



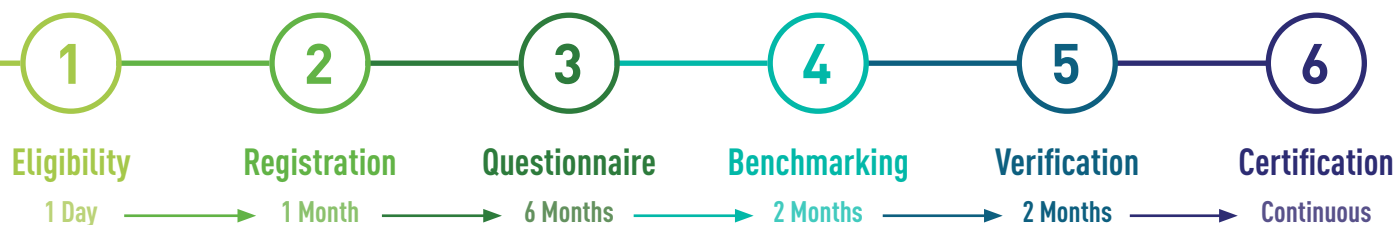
Portfolio Stream
User Guide
for Building Managers

Get BOMA BEST Certified today.

Benefit tomorrow.

Welcome to the BOMA BEST Portfolio Stream User Guide.

This guide will walk you through the 6 Steps to certification:



What is BOMA BEST?

BOMA BEST is a green building management and certification program for all existing building types. It is based on a questionnaire that provides owners, managers and building operators with a framework to critically assess all buildings across ten (10) key areas:

1. Energy
2. Water
3. Air
4. Comfort
5. Health and Wellness
6. Custodial
7. Purchasing
8. Waste
9. Site
10. Stakeholder Engagement

Certified buildings are awarded one of the following five (5) levels:



Certified

BEST Practices +
Score below 20%



Bronze

BEST Practices +
Score between 20 – 49%



Silver

BEST Practices +
Score between 50 – 79%



Gold

BEST Practices +
Score between 80 – 89%



Platinum

BEST Practices +
Score above 90%





Eligibility



Registration



Questionnaire



Benchmarking



Verification



Certification

1: Eligibility

To ensure a smooth certification experience, review the four (4) following eligibility components.

- A. Single Stream vs Portfolio Stream
- B. Property Type
- C. Occupancy
- D. BOMA BEST – BEST Practices



A. Single Stream vs Portfolio Stream

Identify which certification stream you will be using: **Single Stream** or **Portfolio Stream**.

Single Stream

- Each property is individually verified
- Fee is paid every 3 years
- Certification is valid for 3 years

Portfolio Stream

- 20% of the portfolio is verified each year
- Fee is paid annually
- Certification is continuous (doesn't expire)



Participation in the Portfolio Stream is arranged directly between the Property Management Firm and BOMA Canada.

Your property may already be enrolled in the Portfolio Stream. To find out, please contact BOMA Canada.

If your building is in the Single Stream, use the following [guide](#) instead.

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B. Property Type

Each property must be evaluated using the correct questionnaire.

Identify the correct property type for your building based on the primary use of its Gross Floor Area (GFA):

- **Enclosed Shopping Centre:** At least 75% of the GFA is dedicated to retail uses and has indoor common areas
- **Health Care:** At least 75% of the GFA is dedicated to health care uses
- **Light Industrial:** At least 75% of the GFA is dedicated to light industrial uses
- **Multi-Unit Residential Building:** At least 75% of the GFA consists of dwellings with indoor connections
- **Office:** At least 75% of the GFA is dedicated to office-type activities
- **Open Air Retail:** At least 75% of the GFA is dedicated to retail uses with no indoor common area
- **Universal:** Any building that does not fit in the above building definitions

Complete building definitions are available [here](#).

If your building is composed of multiple structures, find out if it can be assessed using one questionnaire [here](#).

C. Occupancy

To be eligible for BOMA BEST Bronze, Silver, Gold or Platinum a building must have a minimum occupancy rate of 70% for 12 consecutive months.

Buildings with occupancy rates below 70% are only eligible for the BOMA BEST Certified level. Contact registration@bomacanada.ca for more information.

D. BOMA BEST – BEST Practices

All buildings must meet the BOMA BEST – BEST Practices to achieve any level of certification.

The BEST Practices are management policies, plans or programs for energy, water, air quality and waste – please download them [here](#).



