



## 9. BOMA BEST Program Policies

### 9.1. Introduction

The following BOMA BEST Sustainable Buildings 3.0 Program Policies are applicable to all participants of the new BOMA BEST Online Portal.

BOMA Canada reserves the right to make changes to any and all BOMA BEST Sustainable Buildings 3.0 Program Policies without notice. BOMA Canada will endeavour to the best of its ability to communicate new and/or revised policies to applicants and the general public.

These Program Policies apply to participants of the BOMA BEST Sustainable Buildings 3.0 program, be they in the Single Stream or the Portfolio Stream.

### 9.2. BOMA BEST Sustainable Buildings 3.0 Program Policies

#### BOMA BEST Sustainable Buildings 3.0 Program Policy 1 – Application Fees

BOMA BEST Sustainable Buildings 3.0 application fees are listed [here](#). Where application fees are based on size of building by square footage, the following conditions must be met:

1. Total size of building shall be determined as the total Gross Floor Area (GFA).

The GFA must **include** the following areas:

- Lobbies
- Tenant Areas
- Common Areas
- Meeting Rooms
- Break Rooms
- Atriums (ground floor only)
- Restrooms
- Elevator Shafts
- Stairwells
- Mechanical Equipment Areas
- Basements
- Storage Rooms
- Parking Area – Underground or closed indoor parking serviced by mechanical ventilation must be included in the gross floor area of the building.

The GFA must **exclude** the following areas:

- Exterior spaces
- Balconies
- Patios
- Exterior Loading Docks
- Driveways
- Covered Walkways
- Outdoor Courts (Tennis, Basketball, etc.)



- The interstitial plenum space between floors (which house pipes and ventilation)
- Crawl Spaces
- Parking Area – Outdoor or open-air parkades must be excluded from the gross floor area of the building.

This definition is consistent with ANSI/BOMA Standard Z65.3-2009.

The GFA used to calculate fees must be entered on the building registration page (“Create New” page) here:

The screenshot shows a web form titled "Create property" with a "Summary" section. The form includes several input fields and dropdown menus. The "Gross Floor Area (BOMA BEST Certification):" field is highlighted with a red box. It contains the text "Enter number..." and a dropdown menu set to "Square Feet". Other fields include "Name:", "Location:", "Country:", "Property type:", "Your building reference code:", "Management company:", "Questionnaire type:", "Building height:", and "Building Owner (legal/beneficial):".

Note: This definition is not necessarily consistent with the definition used to determine GFA for the purposes of benchmarking energy and water using ENERGY STAR Portfolio Manager. Consult section 4 in this Guide for more information on this subject.

2. Where applicants register a building using the incorrect questionnaire type, the Local BOMA Association reserves the right to deny an applicant’s building registration; or, if accepted, notify the applicant of building size category change as deemed appropriate.

BOMA Canada reserves the right to change the Application Fees from time to time. BOMA Canada and its Local BOMA Associations shall endeavour to communicate to BOMA Members and other BOMA BEST stakeholders prior to application fee change, but cannot guarantee a specific time period for such notice.

### **BOMA BEST Sustainable Buildings 3.0 Program Policy 2 – Application Fee Refund**

Applicants may obtain a refund for an application fee within the first thirty (30) days of the building’s registration provided verification has not been completed for the building.

Beyond the thirty (30) day period, no refunds will be provided. In the event where a building is sold to another company, the application fee remains with the building itself, not the management or owner



company that originally registered it. The new management or owner companies may continue the building's certification process at no additional costs provided the online application period is compliant with BOMA BEST Sustainable Buildings 3.0 Program Policy 4 – Online Application Period. An application fee cannot be transferred to another building.

In all cases, no refund for an application fee shall be granted for the purpose of compensation where BOMA BEST certification was not achieved or where the desired level was not achieved after pursuing a Score Upgrade.

### **BOMA BEST Sustainable Buildings 3.0 Program Policy 3 – Eligibility Criteria**

Buildings shall be deemed eligible to participate in the BOMA BEST certification program if all of the following conditions are met at the time of application:

1. The building must be at least one (1) year old.
2. The building must have a minimum of 70% average occupancy for a period of one (1) year representing 12 consecutive months, at a minimum\*.
3. The applicant must select the questionnaire type that matches the definition of that building's asset class (as per section 2 of this Guide).

