

# Managing Agents Sustainability Toolkit

Sustainability Checklist



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## 1. Energy

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The primary objective for a Managing Agent should be to implement an energy reduction strategy that achieves the combined aspirations of the building owner and occupiers. All businesses, whether they own or occupy buildings, will increasingly feel commercial and regulatory pressures to reduce energy consumption and their carbon footprints. The UK government has legislated to reduce CO<sub>2</sub> emissions by 80% by 2050 and buildings' energy use will have to fall considerably to help meet that target.

### 1.1. Produce an energy policy for the building

Discuss with the building owner using Guidance Note 1.1: 'How to write an energy policy' in order to establish the principles to be followed in all aspects of energy management.

### 1.2. Determine the total energy consumed in the building

Use Guidance Note 1.2: 'Identifying when and where energy is being consumed and how to use the information' and BBP Sustainability Benchmarking Toolkit for Commercial Buildings<sup>1</sup> to establish appropriate energy benchmarks.

Refer to Guidance Note 1.4: 'What are Display Energy Certificates (DECs) and Energy Performance Certificates (EPCs)?' to establish the building's energy rating.

### 1.3. Carry out an energy audit of the building

This is key to understanding the current energy use in the building and possible routes to its reduction. See Guidance Note 1.3: 'How to carry out an energy audit'.

### 1.4. Obtain an energy rating for the building

EPCs and DECs are legal requirements for some buildings. See Guidance Note 1.4: 'What are Display Energy Certificates (DECs) and Energy Performance Certificates (EPCs)?' to determine whether procuring a DEC might help to assess and benchmark the building's energy performance.

### 1.5. Determine if there are separate meters for individual floors, units, common parts and on the individual services and consider installing advanced meters

Consider sub-metering energy consumption using the Chartered Institute of Building Services Engineers (CIBSE) guidance document: 'TM39 Building Energy Metering Guidance'<sup>2</sup> and Guidance Note 1.5: 'What is advanced metering?' See also BBP Better Metering Toolkit<sup>3</sup>

### 1.6. Create an action plan to ensure future action and improvement

An action plan that all parties agree on will be the most effective. See Guidance Note 1.6: 'Create an action plan to ensure future action and improvement' and the Carbon Trust's ActionPlan Tool<sup>4</sup>. See also BBP Green Building Management Toolkit<sup>5</sup>.

### 1.7. Involve occupiers in reducing energy consumption

Use Guidance Note 1.7: 'Involving occupiers in reducing energy consumption' and see the Carbon Trust's document: 'CTG001 Creating an Awareness Campaign'<sup>6</sup> for ideas and examples.

### 1.8. Consider purchasing energy from renewable sources

Overall carbon reductions can be achieved by reducing the carbon intensity of the incoming energy supply. For smaller organisations, use Green Energy Certified suppliers as a guide to ensure they meet the standard. For larger organisations use Guidance Note 1.8: 'What is 'green' or renewable energy and how to procure it?'

<sup>1</sup> [www.betterbuildingspartnership.co.uk/working-groups/sustainability-benchmarks/sustainability-benchmarking-toolkit](http://www.betterbuildingspartnership.co.uk/working-groups/sustainability-benchmarks/sustainability-benchmarking-toolkit)

<sup>2</sup> [www.cibse.org/index.cfm?go=publications.view&item=347](http://www.cibse.org/index.cfm?go=publications.view&item=347)

<sup>3</sup> [www.betterbuildingspartnership.co.uk](http://www.betterbuildingspartnership.co.uk)

<sup>4</sup> [www.carbontrust.co.uk/\\_layouts/ctassets.aspx/apr/apthome.aspx](http://www.carbontrust.co.uk/_layouts/ctassets.aspx/apr/apthome.aspx)

<sup>5</sup> [www.betterbuildingspartnership.co.uk/working-groups/owner-occupier-partnerships/green-building-management-toolkit](http://www.betterbuildingspartnership.co.uk/working-groups/owner-occupier-partnerships/green-building-management-toolkit)

<sup>6</sup> [www.carbontrust.co.uk/Publications/pages/publicationdetail.aspx?id=CTG001](http://www.carbontrust.co.uk/Publications/pages/publicationdetail.aspx?id=CTG001)

- 1.9. Establish if your building can participate in local and/or communal schemes for energy generation or provision**

Although this is still relatively rare, it is becoming an option for more buildings. See Guidance Note 1.9: 'What are local energy schemes?'.