2: Registration

- A. Create Username
- B. Register Buildings

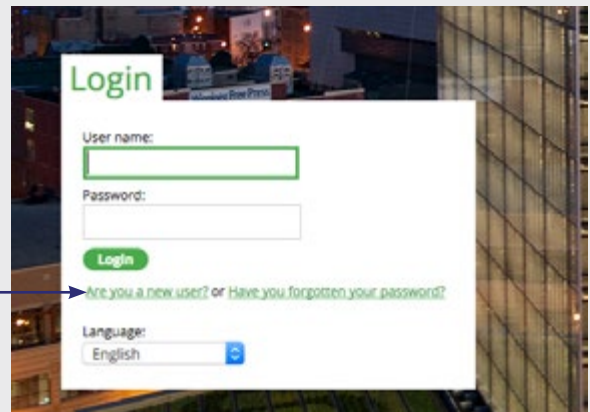
A. Create a username

Start here if you are a new user to the program.

Each username must enter a **unique** Company Name (e.g. "Company - Your Name").

Register your username

Click Here



Create a company name

When creating your company name enter the company name + your name (e.g. Green Building Company - Jane Brown)

Register your company

Enter your details to register your company on the BOMA BEST Online Portal. NOTE: For your company name, enter "Company Name - Your Name" (e.g. Management Company A - Jane Smith)

Company details

Company name:

⚠ This field is required

Country:

Address (4 lines max):

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Complete the rest of the form


Contact details

Contact name:

Contact phone number:

Contact e-mail address:

Please confirm contact e-mail address:



Enter the image text above:

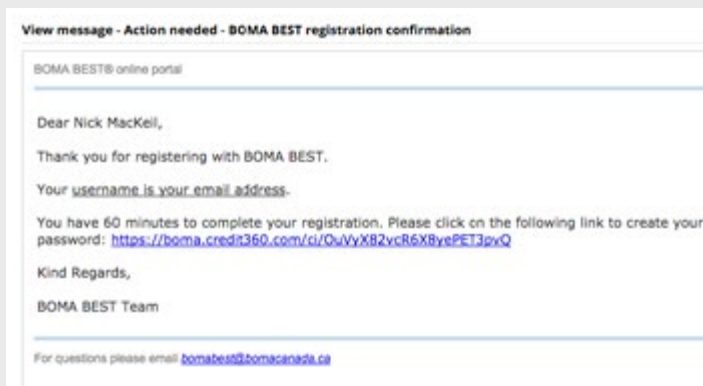
Click Here

Check your email

You will have 60 minutes to click the registration link in the confirmation email.

If expired, email info@bomabest.org

Note: Your username is your email address.



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B. Register Buildings

Next, add your building(s) to your account.

Complete Template

Download the [Building Registration Template](#).

Complete each column and email the completed form to registration@bomacanada.ca

| Local BOMA Association (dropdown) | BOMA Membership (Status where the building is located) (dropdown) | Building Height (dropdown) | Year Built | Building Owner | Ownership status (dropdown) | ABC company with TOB property management | Invoicing Company to Bill |
|-----------------------------------|---|----------------------------|------------|----------------|-----------------------------|--|---------------------------|
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Buildings now visible in your account

Once approved, the buildings will be added to your account and will be visible on your Property page. This may take 1 – 3 weeks.

Properties

Create property | Add users | Export | Undo/Save report | Clear filter

Showing properties 1/16, 1/16 visible | All filter criteria

| Building Name | ID | Street Addr. | Tow. | Province | Gross | Area | Status | Manager | Building Manager |
|---------------------------------|------|----------------------------|-------|----------|---------|-------------------------|---|-------------|-------------------------------|
| Business Building (2017) | 5224 | 40 Wellington Davidson St. | Whic. | ON | 140,000 | Gr... 390,000 GNE | verified | BOMA Canada | Have System Victoria Fazio |
| 50000_1022 Building - Certified | 0000 | 38 Fujon Rd. | Sha. | | 60 000 | Office | Certified To be reviewed certified company | BOMA Canada | BOMA Canada Victoria Fazio |

BOMA Canada will send the invoice to the Invoicing Contact listed in your Registration Form.



3: Questionnaire

- A. Verification Selection
- B. Company-Wide Documentation Review
- C. Action Plan
- D. Start Your Questionnaire

A. Verification Selection

The Portfolio Stream offers a continuous certification process. It requires that each building be verified every five (5) years, equivalent to verifying 20% of the portfolio per year. That annual 20% is called the verification selection.



Whether you have been selected for a verification in the coming year will influence your approach to the questionnaire and what you are expected to complete. Contact BOMA Canada to find out when your building is scheduled to be verified.

If your building has been scheduled for on-site verification in this calendar year, then proceed to Step B.

If your building has not been scheduled for on-site verification in this calendar year, please proceed to Step D.

