



BOMA Building
BEST[®] Environmental
Standards

BOMA BEST[®] Portfolio Program

Continuous Certification Program for:

Enclosed Shopping Centres

Light Industrial

Multi-Unit Residential Buildings

Offices

Open Air Retail

Universal



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1. About BOMA BEST®

BOMA BEST® – Building Environmental Standards is Canada’s largest environmental assessment and certification program for existing buildings. It is a unique, voluntary program designed by industry for industry, providing owners and managers with a consistent framework for assessing the environmental performance and management of existing buildings of all sizes. The purpose of the BOMA BEST® program is to provide our industry with the means to improve the energy and environmental performance of every single building.

BOMA BEST® certification recognizes excellence in energy and environmental management and performance in commercial real estate. The Program is managed by the Building Owners and Managers Association of Canada (BOMA Canada) and delivered with the eleven Local BOMA Associations throughout Canada – BOMA BC, BOMA Calgary, BOMA Edmonton, BOMA Regina, BOMA Manitoba, BOMA Toronto, BOMA Ottawa, BOMA Québec, BOMA New Brunswick/Prince Edward Island, BOMA Nova Scotia, and BOMA Newfoundland and Labrador.

2. Assessing Environmental Management and Performance

One of the BOMA BEST® Program’s central objectives is to facilitate the continuous improvement of building operations and maintenance through the use of a questionnaire or survey-based assessment.

This survey provides a consistent framework for owners, managers and building operators to critically assess ten key areas of environmental performance and management:

- Energy;
- Water;
- Air Quality;
- Comfort;
- Health & Wellness;
- Custodial;
- Purchasing;
- Waste;
- Site; and
- Stakeholder Engagement.



3. Portfolio Program: Continuous Certification

The Portfolio Program stream provides a cost-effective yet rigorous method for continuous BOMA BEST® certifications for portfolios of properties all levels of certification.

The benefits of the program include:

- Continuous certification with no certification expiry as long as program requirements are maintained.
- Annual program fee to allow for annual budgeting at the property level.
- Ability to add or remove properties due to acquisition, disposal or change in management company.
- Annual verification program based on the requirements of [ISO 17021-1:2015](#) and [IAF MD1:2007](#).
- Properties can be included from different geographic regions of Canada.
- Properties can be included from the following asset classes:
 - Office
 - Enclosed Shopping Centre
 - Open Air Retail
 - Light Industrial
 - MURBs
 - Universal