- 1.10. Agree an approach with the building owner for the installation of renewable technologies**

Use Guidance Note 1.10: 'Installing renewable technologies' on the possibilities that can arise.

## 2. Waste

Businesses that generate large amounts of waste can incur significant costs with legislation increasingly penalising waste producers financially. Managing Agents can help building owners and occupiers develop strategies to reduce their waste production and associated costs.

Managing Agents also have legal responsibilities in dealing with waste, which must be fully understood.

- 2.1. Understand the waste hierarchy**

Understanding the waste hierarchy is essential if waste production is going to be reduced and a suitable strategy devised: See Guidance Note 2.1: 'Understanding the waste hierarchy'. Keep the hierarchy in mind when developing a waste strategy and implementing waste management controls.

- 2.2. Produce a waste strategy for a building**

Discuss developing a waste strategy with the building owner and occupiers and refer to Guidance Note 2.2: 'How to produce a waste strategy for a building'.

- 2.3. Determine the waste streams and volumes in the building by carrying out a waste audit**

Use Guidance Note 2.3: 'Carrying out a waste audit' to map a building's waste streams by source, quantity and type.

- 2.4. Check your responsibilities under the Duty of Care Regulations**

Use Guidance Note 2.4: 'Understanding your duty of care responsibilities' to understand your legal responsibilities when producing, storing, transporting and disposing of waste.

- 2.5. Control waste during refurbishment and fit-out**

Use Guidance Note 2.5: 'How to manage waste during refurbishment and fit-out' to produce a successful Site Waste Management Plan.

- 2.6. Identify and dispose of hazardous waste**

Produce, with the building owner and occupiers, a strategy for controlling hazardous waste on-site. Refer to Guidance Note 2.6: 'Identifying and disposing of hazardous waste'.

Some electrical equipment is also considered to be hazardous waste. Refer also to Guidance Note 2.7: 'How to identify and dispose of electrical equipment'.

- 2.7. Identify and dispose of electrical equipment**

Use Guidance Note 2.7: 'How to identify and dispose of electrical equipment' to establish whether your electrical supplier can dispose of your electrical waste items for you.

### 3. Water

A Managing Agent has little control over water use in a building but will be expected to help manage and maintain its supply. Sustainable water management may be less publicised and regulated than managing a building's energy use but it is a natural resource which can easily be conserved. Together with strong environmental benchmarks and water efficient technology, managing a sustainable supply of water will ensure a reduction in environmental impacts and create financial savings.

- 3.1. Produce a water use policy for the building including targets**
- Discuss with the building owner using Guidance Note 3.1: 'Benchmarking water usage and setting targets' and Guidance Note 1.1: 'How to write an energy policy', substituting "energy" with "water".
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- 3.2. Determine the baseline water usage and the waste water output of the building**
- Use Guidance Note 3.2: 'Identifying the building's baseline water usage'.
- Consider installing advanced water meters to receive automatic meters readings and half-hourly water consumption profiles. See Guidance Note 1.5: 'What is advanced metering?' See also BBP Better Metering Toolkit<sup>7</sup>
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- 3.3. Agree an approach with the building owner for the installation of high efficiency plumbing fixtures and control technologies/control systems in the building**
- This approach should be agreed as part of the water management policy. Guidance Note 3.3: 'High efficiency plumbing fixtures and control systems' provides a summary of current technologies and sources of relevant information.
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- 3.4. Undertake a regular programme of leak inspections at the building**
- The inspection programme should be agreed as part of the water management policy. Use Guidance Note 3.4: 'Leak inspections at the building' to identify appropriate actions.
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- 3.5. Where possible, use treated and recycled water, captured rain water and grey water, where potable water is not necessary.**
- Use Guidance Note 3.5: 'Capturing and using treated, recycled, rain and grey water' to identify and implement sustainable water solutions in a building.

