



# **TOBY® CHOICE AWARDS**

## **JUDGES TRAINING**



# TOBY CHOICE AWARDS

- Local pre-qualifying competition
- 360 not required
- Based on inspection form
- Local pathway to local, regional and International competition

*Our goal is to give all Property Management and Building Services professionals an opportunity to elevate their knowledge and practice in our industry*



- Official Property Management competition by BOMA International
- 360 Certification is required (deadline to submit is January 15<sup>th</sup>)
- Based on narrative submitted through official TOBY portal





# WHY JUDGE TOBY?

- Professional development
- Exposure to best-in-class buildings
- Sharpening operational perspective
- Giving back to the industry

# Judging is based on a site inspection and presentation of material related to:



Building  
Operations



Tenant  
Relations



Community  
Impact



Environmental  
& Regulatory



Life  
Safety



Continuing  
Education



# JUDGING PROCESS

## **Buildings compete alongside properties like their own.**

### **Office Categories include:**

- Corporate Facility
- Historical Building
- Medical Building
- Life Science Building
- Suburban Office Park (Low-Rise)
- Suburban Office Park (Mid-Rise)
- Office By Square Feet

### **Office Building Square Footage**

- Under 100K
- 100,000 - 249,999
- 250,000 - 499,999
- 500,000 - 1,000,000
- Over 1 Million

- **Earth Industrial Mixed Use Renovated Retail**

- Enclosed Mall Under 1 million square feet
- Enclosed Mall Over 1 million square feet
- Open Air/Strip Mall

- **Time commitment**
- **Team structure**
- **Scoring mechanics**

# CRITICAL

- NOT GROUP SCORING
- Scoring is 1-5 – based on the management in that building.  
*Not a comparison* of those in the same class!
- Must judge all buildings in category

*If you do not understand this, please be sure to contact the TOBY Leadership team for clarification.*

# JUDGING ETIQUETTE

- Plan 2.5–3 hours per building
- No soliciting
- Be on time
- Respect tenants and operations
- Wear walking shoes; bring a sweater
- Be objective
- Provide constructive feedback with details
- If too much, notify early
- It's okay to feel overwhelmed — the guide exists to help!

# TOBY Choice Timelines

- **Jan 7<sup>th</sup> - Judges Training/in-person/mandatory**
- **Jan 9<sup>th</sup> Call for Entry Ends**
- **Mid-Jan Judging Begins**
- **Mid-Feb Judging Ends**

# **The Inspection Form**

- Combines the two forms used in previous years.
- Pulls in information from TOBY criteria, BOMA 360, and the curriculum from BOMA Foundations Course.

**The goal is to maintain the integrity of the  
BOMA International's TOBY program while  
streamlining the process for property managers.**

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## **MANAGEMENT OFFICE | MANAGEMENT OPERATIONS | TENANT RELATIONS**

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**Aesthetic Appeal**

**Property Management Specific Agreements**

**BOMA Involvement**

**Staff Training & Development**

**Standard Operating Procedures**

**Financial Reporting**

**Critical Documents**

**Operating Expense Analysis**

**Access | Key Inventory**

**Tenant Issue Resolution**

**Pro-Active Tenant Relations**



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N/A only if no on-site management office

**Thoughts for Judges...**

- Is the management office clean and tidy?
- Are files everywhere or are they organized?
- When tenants or visitors are there is it an inviting place?
- Is the lighting adequate?

**Scoring Suggestions**

0 – N / A

1 – Office is out dated, old, not lit properly; file systems are a mess, computers are old

2 –

3 – Office is standard

4 –

5 – The management office is modern; up to date; well lit; files are meticulously stored and labeled

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**Thoughts for Judges...**

- Where is the Management Agreement between the manager and the owner? Is it abstracted for specific performances and dates?
- Certificate of Insurance for PM. Does it comply with Management Agreement language
- Certificate of occupancy (if applicable) for the MGMT office
- Does PM have a org chart detailing their internal organization and how it interacts with Ownership
- If no Management Agreement, some sort of document outlining scope of services or an employment agreement

**Scoring Suggestions**

- 1 – No agreement or documentation is produced relating to Ownership and PM
- 2 – Minimal documentation provided, but missing some
- 3 – PM can produce all documents but does not understand them
- 4 – Most of the documentation is in place and PM has a clear understanding of them
- 5 – PM has all supporting documentation to operate effectively and can clearly articulate the fine points of the management agreement and has a system in place to ensure it is followed

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**Thoughts for Judges...**

- How many meetings has the PM and staff attended throughout the year?
- Are they involved on any committees? Board members? Involved nationally?
- Do any of them hold BOMA designations?
- Are they utilizing BOMA vendor members at their property?
- Are they actively recruiting additional PM's to join

**Scoring Suggestions**

- 1 – Just the PM is a member and rarely attends functions
- 2 – PM and engineer are members but little more involvement
- 3 – PM and staff attend meetings on a consistent basis
- 4 – PM and staff are attending meetings, encouraging others to join, involved locally on committees
- 5 – PM and staff are involved at a national level, are actively promoting BOMA's core values to others, chair a committee, dedicated to the organization, use and promote BOMA members as vendors

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**Thoughts for Judges...**

- Can PM show history of training programs they or staff have completed?
- Is PM and/or staff actively working with BOMA or other organizations to teach curriculum?
- Is there a system in place that allows junior staff to grow and learn?
- Are there any in-house training and development programs?

**Scoring Suggestions**

1 – No history of any training for any staff members; no certifications or degrees; no programs offered or paid for by ownership

2 –

3 – Some training and certifications are present by PM and/or staff; no training is scheduled and done on an as-needed basis

4 –

5 – PM takes an active role in advanced certifications and degrees; staff at all levels are participating in various programs historically and in the future; PM dedicates time to personally train staff on an on-going basis; PM is actively working with BOMA on training programs for other BOMA members

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### Thoughts for Judges...

- Is there is a clear and written Standard Operating Procedures manual present in the management office?
- Is the manual updated frequently or is it a boilerplate from another property?
- How engaged is the PM in terms of its use?
- Is the SOP too detailed rendering it useless?
- If the PM were to leave, could another PM step in and immediately fill the role?
- Does the PM utilize a standard form for vendor service contracts?

### Scoring Suggestions

- 1 – No SOP manual present either electronically or physical
- 2 –
- 3 – A SOP manual is available but used or referenced in-frequently
- 4 –
- 5 – PM is actively involved in the use and changes of the SOP; it is referenced weekly and all staff members are engaged in its contents; standardized vendor forms are used and actively negotiated by PM

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**Thoughts for Judges...**

- Describe the software used for accounting and management.
- What software is used for budgeting purposes? How does the PM forecast out recurring expenses?
- How are revenues budgeted for in-place leases? Vacancies? Tenants at expiration?
- How often is the Chart of Accounts reviewed and updated?
- Describe the CAM reconciliation process?
- Are PM's missing out on any additional revenue such as late fees, after-hours HVAC, parking revenue, etc.?
- Are budgets reforecast throughout the year or on an as-needed basis?
- Is a comprehensive written Business Plan in place and updated annually based on ownership's objectives?

**Scoring Suggestions**

1 – Minimal monthly reports are generated and software used is QuickBooks or Excel

2 –

3 – Reports are presented to judges but no detail is provided as to how they are superior and what goes in to the monthly reports

4 –

5 – Reports are prepared monthly with industry leading software complete with multiple various reports as needed by Ownership; a comprehensive business plan is in place and followed throughout the year; 10 year cash flows are available, updated quarterly and include revenue and expense estimates utilizing advanced software such as Argus.

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**Thoughts for Judges...**

- Are all Certificates of Insurance current (Col)?
- What is the process for keeping Col's current?
- Does PM have them for all tenants, all vendors, the ownership entity of the bldg.?
- Where are large format physical documents kept such as survey and building floorplans? Are they also available digitally?

