

### BOMA International Awards Committee



Kim Saunders, BOMA Fellow Chair Eastport Properties BOMA/Canada



Susan Engstrom, RPA, FMA, BOMA Fellow Co-Vice Chair Bridge Investment Group BOMA/Phoenix

Macky Guilherme, CPM, RPA, FMA Co-Vice Chair Capital Associates BOMA/Raleigh Durham









### Susan Hammer General Manager at JLL Chicago, Illinois

RPA, BOMI-HP, LEED AP O+M

2016 International TOBY Winner for Over 1 Million Square Feet *AMA Plaza* 

BOMA International Executive Committee/ Liaison to Awards Committee BOMA/Chicago Co-Chair Awards Committee



### **BOMA/Chicago**



#### **Jaclynne Madden**

MBA/CAE Director of Education Building Owners and Managers Association of Chicago



Building Owners and Managers Association of Chicago



THE OUTSTANDING BUILDING OF THE YEAR AWARDS  $\ensuremath{\mathbb{S}}$ 



## in a CHANGING WORLD





# **Polling Question**

#### l am a:



**Potential TOBY Applicant** 

**Potential TOBY Judge** 

**Previous Finalist** 

**Previous Winner** 

**Vendor/Supplier Partner** 



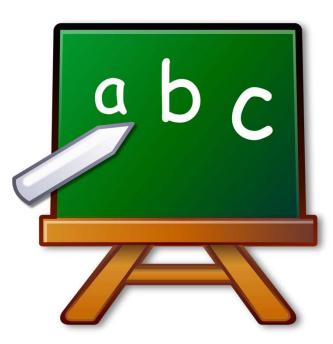
## **Today's Agenda**

- Section 1: TOBY Basics & Overview
- Section 2: TOBY Competition in a Changing World
- Section 3: Best Practices
- Section 4: Question and Answer Session





### Section 1: TOBY BASICS





## Why TOBY

- Recognize excellence in building management & operations.
- Ultimate goal for building operators
- Most prestigious award in the industry
- Market Differentiator TOBY buildings outperform other similar buildings.

Brand Recognition Team Building Owner Recognition





## What do I need to consider if I apply?



Owner Buy-In Preparation Team Participation Timeline Cost/Budgeting



## **Three Levels of Competition**

#### **1. Local**

- 2. Regional
  - Mid-Atlantic, Southern, Southwest, North Central, Midwest Northern, Pacific Southwest, Pacific Northwest, Canada

#### **3. International**

- Includes Regional winners plus world-wide competitors.
- July 2021 BOMA International Conference in Boston MA



### **TOBY Categories**

#### **17 Categories – can only choose ONE!**

5 Categories Based on Square Feet 13 Other Property Types <u>RED < than Five Entries</u>

#### Under 100,000 SF

100,000-299,999 SF 250,000-499,999 SF 500,000-999,999 SF Over 1 Million SF



#### Suburban Low-Rise

Suburban Mid-Rise Corporate Facility Earth Historical Renovated Industrial Medical Mixed Use Public Use Retail • Open Strip • Enclosed Mall

## Which category is Best for Us?



**Follow International Guidelines** 

Read Entry Requirement Descriptions Carefully

Historically, the Square Footage Categories have the Most Entries

Make it a Team Decision



### **Important Dates & Deadlines**

**Check with Local and Regional Contacts for** 

deadlines.

**Regional Winners announced in April 2021** 

International TOBY Gala: July 2021 in Boston, MA



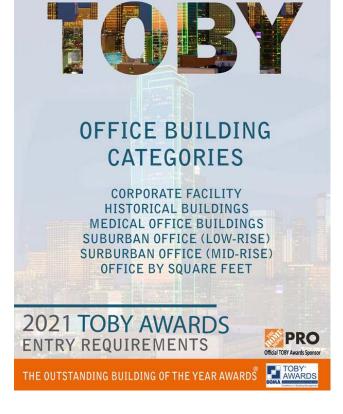


## **Entry Requirements**

The building must be occupied for at least one full year from the date of occupancy of the first tenant by **June 15, 2021** with a minimum of 12 months building operations.

All categories must be at least **50%** occupied.

Review Individual Categories for Separate Requirements.





