



# INTEGRATING SUSTAINABILITY INTO PROPERTY MANAGEMENT SERVICES

Core Provisions

# Introduction

Managing agents have a critical role to play in improving the sustainability performance of the buildings they manage. They are an intrinsic part of the day-to-day management of commercial property and often at the 'coal face' of addressing sustainability in the built environment.

**MEMBERS OF THE MANAGING AGENTS PARTNERSHIP MANAGE**

**+29,000**  
ASSETS IN THE UK, TOTALLING

**+90 MILLION**  
SQUARE METRES OF PROPERTY

**AND IN 2015/16 CONTRIBUTED**  
**+200 HOURS**  
TO THE PARTNERSHIP



The BBP<sup>1</sup> Managing Agents Partnership has been established by the UK's leading property managers with the aim of improving the sustainable management of commercial property and developing practical tools to support the wider industry. Together, the members of the Managing Agents Partnership have a unique opportunity to transform a significant proportion of the UK's existing building stock and to raise standards for the entire industry.

Many of the leading managing agents see sustainability as an integral aspect of good property management. Many property owners are also acknowledging the contribution that sustainability can make to their investment objectives and therefore driving property managers to pay greater attention to sustainability in the management of their portfolios.

To align with these market trends managing agents have been evolving their service offerings. To date, this has typically been in response to individual client demands which has led to a wide variation in how different managing agents incorporate sustainability. Such variation naturally impacts on the pricing of services and allocation of resources. Given the rate at which commercial property changes hands between both owners and their managing agents, it would be beneficial to the whole industry if managing agents' approaches to sustainability were more consistent.

As a result, the Managing Agents Partnership has set itself the challenge to provide greater clarity, transparency and standardisation around the sustainability services that managing agents should provide. In doing so, it is acknowledged that specific skills, knowledge and resources are required to effectively manage the risks and realise the opportunities around delivering sustainability. The benefits of this approach include:

- Reducing risk through proactive management.
- Greater responsiveness to existing and potential client demand.
- Developing 'added value' services for clients.
- Closer engagement with occupiers.

# Programme of work

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The Managing Agents Partnership has developed the following programme of work, taking a step-by-step approach to the transformation of the industry:

## STEP 1 CORE PROVISIONS

The first step is to define the core sustainability provisions that should be included as part of any property management service offer, and what this document sets out to achieve. They have been prepared to ensure applicability across the entire commercial property sector and all members of the Managing Agents Partnership will incorporate these provisions within their property management offer to clients.

It is hoped that these core provisions are adopted and used by the wider industry and that their development will help to create a 'level playing field' when offering sustainability services to clients.

## STEP 2 BEST PRACTICE PROVISIONS

The next step will be to develop best practice provisions to help inform the work of leading managing agents who wish to offer services that go beyond the core provisions outlined in this document.

These best practice provisions will, once again, be designed to provide greater clarity, specificity and consistency across the industry and provide an important starting point for discussions with clients who would like to see best practice implemented across their property portfolios.

## STEP 3 MANAGING AGENTS SUSTAINABILITY TOOLKIT

The Better Buildings Partnership previously developed a [Managing Agents Sustainability Toolkit](#) in 2010. As part of this work programme, the Toolkit will be updated to incorporate the core and best practice provisions, providing up to date guidance, links to other resources and case studies.

The updated Toolkit will provide a valuable resource for Managing Agents who are keen to incorporate sustainability within their property management services, but also for clients keen to procure property management services that are following best practice principles.

## STEP 4 TRAINING

Following the update of the Toolkit, the intention is to develop a training programme for property managers who will be responsible for implementing sustainability across their clients' property portfolios. This training will be based upon the Toolkit and will be available to managing agents across the industry.

# Core sustainability provisions for property management services

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This section sets out the key activities which should be undertaken by managing agents as part of their standard property management offering to clients. It can be used as a starting point when drafting Property Management Agreements<sup>2</sup>. Practical guidance on the implementation of these activities is provided in the next section.

## ✓ **MANAGING COMPLIANCE**

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- Manage compliance of sustainability requirements at the managed property where relevant to the services provided by the managing agent.