If you have not been scheduled for on-site verification in this calendar year but you achieve a **Platinum** in the questionnaire, you must now be verified in this calendar year. Notify your head office immediately. Expectations of buildings selected for verification now apply.



Even if your building is not part of the verification sample, it is good practice to review the information in the questionnaire and update on a regular basis

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If you have not been selected for verification, skip this step!

B. Company-Wide Documentation Review

BOMA Canada may conduct a review of the documentation related to the company's approach to the BEST Practices which are applicable on a portfolio-wide basis.



This review is not an approval of the BEST Practices for an individual building.

For every building, the BEST Practices section must be completed and supporting documents uploaded that demonstrate BEST practice implementation at every building.



If you have not been selected for verification, skip this step!

C. Action Plan

Developing an Action Plan can assist the certification process.

1. Understand the scope:

- Review the BEST Practices.
- Do a quick review of the entire questionnaire.

2. Understand your building's current performance:

- Are there questions where you are already meeting the requirements?
- Are there questions where you are not meeting the requirements and where more resources might be needed?

3. Form your team:

- Who will be responsible for each task?
- Conduct regular team meetings.

| Building Manager Role (examples) | Building Operator Role (examples) | External Contractor (examples) |
|--|---|---|
| <ul style="list-style-type: none"> • Register username and building • Review/update existing contracts and purchasing policies • Implement conservation measures • Gather all supporting documentation | <ul style="list-style-type: none"> • Organize audits for energy, water, and waste • Identify high efficiency systems • Review/update environmental health and safety programs • Create system operation manuals | <ul style="list-style-type: none"> • Perform audits for energy, water, and waste • Perform hazardous materials survey |



4. Quick-wins:

- What management programs, plans or policies can be immediately put into place with little additional effort?
- What low-cost/no cost initiatives can be easily put into place to reduce operating costs? (e.g. re-schedule equipment start-times; installing sensors in washrooms and garage)

5. Identify future capital improvements:

- What high-impact initiatives could be included in the capital plan? (e.g. high-efficiency boiler)

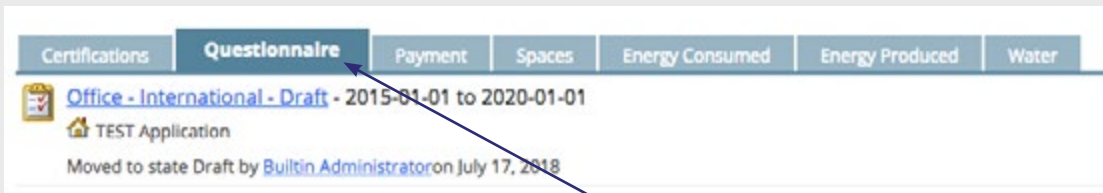
D. Start Your Questionnaire

It's time to start your assessment questionnaire.

Work your way through all categories. Remember, you must meet every BEST Practice to achieve any level of certification.

Start Questionnaire

Access the BOMA BEST assessment from the "Questionnaire" tab.



Click Here

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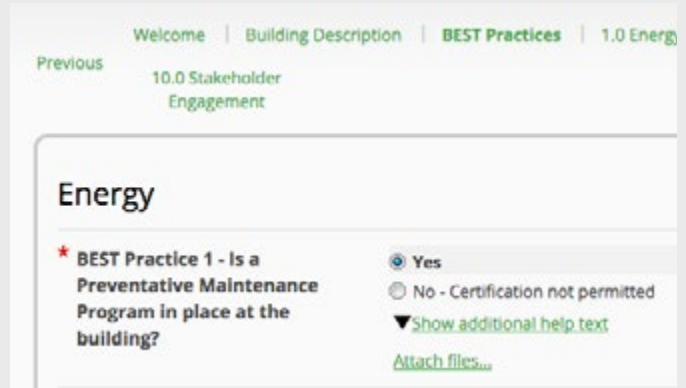
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If you have not been selected for verification, you do not need supporting documentation at this time.

Achieve BEST Practices

Review all BEST Practices:
Every BEST Practice must be answered “Yes” or “BOMA-Accepted Equivalent”



For each building that will be verified, every BEST Practice must have supporting documentation uploaded to the portal even if your corporate policies have been pre-approved.



If you have not been selected for verification, you do not need supporting documentation at this time.