4. Eligibility

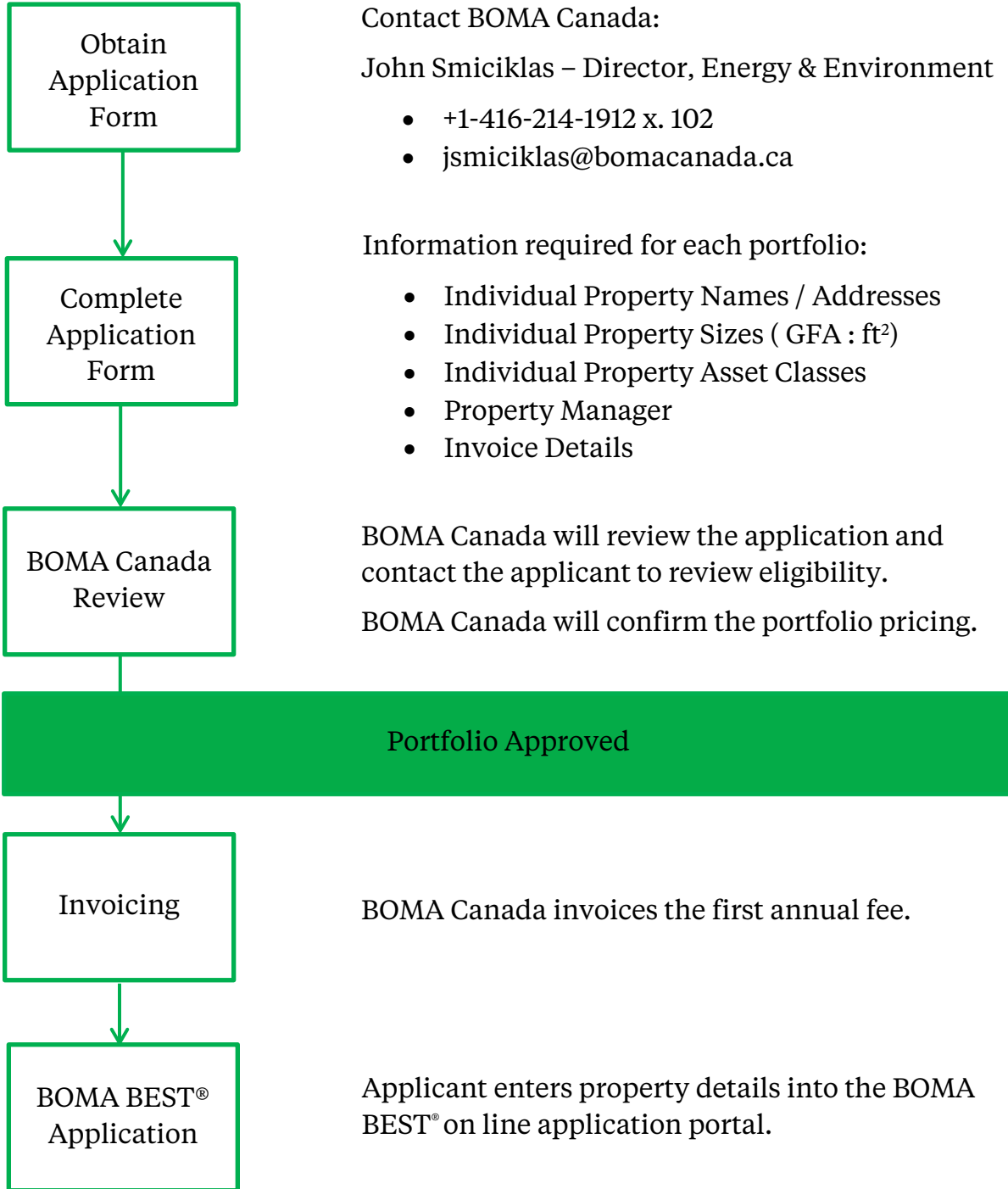
The Portfolio Program has been designed to take advantage of centralized documentation control and verification. As such, the general rules for eligibility are as follows:

- a) Portfolio must operate under common policies and related documentation
- b) Properties in the program must demonstrate compliance with the [3.0 BEST Practices](#) or [V2 BEST Practices](#) (depending on which program is being used).
- c) Policies and related documentation shall be available for a central review and approval BOMA Canada.
- d) Minimum portfolio size may apply depending on the asset classes.
Details are available through BOMA Canada.

BOMA Canada will review each portfolio to determine final eligibility.

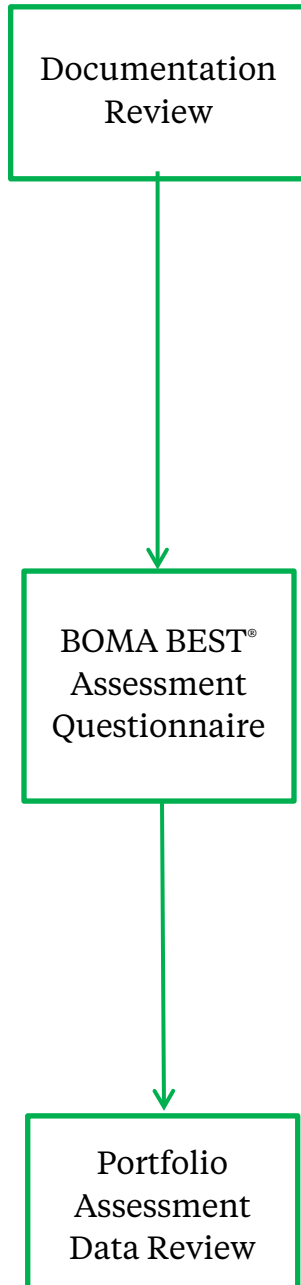


5. Application Process





6. Assessment Process



BOMA Canada will review and approve common policies and documentation for the entire portfolio.