## 🔍 **UTILITIES**

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- Provide utilities consumption data procured by or on behalf of the client, in an agreed format and frequency.
- Procure an energy review and water review for the managed property, on behalf of the client, where reasonable and a positive business case can be expected.

## ♻️ **WASTE**

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- Provide waste collection data per waste stream for waste services procured by or on behalf of the client, in an agreed format and frequency.
- Procure a waste review for the managed property, on behalf of the client, where reasonable and a positive business case can be expected.
- Require waste contractors to provide relevant waste data when negotiating new waste management contracts.

## £ **PROCUREMENT**

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- Consider sustainability as part of the due diligence process when selecting services from any third party provider or contractor.

- Incorporate sustainability requirements within contracts for suppliers and contractors appointed by the managing agent on behalf of the client.
- Monitor contractual sustainability requirements of suppliers and contractors throughout the duration of their contracts.

## ✳️ **SKILLS AND COMPETENCE**

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- Ensure that direct employees delivering services at the managed property have appropriate skills and are competent to deliver the core sustainability provisions.

## 👤 **OCCUPIER ENGAGEMENT**

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- Communicate the sustainability performance of the managed property and the initiatives which are being undertaken to occupiers and building users through appropriate channels.

## 🔧 **MAINTENANCE, ALTERATIONS AND REPLACEMENT OF EQUIPMENT**

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- Promote the inclusion of sustainability considerations when advising upon and/or undertaking maintenance, alterations or improvement works for the managed property.

## 📋 **HANDOVER**

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- Take responsibility for providing and retrieving historic environmental documentation and data when properties are handed over (both incoming and outgoing managing agents).

# Guidance notes

This section builds upon the core sustainability provisions and provides practical guidance on why each provision should be of interest and benefit to managing agents and their clients, as well as how they may wish to approach delivery.

## Defining sustainability

The phrase 'sustainability' is typically used to cover a wide range of environmental, social and economic criteria. For the purposes of this document it is used to cover both the environmental performance of the managed property and the environmental and social considerations of the supply chain.

## ✓ MANAGING COMPLIANCE

### Manage compliance of sustainability requirements at the managed property where relevant to the services provided by the managing agent.

#### ? WHY?

Managing legal compliance is an essential element of all property management activities, including sustainability. Effective management helps reduce the risk of non-compliance, including the resultant fiscal and reputational impacts. It also increases preparedness for forthcoming legislation, enabling ease and costs of compliance.

Sustainability legislation is a fast moving area and managing agents need to keep up to date with legislative requirements and work with the client to establish the applicability of legislation to their activities, responsibilities for compliance, effective compliance regimes and reporting protocols.

#### ⚙ HOW?

At a practical level, it should be recognised that the responsibility for compliance can vary between the ownership level and the property level depending on the specific requirements of each individual regulation. As a result, the role that managing agents play in supporting compliance requirements can therefore vary client to client. It is therefore important for the managing agents and the client to clearly agree the scope of compliance for specific regulations and what is required of each party. As a starting point it is recommended that managing agents assume responsibility for requirements that need to be met at the property level and clients assume the responsibility for requirements at the ownership level. For example, in relation to the current requirements of the CRC Energy Efficiency Scheme (which comes to an end in 2018/19), the provision of energy consumption data for a property would be provided as part of the core management service, whilst the management of CRC compliance at the client corporate level would typically not.

Managing agents should keep up to speed with incoming sustainability legislation and inform the client appropriately. Compliance requirements for such new legislation should be discussed between the managing agent and their client and procedures for fulfilling the requirements agreed at an early stage.

## UTILITIES

Provide utilities consumption data procured by or on behalf of the client, in an agreed format and frequency.

### WHY?

Measurement is the first step of effective management. Managing agents play an important role in monitoring, collating and reporting the utilities consumption of their client's buildings. This data is used by their clients to inform and develop reduction strategies as well as for their own internal and external reporting requirements. Therefore, a managing agent that can effectively and efficiently gather and report data in an accurate and transparent way will be desired by clients.