**Scoring Suggestions**

- 1 – No Certificate's of Insurance are kept for tenants or vendors
- 2 –
- 3 – Some Certificates of Insurance and other critical documents are produced but not all and there is no system to keep them accurate; floor plans are available but only physically, not digitally
- 4 –
- 5 – All Certificates of Insurance are available; there is a system for updating them; all vendor contracts are standardized and available; a list of vendors and contacts is readily available; all building and floorplans, survey, etc are kept both physically and electronically

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### Thoughts for Judges...

- Has the PM done a detailed comparison of their building vs. the competition for CAM expenses? Real estate taxes/assessed values are public record but does PM go a step further to understand quoted CAM with the understanding some competing buildings are unwilling to share specific data.
- What are the largest expenses and what is being done to keep them down?
- Is a RE Tax consultant hired each year to review assessments and possibly re-negotiate with the county?
- How are insurance costs being assessed and kept down while maintaining proper coverages? Has the PM analyzed the mortgage note to see minimum insurance requirements and ensure those are in place?
- Are historical operating expenses tracked as well, especially for Tenants with Base Year stop leases?
- How are caps on controllables handled in relation to OpEx?

### Scoring Suggestions

- 1 – Minimal understanding of all OpEx and how it has changed over time
- 2 –
- 3 – PM can talk about what they are doing to reduce operating expenses at a basic level
- 4 –
- 5 – PM tracks detailed historical expenses; correlates to occupancy levels; works to actively reduce OpEx without sacrificing service; understands the competitive set; CAM reconciliation process is easy due to detailed understanding and tracking of leases and OpEx

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**Thoughts for Judges...**

- Describe the access control at the building during normal operating hours?
- Describe the access control at the building during after hours?
- Is the system electronic and if so, how is the PM tracking occupancy and timing?
- If not electronic, how is PM handling key control?
- Has an upgraded system been proposed via a 3<sup>rd</sup> party proposal? What has ownership's response been?

**Scoring Suggestions**

1 – Antiquated key system; no proposal has been done to upgrade

2 –

3 –

4 –

5 – A advanced digital system allows PM to track entry and movement throughout the bldg.; data is analyzed and tracked to adjust operations throughout the day

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**Thoughts for Judges...**

- What are the systems in place for handling Tenant issues?
- What software is being used or proposed to handle these?
- Are submissions categorized and tracked?
- What changes have been made as a result of the data?
- Are follow-up surveys conducted to ensure the issue is resolved and all parties are happy?

**Scoring Suggestions**

- 1 – No system is in place to handle Tenant requests
- 2 – System is in place but no evidence of it
- 3 – Software is used but that's about it
- 4 – Tracking is done and minimal analysis is completed
- 5 – Detailed tracking is done via software; complaints can be analyzed by topic; changes are made to bldg. operations based on data; leasing/marketing teams include the positive results in their marketing presentations

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**Thoughts for Judges...**

- Is a Tenant Council system in place?
- Has one been proposed?
- What types of functions is the PM/staff doing to keep tenants happy?
- Can any of this be documented (minutes of the meetings?)
- Is a Tenant satisfaction survey done? What were the results? What changed b/c of it?

**Scoring Suggestions**

- 1 – No pro-active activities are done to keep tenants satisfied; completely reactionary
- 2 – Tenant survey is conducted randomly but not much action is taken
- 3 – Tenant survey is conducted relatively frequently and some action is taken; Tenant Council may be in place but not very consistent
- 4 – Both satisfaction surveys and Tenant Councils are in place and PM can prove; minimal other satisfaction activities are done randomly throughout the year
- 5 – Tenant Council meets once a quarter; notes are taken; action is taken; Tenants provide written recommendations which are used in leasing/marketing efforts; satisfaction surveys are conducted and analyzed annually

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## CONSTRUCTION MANAGEMENT | PROJECT MANAGEMENT

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Building Standard

Construction Rules & Regulations

Permitting

Bid Process

Construction Contract | Implementation



## CONSTRUCTION MANAGEMENT PROJECT MANAGEMENT

Building Standard

Construction Rules & Regulations

Permitting

Bid Process

Construction Contract | Implementation

### Thoughts for Judges...

- Does the PM have a document describing Building Standard?
- When was the last time this document was reviewed/updated?
- Is the document referenced in each lease agreement and are tenants provided a copy?
- Is a copy part of the SOP manual?

### Scoring Suggestions

- 1 – PM does not have a written Building Standard document nor has started one
- 2 – Document is “somewhere” but either wasn’t produced or hasn’t been reviewed or updated
- 3 – PM has produced a document
- 4 – PM can describe in detail the Building Standard Document
- 5 – PM has actively worked with ownership and vendors to revise/review the document to include partitions, ceilings, doors, millwork, lighting, plumbing, HVAC, electrical fire alarm, finishes, window treatments, signage, etc.

## CONSTRUCTION MANAGEMENT PROJECT MANAGEMENT

Building Standard

Construction Rules & Regulations

Permitting

Bid Process

Construction Contract | Implementation

### Thoughts for Judges...

- Are written construction rules presented to TOBY judges?
- Are the rules part of the SOP manual?
- What systems are in place to ensure vendors and tenants follow the rules?

### Scoring Suggestions

- 1 – PM does not have a written Construction Rules document nor has started one
- 2 – Document is “somewhere” but either wasn’t produced or hasn’t been reviewed or updated
- 3 – PM has produced a document
- 4 – PM can describe in detail the Construction Rules Document
- 5 – PM has actively worked with ownership and vendors to revise/review the document to include construction hours, freight elevator specifics, loading dock rules, refuse rules, fire alarm “test” settings during construction, OSHA compliance, dress code, floor penetration requirements

## CONSTRUCTION MANAGEMENT PROJECT MANAGEMENT

Building Standard

Construction Rules & Regulations

Permitting

Bid Process

Construction Contract | Implementation

### Thoughts for Judges...

- Can PM describe the permitting process in the local municipality for the building
- Are permits pulled for all work completed by ownership?
- If tenants do work themselves are permits required?

### Scoring Suggestions

- 1 – No permits are pulled for work that either landlord or tenant perform
- 2 –
- 3 –
- 4 –
- 5 – All work whether done by landlord or tenant is permitted; PM knows the building department officials and pro-actively works with them to ensure local permitting laws are being followed; after any work is completed, floorplans are updated accordingly and square footages are adjusted per BOMA standards

## CONSTRUCTION MANAGEMENT PROJECT MANAGEMENT

Building Standard

Construction Rules & Regulations

Permitting

Bid Process

Construction Contract | Implementation

### Thoughts for Judges...

- How does the PM conduct the bid process for a project?
- Is there a written policy on the bidding process by ownership?
- Can they produce the most recent scope of work and resulting bids?

### Scoring Suggestions

- 1 – No written process at all for obtaining bids nor has one been proposed to ownership
- 2 –
- 3 – Some form of standardization is present but PM and staff don't necessarily follow it
- 4 –
- 5 – PM and staff have a detailed written bid process format and are constantly reviewing and updating it; Ownership has buy in as well and reviews bids to ensure it is following standards; detailed scope of work is done for all construction and projects involving 3<sup>rd</sup> parties.

## CONSTRUCTION MANAGEMENT PROJECT MANAGEMENT

Building Standard

Construction Rules & Regulations

Permitting

Bid Process

Construction Contract | Implementation

### Thoughts for Judges...

- Does the PM have a dedicated construction contract or do they use the AIA standard
- Does PM check public records to make sure no construction liens are held on the property post-construction
- Describe in detail your close-out procedures
- How are construction draws handled
- If Tenant handles construction projects, describe the process to track and hold Tenant accountable for Construction Rules & Regulations

### Scoring Suggestions

- 1 – PM uses neither the PM company's document nor the AIA standard documents and relies on contractor
- 2 – PM has various documents but nothing streamlined; no tracking of status of projects
- 3 – PM utilizes standardized documents and tracks status of all construction projects
- 4 – Software is used (MS Project or other) to track progress, procedures in place for draw payments
- 5 – Gant charts and software is used to track projects, all inspections are done, track record of projects being completed on time and at/under budget, all Certificates of Use/Certificates of Occupancy are available , all liens are removed

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CREATING VALUE

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Long Term Capital

Competition

Lease Management

Financial Analysis

Documentation Management

## CREATING VALUE

### Long Term Capital

Competition

Lease Management

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Documentation Management

### Thoughts for Judges...

- How does PM budget for long term capital items such as roofs, HVAC, lobby renovations?
- Is there a schedule of useful life for all bldg. components (roof, HVAC, equipment, etc.)?
- Is the long term capital plan is discussed with ownership?
- Are funds recommended to be set aside based on potential hold period of the asset?

