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CERTIFICATION  
GUIDEBOOK

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## Eligibility: Office Building and Historical Buildings

- The building must be owned or managed by a BOMA Calgary member that is directly responsible or accountable for the property being entered.
- As of January 31, 2012, the building must be at least 1 year old from the date of occupancy of the first tenant.
- At least 50% of the building's rentable area must be used as office space.
- Managed by present incumbent (Management Company) for at least 1 year at the time of the submission deadline.
- See Call for Submission Registration Form for further **TOBY category** eligibility requirements.

## Eligibility: Industrial Building

- The building must be owned or managed by a BOMA Calgary member that is directly responsible or accountable for the property being entered.
- As of January 31, 2012, the building must be at least 1 year old from the date of occupancy of the first tenant.
- Managed by present incumbent (Management Company) for at least 1 year at the time of the submission deadline.
- See Call for Submission Registration Form for further **TOBY category** eligibility requirements.

## Eligibility: Shopping Centre

Typical configuration is an enclosed mall with on-sight parking, one to multiple levels in height

### Community Centre (100,000 - 400,000 sq. ft.)

- Acreage 10-40
- Anchor Ratio 40-60%
- Primary Trade Area 3-6 KM

### Power Centre (250,000 - 600,000 sq. ft.)

- Acreage 25-80
- Anchor Ratio 75-90%
- Primary Trade Area 5-10 KM

### Regional Shopping Centre (400,000 - 800,000 sq. ft.)

- Acreage 40-100
- Anchor Ratio 50-70%
- Primary Trade Area 5-25 KM

### Super Regional Shopping Centre (800,000+ sq. ft.)

- Acreage 60-120
- Anchor Ratio 50-70%
- Primary Trade Area 5-25 KM

- The building must be owned or managed by a BOMA Calgary member that is directly responsible or accountable for the property being entered.
- As of January 31, 2012, the building must be at least one year old from the date of occupancy of the first tenant.
- Managed by present incumbent (Management Company) for at least 1 year at the time of the submission deadline.

## Submission Guidelines

### Certification

Certification must be renewed every three years to ensure that the standard of excellence is maintained. (Note: Any building receiving a local award at the time of certification is eligible for re-certification every three years)

Entrants are advised that standards may be revised or enhanced in subsequent years, therefore re-certification should not be assumed. Certification is valid for a three year term as long as the property management firm does not change.

### New Management

Where a building/facility has been certified in the past or is expected to be entered for certification, a submission will only be considered following a minimum of one year under new management.

### Building/Facility Under Renovation/Rehabilitation

A building/facility will not be considered under the Certificate of Excellence Program if it is undergoing extensive renovations or rehabilitation (e.g. curtain wall replacement). A building/facility undergoing minor renovations and/or ongoing common area improvement programs is eligible; however, entrants are advised that cleanliness/safety measurers/ tenant communication programs, etc., of areas undergoing construction, will be considered by the judges.

### Building Inspection

A mandatory building inspection will be scheduled shortly after the submission deadline. A member of the Judging Team will contact the Property Manager in advance to book a mutually agreeable date and time for a site visit.

Upon arrival, judges should be taken to a Boardroom or office where they will spend a minimum of a 1 hour examining all of the mandatory documents that were not uploaded into the online system (due to size or for security reasons). All mandatory documents must be pre-assembled at this location prior to their arrival. Failure to comply will result in a loss of points and possible disqualification. Following the review, the judges should be taken on a tour of the building (tour guide must be very familiar with all building areas and systems). Please allow a minimum of 2.5 hours to complete the building inspection process.

### Submission Format

Limit the response to each section as outlined. (10 pt. Arial Font)  
Additional material will not be considered. E-mail submissions are acceptable.

### Submission Deadline

Formal submissions must be received at the BOMA Calgary office by 4:00 p.m. March 4, 2012.

## Submission Specifications

### Building Information

Cover Sheet (to include the following)  
Building Name, Building Address/City, TOBY Category, Year Built, Building Owner,  
Building Management Company, BOMA Member Contact Info. (Mailing/Phone/Email)

## Building Description

Provide a summary of the physical description of the building(s) and property.