Complete all Categories

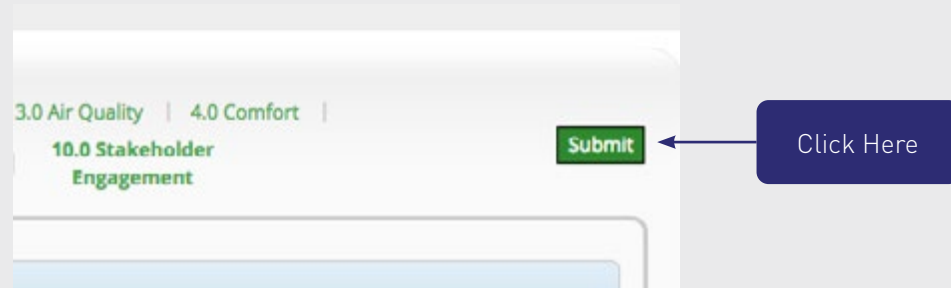
Continue with the rest of the questionnaire.
Supporting documentation must be available for all questions answered “Yes” or “Not Applicable”.
This documentation does not need to be uploaded in the portal (unlike the BEST Practices) but must be available at the time of the verification.





See your Score

To see your score, visit the last category and click on the “Submit” button that appears.

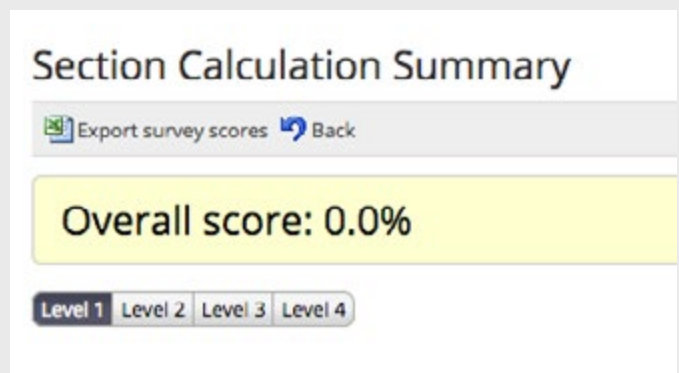


Don't worry, this won't notify anyone! You may do this as often as you like.

Detailed Calculation Summary

You can choose how much scoring detail to show. Level 4 provides the most.

Scroll down until you see your points.





4: Benchmarking

- A. Overview
- B. Instructions

A. Overview

WHAT: Buildings can achieve points for benchmarking energy and water. Benchmarking is the ongoing review of the building’s energy or water consumption to determine if the building’s performance is getting better or worse.

A building’s performance is measured with three (3) key metrics:

- Energy Use Intensity (EUI): Provides the property’s energy use per square meter, normalized for weather conditions
- Water Use Intensity (WUI): Provides the property’s water use per square meter
- ENERGY STAR Score: An index score expressed on a 1-to-100 scale; score of 50 indicates that the building performs better than 50% of all similar buildings

WHY: Benchmarking allows organizations to identify opportunities to optimize energy and water use and reduce overall operating costs – improving your bottom line.

WHERE: Questions on benchmarking appear for all buildings in the Energy category (sub-section 1.2 Assessment) and Water category (sub-section 2.2 Assessment).

HOW: There are two options available for benchmarking energy and water:

1. **BOMA BEST Online Portal**
2. **ENERGY STAR Portfolio Manager**

If you are already benchmarking using ENERGY STAR Portfolio Manager, simply continue using it.

Otherwise, both options are available to you.



B. Instructions

1. Carefully read the instructions applicable to your preferred data entry option.



Benchmarking requires care and consideration. Failure to follow the instructions exactly WILL lead to errors.

Instructions for
ENERGY STAR
Portfolio Manager

Instructions for
BOMA BEST
Online Portal

2) Enter accurate data

Points are awarded in BOMA BEST for different performance metrics. The following table outlines what data must be provided for each, regardless of which option is selected for data entry.



Accurate data MUST be entered or your performance will not be calculated.


| Energy Use Intensity (EUI) | Water Use Intensity (WUI) | ENERGY STAR Score |
|--|---|--|
| <ul style="list-style-type: none"> • Available to all property types • 24 consecutive months of energy data is required • Data cannot be older than the last 36 months • Data must be entered in individual months. E.g. <ul style="list-style-type: none"> • March 1, 2018 – March 31, 2018 • April 1, 2018 – April 30, 2018 | <ul style="list-style-type: none"> • Available to all property types • 12 consecutive months of water data is required • Data cannot be older than the last 18 months • Data can be entered in a bulk amount. E.g. <ul style="list-style-type: none"> • January 1, 2018 – December 31, 2018 | <ul style="list-style-type: none"> • Only applicable to office and select universal properties • No additional data needed. Calculated based on the same data provided for EUI |



3) Generate values in Property Characteristics Table

Once the steps have been followed correctly, values will automatically appear in your building's Property Characteristics Table (regardless of which option was used for data entry).