### Scoring Suggestions

- 1 – No long term budgeting is done and all repairs/replacements are handled on an as-needed basis
- 2 – PM is unaware of age and useful life of systems
- 3 – Capital improvements are budgeted 2-3 years out and PM can produce the documentation for that.
- 4 –
- 5 – A long term capital plan is in place that includes all systems and structures of the building; a sinking fund is generated that captures all future budgeted capital; all systems and structures have a known useful life and mirror that of the manufacturers guidelines

## CREATING VALUE

Long Term Capital

Competition

Lease Management

Financial Analysis

Documentation Management

### Thoughts for Judges...

- Does PM have an analysis of their buildings biggest lease competitors?
- Has the PM walked each of the competing buildings?
- Are they aware of the lease rates and current availabilities at each?
- Do they work with the leasing/marketing team to understand and discuss positioning?
- Has an analysis of public records been done on each competing building to understand basis, debt load, RE Taxes, etc.?
- Is the PM communicating market news (trades, foreclosures, etc.) with asset manager/owner?

### Scoring Suggestions

- 1 – No information is known about the competing buildings
- 2 –
- 3 – Some knowledge of competing buildings is known but no documentation is provided
- 4 –
- 5 – PM has a detailed analysis of 5-10 competing buildings including their asking lease rates, occupancy, major tenants, expiration dates, CAM analysis, RE tax analysis, basis, known loan amounts

## CREATING VALUE

Long Term Capital

Competition

Lease Management

Financial Analysis

Documentation Management

### Thoughts for Judges...

- Are all leases abstracted for critical dates & dollars?
- Is software used or Excel?
- Does Excel abstract match with accounting? How often are the rent invoices that are sent to Tenants audited with actual leases/lease abstracts?
- Are financial analysis items tracked such as free rent, term, face rate, escalations?
- Is a detailed Tenant Improvement analysis done for each deal?
- Does the analysis include new tenants vs. renewing tenants?
- Is there a mechanism in place to track rollover probability?
- Is there a rollover schedule in place that is presented to asset manager/ownership/leasing teams?

### Scoring Suggestions

- 1 – No lease abstract is available and PM relies on accounting to send correct invoices
- 2 –
- 3 – PM produces a sample of the lease abstracts they use and it matches the most recent invoice for that particular tenant
- 4 –
- 5 – All leases are abstracted and match the monthly statements that go out to tenants

## CREATING VALUE

Long Term Capital

Competition

Lease Management

Financial Analysis

Documentation Management

### Thoughts for Judges...

- Does the PM do an analysis of the rent roll to determine which Tenants are at/below/above market rent?
- Is the posted asking rate below some tenants current rate and if so, have recommendations been made to asset manager/ownership to re-assess?
- Are recommendations made to asset managers/ownership about rent roll analysis
- Has a cost segregation study been done or proposed to ownership?
- How are revenues budgeted long term (after a lease expires)
- How are expenses budgeted long term (5 years +)

### Scoring Suggestions

1 – No interaction with leasing team; no understanding of asset management functions

2 –

3 –

4 –

5 – PM can actively show which tenants are at/above/below market; is working with leasing team to recommend renewals and new leases; are able to project revenues after lease expiration utilizing rollover probability; have recommended a cost segregation study to ownership

## CREATING VALUE

Long Term Capital

Competition

Lease Management

Financial Analysis

Documentation Management

### Thoughts for Judges...

- Does PM have all documentation related to prior sale(s) such as environmental, title, survey, etc.
- Is there a Property Condition Assessment from prior sale and has that been reviewed?
- How is this information stored electronically? Is it back-up? If so, with what frequency?
- How many people have access? If PM left unexpectedly could someone come in and take over immediately?
- Can PM show screenshots of organized tree directory
- Does the PM periodically conduct public records searches to make sure any liens or other publicly filed documents are accurate and up to date? How often is this done and what systems are in place?
- Has PM read and understand the survey?

### Scoring Suggestions

1 – Minimal documentation is tracked; PM can't show how and where documentation is stored

2 –

3 –

4 –

5 – PM can show the tree file directory and who has access; all documentation is clearly marked and concise; all documents have been reviewed by PM and they are familiar with challenges; public records searches are conducted quarterly to avoid surprises on title

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ENVIRONMENTAL | SUSTAINABILITY | WELLNESS\*

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Environmental

Sustainability

Wellness

Waste Management

**\*If Bldg is 360 Certified, WELL, or LEED PM automatically  
gets full credit; no need to judge.**

## ENVIRONMENTAL | SUSTAINABILITY | WELLNESS

### Environmental

Sustainability

Wellness

Waste Management

### Thoughts for Judges...

- How does the PM address physical environmental risks such as hurricane's blizzards, etc.?
- Is there a written hurricane/blizzard plan and is that communicated to Tenants, staff, visitors?
- Does the PM know their current Carbon Footprint score? How are they measuring it?
- Is the PM tracking upstream and downstream emissions?
- What is the Energy Star Score presently? How has that changed over time?
- Has the building envelope been analyzed for inefficiencies and if so, has action been taken?
- Are there tracking mechanisms installed or budgeted addressing sustainability? Motion sensors on lights? Water sensors on faucets to make sure they aren't dripping?
- Has the PM worked with their landscaping vendor to utilize plants that need less water?
- Has there been a discussion to switch from sprinklers to drip lines?
- Are all of the sustainability efforts being discussed with current and prospective tenants?
- Has the PM and staff taken the free BOMA Energy Efficiency Program (BEEP) training via webinars?
- Do they participate in BOMA's W2 Challenge (Water and Waste)?
- Have they identified and leveraged any available incentives from government agencies?

### Scoring Suggestions

- 1 – No tracking or knowledge of Energy Star nor carbon footprint knowledge
- 2 – Basic understanding of Energy Star; outdated written plans for environmental emergencies
- 3 – Up to date written plan for dealing with environmental emergencies; actively tracking Energy Star rating
- 4 – Can produce minimal reports/data on energy usage; has actively reviewed written plans and communicates with Tenants
- 5 - PM has a formal tracking program for all available emissions of the bldg.; has worked with the local power provider to understand where improvements can be made; has renewable energy projects on site already; can produce long term historical data on kilowatts used and tie back to occupancy levels and average outdoor temperature; ownership has full knowledge and buy-in; leasing and marketing teams include in their presentation to prospective tenants

## ENVIRONMENTAL | SUSTAINABILITY | WELLNESS

Environmental

Sustainability

Wellness

Waste Management

### Thoughts for Judges...

- Has an Indoor Air Quality (IAQ) been conducted? Is it being tracked on a consistent basis and what is being done to improve it?
- How is the management staff implementing and creating a healthy work environment
- Are current and prospective tenants aware of the goals of management to create a healthy environment?
- What are building features that support a healthy environment such as walking paths, mediation rooms, gyms, immunization clinics, shared gardens, access to farmers markets, etc.?
- Is the PM actively assisting tenants in their business development by understanding their business and potentially connecting them to other tenants in or out of the building?
- Can the PM quantify the social impact of the building from a jobs standpoint? RE Tax standpoint?
- Does the PM invite local government officials to the bldg. to pro-actively address issues? (fire department, building inspectors, elevator inspectors, etc.)
- Are there on site activities such as blood-drives that impact the community?

