

# Sustainability Strategy Implementation and Management

Implement your Sustainability Strategy  
to drive Excellence

V1.1





# What Is Sustainability Strategy Implementation & Programme Management?

In our contemporary business environment, the importance of environmental, social, and governance (ESG) considerations cannot be overstated. Stakeholders increasingly expect organisations to adopt sustainable and responsible practices, raising the bar for action, transparency, and disclosure.

Navigating this complex landscape and meeting these expectations necessitates the development and execution of a comprehensive **Sustainability Strategy** in harmony with your vision, mission, and ESG objectives. This personalised roadmap guides you on the path to becoming a leader in sustainable real asset investment.

At EVORA, we employ our **4D Approach** to create a well-crafted Sustainability Strategy. First, we identify crucial sustainability processes in the Drivers and Design stages. These are strategically implemented in the **Delivery** stage, ensuring seamless sustainability integration throughout your investment lifecycle, readying you for voluntary and mandatory reporting in the Disclosure stage.



As part of the **Delivery** stage, we provide Sustainability Strategy Implementation and Programme Management services. These encompass **four components**.

1

Annual EMS & Sustainability Strategy

2

Core Advisory Programme Management

3

Critical Friend & Ad Hoc Support

4

Tenant Engagement Survey



# 1 Annual EMS & Sustainability Strategy Update

We conduct an annual review of your **Environmental Management System (EMS) and Sustainability Strategy** for alignment with **ISO 14001** standards.

## Gather and assess data

We gather and assess data comprehensively, sourcing relevant information such as client type, assets under management, number of funds, types of real assets, and the ISO 14001 status of your EMS (Certified, Aligned, Not Aligned).

## Evaluate and update documents

We evaluate your existing documentation against ISO 14001 criteria, making necessary updates and, optionally, issuing updated documentation to your stakeholders. This ensures the maintenance of a robust and compliant EMS and Sustainability Strategy, supporting your ongoing environmental management objectives.

## Conduct internal EMS audit and report

We conduct a thorough internal EMS audit, reviewing your system against ISO 14001 standards. Findings are categorised as Observations, Minor Non-Conformity, or Major Non-Conformity, with proposed corrective and preventative measures for each.

We issue a detailed **Internal EMS Audit Report** and hold consultations to discuss findings and recommendations with your team, ensuring the ongoing effectiveness and compliance of your EMS.

## Perform management review and next steps

We present an overview of previous actions, significant changes, environmental objectives, performance data, resource adequacy, and feedback. Following this, we engage in a consultation session with your senior management team to assess the effectiveness of your EMS and recommend next steps.

## Support external EMS audit

We ensure a smooth and successful external EMS audit experience by providing continuous support, addressing queries from the certification body during the audit, and, if necessary, resolving any corrective or preventative actions that may arise during the process.



## 2 Core Advisory Programme Management

We comprehensively manage your Core Advisory Programmes, providing strategic support beyond existing engagement and daily deliverables. Furthermore, we offer any necessary additional support that may not be covered within the existing scope.

Through our **Core Advisory Programme Management**, we ensure seamless execution and strategic alignment, empowering you with robust support tailored to meet your evolving needs.

### Update programme every quarter

We provide headline programme updates, market insights, and key industry sustainability trends. Additionally, we facilitate discussions on potential future requirements and updates on relevant EVORA products. We also offer roadmap updates for our **SIERA** sustainability data management platform.

### Check operations every month

We offer an optional monthly consultation that covers detailed programme updates such as status and timings, addresses challenges regarding current deliverables and dependencies, identifies key risks and opportunities, discusses actions and next steps, and addresses any other business matters.

### Manage requests ad hoc

We manage a variety of ad hoc requests, catering to external data requests such as investor **Due Diligence Questionnaires**, as well as internal data requirements encompassing internal reporting, quarterly investor presentations, and marketing initiatives.

Additionally, we provide performance summaries to inform fund strategies and offer general support, including bespoke analysis tailored to specific needs.



## 3 Critical Friend & Ad Hoc Support

We offer **Critical Friend (Strategic Support) and Ad hoc Support**, typically on a day rate or time basis, to facilitate the implementation of strategies at the organisation, fund, and asset level. This provides tailored guidance and strategic insights to enhance sustainability performance and align with industry best practices.

### Provide critical friend support

We review your approaches against best-practice sustainability guidance, including corporate and fund-level sustainability commitments, objectives, and obligations, in addition to fund ambition, fund real asset type (equity, debt, infrastructure), and fund investment strategy.

