

Heuston South Quarter, Kilmainham,  
Dublin 8

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July 2021

# Site Specific Apartment Management Strategy



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# 1. Introduction

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Cushman & Wakefield (C&W) have been retained as Management Consultants on the Heuston South Quarter development .

C&W's role is to provide expert advice to ensure all long-term management and maintenance matters are considered at the design stage, the construction stage and the operational stage of the project.

As a top 3 global firm, C&W currently manage in excess of 4 billion square feet of real estate worldwide. This extensive experience will ensure that best practice advice, research and management expertise will be available throughout the project.

Our client is applying for permission for a development of 399 BTR apartments consisting of;

- 46 x Studio Apartments
- 250 x 1 Bed Apartments
- 103 x 2 Bed Apartments

In addition the proposed scheme also comprises a Residential Gym, Residential Lounges' / Co-Working area and a TV room.



## 2. Management Strategy

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This report is designed to demonstrate the measures which have been considered to effectively manage and reduce costs for the benefit of the owners and the environment with an objective of improving the overall living experience for all residents while adopting best practice in co-operative living to reduce impact on the environment.

This is in reply to Section 6 of the Sustainable Urban Housing; Design Standards for New Apartments- Guidelines for Planning Authorities (2018)

Management of Heuston South Quarter will be way of 2 phases;

### Design & Construction Stage Advice

C&W will be providing advice on the following areas:

- Security & Safety post completion
- Traffic Flow / Management (in line with Mobility Plan)
- Car Park Management – Occupiers & Visitors
- Delivery Management and Restrictions (in line with Delivery & Service Plan)
- Performance Management Building Information Modelling – flow process
- Completion of Strategy Reviews;
- Welfare Facilities – Amenities spaces, communal lockers, bike stores
- Landscape Design & Management
- Public Realm Management & Event Scheduling
- Waste Management & Movement
- Fire & Life Safety
- Vertical Transportation
- Engineering

Formation of an annual service charge regime to include, cleaning, landscaping, refuse management, maintenance of life safety systems, security etc of the communal areas

- Fair and equitable apportionment of Annual operational charges

### Operational Stage Services

Once Heuston South Quarter is operational, C&W will be appointed as property managers to ensure best practice property management services are available to support the promotor with their aspiration to deliver a world class PRS scheme. Of utmost importance to the continued success post completion will be the management regime put in place. C&W will be responsible for the provision and procurement of the following services:

- Concierge
- On-site Maintenance Manager
- On Site Facility Manager
- Landscape maintenance
- M&E preventative maintenance
- Management of Amenity Spaces

The Concierge will oversee the site based team and will ensure that the Delivery & Service Plan for the development is adhered to, monitored and reviewed post occupation. The Concierge will also appoint specific duties within the team including;

- Access Management
- Goods In / Servicing Management
- Waste Management

In reviewing the management strategy for the completed development, we have accessed on the basis of a single owner whereby all apartments are rented, together with a break up sale development whereby an OMC will be required for the scheme. That being said, the application is for a Specific BTR development and therefore SPPRs 7 and 8 do directly apply in this instance.

### 3. Facilities & Amenities

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The common areas of the completed development at Heuston South Quarter will include;

- The external walls, foundations and roofs and internal load-bearing walls the entrance halls, landings, lifts, lift shafts, staircases and passages
- The access roads, footpaths, kerbs, paved, planted and landscaped areas, and boundary walls Architectural and water features
- All ducts and conduits, other than those within and serving only one unit in the development
- Cisterns, tanks, sewers, drains, pipes, wires, central heating boilers, other than such items within and serving only one unit in the development
- Residents Fitness Centre
- Television Room
- Management and security
- Work/Study Area
- Other areas that are from time to time provided for common use

#### **Management Services & Obligations**

Management through the offices of Cushman & Wakefield will provide services required to the estate and detailed in the title documents of all units. In addition to the prescribed services, Cushman & Wakefield will be best positioned to provide additional services to improve the living experience for all residents on the estate.

The services identified for the proper maintenance and upkeep of the residential development at Heuston South Quarter include;

- Insurance
- Life Safety Systems, Fire Prevention & Protection
- On Site Staff & Facilities
- Energy Consumption & Management
- Waste Management
- Fitness Centre Management
- Residents Multi Function Areas
- Post & Parcel Delivery
- Resident Storage
- Maintenance
- Landscaping & Grounds
- Sinking Fund

These services will be managed and monitored through the on site team and such rules as required will be put in place in ensure proper order.