#### Scoring Suggestions

- 1 – No IAQ has been done, no additional features of the building create a healthy environment
- 2 – PM has done a IAQ sampling but no further tracking or measuring is done
- 3 – PM and staff are actively working to track IAQ and the building has minimal services to promote a healthy environment
- 4 – Building has several impacts on the social environment and the IAQ is above average and trending in the right direction; there is at least 1 event on site that impacts the community
- 5 – PM and staff are all actively engaged in each tenants business to assist and help each tenant, IAQ is top of mind and actively being tracked, monitored and those results are communicated to current and prospective tenants alike; public officials are brought in pro-actively to address potential issues.

## ENVIRONMENTAL | SUSTAINABILITY | WELLNESS

Environmental

Sustainability

Wellness

Waste Management

### Thoughts for Judges...

- Are there policies in place to create a healthy work environment for employees and tenants?
- Are there programs that promote a healthy lifestyle?
- Are there any wellness amenities on site such as a gym, walking trail?
- In the event of an emergency, does PM staff know distances and drive times to local hospitals? Immunizations/Walk-in clinics?
- Are there building features that address the health and wellbeing of entrants such as daylight levels, smoking policies, acoustic conditions
- Describe sanitation guidelines during normal times and during pandemics.
- How often are Indoor Air Quality studies done and what is done with the results? Is it shared with existing tenants? Future potential tenants? Incorporated into the marketing materials of the building?

#### Scoring Suggestions

1 – No written policies are in place that address wellness nor have any been discussed

2 –

3 –

4 –

5 – PM is actively involved with wellness in the work environment and takes an active role in promoting it; tenants are incorporated into the on-going wellness plans and have every opportunity to provide input and feel as though they're in a safe and hygienic environment.

## ENVIRONMENTAL | SUSTAINABILITY | WELLNESS

Environmental

Sustainability

Wellness

Waste Management

### Thoughts for Judges...

- Has a waste audit been conducted? If so, what changed as a result?
- Describe the recycling programs utilized on site and compliance with local government rules
- How are fluorescent tubes disposed of?
- Does PM know the bldg.'s diversion rate (ratio between total waste generated vs. total amount recycled)
- Do they participate in BOMA's W2 Challenge (Water and Waste)
- Has the PM looked in to turning their facility into a electronics drop off facility and can that turn into an additional sense of revenue for the property?
- Does the bldg. produce enough waste to consider a compactor? If so, can PM describe the compacting analysis and process?
- How is the waste area/loading dock in terms of cleanliness? How often is it cleaned?

### Scoring Suggestions

1 –  
2 –  
3 –  
4 –

5 – A waste audit has been conducted and changes have been made based on the findings; PM knows their diversion rate; PM is participating in BOMA's W2 Challenge; Tenants are engaged in the recycling program; field trips are organized to the local landfill and/or recycling facility and are open to Tenants and their families; the trash/compactor area is in pristine condition

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**FIRE | LIFE SAFETY | SECURITY | ADA**

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Access Control (Business Hours & After Hours)

Staff & Tenant Training & Development

Cameras | Deterrents | Safety Measures

Fire & Life Safety Equipment

Security Manual | Fire Safety Plan | Emergency Procedures | Risk Reduction

Emergency Generator

ADA Compliance

**FIRE | LIFE SAFETY  
SECURITY | ADA**

**Access Control (Business & After Hours)**

Staff & Tenant Training & Development

Cameras | Deterrents | Safety  
Measures

Fire & Life Safety Equipment

Security Manual | Fire Safety Plan |  
Emergency Procedures | Risk Reduction

Emergency Generator

ADA Compliance

**Thoughts for Judges...**

- Describe how tenants gain access to the building during normal business hours?
- What are the procedures for after-hour and weekend access control?
- In regards to after-hours/weekend HVAC are tenants charged for that? Are all the rates the same per each tenants lease? How many hours is the HVAC running during non-business hours?
- If an electronic system is used for access control, does the PM track card/badge swipes to determine ingress/egress times which helps establish when HVAC needs are greatest?
- When vendors need access to telephone/equipment rooms, how is that process handled?

**Scoring Suggestions**

1 –  
2 –  
3 –  
4 –

5 – Access is controlled electronically and data is tracked and decisions are made accordingly regarding the operations of the building; HVAC after hours are known per each lease and tracked/billed accordingly

## FIRE | LIFE SAFETY SECURITY | ADA

Access Control (Business & After Hours)

Staff & Tenant Training & Development

Cameras | Deterrents | Safety  
Measures

Fire & Life Safety Equipment

Security Manual | Fire Safety Plan |  
Emergency Procedures | Risk Reduction

Emergency Generator

ADA Compliance

### Thoughts for Judges...

- How often are evacuation drills occurring? Are all of the tenants engaged? Is the local fire dept. on site and giving advice/recommendations? If not, have they at least been invited or had the opportunity to attend?
- Are AED's on site and who is trained? Management Staff? Are tenants trained on them? If not, why or why not?
- Is the PM and all staff certified in CPR/First Aid? If trained on site were all tenants invited?
- How are unwarranted solicitors handled (during business hours and after hours)
- Are PM and staff regularly attending BOMA meetings or reviewing BOMA online training for fire/life safety, etc.?

### Scoring Suggestions

1 –  
2 –  
3 –  
4 –

5 – Tenants participate in the evacuation drills and are provided copies of the safety/emergency plans; the fire department is engaged in the process; AED's are present on each floor and all tenants have been trained in them; PM and staff regularly attend BOMA classes or other industry events relating to safety

## FIRE | LIFE SAFETY SECURITY | ADA

Access Control (Business & After Hours)

Staff & Tenant Training & Development

Cameras | Deterrents | Safety  
Measures

Fire & Life Safety Equipment

Security Manual | Fire Safety Plan |  
Emergency Procedures | Risk Reduction

Emergency Generator

ADA Compliance

### Thoughts for Judges...

- Does PM work with OSHA on a pro-active basis to conduct inspections? When is the last time a OSHA inspector has been on site and conducted a inspection for both the building as well as Tenants?
- Does the PM have a site specific Compliance Plan per OSHA?
- Has the PM identified areas of safety concern (noise levels around HVAC equipment, trip hazards, etc.)
- Is signage appropriate for all high risk areas, emergency exits, chemical identification?
- Is Lockout/Tagout (LO/TO) equipment present on all systems requiring it?
- Describe the camera system currently in place and if none, has one been budgeted and recommended to ownership?
- How long is video stored? Who has access to the video? Are camera's in the right places and are there hidden spots?

### Scoring Suggestions

1 – No camera or security system is in place nor has one been recommended or priced out; LO/TO devices are missing

2 –

3 –

4 –

5 – Camera systems are in place and monitoring is comprehensive; all LO/TO equipment is appropriate; OSHA Compliance Plan is up to date

## FIRE | LIFE SAFETY SECURITY | ADA

Access Control (Business & After Hours)

Staff & Tenant Training & Development

Cameras | Deterrents | Safety  
Measures

Fire & Life Safety Equipment

Security Manual | Fire Safety Plan |  
Emergency Procedures | Risk Reduction

Emergency Generator

ADA Compliance

### Thoughts for Judges...

- Are all fire extinguishers in place and inspections current?
- Are AED's present and all staff/tenants trained in use?
- Does PM know where fire rated walls and doors are throughout building? Clearly marked on floorplans?
- Is the sprinkler system tested on a regular basis? Can PM show documentation?

### Scoring Suggestions

1 –  
2 –  
3 –  
4 –

5 – PM has a detailed plan of when all fire/life safety is set to expire and a process to renew and/or replace; all materials and equipment in all of the first aid kits are up to date and nothing is expired; PM takes an active role in understanding how to operate all equipment and trains staff on safe operation; sprinkler systems are fully understood by PM and they work to actively ensure it is functional and in good working order.

