

Portfolio Stream
User Guide
for Portfolio Managers

Get BOMA BEST Certified today.

Benefit tomorrow.

Welcome to the BOMA BEST Portfolio Stream User Guide.

What is the Portfolio Stream?

The Portfolio Stream of the BOMA BEST Sustainable Buildings program offers Portfolio Managers a cost-effective, yet rigorous method for ensuring that buildings in a portfolio remain certified year over year.

It features the following administrative processes:

- Each building is invoiced annually
- Verification is performed on 20% of the portfolio annually
- Certification is continuous (never expires)

Portfolio Stream buildings are required to meet all technical requirements laid out by the BOMA BEST program.

How do I get started?

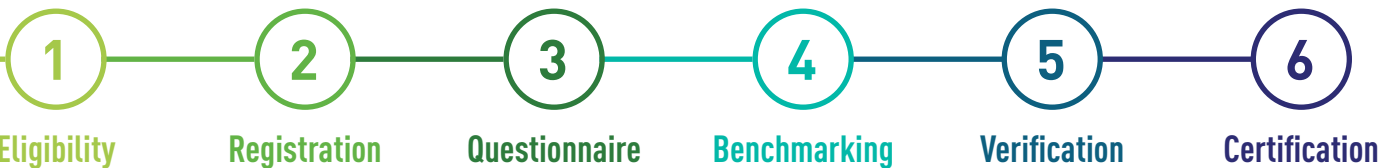
The Portfolio Stream is administered by BOMA Canada directly with the company's head office, typically the Portfolio Manager. The Portfolio Manager will be responsible for communication with each individual building manager within the portfolio.

This guide will help Portfolio Managers with each step of the process.

We have also created a guide for Building Managers in the Portfolio Stream. It can be downloaded [here](#).

Please contact registration@bomacanada.ca with any questions.

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%



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Certification

1: Eligibility

To ensure a smooth certification experience, review the following eligibility components.

- A. Property Type
- B. Occupancy
- C. BOMA BEST – BEST Practices
- D. Corporate Requirements
- E. Approval

A. 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](#).



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B. 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.

C. 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](#).

D. Corporate Requirements

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

The following four (4) topics must be clearly understood and agreed upon prior to registration.

- i. Number of Properties
- ii. Central Point of Central Point of Contact
- iii. Verification
- iv. Invoicing Protocol



Eligibility



Registration



Questionnaire



Benchmarking



Verification



Certification

i. Number of Properties

A portfolio can be composed of any combination of property types with a prescribed minimum number based on the mix of the building types.

You do not need to register every building in your portfolio to participate in the Portfolio Stream. Only include the properties you wish to certify.

Office, ESC, Universal or Health Care	LI, OAR or MURB	Any other combination
Minimum 5 properties	Submit list to BOMA Canada	Submit list to BOMA Canada

Contact to registration@bomacanada.ca to review your list.

ii. Central Point of Contact

The Property Management Firm or Owner must identify a central point of contact within the organization to manage the administrative requirements of the Portfolio. This person will act as a liaison between BOMA Canada and the building management teams to facilitate the following:

- Distribution of notices and forms from BOMA Canada to the property management teams (e.g. Building Registration Form; Verification Request Form)
- Monitoring the verification process and ensuring compliance with the annual schedule
- Notification to BOMA Canada of properties that should be added or removed
- Regular meetings with BOMA Canada to ensure the process is going smoothly

iii. Verification

This Stream provides a continuous certification protocol where each building is verified every five years, meaning that 20% of the portfolio is verified each year. Even if a building is not verified in a given year, it will still be considered certified thanks to the protocol.

- BOMA Canada and the Property Management Firm or Owner will establish an annual verification schedule in Step 3: Questionnaire. All selected buildings must be successfully verified for the portfolio’s certification to remain valid. Properties must be verified based on the schedule or all properties risk their certification status.
- BOMA Canada understands that buildings may change hands and will modify the annual verification schedule to reflect additions or removals from the portfolio.



iv. Invoicing Protocol

Next, the property management firm or owner must identify a billing protocol for their portfolio.

1. Each property is invoiced on an annual basis. Billing will occur at a pre-determined time of year, agreed upon by both parties. The invoicing period is unrelated to the verification schedule.
2. The property management firm or owner must notify BOMA Canada of their preferred invoicing process prior to the first invoice being issued (e.g. if each building is billed individually or if all invoices should be sent to the same corporate address).
3. BOMA Canada will only issue invoices to the property management firm or owner, not to third-party consultants. This ensures continuity in the invoicing process year over year.

E. Approval

To complete the eligibility process, download the [Portfolio Stream Application Form](#). All new portfolios must be approved prior to registering buildings in the Online Portal.

Complete and email it to registration@bomacanada.ca

Once it has been approved, proceed to Step 2: Registration. It is the portfolio manager's responsibility to inform building managers of their inclusion in the Portfolio Stream.