The BOMA BEST® assessment questionnaire must be completed for each building.

For those buildings looking for **Certified** Status:

- Complete the BEST Practices

For those buildings looking for **Bronze, Silver, Gold or Platinum** Certification:

- Complete the BEST Practices and BOMA BEST® Questionnaire.

For detailed step by step instructions of the assessment process, download the [BOMA BEST® 3.0 Application Guide](#).

BOMA Canada reviews the BOMA BEST® assessment data for each individual property in the entire portfolio to ensure complete information has been provided for verification or certification.



7. Verification Process – Sample Sizes

Determine
Sample for
Verification

BOMA Canada will determine the number and location of properties to be verified on site.

Sampling will be conducted in accordance with the principles of [ISO 17021-1:2015](#) and [IAF MD1:2007](#) .

Sample Verification Size Minimum:

20% of properties annually (rounded up)

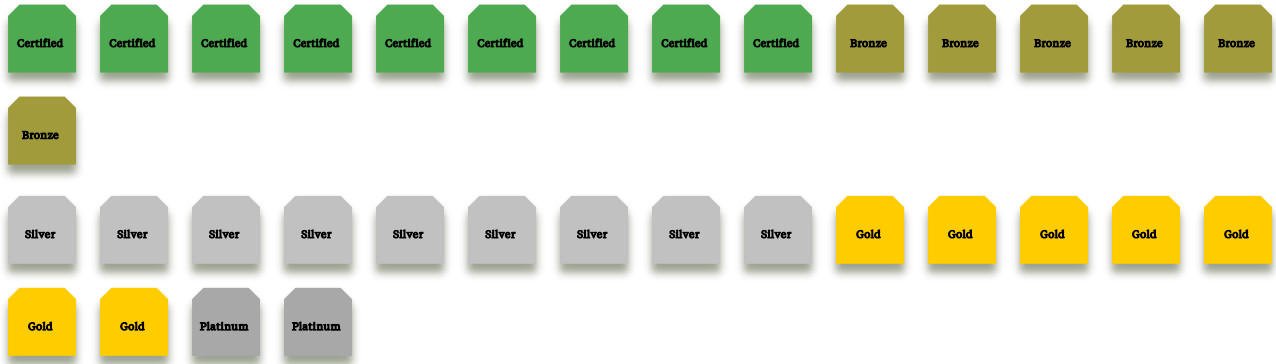
Sample will include a representation of geographies, asset classes and certification levels within the Portfolio.

All properties applying for Platinum Certification will be part of the verification sample for the initial certification.

BOMA Canada may increase the verification sample size to ensure program integrity.



a. Example



33 Properties: Minimum Annual Verification Sample Size

= 20% of 33 = 6.6

Round up to 7 / year

Selection of Certification Levels + all Platinum





8. Verification Process – On Site Verifications

Onsite Verification

BOMA Canada will:

Schedule all onsite verifications

Provide information to each property representative as to the documentation needed

Mandatory BOMA BEST® requirements (e.g. Energy or Water Audits) must meet program requirements for all properties that are part of the verification sample

BOMA Canada will review all onsite verification results and determine:

1. Verifications are successfully completed when:
 - BEST Practices in place
 - Verified scores for the sample are within +/- 5 % of the submitted score
 - Scores show a normal distribution.
2. Verifications are unsuccessfully completed when:
 - A BEST Practice has not been implemented
 - Verified scores for the sample are more than +/- 5 % of the submitted score
 - Scores are not normally distributed
3. Portfolios successfully verified move to Certification
4. Portfolios unsuccessfully verified
 - Corrective action(s) are required that address the core issue(s) raised in the verification process;
 - Corrective action must apply to the entire portfolio;
 - Evidence of implementation of corrective action required;
 - Additional verifications will be scheduled and completed;
 - If verifications are now successful, then move to Certification.