### 4. Alterations & Replacement

This is not an area where Managing Agents are generally able to exert much influence. However, there are important issues to be aware of to ensure compliance with the building owner's objectives and particular building environmental standards. A Managing Agent's role is to ensure changes to a building either retain or enhance its sustainability performance. A Managing Agent should be able to use their position to ensure best practice wherever possible.

- 4.1. The role of the Managing Agent during refurbishment and fit-out works**
- Determine how you can influence the sustainability of refurbishment and fit-out works: Use Guidance Note 4.1: 'The role of a Managing Agent in refurbishment and fit-out'.
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- 4.2. Identify environmental measurement targets**
- Establish how best you can promote sustainability solutions to alteration works and the replacement of building components: Use Guidance Note 4.2: 'Identifying environmental measurement tools'.
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- 4.3. Ensure sustainable sourcing is a considered part of the works**
- This is likely to be part of lease provisions if a green lease is in place. Use Guidance Note 4.3: 'What is sustainable procurement?' for additional information. See also BBP Green Lease Toolkit.<sup>8</sup>

<sup>7</sup> [www.betterbuildingspartnership.co.uk](http://www.betterbuildingspartnership.co.uk)

<sup>8</sup> [www.betterbuildingspartnership.co.uk/working-groups/green-leases/green-lease-toolkit](http://www.betterbuildingspartnership.co.uk/working-groups/green-leases/green-lease-toolkit)

## 5. Transport

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Effective travel planning not only helps to reduce an employee's dependency on car travel but can also help reduce global CO<sub>2</sub> emissions, maintain a healthy workforce and provide financial savings. A Managing Agent will have little control over an occupier's travel planning policy but they can help building owners and occupiers ensure suitable facilities are in place at a building in order to support a Green Travel Plan.

**5.1. Agree a 'Green Travel Plan'**

Green Travel Planning should be a major part of a sustainability strategy; see Guidance Note 5.1: 'What is a green travel plan?'

**5.2. Provide space for bicycle storage and shower and changing facilities for cyclists**

Essential facilities must be in place to support a Green Travel Plan, see Guidance Note 5.2: 'Sustainable transport facilities'.

**5.3. Establish shuttle links where practicable to any local transportation hubs**

Promote and/or establish public and/or commercial transport links to and from a building; see Guidance Note 5.3: 'Shuttle buses and public transport service provision'.

**5.4. Prioritise parking spaces for sustainable transport options**

Minimise car use at a building and assess opportunities for providing charging points for electric vehicles see Guidance Note 5.4: 'What is sustainable car park management?'

## 6. Cleaning

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The extent to which a Managing Agent has any control over cleaning and procurement will differ from building to building. Cleaning staff can play a role in the success of a sustainability strategy as their day to day activities involve maintaining the building. The Managing Agent's role includes guiding and motivating these contractors and encouraging them to become champions of environmental standards.

**6.1. Ensure cleaning contractors support all sustainability measures and follow any sustainable procurement strategy in place**

Communicate a building's sustainability strategy using Guidance Note 6.1: 'Cleaning contracts and sustainable cleaning products'.

**6.2. Provide awareness raising and training to cleaners**

Motivate maintenance and cleaning staff about a sustainability strategy; see Guidance Note 6.2: 'Providing awareness raising and training to cleaners'.