**Submission Requirement: Maximum 1,625 characters (approximately 250 words)  
10pt Arial Font**

## Building Photographs

(High resolution (minimum 300 dpi) 4" x 5" color (JPG) to be submitted via email or on disk)

Provide one photograph of the building's exterior.

Provide one photograph of the management team responsible for daily management of the building.

## Building Standards

- Building Name
- Number of Floors
- Total Building Sq. Ft.
- Office Area Sq. Ft.
- Retail Area Sq. Ft.
- Other Area Sq. Ft.
- Exterior Building Description (type of facade, windows, roof etc)

**NOTE:** No metric measurements. Area will be rentable area of the building using the BOMA/ANSI Standard Method for Measuring Floor Area in Office Buildings.

**Provide single paragraph descriptions of the following: (1) Lobby/Atrium Standard finishes; (2) Corridor Standard Finishes; (3) Restroom Standard Finishes; (4) Typical Tenant Suite Standard Finishes; (5) Utility Distribution; (6) Elevators; (7) HVAC Distribution System; (8) Fire Life Safety Systems; (9) Loading Dock & Parking and (10) Emergency Generator/Back-up Power.**

**Historical Building** - The Building Standards section should include a description of the building's architectural and historical significance. If applicable, proof of historical designation or landmark status must be provided.

**Industrial Office Building/Park** - Entrants should include ceiling height, weight loads, truck/rail access, bay areas, design flexibility, and any distinguishing elements etc.

**Renovated Building** - The Building Standards section should start with a summary explaining the renovated work completed.

**Submission Requirement: Maximum 6,500 characters (approximately 1,000 words)  
10pt Arial Font**

## Summary of Judges' Scoring

*A minimum of 70% must be earned to be certified.*

Section	POINT SCALE	SCORE
<i>Building Information</i>	<i>Prerequisite</i>	
<i>Building Description</i>	<i>Prerequisite</i>	
<i>Photograph</i>	<i>Prerequisite</i>	
<i>Building Standards</i>	<i>Prerequisite</i>	

Judges to verify the following

<b>Building Inspection (Must attach completed checklist) 0-5</b>	_____ (min. 3 to pass)
Community Impact	0-15 _____
Tenant Relations / Building Amenities	0-15 _____
Energy Management / Conservation	0-20 _____
Environmental/ Regulatory / Sustainability	0-15 _____
Emergency Preparedness / Security Standards	0-15 _____
Training for Building Personnel	0-15 _____
<b>Total</b>	<b>0-100</b> _____
<b>Bonus - BOMA BESt Certification</b>	<b>0-3</b> _____
<b>GRAND TOTAL</b>	_____

**BONUS POINTS** will be awarded to those buildings that participate in the BOMA BESt program as follows:

- 1 point - Level 1 certified
- 2 points - Level 2 certified
- 3 points - Level 3 or Level 4 certified

Entrants must provide a copy of their official certification letter in order to qualify for bonus points. *The status of the entry will be confirmed by BOMA Calgary.*

## A. Building Inspection

**Note:**

Entrants shall allow a minimum of 2.5 hours for each building inspection. Judges should begin their inspection with a review of the mandatory documentation.

### Mandatory Documentation Verification

**Note:**

Entrants shall allow a minimum of 1 hour to review mandatory documentation.

The following documents are to be available for the Judge's verification. (Note: if the document was uploaded to the online system, they do not need to be available at the verification. Any documentation not uploaded due to size or security concerns must be available at time of inspection at the property being inspected). **This documentation is mandatory.**

The following ten items are mandatory:

1. Tenant Manual (See Section C)
2. Tenant Work Order System, including 12 month tracking record. (See Section C)
3. Energy Management Plan and results of plan (See Section D)
4. Emergency Preparedness Plan (See Section F)
5. MSDS (See Section E)
6. Elevator Maintenance Log (See Section E)
7. Annual & Monthly Waste Management Audit Reports (See Section E)
8. Occupational Health and Safety Meeting Minutes
9. Annual Fire & Safety Compliance Testing (See Section F)
10. **Passing of Building Inspection (See Section A)**

## Scoring Guide

### A. Building Inspection

Judges shall review the Building Description and Standards prior to visiting the building. Judges shall visit each of the areas identified on the Building Inspection Checklist (Judges use only).