### Guide improvement opportunities

We provide guidance on potential improvement opportunities across various topics, including but not limited to TCFD, SFDR and EU Taxonomy, Decarbonisation/CRREM alignment, Physical Climate Risk, GRESB, Green Building Certification (BREEAM, LEED, Fitwel, WELL), Sustainability Integration (asset business planning, due diligence, stakeholder engagement), and ongoing Sustainability Performance Monitoring and Managed Data strategies.





## 4 Tenant Engagement Survey

We offer a **Tenant Engagement Survey** to support future programmes. Recommended at least every three years, the survey captures data for the reporting period, enhances the frequency and quality of future requested sustainability data from tenants, and elevates sustainability performance across assets.

This survey is instrumental in understanding critical issues within your portfolio, fostering tenant engagement, and boosting tenant satisfaction for improved tenant retention rates and productivity.

This structured approach ensures a comprehensive understanding of tenant satisfaction, facilitating informed decision-making and strategic planning, enhancing tenant engagement, improving sustainability performance, and fostering stronger relationships between your landlords and your tenants.

### Support GRESB and BREEAM In-Use

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The **Tenant Engagement Survey** supports several aspects of **GRESB** performance, encompassing tenant data coverage and feedback on energy and water consumption. It facilitates data collection for GRESB questions relating to energy, water, and waste improvements.

Furthermore, it aligns with **BREEAM In-Use** management performance requirements, particularly in engagement and feedback, as well as in energy and water consumption reporting.

### Implement Tenant Engagement Survey

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We set up a **kick-off meeting** to agree timelines, survey questions, and communication strategies with your tenants, before setting up your Tenant Engagement Survey, alongside links and QR codes.

We ask you to contact your tenants and the building management of individual assets, potentially boosting response rates if the survey originates from a familiar contact. Periodic updates promote transparency and keep the survey on track.

### Craft Tenant Engagement Survey Report & Programme

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We compile a **Tenant Engagement Survey Report**, meeting GRESB requirements and including an analysis of your Net Promoter Score and tenant satisfaction metrics. We host a consultation to discuss findings, tenant comments, potential recommendations, and outline next steps for a **Tenant Engagement Programme**.



## EVORA: Your Partner for ESG Strategy Implementation & Management

EVORA's ESG Strategy Implementation and Management services guarantee compliance with **ISO 14001** standards, provide tailored strategic support, offer guidance on sustainability commitments, and conduct Tenant Engagement Surveys for asset sustainability.

This collaboration supports your organisation in advancing sustainability objectives and aligning with industry best practices.

To learn more, please read our Product Brochures on **Sustainability Strategy**, **Sustainability Strategy Training**, and **Voluntary & Industry Reporting**.

[Sustainability Strategy](#)



[Sustainability Strategy Training](#)



[Voluntary & Industry Reporting](#)





# Trust EVORA Global for Sustainable Assets

**We go beyond consultancy, serving as your trusted partner for sustainable real asset investments.**

With our unparalleled **Collaborative Expertise**, we provide actionable insights that empower your real asset community to thrive in sustainable investment.

Our proven expertise in strategic consulting, climate resilience, net zero, sustainable finance, infrastructure, reporting, and social wellbeing ensure your investments are aligned with environmental, social, and governance goals for a secure ROI.

# Driven by Collaborative Expertise

## STRATEGY

Driving value and impact with sustainable ESG strategies

## TECHNOLOGY

Streamlining operations and insights with advanced real asset technology, **SIERA**

## ADVISORY

Navigating sustainable solutions with expert real asset advice





## Our Mission

To establish sustainability and carbon as foundational factors for investment decisions.

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## Our Purpose

To accelerate the adoption of real asset sustainability and enhance the wellbeing of the planet and its people.

## Our Clients

**250+**  
CLIENTS

**45,000**  
ASSETS

**\$880 billion**  
AUM



**We engaged EVORA Global to help kick off the strategic development of our ESG plans. As part of this, EVORA took the lead in the creation of our inaugural CSR Report: producing content, advising on design, collating, and verifying data. We wanted to announce the launch of our ESG Strategy in a report that upheld our values of being proud, caring, enriching and exceptional. We are delighted with the finished result.”**

**Harriet Dunstan**  
Marketing Director  
**Audley Group**

## Contact Us

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