

# Instructions for BOMA 360 Performance Program® Online Application for Industrial & Retail Buildings

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.
- The building must be occupied for at least one full year from the date of occupancy of the first tenant, with a minimum of 12 months of building operations.

## Fee Schedule

	<b>BOMA Members*</b>	<b>Non-Members</b>
	<b>\$995</b>	<b>\$1500</b>

## Payment

Payment choice of CC or Invoice may be selected at time of submission.

## 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. The designation is assigned to the management company at the time of the first review. If the management company changes during the three years prior to renewal, a new application must be submitted.

## Scoring Information

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

Section	Maximum Points	Required Points
Building Operations and Management	22	15
Life Safety/Security/Risk Management	22	16
Training/Education	20	10
Energy	17	10
Environmental/Sustainability/Health & Wellness	18	12
Tenant/Occupant Relations/Community Involvement	13	7

## Starting Your BOMA 360 Application

- To access the BOMA 360 online application, go to <http://recognition.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.

### **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 or create a pdf file of 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:22; Required Points:15)**

- **Standard Operating Procedures (SOP) Manual must be in place for the building or facility. (1 point)**
  - *Documentation*—Upload a copy of the Table of Contents from the SOP Manual used by the building or facility.
- **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, the *Standard Method for Measuring Floor Area in Industrial Buildings*, or other pre-approved standard. 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 (by checking box) frequency of financial reporting (i.e. quarterly, monthly) and whether financial report is approved by ownership or

- corporate department for the property/facility. (up to 3 points)
- *Documentation* – As best practices, the following type of financial reports should be included in the financial reporting package. Please check all that apply, as required by ownership. In, addition, identify the accounting software utilized. (up to 3 points)
    - Operating Statement
    - Variance Report
    - Aged A/R
    - Rent Roll
    - Capital Expenditure Report
    - Bank Reconciliation
  - **Insurance (Up to 3 points)**
    - *Documentation*—Indicate (by checking box) 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: 22; Required Points:16)**

- **Emergency/Disaster/Pandemic Preparedness & Recovery Plan (Up to 4 points)**
  - *Documentation*—Identify (type in) section of SOP Manual or upload copy of table of contents from building's/facility's emergency preparedness plan. (2 points)
  - *Documentation*—Identify (type in) section of SOP Manual or upload copy of table of contents from building's/facility's emergency recovery plan. (1 point)
  - *Documentation* – Identify (type in) section of SOP Manual or upload copy of table of contents from building's/facility's pandemic and infectious disease preparedness/response plan (may include monitoring of federal, state, and local changes or mandates and adjustments to your pandemic plan where necessary) for most up to date pandemic and transmittable airborne virus guidelines. (1 point)

- **Infectious Disease Compliance and Training (1 point)**
  - Ensure personnel are aware of and following any CDC guidelines, local codes, and ordinances as related to infectious diseases. Provide your staff with the equipment and training necessary to perform their jobs safely, including the use of personal protective equipment (PPE).
    - *Documentation* – Provide evidence of employee awareness training to help educate on infectious disease prevention and mitigation; keep detailed records of when trainings are provided. Training should include how to interact with tenants and visitors in such an environment (e.g. elevator operations and capacity, engaging tenants in their space, social distancing, face masks/covering usage, proper hygiene, etc.). (1 point)
  - **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 or Copy of Lease clause stating the building is in compliance with all current codes. (1 point)
    - *Documentation*—Indicate (by checking box) 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. (2 points)
    - *Documentation* – Upload a copy of both the monitoring and the maintenance contracts for the fire safety system for the building/facility. (1 point)
- **Life Safety Drills (Up to 5 points)**
  - *Documentation*—Upload evidence of evacuation drills conducted within the past 12 months. (3 points)
  - *Documentation*—Indicate (by checking box) if evacuation drills are conducted with the local fire department. (1 point)
  - *Documentation* – Upload evidence of any other relevant life safety exercise (ex. Active Shooter, Shelter-in-Place, business continuity plan etc. (1 point)
- **Building Technology Systems – Cyber Security Protections (Up to 2 points)**
  - Building Automation Systems (BAS) use Endpoint Protection to mitigate threats of penetration/exploitation by hackers from open network access. *Documentation* – Upload description of BAS security protection. (1 point)
  - Building Wi-Fi is provided on a separate, independent network from the BAS system. *Documentation* – Upload description of wireless network. (1 point)
- **Written Security Procedures Manual (3 points)**
  - *Documentation*—Reference (type in) section of SOP Manual table of contents or

other document containing procedures for how security personnel deal with events such as bomb threats; chemical, biological, nuclear, or radiological events; civil disorder/disturbances; crime; hostage situations; medical emergencies; suicide attempts; active shooter, etc.

- **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:20; Required Points:10)**

- **Professional Designations (Up to 5 points)**
  - *Documentation*—Check (from list) active 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, CMCP, CPM, CFM, CCIM, CSM, PCAM, ARM, RAM, SIOR, FMP, WELL AP, Fitwel Ambassador, LEED AP, LEED Green Associate, or other relevant industry designations. If you checked more than one designation above, please make sure to compile the proof of designations into one file. (3 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, CMCP, CPM, CFM, CCIM, CSM, PCAM, ARM, RAM, FMP, SMA, SMT, WELL AP, Fitwel Ambassador, LEED AP, LEED Green Associate, or other relevant industry designations. If you checked more than one designation above please make sure to compile the proof of active designations into one file. (2 points)
- **Licensing (1 point)**
  - *Documentation*—Indicate (by checking box) 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 (4 points)**
- *Documentation*—Indicate (by checking box) 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 (by checking box) 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 (by checking box) 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 (by checking box) 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)