Total Point Score (Combination of Inspection Checklist, & Features) \_\_\_\_\_/5

- 1 = Poor/Unacceptable
- 2 = Below Average
- 3 = Good
- 4 = Above Average
- 5 = Excellent

**NOTE:** In order to be eligible to receive a Certificate of Excellence, entrants must score at least 3 out of 5 in the Building Inspection portion.

## B. Community Impact

Provide a written description of the building management’s impact on the community and how the building management’s efforts in this area have helped make the property a benefit to the local community.

For example: jobs provided (as a direct result of the building’s existence), amenities to the community (parks, blood drives, special events, donation of space, participation in the local Business Improvement Association (BIA) events, student employment programs, etc.) recognition awards/letters. If the impact can be quantified as additional income for the community or charitable event or has some type of savings associated with the impact, please describe.

**NOTES:**

- The submission should reflect activities as they relate to the building specifically - not the company's activities - and how long programs have been in place.
- This area should not be confused with Tenant Relations. Please indicate services that relate to the community and not to the tenants.
- A maximum of three attachments reflecting the events being described is allowed.
- **Industrial Office Building/Park** - Entrants may also include the building’s compatibility with neighboring properties and how the building affects traffic.

**Submission Requirement: Maximum single side of 8.5 x 11 paper 10 pt. Arial Font**

### Scoring Guide

#### B. Community Impact

- Amenities to the community (Blood drives, events, food drives, special events, parks) \_\_\_\_\_/5
  - Community Involvement / Jobs created as a result (Evidence of efforts to reach out to the community are to be considered e.g. car pooling initiative, summer student programs, art gallery, parks, FLAP, farmer’s market, craft shows, schools, co-op programs) \_\_\_\_\_/5
  - Recognition from the city such as awards, letters received from local government, BIA, Schools \_\_\_\_\_/5
- Total Point Score \_\_\_\_\_/15**

## C. Tenant Relations

Generally a well-maintained and professionally-managed facility should have satisfied tenants and/or customers. Provide a summary of the Tenant and/or Customer Relations efforts and/or programs sponsored by building management within the last 24 months.

Describe all proactive efforts on the part of management working with Tenants and/or customers such as forms of communication as well as your maintenance service request process and procedure.

Describe tenant or building amenities available such as health facilities, daycare and food service. Indicate if tenant and/or customer satisfaction surveys were conducted including the frequency and the date the last survey was completed and the results.

Provide evidence of the major findings and the action/s management took to share results, alleviate concerns and/or problems, and/or ensure that acceptable and “popular” procedures and activities were maintained.

Each entrant may provide up to 3 samples of tenant and/or customer appreciation letters, 2 newsletters, 3 photographs reflecting the events being described and the table of contents from their tenant manual (please do not include the entire manual).

**NOTE: Corporate Facility** - Employees are considered tenants and you may include the table of contents of your tenant information manual or guidebook in addition to the summaries described above.

**Submission Requirement:** Maximum single side of 8.5 x 11 paper 10pt. Arial font.

### Scoring Guide

#### C. Tenant Relations

##### Tenant Relations

- Tenant Manual (welcome package) \_\_\_\_\_/2
- Tenant Relations (Internal Policies, e.g. move in/move out, conflict resolution, customer service) \_\_\_\_\_/1
- Tenant Work Order System, including 12 month tracking record \_\_\_\_\_/3
- Tenant Survey, Results & Action Plan (within past 2 years) \_\_\_\_\_/3
- Tenant Retention Strategy (ongoing relationship building with tenant contact) \_\_\_\_\_/2
- Tenant Services (appreciation events, communications) \_\_\_\_\_/2

##### Building Amenities

- e.g. parking, daycare, health facilities, first aid, food service, concierge, meeting facilities, transit access, bike facilities, ATM machines \_\_\_\_\_/2

**Total Point Score** \_\_\_\_\_/15

## D. Energy Management / Conservation

Provide a description of the programs and measures taken to conserve energy at the building.

