

# Instructions for BOMA 360 Performance Program® Online Application For Industrial Buildings Updated February 2019

Welcome to the BOMA 360 Program online application. **Please read the following instructions in their entirety before starting your application. Step-by-step instructions for completing your application are included in this document.** If you have any questions that are not answered below, please contact the BOMA 360 Program Administrator at [boma360@boma.org](mailto:boma360@boma.org)

## Eligibility

- All buildings, comprising a total project, to include any single building industrial properties, one to two stories in height, with more than 5 percent and less than 50 percent office area. Building(s) must have a loading dock, roll-up or sliding rear door(s) for loading, with no common lobby or corridors except for restroom vestibules and utility or fire equipment access.

## Mandatory Requirements/Prerequisites

In addition to meeting eligibility requirements described above, the following are required to apply for the BOMA 360 designation:

- **Standard Operating Procedures (SOP) Manual must be in place.**
  - *Documentation*—Upload a copy of the Table of Contents from the SOP Manual used at the building/facility.
- **Participation in the BOMA Industrial Experience Exchange Report (EER®) survey\*\*:**
  - The building's or facility's income and expense performance data must be included in the most recent BOMA Industrial Experience Exchange Report (EER®) survey, unless exempt from this requirement. **The EER survey is open January 15-April 1 (approx.) each year.\*\***
    - *Documentation*—Check “yes”
  - **OR**, your building/facility is exempt from the Industrial EER survey, e.g. buildings location outside of the U.S.
    - *Documentation*—Check “exempt” and type in explanation in the text box on the application. \* Buildings outside the U.S. and Canada are exempt from the EER prerequisite.
  - **OR**, if you missed the deadline for the most recent Industrial EER survey, you can apply for “provisional” approval for the BOMA 360 designation. This means that you can complete the application for your building/facility, pay all appropriate fees, and submit your building's application. Your application will be reviewed, but confirmation of the BOMA 360 designation will be withheld until completion of the next EER survey.
    - *Documentation*—Check “provisional.”

**\*\*The BOMA EER survey is open January 15-April 1 (approx.) each year. [www.eer.boma.org](http://www.eer.boma.org).**

## **Fee Schedule**

Fees are by building/facility. For portfolio discounts (5 or more buildings), please contact the BOMA 360 Program Administrator at [boma360@boma.org](mailto:boma360@boma.org).

<b>Single Building</b>	<b>\$750</b>
<b>Bundles of 5 or more Buildings</b>	<b>\$500 per building</b>

## **Payment**

Have your credit card ready. Your fee will be charged once you complete and submit your application. For payment questions or assistance, contact the BOMA 360 Program Administrator at [boma360@boma.org](mailto:boma360@boma.org)

## **Renewal of Designation Every 3 Years**

Renewal of the BOMA 360 designation is required every three (3) years. Designees will be required to complete a new application for the building/facility and submit fees in effect at the time of renewal. BOMA will contact designees well in advance of their renewal date with instructions.

## **Annual Statement of Verification**

Although renewal is required every three years, designees are required to demonstrate annual participation in the BOMA Industrial Experience Exchange Report (EER®). Designees will also be required to report any change in the primary contact, management company and/or ownership for the building/facility. BOMA will send a “Statement of Verification” form to all designees prior to their anniversary date each year with instructions for completion.

## **Scoring Information**

To receive the designation, the required points for each section, as detailed below, must be achieved.

<b>Section</b>	<b>Maximum Points</b>	<b>Required Points</b>
Building Operations and Management	21	14
Life Safety/Security/Risk Management	9	6
Training/Education	22	10
Energy	17	10
Environmental/Sustainability	8	4
Tenant Relations/Community Involvement	11	6

## **Starting Your BOMA 360 Application**

- To access the BOMA 360 online application, go to <https://360.boma.org>.
- If you have a username and password on the BOMA International website, [www.boma.org](http://www.boma.org), use the same log in credentials on the 360 portal. If you do not have an existing BOMA International account, you will be asked to establish a user name and password. Your username is your current email address and your password must be at least 7 characters and any combination of

alpha and numeric, but must include one non-alphanumeric character, such as a symbol like @, #, \$, etc.). The password is case sensitive. Please record your user name and password and keep them in a safe place.