# 4. Mobilisation Strategy

*Cushman and Wakefield's objective through the mobilisation program is to undertake activities and complete milestones prior to the proposed contract and service 'Go – Live' date.*

These activities are critical to ensure service delivery through people, data, systems, account and operational process are fully in position to function on day 1.

We also understand the need to ensure the long term success of this contract, it is essential that the mobilisation is carried out in a structured and logical manner. Such implementation and mobilisation of this contract is highly dependant on the team members dedicated to this process. Our team recognise the importance of getting this phase of operations right first time.

*We will work with our clients on Heuston South Quarter to develop a bespoke detailed transition plan that will meet key milestone dates and mitigate any risks.*



*Cushman and Wakefield places great emphasis on the mobilisation of new accounts and has invested significant time and resource into capturing and embedding our best practice and learning in this area.*



We will complete a mobilisation plan that is a high-level indicative approach and will be used to form the basis of a more comprehensive mobilisation plan in due course. This will be subdivided into a full breakout of a sub-plan for all the sites.

The tasks which will be completed during the mobilisation process will include:

- Agree reporting streams and structures for the mobilisation period
- Complete site familiarisations for full account team
- Confirm Account Teams' clearance levels are compliant with site specific requirements
- Agree training requirements/content
- Asset identification/verification/criticality assessment
- Establish maintenance and operational procedures
- Compile PPM planners in line with the specifications provided
- Sub-contractor negotiations (including any change of sub-contractors)
- Compile sub-contractor PPM schedule
- Agree performance levels with sub-contractors
- Identify site rules
- Conduct H&S audit and compile procedures – site conditions and put Health & Safety structure in place
- Agree operations procedures
- Audit site for critical single points of failure
- Reactive and call-out services are set up and fully operational
- Agree audit procedure and implement
- Finalise new contractual documentation
- Finalise administration/records procedures
- Agree statutory test and inspections/records; set up e-Logbooks to ensure legislative compliance
- Review existing logbooks and set up logbooks for all sites
- Develop emergency response action plans
- Review and provide a gap analysis on the completeness and accuracy of existing O&Ms and drawings.

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**Data &  
Analytics**

**Fit Out &  
Interior  
Design**

**Marketing &  
Revenue  
Management**



**Supply  
Chain  
Logistics**

**Resident  
Experience  
Management**

**Property &  
Facilities  
Management**

***The Resident at the Centre of Everything we do***

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## 5. Staffing Plan

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### *Concierge/ Customer Care Services*

The provision of Estate Manager / Concierge Services has now become the standard across the residential apartment market. Whilst acting as a security presence for the development, the Concierge is also there to make life easy and simple for residents.

A non exhaustive list of services that will be provided through the Concierge include;

- ✓ *First Port of Call for any issues*
- ✓ *Deliveries*
- ✓ *Dry Cleaning*
- ✓ *Key Holding*
- ✓ *Reservations*
- ✓ *Community Events Management*
- ✓ *Vehicle Management*
- ✓ *Valet Services*
- ✓ *Chambermaiding*
- ✓ *Visitor Management*

Each Apartment will have a direct link to the Concierge/ Customer Care via their intercom but also through a dedicated Concierge Management System. For Heuston South Quarter, we propose the use of the “**Building Link**” software and further details of the benefits and abilities of this system are set out in our Technology and Innovation section.



Initially it is proposed that Concierge Services will operate 8-12 hours per day and this will be increased/ adjusted as the site matures and more residents take occupation.

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The provision of the right, appropriately qualified staff will be paramount to the success of the completed development.

## ***Estate Manager***

Role to include;

- *Play a proactive and leading role in terms of the service, culture, development, team image, systems, procedures and skills.*
- *Liaising with the Managing Agents, Cushman & Wakefield*
- *Rostering*
- *Scheduling the use of all the facilities with the residents*
- *Training of all the personnel*
- *Have a detailed knowledge of the building from an operational perspective*
- *Oversee all communications with the residents ie, weekly newsletter updates, upcoming events*
- *Resident Liaison*
- *Move in/ Out Management*
- *Understand and own the Health and Safety procedures of the development*
- *Preparation of annual operational budgets*
- *Management of contractors*
- *Managing the logistics of all the services in all the common areas while ensuring the minimum disruption to residents*
- *Managing the Building Management System App.*
- *Developing a community within the individual developments*

The ideal Candidate for this role will have a background in Property & Tenancy Management and a minimum of 5 years experience and qualify for the appropriate PSRA licence. This resource will be an employee of Cushman & Wakefield with salary and administration costs recharged through the landlord operational budgets.