### HOW?

The scope and frequency at which data is reported should be agreed between the client and managing agent as each client will have their own individual requirements. A list of suggested KPIs are provided within [Appendix 2](#). When agreeing the scope of reporting it is recommended that the principle of materiality is considered. The law of diminishing returns applies to the process of collecting and reporting data. Neither client nor managing agent should want to spend a disproportionate amount of resource to collect and report data for utilities that have limited environmental impact or value. Therefore, it may be reasonable to report some asset/meter consumption less frequently than others depending on the resources required and how that information will be used.

As a minimum, data should be based on utility invoices, but could include metered data. It is suggested that any consumption above the following thresholds, per meter, are checked and reported on a quarterly basis, whilst the remainder may be checked less frequently (for example, annually for compliance purposes) on agreement with the client:

- Electricity: +60,000kWh per year.
- Gas: +73,200kWh per year (mirroring CRC threshold).
- Water: +3,000m<sup>3</sup> per year.

Using these thresholds enable resources to be directed to those properties where the efficiency gains are likely to have the most significant positive impact.

Procure an energy review and water review for the managed property, on behalf of the client, where reasonable and a positive business case can be expected.

### WHY?

Running a building efficiently helps to reduce service charge costs and support client and occupier sustainability objectives. Undertaking an energy or water review supports a managing agent in this process by providing a gauge on how efficiently a building is being run, and identifying new opportunities to further improve efficiencies - many of which are often replicable across property portfolios.

### HOW?

Most buildings offer no-cost and low-cost opportunities to improve the energy and water efficiency. The review should establish baseline consumption and identify opportunities to improve the efficiency of the managed property with recommendations reported back to the client. Building managers and technical operators should be a managing agent's first port of call as they have first-hand knowledge of the property and a standard part of their role is to be able to understand and identify these opportunities. However, the value of a third party independent review should not be underestimated. To unlock further savings, or for more complex buildings systems, a more detailed technical review may be required which should be proposed to the client.

Managing agents should also be aware that under the Energy Efficiency Opportunities (ESOS) Scheme the client or occupier may be required to undertake an energy audit for the building every four years. In order to avoid duplication of effort and help to reduce costs it is recommended that, when undertaking an energy review on behalf of the client, timings of upcoming ESOS requirements are checked and the review meets the criteria to enable it to be used for compliance purposes. This can be ensured by requiring any energy review to meet [BS EN 16247-1:2012 Energy audits. PAS 51215 Energy Efficiency Assessment: Competence of a Lead Energy Assessor - Specification](#) may also be useful in selecting a competent assessor.

## WASTE

### Provide waste collection data per waste stream for waste services procured by or on behalf of the client, in an agreed format and frequency.

#### WHY?

Measurement is the first step of effective management. Managing agents play an important role in monitoring, collating and reporting the waste data of their client's buildings. This data is used by their clients to inform and develop waste reduction strategies as well as for their own internal and external reporting requirements. Therefore, a managing agent that can effectively and efficiently gather and report data in an accurate and transparent way will be attractive to clients.

#### HOW?

The most reliable way of producing accurate waste data is by capturing this as part of the on-site waste management regime. However, this has resource and space implications which means that for many properties it will not be achievable. As a result, managing agents are often reliant on waste contractors to provide waste data which is then reported to the client. Therefore, as a minimum, data should be based on waste transfer/consignment notes. A list of suggested KPIs are provided within [Appendix 2](#).

It is common practice for waste contractors to provide estimated waste data based on the number of collections and disposal routes rather than site specific data. For this reason, managing agents should treat these figures with a degree of caution and when reporting should be transparent as to the quality of the waste data.

To ascertain the quality of waste data a managing agent should first seek to understand whether the data reflects the actual waste generated at the managed property or if a level of estimation or assumption has been used by the waste contractor. Data should only be considered accurate if it reflects the actual waste generated at the managed property. Actual waste data can be obtained from compactors or skips taken from a property to a weighbridge prior to disposal. If waste

is collected from wheeled bins and emptied as part of a collection round, data is likely to be estimated unless the vehicles are fitted with scales on the lift.

