



## **MONARCH PARTNERSHIP**

*Utilities simplified*



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**GET ALL YOUR DUCKS IN A ROW**

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**SMART ASSET MANAGEMENT**





# SMARTLY MANAGED ASSETS

## AVOID NASTY OVERCHARGES

**Have you ever struggled with incorrect invoicing or worse, been charged for energy for sites/meters that aren't yours?**

One of our valued housing association customers was charged in excess of £55,000 for buying energy for sites which were no longer under their control.

The association incorrectly added 95 sites to their existing portfolio of 120 before checking with their supplier, or ensuring that their asset register was 100% accurate. This meant that they purchased energy for sites outside of their portfolio, which was non-refundable because of their take-or-pay contract.

Unfortunately, this is more common than you might realise.

## RECENT CONSOLIDATION SUCCESS

### Home Group

#### Social enterprise and charity

One of the UK's largest providers of high quality housing and supported housing services and products. They house over 120,000 people a year, managing 55,000 homes in over 200 local authority areas in England, Scotland and Wales.

Through our up-to-date Asset Management and accurate invoicing, we have consolidated the Group's energy contracts and invoices to improve financial planning and energy cost management. This has helped to reduce fuel poverty for their vulnerable tenants.

- Our SAM activities saved them £350,000 p.a.
- Locked in savings for the next three years with OJEU compliant energy procurement by utilising the current low energy prices
- Continuous reduction of energy costs with thorough Bill Validation and Asset Management

## UTILITIES ASSET MANAGEMENT IS A STRATEGIC IMPERATIVE

Utilities asset management should be a strategic imperative for many different organisations: housing associations, hotels and leisure, facilities and property management, maintenance, construction, manufacturing, to name but a few.. Many companies face the need to create a more sustainable asset base, against a background of rising energy prices and costs. However, many organisations include energy and water only in their procurement strategy, and not as part of their asset management. Often the focus is on the housing stock builds, repairs and maintenance.

Companies talk about energy efficiency, warm homes, energy saving measures and sustainability of the operations as means to reduce both carbon emissions and tackle fuel poverty. However, the types of meters they have in housing stock or office premises are usually not included in the asset management strategy. Some of our customers, for example, have had several electricity meters at one site.





## A HOLISTIC APPROACH TO SMART ASSET MANAGEMENT

Understanding your energy and water portfolio is the first step in achieving better value for money across your utilities. An effective, well-managed asset register means you will never miss an opportunity to reduce your consumption and expenses. To achieve savings and efficiencies, you need to be aware of what assets you have and how much an individual asset contributes throughout its life, taking into account its age, location, and consumption pattern.

We promote a "holistic asset management approach" to ensure that quality, affordability and value for money are key measures of success.

### BENEFITS

- ✓ Accurate data for planning and reporting
- ✓ Procure energy and water for correct sites and supplies, and for correct spend amounts
- ✓ Easily divvy up sites for housing, finance and facilities managers
- ✓ Up-to-date Asset Register with site and meter lists, meter reads, and consumption profile online, 24/7
- ✓ Manage Change of Tenancies, site additions/removals, voids and council tax efficiently

## INEFFICIENT ASSET MANAGEMENT SIGNS:



1

- Inaccurate utilities portfolio
- Paying for wrong meters
- Several meters at one site

2

- Numerous suppliers
- Overcharges
- Debit/credit on account
- Deemed rates

3

- Poor planning and budgeting
- Insufficient data
- Unexpectedly high bills
- Difficulty in proving VfM



## OUR SOLUTIONS:

- ✓ Data cleansing and asset register creation
  - ✓ Consumption analysis
  - ✓ Meter review: HH/NHH, gas
  - ✓ Site works and new connections
  - ✓ CoO/CoT
  - ✓ Void management
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- ✓ Consolidation and co-terminus dates
  - ✓ Historical audit for overcharge
  - ✓ Best prices obtained
  - ✓ Tendering and mini-competitions
  - ✓ Lower energy and water bills
  - ✓ Wholesale market monitoring
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- ✓ Energy management reporting
  - ✓ Consumption cost and CO2 reports
  - ✓ Accruals report
  - ✓ Integrated payment reports
  - ✓ Reduced consumption
  - ✓ Effective use of funds for affordable housing and tackling fuel poverty







**WANT TO  
IMPROVE YOUR  
OPERATIONAL  
PERFORMANCE  
AND INCREASE  
BUSINESS  
EFFICIENCY?**

Our strategic asset management approach helps companies to create and maintain an accurate database of their utilities.

We take care of the management of your sites and meters with suppliers, making sure your portfolio contains only the meters you are responsible for.

We review your register quarterly and maintain the status of sites and meter readings. For accuracy, we cross-reference the entire portfolio against Xoserve and ECOES national databases.

As a result, you are able to maximise return on the assets, maintain a high quality assets register, and monitor schemes against your KPIs. This delivers improved operational performance, cost-efficiency, and sustainability.

Our holistic approach has resulted in savings and refunds of millions for our clients.

We help you to include your utilities as part of your Asset Management Strategy, Total Facilities Management or Value for Money strategy. You can then make the best use of all of your assets to meet the needs of current and future residents, clients and staff.



## THE SCOPE OF OUR SAM SERVICE IN BRIEF:

### 1) Asset Register creation:

- We collect data and maintain an accurate database of your utilities
- We take care of the management of suppliers, making sure your portfolio contains only the meters you are responsible for

### 2) Processing site removals:

- Change of tenancy – removing a contracted site from the portfolio and passing the details of the new owner to the supplier
- Meter removals/disconnections – engaging with the supplier for the disconnection of the meter, obtaining quotations for it, and arranging site appointments with the responsible manager

### 3) Site additions:

- Simple additions – adding the site to the database and recording the current supplier, tariff and contract end date
- Site additions and contracts – as above, however, also including tendering for a co-terminus end date with the supplier
- New meter installations – obtaining quotations and arranging installation dates





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