## ***Customer Care Agent***

We propose that initially the Estate Offices would operate 12 hours Monday to Friday and 8 hours Saturday and Sunday with the role to include;

- *Welcoming residents upon arrival in a friendly and efficient manner*
- *Acting as a point of reference*
- *Understanding our residents needs and offering them customised solutions*
- *Acquire extensive knowledge of the development and the surrounding amenities and services*
- *Delivering parcels to the residents when necessary*
- *Answer Phone calls/ make reservations*
- *Respond to complaints and find appropriate solutions*
- *Oversight of Amenity spaces*
- *Administration of Building Link System*

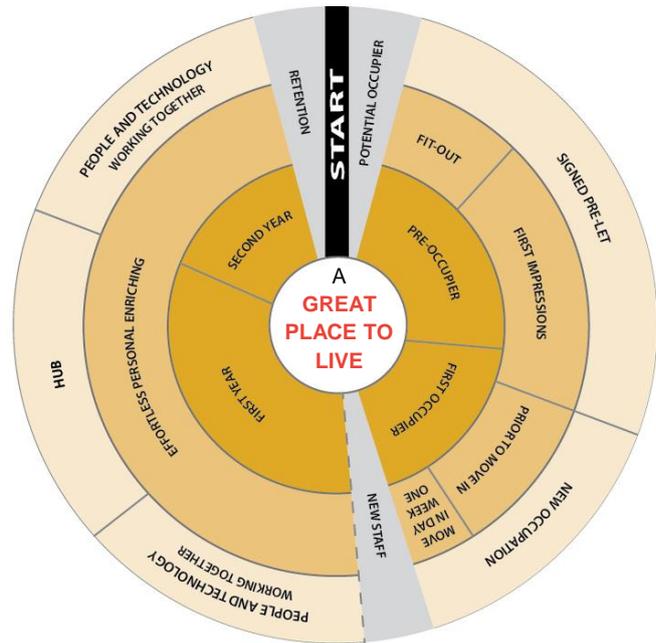
We anticipate that this role and the operation times of the Estate Office will evolve as the buildings occupies and services are finalised. With this in mind and given the requirement for shift work, we propose that this service would be sub contracted to a 3<sup>rd</sup> party firm.



# 6. Innovation & Creativity

Cushman & Wakefield is committed to being at the forefront of the ever-evolving demands of BTR development management. We understand the demands of residents, visitors and investors and provide leading edge customer engagement, social and digital media, customer service and community engagement.

Most importantly, we constantly strive to *innovate*. We use matrixes that are measurable and we seek and act upon resident and client feedback. We develop asset management plans and seek to review with you, the client, on an annual basis.



A sample of the technology that will be deployed in Heuston South Quarter will include;

### Building Link

We have partnered with Building Link on a number of residential schemes to date and recommend that this is the Technology Platform that should be deployed within Heuston South Quarter



Building Link is a powerful, customisable platform and currently services over 1.35 million residential units around the world.

The system offers many management tools including;

- |   |                      |                           |  |
|---|----------------------|---------------------------|--|
| Package Tracking                                | Key Tracking         | Maintenance & Work Orders | Visitor Permissions and Staff Instructions |
| Resident Profiles with Expandable Custom Fields | Document Library     | Amenity Reservations      | Building-Wide Calendar                     |
| Asset Tracking                                  | Management Analytics | Employee Management       | Parking Spaces and Vehicle Management      |

### Seamless & Effortless Communication

- |                                      |                               |                               |   |
|--------------------------------------|-------------------------------|-------------------------------|---|
| Emergency Phone/SMS Broadcast System | Automatic Email Notifications | Building-Wide Surveys         | Digital Signs: Electronic Displays for Packages & Announcements |
| Shift Log                            | Emails and Recipient Lists    | Building Directory            | Resident Directory  |
| Bulletin Board                       | Scrolling Announcements       | Autodialer for the Front Desk | Board-Only Library/Discussion Area                              |

The system also incorporates;

**Tenant Occupation Support** – move in, meter readings, inventory checklist, operational manuals, Tenant Handbook, ongoing communications