### Building Staff Education

Describe any programs in place to educate building operations staff, property manager, engineers, leasing agents, and other personnel about the importance of methods for energy conservation. This may include encouraging or requiring participation in BOMA energy Efficiency Programs, Webinars, pursuing industry certification and professional development programs. Provide a summary of the policies, procedures and/or training programs provided for employees such as BOMA BEST, BOMA Energy Efficiency Program (BEEP), ENERGY STAR®, LEED etc.

### Building Operations and Maintenance

Describe your building maintenance procedures and how they contribute to energy conservation. This should include consideration of the following: preventative maintenance programs, system documentation, equipment and system performance monitoring, sensor and control calibration.

### Building Energy Management System Monitoring (EMS)

Energy Management systems are often underutilized in commercial buildings. When fully engaged, they are powerful tools for improving the performance of HVAC and lighting systems and conserving energy. Describe the EMS in place in your building and the degree to which you use it to reduce the buildings energy consumption. Describe how tenants are encouraged to conserve energy.

Include a description of energy conserving projects completed or planned to be completed in next 12 months. Describe and quantify the savings to the owner and to the tenants when projects and programs have been implemented to reduce energy. Include graphs demonstrating reduction and savings where possible. All graphs should be combined into a single PDF.

Describe certifications and awards you have received that relate to energy conservation.

**Submission Requirement: Maximum single side of 8.5 x 11 paper 10pt Arial Font**

## Scoring Guide

### D. Energy Management / Conservation

- Energy Management Plan (comprehensive manual available on-site supporting energy management policies and procedures) \_\_\_\_\_/3
- Company goals/targets in place for reducing energy consumption (utility procurement - aligned with “green” supplier) \_\_\_\_\_/2
- Enrollment in incentive/rebate programs \_\_\_\_\_/1
- Energy efficient projects in place or intent to commit within 12 months (e.g. BAS, solar panels, plug and lighting audits, lighting retrofits, power factor correction, thermal storage, deep lake cooling, VFD, energy efficient roofing, chiller refrigerant change-out and heat reclaim, high efficiency equipment, re-commissioning) \_\_\_\_\_/3
- Tenant Awareness, Incentive, Education and Participation Programs \_\_\_\_\_/3
- Building Staff Education \_\_\_\_\_/3
- Building Operations and Maintenance Procedures \_\_\_\_\_/3
- Energy Management System Monitoring \_\_\_\_\_/3
- Tracking/Benchmarking of utility consumption and comparison year over year, showing results /savings \_\_\_\_\_/2

**Total Point Score** \_\_\_\_\_/20

## E. Environmental / Regulatory / Sustainability

Describe policies and procedures for a minimum of 5 programs that could include waste management and recycling, accessibility for disabled tenants and visitors, lamp disposal, indoor air quality management and testing, water reduction and management, storage tank and generator precaution and management, storm water management, green friendly landscape management, integrated pest control management, hazardous waste management, green cleaning, green purchasing policy, exterior building maintenance management plan, managing asbestos, emergency clean up, blood borne pathogen program, pandemic preparedness etc.

When describing these programs explain if you have municipal, provincial or federal compliance that you are following. If these programs are not mandated, then explain their purpose for implementing.

Provide a summary of how building management monitors tenant operations for environmental compliance.