\* Buildings certifying under the Portfolio Program stream may be eligible to certify without meeting the occupancy requirements. In such case, the building may only achieve a Certified level of certification. Contact BOMA Canada to find out more.

In addition to the above, buildings in the Portfolio Program must meet the following requirement:

1. All buildings in the Portfolio must operate under a common management company, using common management policies;
2. Buildings in a single Portfolio Program registration may be located across the country. They do not need to be within the same geographical space, nor be represented by the same Local BOMA Association.

### **BOMA BEST Sustainable Buildings 3.0 Program Policy 4 – Online Application Period**

Applicants will have a period of up to six (6) months to complete the BOMA BEST online assessment survey beginning on the date access has been granted to the online questionnaire.

If the building is not ready for verification after the six (6) month period, the Applicant can contact BOMA Canada (Portfolio Program stream) or the designated Local BOMA Association (Single Building stream) for an application period extension. Up to six (6) months can be given as an extension. If no extension is requested, BOMA Canada or the designated Local BOMA Association reserves the right to render the file inactive based on its best judgement but *not* before attempts are made to communicate with the Applicant.

Should an application become inactive due to an elapsed period of six (6) to twelve (12) months, the Applicant must contact BOMA Canada (Portfolio Program stream) or the designated Local BOMA Association (Single Building stream) to discuss reactivation.

In all cases, after twelve (12) months have elapsed from the date access was granted to the online assessment the file will be rendered permanently inactive. BOMA Canada or the Local BOMA Association may do so without prior contact with the Applicant. Applicants wishing to continue pursuing a BOMA BEST certification after the twelve (12) month period has elapsed on their original application will be



required to pay a new BOMA BEST Sustainable Buildings Application Fee. The Applicant may be required to use the most recent version of the BOMA BEST Sustainable Buildings questionnaire.

Refunds for incomplete assessments cannot be issued, as per BOMA BEST Sustainable Buildings 3.0 Program Policy 2 – Application Fee Refund.

### **BOMA BEST Sustainable Buildings 3.0 Program Policy 5 – On-Site Verification: Missing Documentation**

Where a building application has been reviewed as part of an on-site verification tour and is *not* recommended for certification due to missing documentation and / or information; and whereby the Verifier conducting the on-site verification provides recommendations to meet the certification, then:

1. An applicant shall have up to thirty (30) days to provide the requested documentation and/or information and resubmit to the Verifier as agreed upon; and
2. Should the Verifier require a second on-site visit, the applicant shall be required to pay all applicable Verifier costs for such visit (see BOMA BEST Sustainable Buildings 3.0 Program Policy 6).

Notwithstanding the above clause 1; BOMA Canada (Portfolio Program stream) or the designated Local BOMA Association (Single Building stream), upon consultation with the Verifier, may, at its sole discretion, grant an applicant an extended period to gather required documentation and/or information by another thirty (30) days, if required, for a total of sixty (60) days following the on-site verification.

### **BOMA BEST Sustainable Buildings 3.0 Program Policy 6 – On-Site Verification: Additional Verification Costs**

#### **Travel Costs**

Where, for the purposes of an on-site verification tour, an applicant’s building(s) is located at a considerable distance from BOMA Canada or the designated Local BOMA Association office, the applicant will be responsible for the payment of all applicable Verifier travel costs. The definition of “considerable distance” shall be determined by BOMA Canada or the designated Local BOMA Association.

Travel costs may include: flight, gas, car rental fees, accommodation and meals where applicable. Please consult with BOMA Canada (Portfolio Program stream) or the designated Local BOMA Association (Single Building stream) office prior to registering a building if there is concern that a building may be located at a “considerable distance” from a BOMA office.

#### **Questionnaire revision**

It is expected that the Verifier will have to amend some answers prior to finalizing the certification score as a result of the on-site visit and documentation review. A Verifier may amend up to twelve (12) answers within the questionnaire. If more than twelve questions require modification, this will incur an additional verification cost.

#### **Additional Review**

Following the verification, the Verifier can assist the Applicant in understanding what documentation is still required to achieve certification. However, there can be no more than two (2) interactions with the Verifier focused on clarifying a question’s intent. Additional document review beyond the two (2) interactions will incur an additional verification cost.



## **Second on-site visit**

In the event where a second on-site verification visit is required, this will incur an additional verification cost.