Where a level of estimation or assumption has been used it is helpful to pose the following questions to further determine the quality and accuracy of the data:

1. Have assumptions been used in relation to collection practices? Waste contractors may use proxies based on size of containers, number of contracted removals etc. to provide waste volume data.
2. Have assumptions been used to convert volume figures to weight? Waste contractors may use estimates to convert volume data into weight. Such conversions introduce an additional layer of assumption and therefore inaccuracy.
3. Have assumptions been used to generate individual waste stream composition data? Waste contractors may use waste stream composition assumptions based on industry averages for skips and end treatment facilities rather than figures relating to the individual property or the specific end treatment facility being used.

### Procure a waste review for the managed property, on behalf of the client, where reasonable and a positive business case can be expected.

#### WHY?

Managing agents have a significant opportunity to improve waste management practices and reduce costs for occupiers. The landfill tax rate for active waste is currently £84.40 per tonne (as at 1st April 2016) and rising each year in line with inflation. This now makes landfill the costliest disposal route for waste, yet a disproportion amount of the waste still goes to landfill. Therefore, assessing performance and identifying opportunities to help occupiers maximise the recycling / recovery of their waste will help them to reduce these costs or even generate an income stream from certain waste types.

## ⚙️ HOW?

Most buildings offer no-cost and low-cost opportunities to improve on-site waste management. The review should identify waste collection practices, baseline waste data and identify measures, using the principles of the Waste Hierarchy, for improved waste management practices with recommendations reported back to the client.

On a practical level, engaging with the waste broker for the property is a good starting point. They will have a working knowledge of the property, relationships with the waste carriers and details regarding the composition of the waste. They should also be in a position to advise on what opportunities exist that are technically and economically feasible. If a waste broker does not exist managing agents can attempt to discuss directly with the waste carriers or seek specialised advice from a third party.

WRAP provides practical guidance targeted at specific sectors and waste streams at <http://www.wrap.org.uk>

## Require waste contractors to provide relevant waste data when negotiating new waste management contracts.

### ❓ WHY?

There is often little that can be done to change the level and granularity of waste data that is provided by a waste contractor mid-contract. However, during the tendering and re-tendering of waste management contracts managing agents have the opportunity to ensure the selected waste contractor has the processes in place to meet the desired data requirements.

### ⚙️ HOW?

When tendering or retendering a contract, the managing agents should engage with the client and try to understand what data is required for their own reporting purposes and in what format. These requirements can then be specified to the waste contractor. The ultimate aim should be to ensure the most environmentally practicable disposal method through the application of the Waste Hierarchy, and structuring of incentives that do not result in perverse behaviour e.g. financial incentives based on number of collections/lifts.

## £ PROCUREMENT

## Consider sustainability as part of the due diligence process when selecting services from any third party provider or contractor.

### ❓ WHY?

It is common practice for managing agents to procure services and products from third party suppliers and contractors relating to the everyday management of the property. These services can have a significant impact on the sustainability performance of a property, which in turn can directly affect a managing agents ability to deliver against client targets and KPIs. It is therefore important for managing agents to manage this risk. For example, specifying the type of cleaning products which a cleaning service may use.

In addition, managing agents have the opportunity to have a much greater influence beyond the activities occurring directly at the property by encouraging their suppliers to implement sustainability best practice within their own everyday business operations.

Furthermore, this topic has seen, and will continue to see, substantial legislative changes and additions, such as when the Modern Slavery Act 2015 came into force which requires full transparency up and down the supply chain. Not only will a managing agent have their own reporting requirements but will also need to assist their clients in meeting their requirements.

### ⚙️ HOW?

Sustainable procurement is the process of acquiring goods and services while considering environmental and socio-economic factors in the decision making process. It usually involves looking at what the product is made of, where it has come from and who has made it. The ultimate goal is to minimise the environmental and social impacts of purchases. Practical examples of this could include:

- From an environmental perspective, requiring the supplier or contractor being certified to ISO14001 or have an informal environmental management system in place that effectively addresses the management of the key risks associated with their business activities.



- From a social perspective, requiring the supplier or contractor to pay all staff the national living wage.
- Preferring locally sourced products and suppliers.