**Submission Requirement:** Maximum single side of 8.5 x 11 paper 10pt Arial Font

### Scoring Guide

#### E. Environmental / Regulatory / Sustainability

##### Environmental

- Environmental Management Plan/Manual
  - Environmental Incentives (evidence of management encouragement through correspondence)
  - Tenant Compliance
- Asbestos Management Plan (if applicable) \_\_\_\_\_/5

##### Regulatory

- Elevator Maintenance Log
- Waste Audit Reports (month/annual)
- Waste Reduction Work Plan Posted
- Roof Anchor Plan & Inspection
- CFC Reporting
- Air Emissions

##### Health & Safety

- Procedures (Staff & Contractor)
  - (hot work permits, spill control procedures, lockout/tag out, roof waivers, etc.)
- Committee (Record Keeping, Display Board)
- Equipment (chemical storage, protective gear, safety shower, eyewash station)
- WHMIS compliance
- MSDS (housekeeping & maintenance)

##### Accessibility

- **Wheelchair**
  - Entryways, washrooms, elevators, lights switches (maximum height 42")
- **Visually Impaired**
  - Elevator buttons to be Braille; main directory to be Braille; suite # and names to be Braille; floor indication by voice or tone in elevator; concierge service available for assistance in building \_\_\_\_\_/5

##### Sustainability

- Reduction of environmental footprint
- Cradle to grave programs
- Green cleaning, green purchasing, green landscaping
- Water Reduction and Management \_\_\_\_\_/5

**Total Point Score** \_\_\_\_\_/15



## F. Emergency Preparedness / Security Standards

Provide a summary of procedures, protocols and programs for Life Safety, Fire, Disaster and Security standards. You can include a table of contents of your emergency management and security standards manual(s).

Include how fire and evacuation drills are conducted, how often and when.

Describe training for property management and tenants as well as recovery procedures.

If you work with local first responders and conduct live training, explain how this is accomplished.

Provide a summary about your Business Continuity Plan / Pandemic Plan and if drills are conducted how they are documented and communicated.

**Maximum single side of 8.5 x 11 paper 10pt. Arial Font**

### Scoring Guide

#### F. Emergency Preparedness / Security Standards (Building Specific)

##### Emergency Preparedness

- Emergency Preparedness Plan (Fire, Disaster, Pandemic, etc.) \_\_\_\_\_/3
- Evacuation Procedures, Tenant and Staff Training, Drills \_\_\_\_\_/2
- Emergency Systems, Maintenance, Procedures, Training, Testing, Recording/log Books \_\_\_\_\_/2
- Annual Fire & Safety Systems Certificate \_\_\_\_\_/2
- Business Continuity Plan / Pandemic Plan \_\_\_\_\_/2
- Emergency Equipment (AED, Oxygen, SCBA, first aid/trauma kits) \_\_\_\_\_/1
- Communications Equipment (2 way radios, PA systems, paging, emergency notification system) \_\_\_\_\_/1

##### Security Standards

- Key Control \_\_\_\_\_/2
- Security Policies/Procedures
- Security Systems (CCTV/Access Control/Duress)
- Staffing (proof of training and licenses)

**Total Point Score** \_\_\_\_\_/15

## G. Training of Building Personnel

Provide a list of qualifications/professional designations for building staff and a building specific organization chart of the building management staff.

Describe the following: on-going training programs for building personnel including seminars, in-house training and continuing education completed as well as designations, participation in professional organizations and team building and how this is managed for all personnel. Detail prior year and current year training plus future plans.

**NOTE: Industrial Office Building/Park** - Discuss training for both on-site and off-site building personnel dedicated to the property.

**Submission Requirement:** Maximum single side of 8.5 x 11 paper 10pt. Arial Font

### Scoring Guide

#### G. Training of Building Personnel

- Building Organizational Chart \_\_\_\_\_/1
- Staff Development (succession planning, skills upgrading, retention, seminars, professional development, personal growth, mentoring, team building efforts) \_\_\_\_\_/5
- Training (Job specific, tracking of required courses and certifications. I.e. summary of Health and Safety courses and when last taken by each staff member) \_\_\_\_\_/5
- Industry/internal Awards & Recognition \_\_\_\_\_/2
- Staff: Existing professional designations/qualifications \_\_\_\_\_/2

**Total Point Score** \_\_\_\_\_/15