## FIRE | LIFE SAFETY SECURITY | ADA

Access Control (Business & After Hours)

Staff & Tenant Training & Development

Cameras | Deterrents | Safety  
Measures

Fire & Life Safety Equipment

Security Manual | Fire Safety Plan |  
Emergency Procedures | Risk Reduction

Emergency Generator

ADA Compliance

### Thoughts for Judges...

- Are there written plans in place in the event of natural disasters (hurricane, blizzard, flood, etc.)?
- Are there written plans in place in the event of a man-made event (active shooter, hostage, suicide, etc.)
- Are neighboring property owners aware of procedures and willing to assist?
- Have “Floor wardens” been established?
- Are there working flashlights with easy access available to critical staff? Bullhorn?
- Are there staging areas and are they appropriate to allow first responders access?
- Understanding of what systems may cause explosions (natural gas leak, propane tanks, AST’s, UST’s, etc.)
- Is there a contract in place (including a scope of service) with a disaster recovery vendor?
- Describe how the plans are stored and accessed? Is it simple enough to easily follow during an emergency?  
If it’s only electronic and the power is out, what happens?
- Are emergency exit plans clear and positioned effectively throughout hallways?
- How often are fire drills conducted? When was the last fire drill conducted and what were the results?  
Were changes made based on the results of the drill? Were local fire departments in attendance or at least invited?

#### Scoring Suggestions

- 1 – No written plans are in place
- 2 –
- 3 – Plans are in place but they are boilerplate from another property
- 4 –
- 5 – Written plans are reviewed annually and changes are made; simplicity is the key; tests are done to ensure the plan works; all tenants are actively involved

**FIRE | LIFE SAFETY  
SECURITY | ADA**

Access Control (Business & After Hours)

Staff & Tenant Training & Development

Cameras | Deterrents | Safety  
Measures

Fire & Life Safety Equipment

Security Manual | Fire Safety Plan |  
Emergency Procedures | Risk Reduction

Emergency Generator

ADA Compliance

**Thoughts for Judges...**

If no generator is currently installed, this is N/A

If so...

- Does PM understand the capacity of the generator?
- What does it power?
- Are all tenants covered under the use of the generator?
- What is the fuel source of the generator and does PM have an understanding of challenges?
- How often is the generator tested? Can PM show documentation of testing?

**Scoring Suggestions**

1 –  
2 –  
3 –  
4 –

5 – PM can provide detailed service and testing history on all back-up equipment; they fully understand what the emergency generator will power and what it will NOT power; they have a idea of how many gallons per hour the generator consumes depending on usage and has a plan in place to re-fill fuel during emergencies; is fully aware of what tenants require consistent power and have a plan in place for any perishable items that depend on electricity.

## FIRE | LIFE SAFETY SECURITY | ADA

Access Control (Business & After Hours)

Staff & Tenant Training & Development

Cameras | Deterrents | Safety  
Measures

Fire & Life Safety Equipment

Security Manual | Fire Safety Plan |  
Emergency Procedures | Risk Reduction

Emergency Generator

ADA Compliance

### Thoughts for Judges...

- Has an ADA Compliance report been done recently? What were the findings/recommendations and are they getting resolved?
- Are the handicap parking stalls located in the best spot for tenants and visitors to allow easy access?
- Are all restrooms ADA compliant and if not, are directions to the ADA compliant restroom clearly marked?
- Are there any cracks or uneven surfaces that would inhibit wheelchair accessibility?
- Is proper consideration given during emergency drills to those with special needs (wheelchairs, hearing impaired, etc.)
- Does the PM know which tenants have employees with special needs?
- Is the PM aware of which doorways may not be wheelchair accessible?

### Scoring Suggestions

1 – Clear ADA violations are present; trip hazards; no ADA compliant restroom  
2 –  
3 –  
4 –  
5 – An ADA study has been completed and PM has worked to reduce risks; PM understands all tenants that have special needs employees

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**ENTRANCE | MAIN LOBBY**

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Greeting | Helpfulness of Lobby Attendants

Aesthetic Appeal

Directory | Signage

Lobby Desk | Equipment

## ENTRANCE | MAIN LOBBY

Greeting | Helpfulness of Lobby Attendants

Aesthetic Appeal

Directory | Signage

Lobby Desk | Equipment

### Thoughts for Judges...

If no main lobby attendants/security this is a N/A.

If so...

- Are they seated or did they get up to meet you?
- Did they ask if you found parking ok?
- Did they make eye contact?
- Does it feel like a security guard or a helpful attendant?
- Are they easy to see to visitors coming in?
- Did the PM discuss the hiring/review process of the attendants and break it down to a cost PSF for the building?
- Did attendant treat you "special" for the tour or did you get "typical" treatment?

### Scoring Suggestions

0 – Not Applicable

1 – Attendants were rude; not interested in helping; had trouble with visitor badge process; overall negative

2 –

3 –

4 –

5 – Attendants were friendly and welcoming; had knowledge of the visitor badge process; were able to answer questions about building specifics if questioned

## ENTRANCE | MAIN LOBBY

Greeting | Helpfulness of Lobby Attendants

Aesthetic Appeal

Directory | Signage

Lobby Desk | Equipment

### Thoughts for Judges...

- When is the last time lobby renovations have been done and does the PM have a capital budget allocated to re-doing the lobbies every "X" number of years?
- Is the décor up to date/modern and if not, does the PM have a capital budget to bring it up?
- Are there any furniture items ripped/torn that need to be repaired?
- What is the condition of the walls? Is there need for touch up paint/repair?
- Are there any aroma's (good or bad)?
- Is all of the lighting uniform and modern?

### Scoring Suggestions

1 – Some lights are dim or mis-matched; windows are dirty; dated feel to the entrance

2 –

3 –

4 –

5 – All lights are uniform and bright; all windows are washed; walk-off mats are clean and have bldg. logo on them; space is modern and inviting; flowers or landscaping is crisp as visitors approach the bldg.

## ENTRANCE | MAIN LOBBY

Greeting | Helpfulness of Lobby Attendants

Aesthetic Appeal

Directory | Signage

Lobby Desk | Equipment

### Thoughts for Judges...

- Are all of the current tenants listed in the directory?
- What process does the PM take to update directory?
- Is the signage in the main lobby adequate and clear directing tenants to the café and other tenant amenities?
- If directory isn't digital, has PM collected bids to convert to digital and presented to ownership?
- Is the contact information for leasing and property management clearly marked either on the directory or on the building signage or both?

### Scoring Suggestions

1 – Directory is out of date and missing tenants or has tenants that are no longer there

2 –

3 –

4 –

5 – Directory is electronic; all tenants are current and matches rent roll; signage for elevators, stairwells, suites, café, etc. are clear and aesthetically appealing

## ENTRANCE | MAIN LOBBY

Greeting | Helpfulness of Lobby Attendants

Aesthetic Appeal

Directory | Signage

Lobby Desk | Equipment

### Thoughts for Judges...

If no lobby desk/equipment this is N/A

If so...

- Is the desk located in a visitor/tenant friendly area?
- Is the area neat and tidy?
- Is it modern and matches the flow of the rest of the lobby?
- Do the computer/phone systems look modern and useful or antiquated?
- If a camera/badge system is utilized is the process quick enough and is it useful for property operations?

### Scoring Suggestions

0 – N/A

1 – Desk and equipment are outdated and do not flow properly with the layout of the lobby; PM has made no recommendations to correct or budget a better system

2 –

3 – System for processing visitor badges is good; desk and equipment seem adequate

4 –

5 – PM is constantly evaluating wait times for visitor badges and process to improve efficiency; recommendations are made to ownership on possible system upgrades every couple of years; positioning of the front desk is perfect allowing visitors easy and quick access to floors

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## PARKING FACILITIES | LANDSCAPING | GROUNDS

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Cleanliness of Parking Lots/Garages

Signage

Security | Safety | Lighting

Aesthetic Appeal of Landscaping

Landscape Management

## PARKING FACILITIES LANDSCAPING | GROUNDS

Cleanliness of Parking Lots/Garages

Signage

Security | Safety | Lighting

Aesthetic Appeal of Landscaping

Landscape Management

### Thoughts for Judges...

If no parking is owned/controlled by ownership this is N/A

If so...