It is recommended that managing agents refer to [BS8903 Principles and Framework for Procuring Sustainably](#) which provides a framework for implementing sustainable procurement processes across the supply chain.

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## Incorporate sustainability requirements within contracts for suppliers and contractors appointed by the managing agent on behalf of the client

### ? WHY?

During the tendering of service contracts managing agents have the opportunity to require specific standards and / or levels of performance from their suppliers and contractors. In addition, ensure contractors are able to demonstrate they possess the skills and competencies required to deliver services and mitigate against any inherent risks. By incorporating sustainability requirements at this stage will ensure both parties are aware of their responsibilities and risks are reduced for the managing agent and client.

### ⚙️ HOW?

During contract negotiations the managing agent may want to incorporate within the contract requirements that cover:

- Compliance: Identifying regulatory requirements and managing risks appropriately.
- Standards: Meeting voluntary or industry standards.
- KPIs: Setting performance indicators and targets.
- Monitoring: reporting performance against KPIs throughout the term of the contract.

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## Monitor contractual sustainability requirements of suppliers and contractors throughout the duration of their contracts.

### ? WHY?

It is important to ensure that any sustainability requirements written into supplier contracts are met and compliance and performance are monitored on a regular basis. This is important to minimise risk exposure and ensure that the supplier has the correct management processes in place.

### ⚙️ HOW?

Managing agents should have a review process in place which:

- Regularly monitors performance against contractual KPIs.
- Identifies immediate non-compliance.
- Establishes the corrective action required.
- Identifies where training is needed.

### \* SKILLS AND COMPETENCE

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## Ensure that direct employees delivering services at the managed property have appropriate skills and are competent to deliver the core sustainability provisions.

### ? WHY?

The ability for a managing agent to deliver services effectively and in-line with client expectations is directly related to the skills of their on-site employees and the level of training they receive. Failure to therefore ensure employees have the required level of skills and training could result in a managing agent being unable to fulfill the client's requirements.

## HOW?

The training of on-site staff can be carried out in-house (informal or externally accredited). Third party training providers or training programmes run by industry bodies such as BSRIA, CIBSE, IEMA and UKGBC may also be an attractive option. Training should be reviewed periodically due to staff changes and as new training needs emerge. The training of contractors should be picked up as part of any procurement exercise.

## OCCUPIER ENGAGEMENT

**Communicate the sustainability performance of the managed property and the initiatives which are being undertaken to occupiers and building users through appropriate channels.**

### WHY?

Managing agents have a key role to play in ensuring that occupiers and buildings users understand the actions and initiatives that are being implemented by the managing agent to improve the sustainability performance of the managed property. Encouraging engagement and participation can contribute to improving the performance of the property and satisfy occupier demand for the more sustainable management of properties they own or lease.

### HOW?

Communicating with building occupiers on sustainability matters should ideally utilise existing communication channels. The nature and extent of occupier engagement will vary depending upon the property type, leasing arrangements and management control. Examples range from including 'sustainability' as a standing agenda item on quarterly occupier meetings; to undertaking proactive messaging and events in shopping centres.

## MAINTENANCE, ALTERATIONS AND REPLACEMENT OF EQUIPMENT

**Promote the inclusion of sustainability considerations when advising upon and/or undertaking maintenance, alterations or improvement works for the managed property.**

### WHY?

Any changes to maintenance arrangements, alterations, replacements and improvement works can significantly impact the environmental performance of a property and its risk exposure. Managing agents that can identify potential risks and opportunities when occupiers submit requests will, therefore, be of great value to clients.

### HOW?

Managing agents should encourage the inclusion of sustainability within the Planned & Preventative Maintenance (PPM) programmes (where lease provisions allow). This should cover areas such as energy efficiency, water efficiency, and whole life costing considerations. The three main areas that can significantly influence the performance of a property are heating, cooling and lighting. Examples of specific measures might include improving control systems and phasing out of inefficient equipment and replacement with energy efficient equipment. Materials sourcing is also critical, particularly during alterations, improvements or fit-outs. Managing agents should encourage the use of the waste hierarchy including the retention, re-use and recycling of materials and responsible sourcing of any new equipment or materials using independent accreditations wherever possible.