**6.3. Programme cleaning times to minimise the use of lighting, heating and air-conditioning resources**

Integrate cleaning schedules into a sustainability strategy using Guidance Note 6.3: 'Aligning cleaning schedules and environmental performance'.

**6.4. Specify appropriate cleaning and maintenance procedures for specialist 'green' plant, equipment, fixtures or fittings**

Involve facilities management teams and cleaning contractors in sustainability strategy planning using Guidance Note 6.4: 'Implementing cleaning and maintenance procedures'.

## 7. Sharing Initiatives

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A Managing Agent can act as a facilitator for change in a building. Although few occupiers will have the capacity to develop major sustainability initiatives on their own, in collaboration they can achieve much more than they could hope to alone. By establishing Green Building Management Groups (GBMGs) and encouraging the exchange of information, a Managing Agent can help develop a sustainability strategy to meet the needs of both owner and occupiers and assist them in setting collective goals.

**7.1. Encourage the building owner and the building occupiers to share and exchange sustainability data and policy target achievements**

Communicate and exchange sustainability data using Guidance Note 7.1: 'Sharing targets and achievements' for advice. See BBP Green Building Management Toolkit<sup>9</sup> for guidance on how to establish and develop a Green Building Management Group.

**7.2. Help run sustainability workshops for the building occupiers to demonstrate how reductions and savings to energy, water and waste consumption can be made.**

Environmental training should form part of a full sustainability awareness campaign; See Guidance Note 7.2: 'Providing or arranging environmental workshops'.

**7.3. Provide environmental training and education to employees and communicate their achievements when appropriate.**

Use Guidance Note 7.3: 'How to provide training & education and communicate achievements to employees' to identify suitable training and education material to motivate staff. Also see BBP Green Building Management Toolkit for ideas on how to communicate progress and results.

## 8. Service Charge

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A Managing Agent can help a building owner to provide maintenance and other services to a property, the costs for which are generally recovered through a service charge. Where energy, water use and waste management provision is shared between multiple occupiers, it is best practice to make sure service charges are both transparent and fairly apportioned. Sub-metering of energy (and ideally water) use for both occupier and owner controlled parts of a building will allow for fairer apportionment.

**8.1. Where practicable, separately identify the cost of sustainability/environmental initiatives within the service charge account**

**8.2. Consider service charge adjustments to reflect the metered use of energy and water by individual occupiers**

Use Guidance Note 1.5 'What is advanced metering?' See also BBP Better Metering Toolkit<sup>10</sup> for guidance on metering options.

<sup>9</sup> [www.betterbuildingspartnership.co.uk/working-groups/owner-occupier-partnerships/green-building-management-toolkit](http://www.betterbuildingspartnership.co.uk/working-groups/owner-occupier-partnerships/green-building-management-toolkit)

<sup>10</sup> [www.betterbuildingspartnership.co.uk](http://www.betterbuildingspartnership.co.uk)

## 9. Tenant Handbook

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A tenant handbook is a key source of information for occupiers. The handbook should include all appropriate data and documents relating to sustainability aspects of the building.

### 9.1 **Ensure that occupiers are provided with a handbook or information pack at the commencement of their tenancy.**



This should include energy and environmental management information such as;

- any EPC/DEC ratings together with recommendation reports
- energy and utility reduction targets
- details of any energy metering strategy and monitoring data
- an environmental policy
- water strategy and performance data
- waste strategy and performance data

The information in the handbook or information pack must be kept up-to-date by the Managing Agent and reflect shared sustainability initiatives. See Guidance Note 7.1: 'Sharing targets and achievements' and the BBP Green Building Management Toolkit<sup>11</sup>.

<sup>11</sup> [www.betterbuildingspartnership.co.uk/working-groups/owner-occupier-partnerships/green-building-management-toolkit](http://www.betterbuildingspartnership.co.uk/working-groups/owner-occupier-partnerships/green-building-management-toolkit)