

How to build business cases for sustainable success

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Institute of Workplace
and Facilities Management

Speaker



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Building a business case

The recent IWFM Sustainability Surveys have highlighted business case and ROI as a major barrier to implementing sustainability measures and involvement in decisions to achieve net zero.

In 2023, 57% of WFMs indicated that their organisation had ROI requirements that expected projects relating to energy efficiency/decarbonisation/net zero to breakeven or better.

The Carbon and Net Zero survey 2022 also identified that 63% of FMs felt high-upfront costs to installing technology, and commercial arrangements within contracts, were a barrier to their sustainability plans – for example solar PV on roofs negating warranties.



Introduction

1.1 What is the purpose of this document

This document is written to help facilities managers to develop and present a structured business case for energy and environmental management aligned with their organisational needs. Most organisations will have their own template, with this guidance intended to focus on what information you need to share with senior budget holders to put the best business case forward to unlock the finances needed. This requires an understanding and interpretation of data to identify the insights necessary for presentation to enable approval.

1.2 Who is this document for?

The guidance document will allow senior facilities managers to communicate effectively to senior individuals in their organisation (or client stakeholder if outsourced), and for junior FMs to engage within their department.

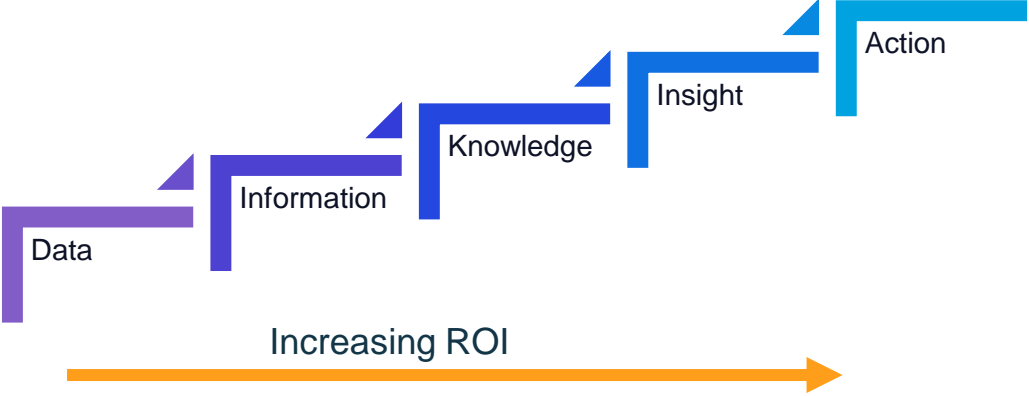
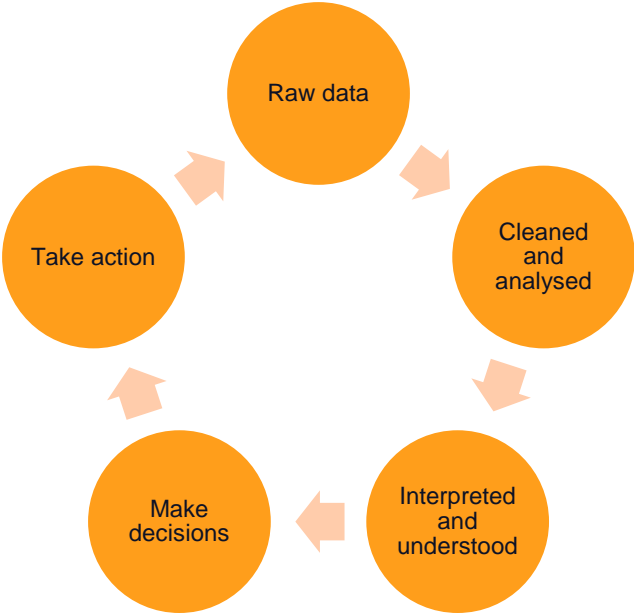
1.3 What does the document cover?

Identifying features of existing buildings which can be exploited should be one of the first considerations when assessing the ROI potential. Each case will be unique, but there are common areas that would significantly enhance a comprehensive asset strategy, incorporating tenant demand, regulatory risk and competitiveness – as such they are important considerations for the business case

Business drivers

1. Improving sustainability performance and bringing more space into rental use can increase the income for the property and occupancy rates, significantly improving the ROI of any project
2. Improving the operational controls within the building can reduce sickness levels and improve productivity, providing benefits on employee costs, improving the ROI of a project
3. Improved data and reporting can provide better metrics and identified more appropriate technologies which are more efficient in use, improving the ROI of a project

Key issues



Aligning with the business strategy

1. How does the project allow the organisation to meet its strategic goals and targets?
2. How confident are you on the costs to implement and the likely savings (including wider benefits) being realised?
3. What are the risks associated with the implementation and are there means to mitigate or manage them?
4. Do you understand the finance processes sufficiently for the project calculations to align with the internal systems? What metrics are used to evaluate projects?
5. How will the success of the project be measured at commencement and in operation – how can this be communicated?
6. Have others in the sector and industry implemented the initiative and what has been the feedback?

Building business cases for sustainability in partnership with Equans

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