- Are all of the floors/areas clean and free of debris?
- What is the pressure washing schedule? Can PM provide invoices/dates proving such?
- Has PM analyzed who may be the most economical to keep areas clean?  
Landscape crew vs. day porter vs. maintenance?
- Striping of all stalls is clear and in no need of re-striping

### Scoring Suggestions

1 – Trash and debris can be seen throughout the parking facility; desperately needs pressure washing; re-striping is needed

2 –

3 – Area is neat and tidy; PM has had it recently pressure washed but can't provide details of a routine schedule

4 –

5 – PM has an active program for clean-up; pressure washes the areas on a consistent basis, not just for TOBY judging

## PARKING FACILITIES LANDSCAPING | GROUNDS

Cleanliness of Parking Lots/Garages

Signage

Security | Safety | Lighting

Aesthetic Appeal of Landscaping

Landscape Management

### Thoughts for Judges...

- Are visitor/guest spaces clearly marked ?
- Are ADA parking stalls clearly marked?
- Is directional signage needed to direct guests to lobby/check-in area
- Are there ride share designated areas or if not, has the PM considered them?
- Is the clear height clearly marked on the entrance to the parking garage well in advance so larger vehicles don't have to back up and stop traffic? Has PM confirmed this height?
- Is there a dedicated high vehicle area for guests with larger vehicles? Are security/lobby attendants aware of clear height and special parking areas
- If signage is present is it visible enough or does landscaping need to be trimmed or the signage moved?

### Scoring Suggestions

1 – Minimal or no signage on site; confusing as to how to get from garage to front lobby

2 –

3 –

4 –

5 – All signs are clearly marked; no question or confusion as to where to go; all signage matches the flow of the building design

## PARKING FACILITIES LANDSCAPING | GROUNDS

Cleanliness of Parking Lots/Garages

Signage

Security | Safety | Lighting

Aesthetic Appeal of Landscaping

Landscape Management

### Thoughts for Judges...

- Are the grounds well lit enough at night?
- Does the PM have a lighting study indicating foot lumens and made recommendations to make lighting better?
- Are there emergency call boxes on site? If not, has PM priced them out and made recommendations to ownership or put them in the long term budget?
- Are exterior lights on a daylight sensor or is it a manual process? How does PM team handle that?
- Are there any lights on unnecessarily during the day?
- Can the PM show judges photos of the building and facility at night
- Has a crime report been conducted for the area and analyzed for likely threats?
- Can PM provide a scope of work for either the current 3<sup>rd</sup> party security firm or the proposed scope of service and bids which were recommended to ownership?

#### Scoring Suggestions

1 – PM is unclear if all lights are working at night; unknown of types of bulbs; no thought has been given to security levels or threats

2 –

3 – Security levels have been assessed but no actions have been taken; all lights may or may not work at night

4 –

5 – PM can provide high resolution photos of the property at night and lighting is great; systems are in place to ensure lights are only used when needed; crime reports are available and PM works with local law enforcement to reduce threats in the area

## PARKING FACILITIES LANDSCAPING | GROUNDS

Cleanliness of Parking Lots/Garages

Signage

Security | Safety | Lighting

Aesthetic Appeal of Landscaping

Landscape Management

### Thoughts for Judges...

- Does the exterior landscaping match the scale of the building?
- Are the mulch beds adequate?
- Do the pots flow with the design of the building?
- Has a landscape architect conducted a foliage survey and made recommendations?
- Are the trees trimmed to an appropriate level and is there a clear ongoing process to keep them trimmed?

### Scoring Suggestions

1 – Mulch beds are lacking; trees are not trimmed; minimal landscaping

2 –

3 –

4 –

5 – PM can show a dedicated process to maintaining landscaping appeal; is fully aware of the type of foliage on their property; makes recommendations to ownership about ways to change foliage/trees to improve operations and/or aesthetic appeal

## PARKING FACILITIES LANDSCAPING | GROUNDS

Cleanliness of Parking Lots/Garages

Signage

Security | Safety | Lighting

Aesthetic Appeal of Landscaping

Landscape Management

### Thoughts for Judges...

- Can PM provide the scope of work for the landscaping contract?
- How often are sprinklers used and how does PM ensure only landscaped surfaces are being watered?
- Is the sprinkler system run on city water or well water?
- Has a drip line been installed or priced out to reduce water usage and waste?
- How often is the landscape contract bid out?

### Scoring Suggestions

1 – No landscaping contract is in place or no scope of work provided; sprinkler heads are broken or sprinkler system is not even active anymore due to disrepair

2 –

3 –

4 –

5 – PM works closely with landscaping team as well as landscape architect to address water conservation plans; can provide the scope of work for the landscaping contract and actively adjusts that when needed; makes recommendations to ownership on how to improve landscaping

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COMMON AREAS | HALLWAYS | STAIRWELLS  
RESTROOMS | TENANT AMENITIES

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Aesthetic Appeal – Common Areas

Aesthetic Appeal - Restrooms

Janitorial Contract

Tenant Amenities

**COMMON AREAS | HALLWAYS  
STAIRWELLS | RESTROOMS  
TENANT AMENITIES**

Aesthetic Appeal – Common Areas

Aesthetic Appeal - Restrooms

Janitorial Contract

Tenant Amenities

**Thoughts for Judges...**

- Are the common areas modern, up to date and aesthetically appealing to the eye?  
If not, can PM describe efforts to upgrade?
- Is the carpet/flooring in good condition throughout?
- Are the stairwells well lit? Is the stairwell dingy and undesirable to use unless in an emergency?
- Are all of the lights throughout the common areas uniform and in good working order?

**Scoring Suggestions**

1 – Dated finishes throughout the building and PM has no capital plan to address it; PM is unsure of when the last time renovations were completed

2 –

3 –

4 –

5 – Flooring throughout common areas is immaculate and PM has a schedule of upgrades; wall coverings and lighting are modern and up to date; stairwells are inviting and encouraged to be used

**COMMON AREAS | HALLWAYS  
STAIRWELLS | RESTROOMS  
TENANT AMENITIES**

Aesthetic Appeal – Common Areas

Aesthetic Appeal - Restrooms

Janitorial Contract

Tenant Amenities

**Thoughts for Judges...**

- Are the restrooms modern, up to date and aesthetically appealing to the eye? If not, can PM describe efforts to upgrade?
- Is the flooring in good condition throughout?
- Are all of the lights throughout the restrooms uniform and in good working order? Are there motion sensors on the lighting?
- Are the restrooms tidy and neat? Are there any odors?

**Scoring Suggestions**

1 – Dated finishes throughout the restrooms and PM has no capital plan to address it; PM is unsure of when the last time renovations were completed

2 –

3 –

4 –

5 – Restrooms are immaculate and PM has a schedule of upgrades; wall coverings and lighting are modern and up to date; restrooms are clean and free of any odors or debris.

**COMMON AREAS | HALLWAYS  
STAIRWELLS | RESTROOMS  
TENANT AMENITIES**

Aesthetic Appeal – Common Areas

Aesthetic Appeal - Restrooms

Janitorial Contract

Tenant Amenities

**Thoughts for Judges...**

- Can the PM provide a detailed scope of work for the janitorial company? Is that scope of work updated based on occupancy fluctuations (think Work From Home)?
- How are tenant issues resolved relating to the janitorial services?
- Are there walk-off mats outside the bldg. to prevent dirt from getting in? Are they customized for the bldg.?
- What systems are in place to monitor restroom supply levels (soap, paper towels, toilet paper, etc.)
- Does the PM offer the services of a day porter to Tenants as a fee service? Can it be used as a revenue category for the building?
- What processes are in place for routine cleaning vs. periodic?
- Has PM conversed with janitorial vendor about “green supplies” vs. effectiveness?

