look forward to seeing it used in real-time.”

Bill Swan, BPR Group
Managing Director

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RESPONSIBLE PROPERTY MANAGEMENT TOOLKIT LAUNCH

“It was fantastic to see so many industry specialists collaborating together on creating content for the much needed tool. Various management teams will benefit from access to guidance around energy and water benchmarking, auditing, waste or social value to name a few.”

Justyna Tobolska, Dentwnt London
Sustainability Manager

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RESPONSIBLE PROPERTY MANAGEMENT TOOLKIT LAUNCH

“The RPM toolkit will provide much needed guidance and practical examples to property companies on how to embed sustainability into their strategies and onsite operations. It will set the benchmark to all companies involved in managing properties and highlight the importance of working collaboratively with both the occupiers and the supply chain.”

Oli Williams, Tandem Property
Associate Partner

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RESPONSIBLE PROPERTY MANAGEMENT TOOLKIT LAUNCH

“The Toolkit is a very comprehensive guide which will help us to deliver a more sustainable built environment. The accessibility of the information, the range of topics covered, and the emphasis that the Toolkit places on collaboration make it a really valuable resource for those looking to have an impact in this area.”

Frankie Byron, LSH
Head of Sustainability

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RESPONSIBLE PROPERTY MANAGEMENT TOOLKIT LAUNCH

“What is most striking about the Responsible Property Management Tool Kit is the breadth and depth of contributors' knowledge and expertise. Any organisation using this tool should know that each element has been reviewed through many different lenses – sustainability, commerciality, health and safety to name but a few – so that it best facilitates real estate ESG objectives.”

Ben Brown, CBRE
Utilities Manager

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RESPONSIBLE PROPERTY MANAGEMENT TOOLKIT LAUNCH

“We see lots of high level commitments from property organisations regarding their ESG strategies but it is crucial that we give the teams on the ground the necessary training and skills to be able to deliver these strategies effectively. The RPM toolkit does this by providing practical guidance for PMs, FMs and AMs to enable them to deliver responsibly managed properties from the ground up.”

Debbie Harrington, Tandem Property
Associate Partner

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RESPONSIBLE PROPERTY MANAGEMENT TOOLKIT LAUNCH

“We welcome the BBP's and MAP's collaboration to create the Responsible Property Management toolkit that defines sustainability best practice and provides practical information on how to implement it. We are proud to have taken part and will welcome sharing the toolkit with our property management teams to translate it into action.”

Lizzie Jones, Savills
Head of Corporate Social Responsibility

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RESPONSIBLE PROPERTY MANAGEMENT TOOLKIT LAUNCH

“Updating the Toolkit has been a work in progress now for several years such is the scale of the task but we are confident that this now provides the basis to raise the bar in terms of ESG and Responsible Property Management in order for our industry to play its vital part in meeting the challenge of the Climate emergency that we face.”

Vicky Cotton, Workman LLP
ESG Director
Hedley Jones, Workman LLP
Partner

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RESPONSIBLE PROPERTY MANAGEMENT TOOLKIT LAUNCH

“We are pleased to support the launch of the BBP Responsible Property Toolkit. We believe that the toolkit will provide support to the sector on providing not only practical guidance but best practice property management for both owners and managing agents.”

Jane Wakiwaka, The Crown Estate
Head of Sustainability – Real Estate

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