Property characteristics Change...

| | | | |
|---|---|---|----------------------|
|  | Address: | 1 Dundas Street West, Suite 1801, Toronto, ON, M5G1Z3, Canada | |
| | Property Type: | Office - Office | |
| | Gross Floor Area (for ENERGY STAR): | 500,000 Square Feet | |
| | ENERGY STAR Score: | 100 | ← Values appear here |
| | Total GHG emissions: | 133 Metric Tons CO2e | |
| | Water Use Intensity : | 678.15 m ³ /m ² | |
| | Weather-normalized Site Energy Use Intensity: | 0.260 GJ/m ² | |
| | | | |



Points will not be awarded in BOMA BEST if the Property Characteristics Table is not populated.

Upload screenshot

Upload a screenshot of your Property Characteristics Table as supporting evidence. Manually enter your results in the subsequent designated fields.

1.2 Assessment

01.02.01 - Do you benchmark energy performance using either BOMA BEST or ENERGY STAR Portfolio Manager portal?

BOMA BEST
 ENERGY STAR
 No

[▼ Show additional help text](#)
[Attach files...](#)

Click here

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If you have not been selected for verification, skip this step!

Contact BOMA Canada to find out when your building is scheduled to be verified.

5: Verification

On an annual basis, BOMA Canada and the participating firm will identify which properties will receive a verification in that calendar year.

Approximately 20% of the portfolio is verified each year. If your building has been scheduled for verification complete the following steps.



Review the [Verification Checklist](#) to confirm that you are ready for verification.

Request Verification

When you are ready, complete the editable [Verification Request](#) form and return to: verification@bomacanada.ca

The screenshot shows the BOMA BEST Verification Form. At the top is the BOMA logo. Below it is the title 'BOMA BEST Verification Form'. There are several input fields: 'Management Company' with a dropdown arrow, 'Building Name', 'Building Address', and 'Building Verification Contact Information'.

All Platinum buildings are subject to an on-site verification and an off-site (remote) verification. Applicants may be contacted for additional information to support the remote verification. The Certification level and score is only finalized once this verification is completed.¹

A Final Verification Report is issued summarizing the building's performance and final score. It details changes made to the verifier's questionnaire resulting from the verification. These changes do not automatically appear in your questionnaire. We recommend applying them.

Update your questionnaire

Review the Final Verification Report and apply changes to your questionnaire.

The screenshot shows a navigation bar with tabs: 'Certifications', 'Questionnaire', 'Payment', 'Spaces', 'Energy Consumed', 'Energy Produced', and 'Water'. The 'Questionnaire' tab is selected. Below the tabs, there is a list of applications. One application is highlighted: 'Office - International - Draft - 2015-01-01 to 2020-01-01'. Below this application, it says 'TEST Application' and 'Moved to state Draft by BuiltIn Administrator on July 17, 2018'. A blue button labeled 'Click Here' has an arrow pointing to the application name.

¹ Buildings achieving other levels of certification may also be subject to a random quality assurance assessment performed by BOMA Canada. This may result in a score change. Applicants will be notified of their final score when it is available.



6: Certification

A. Certification – Completed on-site verification

B. Certification – Did not yet complete on-site verification

Each individual building will receive an individual certification. There is no portfolio-wide certificate.

A. Completed on-site verification

If your property received an on-site verification, you will be issued a certificate with a renewal date of 5 years. The certificate year of expiry will coincide with the next on-site verification visit.

B. Did not yet complete on-site verification

If your property is **new** to the portfolio and did not receive an on-site verification, your building’s status will be updated to certified at the level indicated in the completed questionnaire. A certificate will be issued for your building.

If your property **already existed** in the portfolio and did not receive an on-site verification, no changes will be made to your certificate. It will be updated upon your next on-site verification (5 years from the last verification date).

View your Certification Record

Congratulations!
You are now Certified.
Your information will appear in the ‘Certifications’ tab.

| Ref | Certification Level | Certification Score | Certification Date | Certification Expiry Date | Pr |
|-----|---------------------|---------------------|--------------------|---------------------------|----|
| | | | | | |



Celebrate your achievement!

Consult our [marketing recommendations](#) to celebrate your achievement!



BOMA BEST as a management tool

You have unlimited access to the BOMA BEST Online Portal for the duration of your certification.

This gives you the opportunity to update the questionnaire as improvements are made to your building and perform regular benchmarking of your energy and water, making recertification easier!

Still have questions? Review our [Frequently Asked Questions](#).

Have suggestions or feedback on how to improve this guide? Contact us at info@bomabest.org