One particular area managing agents should be aware of is the risk relating to Minimum Energy Efficiency Standards which could have a bearing on certain alterations and works. Managing agents involved in such works should notify the client and occupier if they believe any works are being undertaken could

potentially have an adverse impact the EPC rating of the building. Managing agents should be aware that requirements differ between England & Wales (Energy Efficiency (Private Rented Property) Regulations 2015) and Scotland (Assessment of Energy Performance Of Non-Domestic Buildings Regulations 2015).

Additionally, there may be provisions within the lease to ensure that an occupier cannot carry out their own EPC assessment as well as undertake works which adversely impact the EPC rating. A managing agent should be aware whether such restrictions are in place.

## **HANDOVER**

### Take responsibility for providing and retrieving historic environmental documentation and data when properties are handed over (both incoming and outgoing managing agents).

#### **WHY?**

The seamless transition of a property from one managing agent to another is beneficial to both client and managing agent. Including the timely provision of environmental documentation during the handover process can help ensure a swift and smooth transition, and avoid unnecessary time spent from client or incoming managing agent trying to retrieve historic information. Providing such information can also help the incoming owner and/or managing agent to establish a baseline to which future performance can be measured against.

#### **HOW?**

To help ensure a smooth handover of environmental information managing agents should store within a central register (typically two years' worth unless specific statutory time lines apply) and request details regarding the following areas:

- a. Information and/or documentation related to environmental regulatory compliance.
- b. Existing environmental building ratings and certification together with any recommendation reports.
- c. Details of any utility metering and waste management arrangements, previous audits and performance data (for the purpose of assessing performance trends rather than corporate reporting) which has been procured for the buildings as part of the Service Charge.
- d. Historic records of any improvement measures and works in order to improve the environmental performance of the property.
- e. Other relevant supporting information which impacts on environmental performance.

A handover information checklist is provided in [Appendix 1](#) to support managing agents in this process.

### **Contracts and costs**

Individual contracts (and fees) will continue to remain the subject of negotiation between the property owners and their agents. It is hoped that the core provisions, together with the best practice standards will enable agents to offer consistent and transparent service offers, and property owners to specify more clearly the standards that they expect of their agents. It is also hoped that by defining core sustainability service and best practice, managing agents will be better positioned to deliver sustainability services and that an informed discussion can take place concerning the resources (and therefore the fees) required to deliver these services.

# Appendix 1: Handover information checklist

ITEM	COMMENTS
<b>Regulatory compliance</b>	
<input type="checkbox"/> <b>Confirmation of participation in the CRC Energy Efficiency Scheme</b>	Evidence packs will most likely be held by the client. Managing agents should know if the property is a significant undertaking in its own right.
<input type="checkbox"/> <b>ESOS Audits</b>	Need to be carried out every four years. Any schedules of actions carried out against recommendations should be made available with reports.
<input type="checkbox"/> <b>Energy Performance Certificates</b>	Should be part of sales pack, however, can also be found at <a href="https://www.ndepcregister.com">https://www.ndepcregister.com</a> (England & Wales) and <a href="https://www.scottishepcregister.org.uk">https://www.scottishepcregister.org.uk</a> (Scotland). The client may also have copies of the Recommendations Report and .nct file. Scottish EPC's certified pre-2013 are not held in central system so will need to be made available. In addition, Action Plans should be requested for Scottish properties and/or units over 1,000m <sup>2</sup> ).
<input type="checkbox"/> <b>Display Energy Certificates</b>	If legally required should be displayed publically within the building, however, can be found at <a href="https://www.ndepcregister.com">https://www.ndepcregister.com</a> .
<input type="checkbox"/> <b>Air conditioning inspections</b>	Need to be carried out every five years. Copies can be found at <a href="https://www.ndepcregister.com">https://www.ndepcregister.com</a> for England & Wales. For properties in Scotland there is no central register and reports should be held by the client.
<input type="checkbox"/> <b>Refrigerants records</b>	Usually held by the managing agent or in site files.
<input type="checkbox"/> <b>Heat Network Regulation Notifications</b>	Need to be carried out every four years. There is currently no central data base so it is important these are included within the sales pack.
<input type="checkbox"/> <b>Water risk assessments &amp; drainage plans</b>	Usually held by the managing agent or in site files.
<input type="checkbox"/> <b>Waste transfer and consignment notes</b>	Usually held by the managing agent or in site files.
<input type="checkbox"/> <b>Other licences (e.g. invasive species action plan, asbestos, discharge consents)</b>	Usually held by the managing agent or in site files.