**Powerful Dashboard including** – Unit Look Up, Maintenance Request trends, Package Tracking, Amenity Space Usage trends

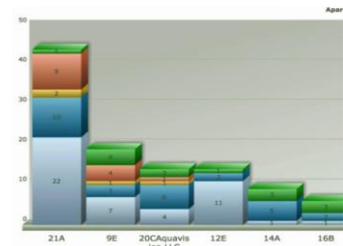
**Robust Customisation including** – Permission Types, Maintenance Categories, Delivery Types – Create “My Houston South Quarter”

**Mobile Applications** – Building Link on the Go

**Keylink** - biometric employee identification, and seamless integration. It should be a requirement of all leases that keys are held at Concierge for emergencies and to facilitate scheduled inspections.

**Geo Sensors** – Aware-FC monitors residential fitness centres, letting residents look at a dashboard from their home to see which exercise equipment is available.

**Residents Passport** - Identifies each resident by name, picture, apartment number, move-in date or any other data field in the BuildingLink database. Can also be used as a “cashcard” for operation of laundry services etc



Other examples of Innovation & Creativity that will be embraced include;



**MANAGEMENT**

Occupier verdict  
91% of Management ratings were 'good' or 'excellent'

**YOU SAID**

7 in 10 occupiers were dissatisfied with any of the sustainability initiatives being undertaken at the property.

**WE RESPONDED**

The next occupier meeting will be held on Friday 17th June, 11am. We look forward to hearing your views.

**Property Name**  
Occupier Satisfaction Study 2015

**You spoke. We listened.**

**90%** of occupiers said they would be likely to recommend the Property Management team.

**90%** of occupiers said they would be likely to recommend the Property Management team.

**100%** of occupiers agreed to participate in the study.

**XYZ**



# 7. Long Term Planning

## Long Term Planning

Section 6.13 of the Apartment Guidelines 2018 requires that apartment applications shall:

“shall include a building lifecycle report, which in turn includes an assessment of long term running and maintenance costs as they would apply on a per residential unit basis at the time of application”

“demonstrate what measures have been specifically considered by the proposer to effectively manage and reduce costs for the benefit of residents.”

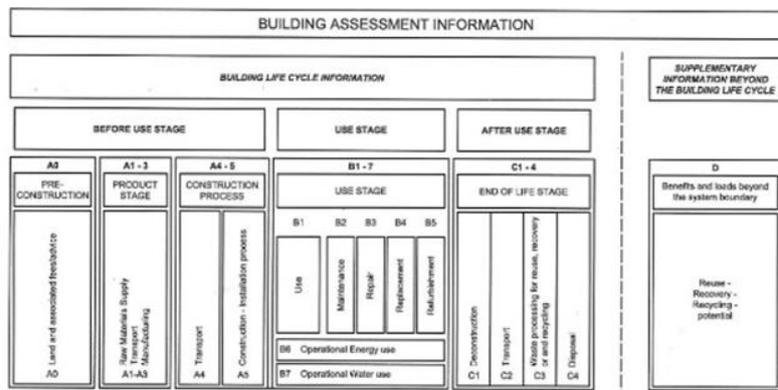
We carefully manage sinking funds so that there is always funding in place for any future works requirements.

Sinking fund requirements vary from development to development and from building to building and we calculate what is required for each element of Heuston South Quarter by taking the expected costs of future works and dividing it by the number of years expected to pass before these costs are incurred. This approach ensures that;

- The Management Company fully understand the requirements of the Sinking Fund
- A specialist consultant is engaged to carry out a detailed assessment of the development
- Annual reviews are undertaken
- Proactive plan and schedule is put in place

The elements of the buildings which should be incorporated into the calculation of the Sinking Fund include;

- Roofs
- Elevations
- Stair Cores & Lobbies
- Basement Car Park
- M&E Services
- Exterior



**Key**  
 1 Highest severity of consequence of failure  
 2 Anticipated severity of consequence of failure  
 3 Lowest severity of consequence of failure  
 4 Minimum service life  
 5 Most likely service life  
 6 Maximum service life

A Building lifecycle report has been completed and will be taken over by management of Heuston South Quarter in due course.

## 8. Sub-Contractor Management

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Cushman & Wakefield's procurement team provides an innovative supplier vetting and procurement service with access to economies of scale.

The procurement process uses a contractor vetting process designed to provide high quality suppliers subject to ongoing performance management particularly in sustainability and Health & Safety. The procurement process is transparent and auditable and focuses highly on appropriate specification levels with client/occupier involvement.