- You will be asked to upload a photo of the outside of your building (mandatory).
- To claim the BOMA member discount and points for BOMA membership, you must provide the name of the BOMA member for the building and BOMA membership number.
- Once you have logged in, click on “My Buildings.” You will see 3 listings: Incomplete Buildings, Renewals, and Completed Buildings.
- You can enter and exit the system as many times as you would like for each application. Your information is automatically saved. **Once you select “submit” at the end of the application process, however, you will not be able to change any information on your application or access your application for any reason unless authorized by the Program Administrator.** We suggest you establish a paper or electronic file and save copies of all documentation you submit.
- Throughout the application, you will be asked to upload documents to support responses to questions. **To upload more than one document for a single question, you must cut and paste all documents into a single document before uploading.**
- Incomplete applications (i.e. not submitted) will be automatically locked out from the system and may be deleted after nine (9) months.
- If you are contacted regarding a completed application, and are asked to submit additional information or documentation, you will have up to sixty (60) days from receipt of notice to do so. After 60 days, the application will be automatically deleted from the system and you will forfeit your BOMA 360 designation.
- Once you submit your application, you will receive e-mail confirmation of your application and payment.
- Points assigned by the computer during the application process are checked for each application during the review process. Reviewers may adjust points assigned if they determine that documentation provided is insufficient or incorrect. You may be contacted by a reviewer for additional information.
- The BOMA 360 Program designation is conferred by the BOMA 360 Program Council of BOMA International. For a roster of Council members and/or procedures for challenging any decision of the Council, please contact the BOMA 360 Program Administrator at [boma360@boma.org](mailto:boma360@boma.org).
- All data submitted is kept in strictest confidence. No building/facility-specific data is shared, published or reported.

### **Waiver of Requirements for TOBY Regional Participants**

The BOMA 360 Council voted in August 2016 to change the BOMA 360 program criteria to recognize all TOBY participants at the regional level as having achieved the minimum required points in all six

sections of the BOMA 360 application –the prerequisites section is still a requirement. The \$300 discount off the BOMA 360 application fee is ONLY extended to regional TOBY **winners**.

Regional TOBY Industrial Building category participants will receive credit for Sections 1- 6. By receiving credit, we mean that you will not have to complete these sections and will automatically get the minimum required points for those sections.

All applicants are still required to demonstrate fulfillment of the BOMA 360 prerequisites and pay the associated application submission fees. Upon the renewal of your BOMA 360 designation in another three years, you will be required to re-submit your application (**this time completing it in full –unless participating in the most recent regional TOBY competition**) and pay the full application fees in effect at the time of renewal, just like all other BOMA 360 designees.

### **Step-by-Step Guide to Completing the BOMA 360 Application**

As you work through the six sections of the application, you will be asked to describe and/or upload documentation to support your application. The application process will go more quickly and smoothly if you gather this information in advance. Most applications can be completed in one hour after all documentation has been collected. **Please Note: To upload more than one document for a single question, you must cut and paste all documents into a single document before uploading.**

**We also recommend that you save all uploaded documents into a file for future reference. Once you complete and submit your application, you will not be able to access these documents in the BOMA 360 system. Also, when you renew your application, you will not be able to access documents from your original application in the BOMA 360 system.**

### **Section 1: Building Operations & Management (Max. Points:21; Required Points:14)**

- **Document use of BOMA floor measurement standard (2 points)**
  - *Documentation*—Type in section of lease where the BOMA floor measurement standard is referenced, or upload other documentation, such as a sample lease document or architectural calculations referencing the BOMA office standard, or the *Standard Method for Measuring Floor Area in Industrial Buildings*. If a lease is not available, such as in a corporate facility, upload other documentation such as architectural calculations.
- **Financial Management (Up to 6 points)**
  - *Documentation*—Identify (check) frequency of financial reporting (i.e. quarterly, monthly) and upload samples of quarterly and monthly financial reports. (up to 3 points)
  - *Documentation*—Identify (from list) types of reports included in financial management reports, such as operating budget formats, operating statements, variance reports, expense distribution, aging reports, rent roll, general ledger and capital expenditure report, and identify (type in) accounting software utilized. (up to 3 points)

- **Insurance (Up to 3 points)**
  - *Documentation*—Indicate (check) if the building/facility is covered by insurance policies for comprehensive (1 point) and/or liability insurance (1 point). Also upload certificates of insurance or proof of self-insurance.
  - *Documentation*—Upload sample lease language requiring tenant property insurance. (1 point)
  
- **Preventive Maintenance Program (4 points)**
  - *Documentation*—Upload sample lease language requiring tenant to perform preventive maintenance on HVAC, dock doors/dock equipment and fire/life safety equipment at a minimum.
  