## Voluntary certification

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|--------------------------|--|--|
| <input type="checkbox"/> | <b>Environmental certificates e.g. BREEAM, LEED, PassiveHaus, Ska, WELL Building Standard etc.</b> | Numerous certification tools and initiatives now exist to allow property companies to report the environmental performance of their buildings and operations. A short summary of common industry initiatives can be found <a href="#">here</a> .   |
| <input type="checkbox"/> | <b>Environmental Management System (EMS) e.g. ISO14001</b>   | Firstly, it should be confirmed whether a building is certified at a single building level or part of the outgoing managing agent's portfolio wide EMS. It should then be confirmed how the EMS delivery was funded. All documentation should be made available where the EMS has been funded via the service charge. Documentation may be harder to retrieve / separate out when part of a managing agent's portfolio wide EMS. |

## Utilities

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|--------------------------|---|---|
| <input type="checkbox"/> | <b>Metering plan</b>  | This should provide meter locations, MPAN and MPRN numbers, details of what they serve and any photos of meters to aid their location and reference.  |
| <input type="checkbox"/> | <b>Previous audits procured for the buildings as part of the Service Charge</b> | Usually held by the managing agent or in site files. Any schedules of actions carried out against recommendations should also be made available with reports.   |
| <input type="checkbox"/> | <b>Utility performance data</b>   | This should be in the format of previous utility invoices, ideally going back two years; Half Hourly or AMR data, ideally going back two years; and / or manual meter readings, ideally going back two years. |
| <input type="checkbox"/> | <b>Previous occupier recharging arrangements calculations</b>                   | Usually held by the managing agent or in site files.  |
| <input type="checkbox"/> | <b>Copies of existing supply contracts</b>                                      | Usually held by the managing agent.   |
| <input type="checkbox"/> | <b>Site Drainage Plan</b>   | Usually held by the managing agent or in site files.  |

## Waste management arrangements

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|--------------------------|---|---|
| <input type="checkbox"/> | <b>Waste management plan</b>  | This should include details of current waste management arrangements including on-site recycling provisions.  |
| <input type="checkbox"/> | <b>Previous audits procured for the buildings as part of the Service Charge</b> | Usually held by the managing agent or in site files. Any schedules of actions carried out against recommendations should also be made available with reports. |
| <input type="checkbox"/> | <b>Waste collection data</b>  | This should ideally include 2 years' worth of data split by waste stream as it leaves site, and final destination after processing (MRF splits).              |

<input type="checkbox"/>	<b>Duty of Care documentation</b>	This should include items such as Waste Transfer Notes, Waste Consignment Notes, Waste Carrier Licenses, Hazardous Waste Producer Registrations.
<input type="checkbox"/>	<b>Risk assessments</b>	Specifically relating to hazardous waste handling and storage.
<input type="checkbox"/>	<b>Sub contracted waste activity</b>	Activities outside of the main waste management contract that require Duty of Care to be fulfilled (e.g. hazardous waste, landscaping, site maintenance, interceptor clearance).