For more information on additional verification costs, contact BOMA Canada (Portfolio Program stream) or the designated Local BOMA Association (Single Building stream).

## **BOMA BEST Sustainable Buildings 3.0 Program Policy 7 – Verification Methodology for eligible Open Air Retail or Light Industrial Buildings in the Portfolio Program.**

Each building within the Portfolio will be assessed with its own questionnaire. Verification will be based on sampling, as per ISO 17021:2006. In the case where a building does not meet the Level identified during registration, the Verifier will select a wider sampling of buildings to verify, as per ISO 17021:2006. All additional verification costs will be billed at an hourly rate plus disbursements, such as travel costs.

## **BOMA BEST Sustainable Buildings 3.0 Program Policy 8 – Appeals Process**

Following the BOMA BEST verification, Applicants may launch a formal appeals process to contest a decision made by the Verifier in regards to the Applicant’s questionnaire.

To launch the appeals process, the Applicant must file a formal complaint or appeal with BOMA Canada (Portfolio Program stream) or the designated Local BOMA Association (Single Building stream) via email. The issue will be reviewed and resolved locally at the discretion of BOMA Canada or the Local BOMA Association. It is possible that the issue is submitted as a Technical Clarification Request. If necessary, the Applicant will be granted an extension to the thirty day verification period deadline (See BOMA BEST Sustainable Buildings 3.0 Program Policy 5 – On-Site Verification: Missing Documentation).

The decision will be communicated directly to the Applicant. All decisions are final.

## **BOMA BEST Sustainable Buildings 3.0 Program Policy 9 – Certification Period for Single Buildings**

The building will remain in the “Certified” status for a period of three (3) years from the date on which the Verification was deemed successful. The exact date of the certification will be available to applicants via the “Certifications” tab in the BOMA BEST Online Portal.

As a certification nears expiry, three reminders will be sent automatically by the Online Portal reminding applicants to begin the recertification process. Should the building become “Expired” access to the Online Portal becomes “read only” until such a time as the recertification is requested.

## **BOMA BEST Sustainable Buildings 3.0 Program Policy 10 – Certification Period for Portfolio Program**

Buildings in the Portfolio Program are moved to the “Certified” status (not the same as achieving a Certified certification Level) once the portfolio’s verifications are deemed successful. The exact date of the certification will be available to applicants via the “Certifications” tab in the BOMA BEST Online Portal.

Buildings will remain in this “Certified” status continuously (never moving to “Expired”) provided the following two conditions are met:



1. All verifications conducted on the sample are deemed successful. Each building will be verified on a three-year cycle (similar to the Single Building stream).
2. Payment of the annual fee is received.

Access to the BOMA BEST Online Portal remains available while the buildings are in the “Certified” state.

Certification will be applied to the Portfolio as a whole and to the individual properties. In the case where fees are not submitted within 60 days of the registration anniversary, BOMA Canada reserves the right to render all buildings within the Portfolio inactive. These buildings may be returned to “Certified” status once the fee has been collected.

### **BOMA BEST Sustainable Buildings 3.0 Program Policy 11 – Certification Credentials**

BOMA BEST certification is registered by building (property) *not* by its owner and/or Management Company (i.e. by Applicant). If the ownership and/or management of a BOMA BEST certified building changes, it is the responsibility of the existing or new owner and/or management companies to advise BOMA Canada or the designated Local BOMA Association of such a change.

### **BOMA BEST Sustainable Buildings 3.0 Program Policy 12 – Recertification**

For buildings in the Single Building stream, buildings may choose to recertify at any time. The building does not need to be in the “Expired” state to begin the process.

An applicant may recertify a building in accordance with the following terms:

1. Recertification fees shall be in accordance with the current BOMA BEST Sustainable Buildings 3.0 Application Fees.
2. On-site verification is required for recertification (included in the recertification fee).

### **BOMA BEST Sustainable Buildings 3.0 Program Policy 13 – Purpose of BOMA BEST Certification**

The BOMA BEST Sustainable Buildings program is a voluntary energy and environmental assessment and certification program, and therefore does not constitute a guarantee of a building’s performance and value for insurance, or valuation purposes. BOMA Canada does not take responsibility for any undue representation of a building’s performance and/or asset value made on the basis of its achieved BOMA BEST certification.