Note: Costs associated with review of corrective actions and any additional verification(s) are extra and will be invoiced by BOMA Canada.



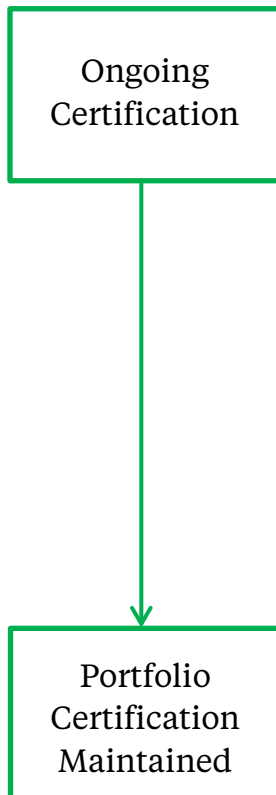
9. Certification Process



BOMA Canada will certify each property within the portfolio and the appropriate BOMA Local will provide individual certificates for each building / property



10. Ongoing Certification



- Changes to Portfolio processed
 - i.e. buildings/ properties added or removed
 - buildings/ properties identified for certification upgrade
- Annual fee invoiced.
- Annual verification sample determined.
- Annual on-site verification process completed.
- Corrective action(s) and additional verification(s) as required.
- Certification status updated for relevant building/property.



11. Pricing

Light Industrial and Open Air Retail¹

Annual Fee: \$0.0055 / ft² (i.e. \$5.50 per 1,000 ft²)

- Fees are invoiced each calendar year
- Minimum fee of \$100.00 / property
- Fees will be capped on a per building basis if the portfolio meets certain minimum eligibility requirements as determined by BOMA Canada.
- Firm prices will be provided by BOMA Canada for each property.

Examples

- 20,000 sq. ft. property = \$110.00 /year
- 100,000 sq. ft. property = \$550.00 /year

Office, Enclosed Shopping Centre, Universal¹

Annual Fee: Set fee based on approximately 1/3 of the current BOMA BEST[®] price list.²

- Fees are invoiced each calendar year
- Firm prices will be provided by BOMA Canada for each property.

MURB¹

Annual Fee: \$3.60 / Unit

- Fees are invoiced each calendar year
- Minimum fee per property may apply
- Fees will be capped on a per building basis if the portfolio meets certain minimum eligibility requirements as determined by BOMA Canada

Educational Campuses¹

Annual Fee: \$0.0055 / ft² (i.e. \$5.50 per 1,000 ft²)

¹ Minimum portfolio sizes may apply. BOMA Canada will provide a price quote for each property / portfolio.

² BOMA Canada may substitute per square foot / year pricing for certain portfolios. BOMA Canada will provide a price quote for each property / portfolio



12. Additional Items

Additional Certifications

Properties may be added to an existing, certified portfolio at any time. However, depending the number and nature of properties added, some incremental properties may be more easily added “on demand”, while others may be more easily added when the annual fee is assessed. BOMA Canada will review and provide details.

Verification

The cost for verification is included within the annual fee except for:

- Travel costs and other disbursements.
- Additional review required of documentation or properties that have submitted information that was verified to be substantially incorrect.
- Additional verification costs will be billed at an hourly rate plus disbursements such as travel costs.

For more information, please consult the [BOMA BEST® 3.0 Application Guide](#) or contact BOMA Canada:

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