## Building management

<input type="checkbox"/>	<b>PPM Schedules</b>	Records of previous improvement works.
<input type="checkbox"/>	<b>Asset registers</b>	Usually held in site files.
<input type="checkbox"/>	<b>BMS login details</b>	Usually held in site files.
<input type="checkbox"/>	<b>Occupier Handbook</b>	Usually held by the managing agent.
<input type="checkbox"/>	<b>Building Logbook</b>	Usually held in site files.
<input type="checkbox"/>	<b>Biodiversity Action Plan / arrangements</b>	Usually held by the managing agent.
<input type="checkbox"/>	<b>Occupier engagement programmes</b>	This should include confirmation of any occupier groups/forums that are in place, how they operate, key contact details and previous meeting documentation.
<input type="checkbox"/>	<b>Local community involvement</b>	This should include details of any existing relationships with local community groups and relevant contact details. Such instances are typically more relevant to shopping centre management.
<input type="checkbox"/>	<b>Flood Risk Assessment</b>	Usually held by the managing agent, however, may also be held by the client as part of due diligence on purchase. It is helpful to not only retrieve the assessment but also details of any preventative works which have been carried out. Flood risks maps are available via the Environment Agency at <a href="http://maps.environment-agency.gov.uk">http://maps.environment-agency.gov.uk</a> .

# Appendix 2: Data collection KPIs

It is appreciated that each managing agent and client will agree their own set of environmental KPIs and reporting frequency. However, the following has been suggested as a useful starting point to report on a quarterly basis to provide some industry standardisation.

## ELECTRICITY, GAS AND WATER METER DATA

Property details	
Building name	Text.
Building address	Text.
Asset type	e.g. office, shopping centre, retail park, industrial etc.
Floor area	m <sup>2</sup> (NLA or GIA).
Meter details	
MPAN (electricity) / MPRN (gas) number	MPAN (21 digits). MPRN (6-10 digits).
Meter Serial Number (MSN)	Unique alphanumeric reference.
Utility type	Electricity, Gas or Water.
Utility provider	Text.
Supply contract open date (i.e. the date that the supply entered landlord control)	Date.
Supply contract close date (i.e. the date that the supply left / will leave landlord control)	Date.
Tariff comments / notes	e.g. green tariffs / renewable supplies.
Type of supply	Suggested list of options: <ul style="list-style-type: none"><li>• Landlord obtained</li><li>• Tenant recharge</li><li>• Common parts</li><li>• Void</li></ul>
Supply description / location	e.g. 2nd floor, car park lighting, unit 3.
Consumption	
Units	kWh for electricity & gas. m <sup>3</sup> for water.
Above utility consumption start date (i.e. the date that the consumption reading provided starts at)	Date.
Above utility consumption end date (i.e. the date that the consumption reading provided ends at)	Date.
Utility cost for specified period	£
Accuracy	Whether data is from invoices, meter read or estimated.

## WASTE DATA

Property details	
Building name	Text.
Building address	Text.
Asset type	e.g. office, shopping centre, retail park, industrial etc.
Floor area	m <sup>2</sup> (NLA or GIA).
Waste generation	
Waste broker name	Text.
Waste carrier name	Text.
Waste data start date (i.e. the date that the data provided starts at)	Date.
Waste data end date (i.e. the date that the data provided ends at)	Date.
Waste stream	Suggested list of options: <ul style="list-style-type: none"><li>• Landfill</li><li>• Sent to Offsite MRF</li><li>• Sent for Incineration</li><li>• Sent for Incineration with energy recovery</li><li>• Recycled waste (e.g. paper, plastic, glass)</li><li>• Food waste / anaerobic digest / composted</li><li>• Hazardous waste</li></ul>
Container type	Suggested list of options: <ul style="list-style-type: none"><li>• wheelie bins (1,100/240 litre)</li><li>• black bag collection</li><li>• Compactors</li><li>• Skips</li></ul>
Total generation	Number of containers, volume (m <sup>3</sup> ) or weight (tonnes) (weight preferable if available).
Cost	£
MRF performance figures	Suggested list of options: <ul style="list-style-type: none"><li>• % Landfilled</li><li>• % Incinerated</li><li>• % Incinerated with energy recovery</li><li>• % Recycled</li><li>• % Composted / anaerobically digested</li><li>• % Reused</li></ul>



# Managing Agents Partnership members



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The views expressed in this document are not necessarily those of either the individuals who provided input or their organisations.

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1 The Better Buildings Partnership (BBP) is a collaboration of UK property owners with 27 members and over £180bn AUM.

2 For avoidance of doubt the following information is not legal drafting and exacting wording and specification is left to each managing agent to implement as they see fit with their clients.