- **Repairs and Maintenance (Up to 6 points)**
  - Tenant obligations (3 points) *Documentation*—Upload sample lease language requiring tenant to perform repairs and maintenance.
  - Perform regular property inspections (3 points) *Documentation*—Upload tenant inspection checklist.

**Section 2: Life Safety/Security/Risk Management (Max. Points: 9; Required Points:6)**

- **Emergency and Disaster Preparedness and Recovery Plan (Up to 2 points)**
  - *Documentation*—Identify (type in) section of SOP Manual or upload copy of table of contents from SOP Manual used at the building/facility covering the emergency preparedness plan. (2 points)
  
- **Emergency Communications Plan (1 point)**
  - *Documentation*—Upload description of building's/facility's emergency communications plan.
  
- **Code Compliance (up to 2 points)**
  - *Documentation*—Upload copy of Certificate of Occupancy or business license for the building or facility. (1 point)
  - *Documentation*—Indicate (check) that a system is in place to confirm that all common, leased or occupied spaces in the building or facility are compliant with any requirements of local government agency or building department for a certificate of occupancy or other applicable permit to conduct business. *Note: If not required in your jurisdiction, you may still check this item to claim the point.* (1 point).
  
- **Fire and Life Safety Systems (3 points)**
  - *Documentation*—Describe (type in) policies or procedures to ensure the building/facility complies with fire safety codes, or reference section of SOP Manual table of contents for fire safety code compliance.
  
- **Americans with Disabilities Act (1 point)**
  - *Documentation*—Upload copy of ADA Compliance Guide table of contents or other documentation of ADA plan in effect.

### **Section 3: Training & Education (Max. Points:22; Required Points:10)**

- **Professional Designations (Up to 4 points)**
  - Documentation—Check (from list) professional designations earned by the primary contact responsible for the day-to-day operation of the property or indicate (type in) comparable bachelor’s or master’s degree in real estate. Designations may include RPA, FMA, CPM, CFM, CCIM, CSM, PCAM, ARM, RAM, SIOR, FMP, or other relevant industry designations. (2 points)
  - Documentation—Check (from list) professional designations earned by any additional member of the building team or indicate (type in) comparable bachelor’s or master’s degree in real estate. Designations may include RPA, FMA, CPM, CFM, CCIM, CSM, PCAM, ARM, RAM, FMP, SMA, SMT, or other relevant industry designations. In the text box, type the name of the team member who has earned a designation or degree. (2 points)
  
- **Licensing (1 point)**
  - *Documentation*—Indicate (check) if licenses for building/facility personnel are required by local, state or federal jurisdiction. In text box, type in license numbers or, if not required, indicate name of state.
  
- **Continuing Education/Professional Development (4 points)**
  - *Documentation*—Indicate (check) if property executives and licensees have completed at least 10 hours, cumulatively, of professional development/continuing education programs or courses in the past 12 months. You do not have to list courses.
  
- **Professional Development Plan (up to 4 points)**
  - *Documentation*—Upload a copy of the professional development plan for members of the building team (building and technical management team). (2 points)  
*A professional development plan is in place for members of the building team to help identify and nurture growth potential and to ensure all members are being developed with an eye towards future workplace changes. This plan should include both formal and informal professional development opportunities and requirements, potential career path goals and other opportunities for growth. Formal opportunities include 1) vocational education, typically post-secondary or polytechnic training leading to qualification or a credential required to maintain employment; 2) licensing; 3) training to keep current with changing best practices or technology in a profession; and 4) continuing education opportunities. Informal opportunities can include mentorship and other professional guidance.*
  - Documentation—Upload a copy of the corporate professional development plan for all company employees (management, technical, administrative, etc.). (2 points)
  
- **Professional Memberships (Up to 3 points)**
  - *Documentation*—Indicate (check) if anyone on the building management team is a BOMA member. (2 points)
  - *Documentation*—Indicate (check from a list) other memberships held by members of the building management team. Examples of other memberships are CCIM, CREW, ICSC, IFMA, IREM, NAIOP, SIOR, etc.(1 point)