2: Registration

- A. Create Username
- B. Register Buildings

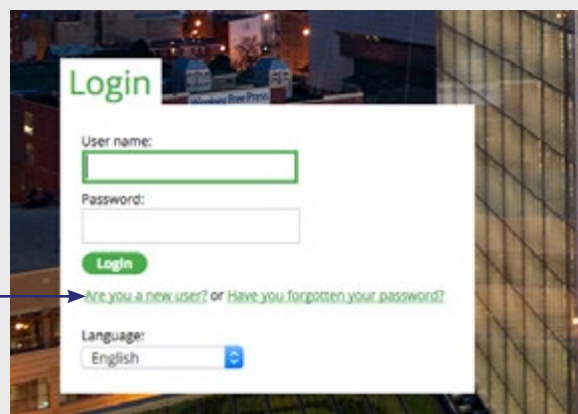
A. Create Username

To see all the buildings within your Portfolio, start here to create a username.

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.

View message - Action needed - BOMA BEST registration confirmation

BOMA BEST® online portal

Dear Nick MacKell,

Thank you for registering with BOMA BEST.

Your username is your email address.

You have 60 minutes to complete your registration. Please click on the following link to create your password: <https://boma.credn360.com/ci/OuVyXB2vcR6X8yrePET3pvQ>

Kind Regards,

BOMA BEST Team

For questions please email bomabest@bomacanada.ca





B. Register Buildings

Once your application has been approved, it's time to register your buildings in the BOMA BEST Online Portal.

Complete Template

Complete the [Building Registration Form](#) or distribute it to property managers.

Email the completed form to registration@bomacanada.ca

Use this same form to add buildings to an existing portfolio.

Invoicing

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

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



3: Questionnaire

- A. Verification Selection
- B. Company-Wide Documentation Review

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.



Once the verification calendar has been completed, notify building managers if their building will be verified in the upcoming year or not.

Buildings that are included in the upcoming verifications must complete all steps in the process, as outlined in the [User Guide for Building Managers in the Portfolio Stream](#).

Buildings that are not included in the upcoming verifications can complete the questionnaire but do not need supporting documentation at this time.

If a building is not included in the upcoming verifications but earned **Platinum** in the questionnaire, they **must** be verified. They must therefore notify Portfolio Managers and be included in the upcoming verification schedule.

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.

If this is the case for your Portfolio, BOMA Canada will be in touch.



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.

Building Managers will now proceed to completing their building's questionnaire.



4: Benchmarking

- A. Overview
- B. Instructions

A. Overview

Benchmarking is completed at the building level. Building Managers may require support from the Portfolio Manager if there is a corporate ENERGY STAR Portfolio Manager account.

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

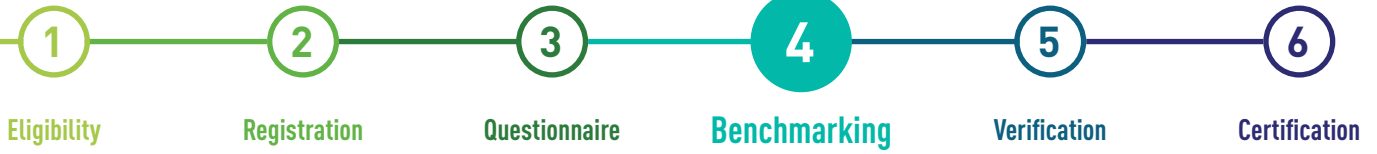
2) Enter accurate data

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
	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

Values appear here



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

Upload screenshot

Building Managers must upload a screenshot of the Property Characteristics Table as supporting evidence and manually enter the results in the subsequent designated fields.

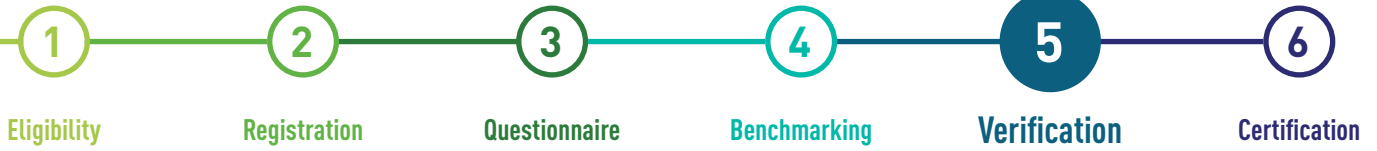
1.2 Assessment

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



5: Verification

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

Approximately 20% of the portfolio is verified each year.



Buildings included in the verification schedule should review this [Checklist](#) to confirm they are ready for verification.

Request Verification

Buildings that are ready will complete the editable [Verification Request](#) form and return to: verification@bomacanada.ca

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

Applicants are encouraged to review the Final Verification Report and apply changes to the questionnaire.

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

Building Managers will receive certificates for each individual building. There is no portfolio-wide certificate.

A. Completed on-site verification

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

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

View the Certification Record

Congratulations!

Your portfolio is now certified.

You can see each building’s record in the “Certifications” tab.

Ref	Certification Level	Certification Score	Certification Date	Certification Expiry Date	Pr
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Celebrate your achievement!

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



BOMA BEST as a management tool

You and your Building Managers have unlimited access to the BOMA BEST Online Portal for the duration of your portfolio's certification.

This gives Building Managers the opportunity to update the questionnaire as improvements are made to the building and perform regular benchmarking of their 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