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

- **ENERGY STAR® Benchmarking (Up to 4 points)**
- **ENERGY STAR®**
  - *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)
  - *Documentation* Retail Properties: For Retail: Benchmarking a building in Energy Star Portfolio Manager, mandatory for the Regional and International levels, requires selecting the Enclosed Mall or Other Mall categories. A SCORE WILL NOT BE GENERATED, but an energy use intensity (*kBtu/ft<sup>2</sup> or ekWh/ft<sup>2</sup>*) will be produced that can be used to benchmark against industry standards and monitor improvement. The Statement of Energy Performance (SEP) will show an N/A for the score, but will include the energy use intensity data. **Retail properties will receive a score of 2 points for benchmarking and uploading the SEP.**
    - *Buildings outside the U.S. and Canada may be eligible for alternative benchmarking programs to ENERGY STAR® depending on their location. Please contact BOMA360@boma.org for more information.*
  - *Documentation*—Indicate (by checking box) 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; frequency of reporting (at least quarterly); 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/store 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 buildings 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/Health & Wellness (Max. Points: 18; Required Points:12)**

- **Sustainability & Healthy & Wellness Programs (Up to 3 points)**
- **Documentation**— Upload a summary of Sustainability and Health & Wellness Programs to include green cleaning, green purchasing, integrated pest control management, water conservation methods, wellness training and programs, immunization clinics, and other programs in place at the property.
- **Waste Management and Recycling Programs (Up to 8 points)**
  - Indicate whether the building/facility benchmarks waste through EPA's ENERGY STAR® Portfolio Manager (1 point for benchmarking)
  - **Documentation—For each area (point) claimed below, upload copies of building's/facility's waste management plan and recycling policies, or a letter from vendor(s) who removes specified materials describing program/practice.** All procedures must comply with applicable local, state and federal laws. There are 6 areas where documentation can be provided to earn a maximum of 8 points:
    - (1) **Waste management and Recycling Program:** overall program that ensures on-site source separation of cardboard, mixed paper, glass, metal, and plastic from other waste. (2 points)
    - (2) **Universal and Hazardous Waste:** including procedures for proper storage and disposal of mercury-containing fluorescent bulbs and other mercury-containing devices; batteries; toner cartridges; and electronics. (1 point)
    - (3) **Construction and Demolition Waste:** including diversion of materials by salvage for donation or reuse, or for recycling. (1 point)
    - (4) **Bulk Waste:** including guidelines for diversion of as much material as possible from landfill by salvage for donation or reuse, or for recycling. Includes large or bulky items not typically generated on a day-to-day basis and that are generally removed separately from the regular waste stream, such as furniture and appliances. (1 point)
    - (5) **Onsite Trash Compaction:** program that enhances efficient disposal or recycling operations and lowers waste removal transportation costs by decreasing the frequency of removal. Should include paper, cardboard, bottles, glass and/or aluminum cans. Compaction of construction/demolition waste, hazardous waste and bulk waste are NOT in the onsite trash compaction program. The program may be comprehensive or limited in scope. (Up to 2 points)
      - **Limited in scope** (includes only certain waste streams). (1 point)

**OR**

    - **Comprehensive** (for all building waste). (2 points)  
*ADDITIONAL Documentation (this item only)*—upload description with specifications of trash compaction program, including

equipment used, OR haul report showing tonnage of compacted waste removed during a typical waste pickup

(6) **Alternative Food Waste/Organic Material disposal program:** includes composting or other means of non-landfill disposal of food waste and other organic matter, including landscaping debris. (1 point)

○ **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 5 points)**

- *Documentation*—Indicate (by checking box) 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) access to outdoor spaces, walking trails, fitness areas, etc. (1point)

**AND**

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

## **Section 6: Tenant/Occupant Experience/Engagement and Community Involvement**

**(Max.Points:13; Required Points:7)**

- **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 and Occupant Relations/Communications (Up to 9 points)**
- **Retail: Marketing, Branding & Customer Service**
  - ☐ *Documentation* – Upload examples of signage in parking facilities, building entrances and exits, lobbies, common areas, and outside tenant and occupant spaces outlining any rules and procedures related to infectious disease prevention or mitigation, as well as examples of direct tenant communications. Display signs or posters about healthy best practices (i.e. taking the stairs, proper handwashing, etc.). including any permanent displays, information in tenant manual or tenant communication providing guidance on health and wellness. (1 point)
  - *Documentation*—Indicate (by checking box) 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 (by checking box) 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: RETAIL:* describe if the facility includes a Merchant’s Association, and if so describe membership, fees, participation, events, and management’s role in promoting the local business, including communication to position the facility and to improve customer service. (1 point)
  - *Documentation*—Indicate (by checking box) 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 Wi-Fi; RETAIL: is it available to shoppers.

- Outdoor fitness, eating, or other rest areas for tenants and/or the public.
- 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)

**(Optional) TOBY Awards Application and On-Site Verification/Judging – Pending successful completion of a BOMA 360 application**

- Per alignment with The Outstanding Building of the Year (TOBY) Awards program, buildings that earn the BOMA 360 designation AND are BOMA Members, may then proceed to the supplemental portion pertaining to the TOBY Awards.
  - Third-party (and on-site or virtual) judging and verification as part of the TOBY Awards competition will take place at the local, regional, and /or international level.

**Checking and Submitting Your Application**

Congratulations! You are now ready to submit your 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 email confirmation when your application is submitted and payment is made. Failure to pay may result in the rescinding of a building’s certification.

Applications are reviewed within thirty (30) days of submission but must be submitted by January 15 to compete in that year’s TOBY cycle.

Every effort is made to finish all reviews in time for designees to be recognized for various BOMA International deadlines. Any building needing approval for separate deadline is encouraged to submit their application at least 30 day prior to when they need confirmation of approval.

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