**Scoring Suggestions**

1 – Building seems dirty and dingy; restrooms are not clean; janitorial service is minimal and not adequate

2 –

3 –

4 –

5 – Detailed scope of work is provided and PM is actively reviewing it as well as bidding out the process on a adequate basis; the property is spotless and no dust or debris is present anywhere; restrooms are immaculate

**COMMON AREAS | HALLWAYS  
STAIRWELLS | RESTROOMS  
TENANT AMENITIES**

Aesthetic Appeal – Common Areas

Aesthetic Appeal - Restrooms

Janitorial Contract

Tenant Amenities

**Thoughts for Judges...**

- What tenant amenities are present and utilized? Gym? Café?
- Is there a seating area in the common areas for visitors and tenants? Does it match the architectural and design flow of the rest of the building or was it an after thought?
- Are there outdoor seating areas that are inviting or are they old due to being out in the elements?
- Are there any walking trails around the property or surrounding area?
- Is the gym modern and up to date enough that tenants utilize it?
- Has the PM proposed and bid out other tenant amenities and presented to ownership as part of a long-term capital plan?

**Scoring Suggestions**

1 – No tenant amenities are provided nor has PM addressed ways to enhance the experience for tenants

2 –

3 –

4 –

5 – Tenant amenities are abundant and inviting; PM has done a great job of turning unusable space into areas that tenants can enjoy; these amenities are highlighted as part of the marketing process to attract new tenants

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TYPICAL TENANT SUITES | VACANT SUITE(S)

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Aesthetic Appeal

Signage

Marketability | Marketing Process

## TYPICAL TENANT SUITES VACANT SUITE(S)

Aesthetic Appeal

Signage

Marketability | Marketing Process

### Thoughts for Judges...

- Do vacant suites appear to be fresh and modern?
- Are there missing/stained ceiling tiles throughout the grid?
- Is lighting throughout the space uniform and energy saving? Are all of the lights on during the tour?
- Is the carpet old and needs to be replaced?
- Do the walls need to be painted a neutral white color?
- Are there any offensive odors?
- Do occupied suites appear to meet the Building Standard?
- Have tenants been allowed to do their own improvements making spaces feel cramped or not code compliant?

### Scoring Suggestions

1 – Vacant suites are dingy; carpet is old and needs to be re-done; ceiling grid is missing tiles; lights are not uniform; PM has not proposed or recommended to ownership a solution

2 –

3 – Suites are adequate; PM has tried to get ownership to spend capital making them more leasable

4 –

5 – Vacant suites are kept in immaculate/move-in condition; PM has bid out the process to modernize and upgrade tenant suites; all lighting is consistent throughout;

## TYPICAL TENANT SUITES VACANT SUITE(S)

Aesthetic Appeal

Signage

Marketability | Marketing Process

### Thoughts for Judges...

- Is all signage for each tenant suite uniform throughout the building?
- Is directional signage to get to tenant suites adequate throughout the hallways?
- Have tenants put up their own, non-uniform directional signage?
- Are emergency exit signs adequate, clear to read, and posted appropriately in tenant suites?

### Scoring Suggestions

1 – Signage throughout the building is not uniform; tenant suites are missing numbers or tenant names; PM has no budget or bids to correct the issue

2 –

3 –

4 –

5 – All signage is new and matches the landscape/architecture of the building; getting to tenant suites is not a challenge from the time the visitor leaves the elevator; no non-building standard signage has been added by tenants; exit signs are clear but not overbearing

## TYPICAL TENANT SUITES VACANT SUITE(S)

Aesthetic Appeal

Signage

Marketability | Marketing Process

### Thoughts for Judges...

- Does the PM have up to date floorplans of the space?
- Has a office design firm been engaged to review vacant suite options?
- Are all of the vacancies listed appropriately on CoStar/Loopnet
- Is the PM team engaged during showings to showcase how well the property is managed and run?

### Scoring Suggestions

1 – PM is unaware of who the leasing team is and does not interact with them; no knowledge of what is being proposed to new tenants

2 –

3 –

4 –

5 – PM can provide current leasing flyers and can show history of meetings/calls with leasing teams to make recommendations; all floorplans are accurate and adhere to BOMA standards; PM can show the vacant spaces are listed accurately on CoStar/Loopnet; all management related highlights of the building are incorporated into the marketing materials

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EQUIPMENT ROOMS | SERVICE AREAS  
CENTRAL PLANT | ENGINEERING ROOMS

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Aesthetic Appeal

Safety | Access

OSHA Compliance

Preventive Maintenance Plan

Physical Organization | Documentation

Equipment/Systems Labeling

Building Automation System | Energy Management System

**EQUIPMENT ROOMS  
SERVICE AREAS | CENTRAL PLANT  
ENGINEERING ROOMS**

Aesthetic Appeal

Safety | Access

OSHA Compliance

Preventive Maintenance Plan

Physical Organization | Documentation

Equipment/Systems Labeling

Building Automation System | Energy Management System

**Thoughts for Judges...**

- Are the equipment/service areas broom swept or better? Are there cobwebs in the corners?
- Is the lighting sufficient enough for maintenance staff and vendors?
- Do the systems look like they are being dusted and kept free of debris
- Is it easy to move around or is there debris and cleaning/maintenance items in the way?

**Scoring Suggestions**

1 – Very hard to see; equipment is not maintained or free of dust/debris; climate control is not conducive to working/repairing systems

2 –

3 –

4 –

5 – Walls and floor are painted; all systems are free of dust and debris; lighting is superior

**EQUIPMENT ROOMS  
SERVICE AREAS | CENTRAL PLANT  
ENGINEERING ROOMS**

Aesthetic Appeal

Safety | Access

OSHA Compliance

Preventive Maintenance Plan

Physical Organization | Documentation

Equipment/Systems Labeling

Building Automation System | Energy Management System

**Thoughts for Judges...**

- Are the doors leading into electrical/service areas kept locked at all times?
- How do vendors gain access to these areas?
- Is there appropriate safety equipment (ear protection, flashlights, etc.) that is handy and easily accessible?
- Do the emergency flashlights work that are near the entrance doors?
- Are the back flow preventers maintained and tagged properly?
- Are all Lock Out/Tag Out pieces affixed properly to all equipment

**Scoring Suggestions**

1 – No safety equipment; doors are not protected; areas are not clearly marked

2 –

3 –

4 –

5 – All doors servicing back of the house areas are locked and camera systems are in use; all vendors have up to date certificate of insurance; all LO/TO is installed; all back flow maintenance logs are present and easy to understand; safety equipment is available and easy to find in the event of power loss

**EQUIPMENT ROOMS  
SERVICE AREAS | CENTRAL PLANT  
ENGINEERING ROOMS**

Aesthetic Appeal

Safety | Access

OSHA Compliance

Preventive Maintenance Plan

Physical Organization | Documentation

Equipment/Systems Labeling

Building Automation System | Energy Management  
System

**Thoughts for Judges...**

- Can the PM describe their involvement with OHSA?
- Have there ever been any OSHA violations at the property?

**Scoring Suggestions**

1 –  
2 –  
3 –  
4 –

5 – PM has a firm understanding of OSHA compliance and works with local officials to ensure compliance

**EQUIPMENT ROOMS  
SERVICE AREAS | CENTRAL PLANT  
ENGINEERING ROOMS**

Aesthetic Appeal

Safety | Access

OSHA Compliance

Preventive Maintenance Plan

Physical Organization | Documentation

Equipment/Systems Labeling

Building Automation System | Energy Management System

**Thoughts for Judges...**

- Describe if the preventive maintenance plan is preventive or predictive?
- If predictive, what type of data and analysis is being tracked to assist in the repair/replacement plan?
- If preventative, what software or system is being used to determine when to repair/replace?
- How often is the maintenance plan reviewed and updated?
- Does the maintenance plan for each system follow the manufacturers recommendations?