- **BOMA Education and Events (Up to 3 points)**
  - *Documentation*—Indicate (check) if any member of the management team has participated in at least one BOMA-sponsored local event in the last 12 months. (2 points)
  - *Documentation*—Indicate (check) if any member of the management team has participated in at least one BOMA-sponsored regional or international event in the last 12 months. (1 point)
- **TOBY® Participation (Up to 3 points)**
  - *Documentation*—Indicate (check) if the building/facility has participated in the TOBY competition (any level) within the last 3 years. (1 point)
  - *Documentation*—Indicate (check) if the building/facility was a local or regional TOBY winner in the last 3 years. (1 point)
  - *Documentation*—Indicate (check) if the building/facility was an International winner in the last 3 years. (1 point)

#### **Section 4: Energy (Max. Points:17; Required Points:10)**

- **ENERGY STAR® Benchmarking (Up to 4 points)**
  - *Documentation*—Upload copy of Statement of Energy Performance from ENERGY STAR Portfolio Manager (note: An ENERGY STAR label for the building is not required to achieve this point) (2 points)
  - BONUS POINT: *Documentation*—Indicate (check) if building/facility has achieved an ENERGY STAR average score of 50 or higher over last calendar year. (1 point)
  - BONUS POINT: *Documentation*—Upload copy of sample lease language requiring tenant to share energy data. (1 point)
- **Building Energy Management (6 points)**
  - *Documentation*—Upload copy or summary of building's/facility's energy management plan to include: commitment to ongoing improvement of energy performance; performance assessment using ENERGY STAR benchmarking tool; energy performance goals; action plan; evaluation of progress; and review/reassessment process. (4 points)
  - *Documentation*—Upload copy of tenant improvement specifications that require use of ENERGY STAR-rated equipment, for example warehouse lighting, water heater equipment, HVAC or plumbing. (2 points)
- **Energy System Servicing/Maintenance (2 points)**
  - *Documentation*—Upload section of sample lease language requiring tenant to enter into a regularly scheduled preventive maintenance/service contract with an HVAC maintenance contractor. (2 points)
- **Energy Awareness (Up to 5 points)**
  - *Documentation*—Upload list of education courses, including program titles, dates, and sponsoring organizations, on energy management topics attended by building's or facility's management and operations staff over the past 2 years. Courses may include BEEP® for Industrial or other training through BOMA or other organizations. Documentation for a minimum of 6 hours (cumulative) is required. (2 points)

- *Documentation*—Upload an example of a typical communication to tenants or occupants regarding energy use and savings, to include at least one of the following: specific ways tenants/occupants can impact energy savings; information about energy savings initiatives undertaken by management; energy-saving tips for individuals. (3 points)

**Section 5: Environmental/Sustainability (Max. Points: 8; Required Points:4)**

○ **Other Building Certifications (2 points)**

- *Documentation*—Indicate (check) if your building has achieved any level of LEED® certification for new construction or existing buildings, Green Globes® (any level), or BOMA BEST (any level), or can demonstrate compliance with ANSI/ASHRAE/USGBC/IES Standard 189.1 (2008 or 2011 Edition) Standard for the Design of High-Performance Green Buildings Except Low Rise Residential Buildings, or the International Green Construction Code (2012 Edition). You may check all that apply; however, the maximum number of points you will receive is 2 points. LEED, Green Globes and BOMA BEST certifications must be current.

**AND**

- *Documentation*—For any **one** of the certifications checked, upload verification as follows: For LEED, Green Globes or BOMA BEST, upload copy of certificate, letter or other documentation from program sponsor that the certification is current. For Standard 189.1 or International Green Code, upload a copy of verification of compliance from either a state or municipal building official or an independent inspector or other professional certified by ASHRAE or ICC as competent to conduct such inspections.