We implement performance based contracts thus managing supplier risk and delivering best value. It provides a unique vehicle not only to obtain bulk discounts on procurement, but also the performance management of FM contracts ensuring both effective operational performance and 'value for money' through the service charge.

Contracts are only granted to suppliers who have committed to our standards and KPIs (including environmental standards).

We have partnered with Safe Contractor to evaluate and measure our sub-contractors and their ability to meet service standards, quality assurance and Health & Safety obligations. Annual checks carried out on all contractors include;

- Insurance Levels
- Health & Safety Policy
- H&S Arrangements
- PPE
- Emergency Procedures
- Qualifications
- Accreditations



We deliver savings through procurement based on:

- transparency
- robust processes
- contractor vetting
- reduction of risk
- economies of scale
- framework agreements
- commitment to standard key performance indicators (KPIs)
- commitment to environmental standards

We use a purchase order management system, which integrates seamlessly into our property management system. This system handles the creation of the order, linked to service charge coding and allocation. Orders are approved through a workflow system which automatically routes the order to the approver with sufficient authority to cover the total order value.

# 9. Management Systems & Procedures

## After Hours Service & Procedures

One of the key modules of our system is a service desk which we operate on a 24/7 basis. This takes all reactive calls from occupiers related to facilities management issues. The system is pre populated with all the suppliers for each location we manage and for each service.

Against each service there are defined service level agreements (SLAs) which measure the time to contain and the time to complete the works.

Our operators are fully trained although outsourced to specialist third party. Our 24-hour service desk provides, a single communication point for occupiers to use. We can also offer a personalised telephone number service which will be answered with a dedicated greeting if this of interest.



## Management of On Site Personnel

As documented previously, there will be a number of staff engaged across this portfolio and we envisage that there is potential for a combination of contracted employees through both Cushman & Wakefield and other sub-contractors.

In terms of our management of on-site personnel, our process and service will include;

- Advertisement and recruitment of all staff
- Confirmation of character records
- Execution of contracts of employment
- Review of workmanship standards of all contracted tasks
- Instruct and arrange required training
- Oversee work activities to ensure they are executed in a productive, efficient manner
- Arrange and implement holiday cover
- Support and train all staff on delivery of services
- Confirm adequate equipment and clothing
- Arrange remuneration, including payslips, record all tax and social security deductions and statutory returns
- Comply with all statutory obligations
- Undertake regular performance reviews and provide feedback

## Health & Safety Management

We are fully aware of the need to effectively manage risk and to comply with statutory requirements to protect the reputation of Heuston South Quarter.

We believe that the 6 key steps to maintaining statutory compliance are:

- Establishment of policies and procedures
- Auditing and monitoring
- Training and competent staff
- Managing competent contractors
- Measuring performance
- Effective communication between all stakeholders.

If these controls are managed effectively then this will lead to a number of benefits, including:

- Risk control
- Reduction in operational costs, through accident avoidance, reduced claims and lost time
- Providing added value through engagement with occupiers and external stakeholders.

## Insurance Administration & Claims Procedure

*In accordance with the Management Company's covenants contained within the relevant leases (both commercial and the residential head leases), we will ensure that our clients are advised on the correct level of insurance cover required annually including;*

- All Risks
- Public Liability
- Employer's Liability
- Buildings
- Director's & Officer's Liability
- Loss of Rent/ Alternative Accommodation

In addition, each year, circa 8 weeks in advance of renewal we will commence negotiations on the renewal of your policies including;

- Revised valuation issued to broker
- Review of claims
- Broker places policy to the market
- Broker reports back within 4 weeks
- Renewal terms issued to Client/OMC Directors for approval
- Policy Renewed

We will also administer any claims on the policy during the course of the year. This process is agreed in advance with both the Management Company and the relevant broker. Our in-house management system, RAMIS, logs and tracks all claims and incidents in one location on one database. This allows for outstanding management control in real time.

## Procedure for House Rule Management

*House Rules generally rely on voluntary compliance and the covenants are relatively standard and generally restrict certain actions such as excessive noise, use of balconies and the keeping of pets.*

For the Residential OMC, the MUD ACT 2011 introduced empowerment to the OMC to introduce new rules deemed necessary to protect the overall interest of the development.

Regular reminders will be issued to all occupants in relation to House Rules and we have standard procedures and protocols in place to deal with House Rules breaches.

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