### **Local TOBY Process**



**Prepare and Write the Application** 

Strongly Recommend the Use of International Guidelines and Online Portal



## **TOBY Application Sections**

#### **Online TOBY Portal Application for Regional & International**

- Application worth 100+ points
- Building Description/Building Standards/Photos: 5 points
- Community Service: 15 points
- Tenant Relations: 15 points
- Energy Conservation: 20 points
- Environmental & Regulatory, Sustainability, Waste: 15 points
- Emergency Preparedness/Life Safety: 15 points
- Training for Building Personnel: 15 points



## **TOBY Application for Earth**

#### **Online TOBY Portal Application for Regional & International**

- Application worth 110+ points
- Building Description/Executive Summary/Photos: 5 points
- Reduction of Environmental Risk: 15 points
- Indoor Air Quality/Green Cleaning:15 points
- Recycling: 10 points
- Community Service: 10 points
- Energy Conservation: 20 points
- Water Conservation: 10 points
- Interior Finish: 10 points
- Indoor Air Quality/Green Cleaning: 5 points
- Occupant Communication/Education: 5 points
- Case Study: 5 points



### **8 Week Timeline**

- Week 1: Stakeholder buy-in, confirm category, read guidelines, benchmark for Energy Star and share with BOMA Int'l, begin gathering supplemental information; schedule inspection prep; <u>delegate tasks.</u>
- Week 2: Write Building Description & Building Standards sections; make a list of required photos; arrange for photo shoot.
- Week 3: Write Community Impact and Tenant Relations
- Week 4: Write Energy Conservation; begin Env., Reg, Sust, Waste (ERSW)
- Week 5: Complete ERSW, Write Emergency Preparedness/Life Safety
- Week 6 Complete Training for Building Personnel, begin review of all sections, confirm all documents.
- Week 7: Final edits and upload into the TOBY online portal
- Week 8: Final proof, check attachments and SUBMIT



# **TOBY & BOMA 360 Comparison**

If your building has achieved the BOMA 360 designation (or LEED or in Canada BOMA BEST), then you are strategically placed to compete for a TOBY award based on the work you have already done!

Refer to the BOMA 360 and TOBY Comparison document.

Keep in mind that these are separate programs/awards.

#### **RENOVATED BUILDING**

North Central Region

1 North Dearborn Chicago, Illinois Managed by MB Real Estate Services Inc. Owned by OND Property LLC Year Built: 1929



вома

BEST

Canada Region

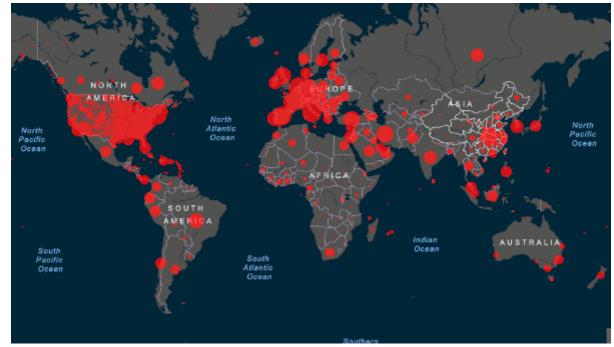
**101 McNabb Street Markham, Ontario, Canada** Managed by Crown Property Management Inc. Owned by OP Trust Office Inc. Year Built: 1984

Southern Region

Doctor's Center at Emory St. Joseph's Hospital Atlanta, Georgia Managed by Lillibridge Healthcare Services Inc. Owned by LHT North Atlanta, LLC Year Built: 1980



### Section 2: TOBY In A Changing World



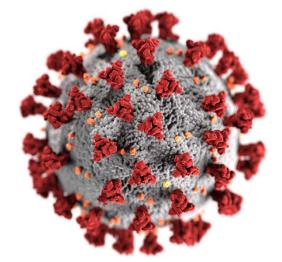


## 2020/2021 TOBY Season In a New World

#### It is not what has changed...



#### But what has changed us!





## **TOBY Application Changes – Energy Star**

#### 8. <u>All U.S. Entrants</u> – ENERGY STAR<sup>®</sup> has suspended all new and renewal certifications in 2020.

- Provide a copy of the Statement of Energy Performance printed from ENERGY STAR<sup>®</sup> received within the past 24 months.
- b. Share your data with BOMA International in the ENERGY STAR<sup>®</sup> online portfolio manager. Any entry that does not include both 1 and 2 will not be eligible to compete at the International level.

To share your data with BOMA International, go to the Facility Summary page on the ENERGY STAR<sup>®</sup> website by clicking on the facility name on the My Portfolio page. Select "Add user to share this facility" under the Sharing Data section (on the right-hand side of the page) and follow the instructions.



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- US ENTRANTS: EPA Suspended new and renewal certification for 2021
- Statement of Energy Performance (SEP) accepted if printed within 24 months prior to the application deadline.
- Canada and other International entrants – No Change.
- NOTE: The SEP is mandatory as noted in the guidelines. All other EnergyStar documentation is not accepted and could result in disqualification.