○ **Exterior Maintenance Management (Up to 2 points)**

- *Documentation*—Upload copy of exterior maintenance management plan that includes, at a minimum, green pest control, fertilizer strategies, and storm water control. (1 point)

**OR**

- *Documentation*—Upload copy of a comprehensive exterior maintenance management program that includes all the elements of the above **PLUS** proactive environmental management in at least 2 of the following areas: maintenance of roads and grounds; snow removal; landscaping and irrigation practices/erosion control; window cleaning; automated exterior light system; rooftop management. (2 points)

○ **Traffic Reduction Initiatives (Up to 4 points)**

- *Documentation*—Indicate (check) which of the following strategies are in place: bike rack (1 point), carpooling incentives (1 point), public transportation incentives (1 point), car charging stations (on site or readily accessible to building) (1 point)

**AND**

- *Documentation*—Upload description of those checked and other additional traffic reduction initiatives

**Section 6: Tenant/Occupant Experience/Engagement and Community Involvement**  
**(Max.Points:11; Required Points:6)**

- **Community Impact (1 point)**
  - *Documentation*—Upload description (no more than 1 page) of activities or events held at the property or offsite with the tenant for the benefit of the community that are either open to the public or to tenants/occupants only. Examples: blood drives, charity events, fundraisers, electronics recycling, parking available on weekends for community events, etc. (1 point)
  
- **Tenant/Occupant Experience & Engagement (Up to 7 points)**
  - *Documentation*—Indicate (check) if building/facility communicates with tenants/occupants by newsletter, Web site and/or customer service telephone number on at least 2 of the following topics: new building amenities; technology; life safety; security procedures; energy conservation measures. (1 point)
  - *Documentation*—Upload copy of tenant/occupant survey conducted in the last 12 months, or type in URL address of online survey. (1 point)
  - *Documentation*—Upload table of contents from tenant/occupant manual. (1 point)
  - *Documentation*—Upload a sample appreciation letter from tenant/occupant (1 point).
  - *Documentation*—Indicate (check) if face-to-face meetings with tenants/occupants are conducted at least twice per year, OR if the building has a comprehensive management program for critical leasing or operations dates and information. If the latter, type in name of software or name of platform. (1 point)
  - *Documentation*—Describe (type in) description of tenant relations/appreciation programs, for example, ice cream social, dessert reception, spring bike tune-up, etc. (1 point)
  - *Documentation*—Indicate (check) if building has a comprehensive work management system for responding to tenant/occupant maintenance issues, OR an ongoing program for informing and advising tenants/occupants about building operational problems, such as utility and service interruptions. If the latter, upload copy of blank notification template or example of a tenant/occupant communications piece. (1 point)
  - *Documentation* – Indicate tenant amenities available. Check all that apply (1 point)
    - Car charging stations
    - Free wifi
    - Other, please describe
  
- **Advocacy on Commercial Real Estate Industry Related Issues (Up to 3 points)**
  - *Documentation*—Describe (type in) activity such as participation in advocacy days, and/or meetings or correspondence with elected officials and/or regulatory agencies on matters of industry importance. Activities must be within past 12 months. Also type in date of activity. (1 point)
  - *Documentation*—Upload copy of article, editorial, or op ed piece authored or co-authored by applicant within the past 12 months on relevant industry-related matters. (1 point)
  - *Documentation*—Upload description of at least one (1) planned or unplanned event in cooperation with municipal departments, such as police department, fire department, special improvement districts, and public works. (1 point)

## **Checking and Submitting Your Application**

Congratulations! You are now ready to submit your renewal application and pay the total application fee due. If the online system does not allow you to submit your application, this means that you have not achieved the required points in one or more of the sections. Go back and check your work.

**Remember, once you select “submit” at the end of the application process, you will not be able to change any information on your application or access your application for any reason unless authorized by the Program Administrator.** We suggest you establish a paper or electronic file and save copies of all documentation you submit.

## **When Will I Hear from BOMA International Regarding the Status of My Application?**

You will receive an automated e-mail confirmation when your application is started (and \$50 application fee is paid) and again when your application is submitted (and payment of balance is made).

Applications are reviewed within thirty (30) days following the renewal due date.

<u>Approx. Due Dates</u>	<u>Application will be reviewed no later than</u>
March 1	March 15-31
June 1	June 15-30
September 1	September 15-30
December 1	December 15-31

Depending on the date you submit your application, you will hear back from BOMA International, via e-mail, regarding the status of your application either within a few weeks (if application is submitted at beginning or middle of the quarter) or a few days (if application is submitted closer to the due date for that quarter).

Every effort is made to finish all reviews in time for designees to be recognized at BOMA International’s annual conference at the end of June.

**Questions? Contact the BOMA 360 Program Administrator at [boma360@boma.org](mailto:boma360@boma.org)**