**Scoring Suggestions**

1 – No preventative maintenance plan is in place; all repairs are done on an as-needed basis

2 –

3 –

4 –

5 – PM and/or engineering staff has provided up to date, current preventative maintenance plans which are easy to read, understand and they match the manufacturers recommendations; predictive maintenance is used where applicable and data is analyzed by technicians and recommendations are made accordingly

**EQUIPMENT ROOMS  
SERVICE AREAS | CENTRAL PLANT  
ENGINEERING ROOMS**

Aesthetic Appeal

Safety | Access

OSHA Compliance

Preventive Maintenance Plan

**Physical Organization | Documentation**

Equipment/Systems Labeling

Building Automation System | Energy Management System

**Thoughts for Judges...**

- Is the area organized properly in the event a new engineer were to take over?
- Is the documentation kept both as a hard copy and electronically? If one or the other, explain the thinking.
- Is it easy to find information on all of the building systems?

**Scoring Suggestions**

1 – Minimal organization is present; documents are not available and PM/staff has made no effort to replace them

2 –

3 –

4 –

5 – All documentation is clearly marked, easy to read and stored electronically as well

**EQUIPMENT ROOMS  
SERVICE AREAS | CENTRAL PLANT  
ENGINEERING ROOMS**

Aesthetic Appeal

Safety | Access

OSHA Compliance

Preventive Maintenance Plan

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Equipment/Systems Labeling

Building Automation System | Energy Management System

**Thoughts for Judges...**

- Are all systems labeled properly?
- Are pipes/ducts labeled properly for flow direction?
- Are meters labeled for each area they service?
- Are phone lines and data cables clearly labeled for each area they service?

**Scoring Suggestions**

1 – No labels are installed on equipment; electric meters are not labeled; manufacturer labels are worn off or missing

2 –

3 –

4 –

5 – All piping throughout mechanical rooms are clearly marked with directional signage of water/air flow; meters are all labeled properly; manufacturer and serial numbers are clear on all equipment; emergency contact information is clear for each piece of equipment

**EQUIPMENT ROOMS  
SERVICE AREAS | CENTRAL PLANT  
ENGINEERING ROOMS**

Aesthetic Appeal

Safety | Access

OSHA Compliance

Preventive Maintenance Plan

Physical Organization | Documentation

Equipment/Systems Labeling

Building Automation System | Energy  
Management System

**Thoughts for Judges...**

- How well does the PM/Bldg. Engineer describe the current Energy Management System (EMS)?
- Have alternatives to the EMS been bid out or discussed with outside vendors?
- Is a Building Automation System (BAS) in place and what systems does it control?
- If not, has a BAS been bid out with outside vendors and discussed with ownership?
- How is the information and data tracked?
- Is the data being used to make pro-active decisions that improve operations?

**Scoring Suggestions**

1 – No automation software is used for any system throughout the building and PM has not budgeted or priced out a solution to prepare for ownership.

2 –

3 –

4 –

5 – An advanced BAS is in place that controls all available systems including EMS, security, access control, etc.; PM analyzes data and makes changes to operations based on the analysis; all staff is familiar with its use and understand how to properly use it

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## ELEVATORS

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Aesthetic Appeal

Operation

Safety

## ELEVATORS

Aesthetic Appeal

Operation

Safety

### Thoughts for Judges...

- Is there proper lighting in the elevator?
- When is the last time the elevator cabs were re-modeled?
- Is there a budget to modernize the cabs?
- Are there amenities in the elevator (tv's, music, etc.)
- Are there any odors or noises that need to be addressed?

#### Scoring Suggestions

- 1 – Cabs are dated; carpet/flooring needs to be replaced
- 2 –
- 3 – Cabs are newish and PM has a proposal to upgrade and modernize elevator cabs in the next 5 years
- 4 –
- 5 – Elevator cabs are modern and match the rest of the architecture/design of the building; all lights are working

## ELEVATORS

Aesthetic Appeal

Operation

Safety

### Thoughts for Judges...

- How are call times? Does the PM know the speed of the elevator?
- Do all of the buttons work?
- Is the elevator certificate up to date?

#### Scoring Suggestions

- 1 – Several buttons are not operating; jerking motion when stopping
- 2 –
- 3 – Elevator certificate is up to date
- 4 –
- 5 – PM can describe the type of elevator, how much the weight capacity is; all of the buttons are functioning properly; call times are discussed and compared to industry standards; plans are in place in the event a elevator is down; PM ensures elevator certificate is up to date at all times

## ELEVATORS

Aesthetic Appeal

Operation

Safety

### Thoughts for Judges...

- Does the emergency phone work?
- Can PM show call logs of how often the emergency phone is tested?
- Does the emergency stop buttons/emergency call buttons work?
- Is it level with the landing platform when arriving at a floor?

#### Scoring Suggestions

1 – Emergency phone is inoperative; emergency stop buttons do not work

2 –

3 –

4 –

5 – Call logs of historical emergency phone tests are provided; no issues with landings not being level; all safety equipment relating to door closings are operating fine; PM has worked with elevator company to modernize elevators every few years

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## ROOF

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Aesthetic Appeal

Safety

Equipment

Capital Requirements

## ROOF

Aesthetic Appeal

Safety

Equipment

Capital Requirements

### Thoughts for Judges...

- Is there any active ponding on the roof? Has it rained lately? Any reported leaks by tenants?
- Is there any visible vegetation?
- How often is the PM or staff monitoring the roof condition?
- Is there an existing preventive maintenance and cleaning program with a 3<sup>rd</sup> party vendor to extend the life of the roof and keep it clean?

#### Scoring Suggestions

1 – Visible ponding, growth of vegetation present, PM unaware of situation

2 –

3 –

4 –

5 – PM and/or staff are on the roof at least once a month to do visual inspections and take immediate corrective actions

## ROOF

Aesthetic Appeal

Safety

Equipment

Capital Requirements

### Thoughts for Judges...

- Can PM show a anchor map for safety equipment relating to anchors? (I-WCA I-14.1)
- Do they have a 10-year load certification and annual inspections (I-WCA I-14.1)
- Is there a guardrail system or horizontal lifeline for roofs with parapet below 39"?
- Are all cell phone antennae's labeled properly with warnings?
- Are all trip hazards and low clearance surrounding equipment clearly labeled?

### Scoring Suggestions

1 – Roof is not compliant with I-WCA recommendations; no guard rail system; several trip hazards present

2 –

3 –

4 –

5 – Anchor map is current and accurate; guard rail system is in place and sturdy; there are no trip hazards and all equipment is clearly marked for safety

## ROOF

Aesthetic Appeal

Safety

Equipment

Capital Requirements

### Thoughts for Judges...

- Can PM describe all mechanical equipment that is on the roof and its interaction with roof membrane?
- Is all equipment properly marked?
- How do equipment vendors gain access to the roof for repairs & maintenance? Do they have appropriate insurance coverage?
- Is the roof access door locked at all times? How do vendors check-out/check-in key?

#### Scoring Suggestions

1 – Equipment is not mounted well and risks being blown off; mounting systems appear to have led to roof penetrations

2 –

3 –

4 –

5 – PM has a roof report that indicates all equipment and areas of concern for leaking and takes a pro-active approach to minimizing leaks; all cell phone equipment is monitored for emissions and damage; all equipment is firmly anchored in the event of inclement weather

## ROOF

Aesthetic Appeal

Safety

Equipment

Capital Requirements

### Thoughts for Judges...

- Is there a current roof assessment by a third party vendor describing the useful life of the existing roof?
- Have vendors provided alternative roofing solutions which may be more efficient?
- Can PM describe the warranty of existing roof?
- How is a roof overlay or replacement being budgeted and communicated to ownership?

#### Scoring Suggestions

1 – No knowledge of existing roof system; no knowledge of useful life; no capital plan for repair/replacement

2 –

3 –

4 –

5 – PM has full knowledge of current roofing system, has a copy and has read the warranty information; has a long term capital budget outlining various options; works with 3<sup>rd</sup> party vendors for a comprehensive maintenance program that extends the life of the roof on an annual basis.



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