## **TOBY Application Changes – Community** Impact

NOTE: Due to the impact of the COVID-19 pandemic in 2020, community impact examples and data that occurred within the past 24 months can be referenced in this section. **COMMUNITY IMPACT** 





### **TOBY Application Changes – Tenant Relations/Communications**

- ✓ NOTE: Due to the impact of the COVID-19 pandemic in 2020, tenant relations/communications examples that occurred within the past 24 months can be referenced in this section.
- ✓ A description of how the building's management team communicated with its tenants during COVID-19.
- ✓ 3 photos on how you fitted your building for COVID-19





### **TOBY Application Changes – Energy Conservation**

NOTE: Due to the impact of the COVID-19 pandemic in 2020, training for building personnel can be conducted virtually via online courses rather than by in-house training, classroom training or, staff meetings. Participation in BOMA-sponsored event may be virtual, as well. **Building Staff/Tenant Education** 





### **TOBY Application Changes – Emergency Preparedness**

**NOTE:** Due to the impact of the COVID-19 pandemic in 2020, entrants can use data up to 24 months prior to application deadline.

For more information about emergency evacuations, please refer to BOMA International's document *Preparing for Emergency Evacuations –* 

www.boma.org/coronavirus





## **TOBY Application Changes – Training for Building Personnel**

NOTE: Due to the impact of the COVID-19 pandemic in 2020, training for building personnel can be conducted virtually via online courses rather than by in-house training, classroom training or, staff meetings. Participation in BOMA-sponsored event may be virtual, as well.





## **TOBY Application Changes – Building** Inspection

NOTE: Due to the impact of the COVID-19 pandemic in 2020, BOMA acknowledges that on-site building inspections may be impacted. TOBY judges have been given the option to conduct on-site or virtual inspections at the discretion of the BOMA local association.

For more information, please refer to the TOBY Awards Virtual Site Inspection document <u>https://toby.boma.org/Documentation/2020\_06\_</u> <u>16\_TOBY\_Inspections%20\_COVID\_19\_FINAL.docx</u> All areas and documentation must be addressed.

70% minimum score required.

Refer to TOBY Awards Virtual Site Inspection document.



## **Onsite or Virtual Inspection**

On-site inspections may not be practical.

BUT – an inspection – on-site or virtual is required to preserve the integrity of the awards process.

On-line or virtual inspections are at the discretion of BOMA local associations

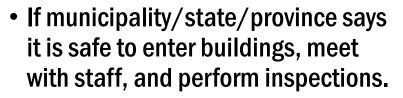
The same judging process should be used, if not for the entire local competition, but at least for all buildings in the same category.



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BULLING NAME		NAME OF JUDGE
ADDRESS		TOUR START TIME
CITY		TOUR END TIME
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## **Onsite Inspection - Requirements**





- Judges and building staff agree they are willing to do so.
- Judges establish guidelines and communicate to building teams.
- Follow all required guidelines for social distancing and PPE mandates.



## **Onsite Inspection**

Further suggestions to reduce risk:

- Conduct documentation review virtually through a screen sharing application.
- Conduct site visits after hours
- Reduce the number of the building side team to the lowest number needed to answer questions. Team members should be consistent throughout competition – such as Manager, Engineer, Security, etc.





## **Virtual Inspection**



**Requirements:** 

All mandatory documentation

Photos to show features of the building as identified in TOBY guidelines.

Screen share to show areas of the building – virtual walk-through



## **Onsite & Virtual Inspection**

- Prescribed inspection areas minimum 70% score required.
- Evidence of Evacuation Drills depends on jurisdiction.
- Preventive Maintenance Manual
- Standard Operating Procedures Manual
- Financial Reporting
- Purchasing Policies
- COI Comprehensive & Liability Insurance
- Certificate of Occupancy or Business
- License
- THIS FORM IS MANDATORY FOR REGIONAL & INTERNATIONAL COMPETITION: FAILURE TO SUBMIT WILL RESULT IN DISQUALIFICATION.

Prepare your onsite inspection to touch on each aspect. Practice with your team.





TOBY INSPECTION VERIFICATION

Building Name: Local/City/Jurisdiction: Category:

applicable to the property type )	Yes	N/A	Comments
Entrance /Main Lobby			
Security/Life Safety			
Management Office			
Elevators			
Multi-Tenant Corridors			
Restrooms			
Stairwells			
Typical Tenant Suite			
Central Plant/Engineering Office			
Equipment Rooms/Service Areas			
Evidence of Evacuation Drills conducted within past 12 months*			
Roof			
Parking facilities (grade only if Owner/Agent Operated)			
Landscaping/Grounds			
Refuse Removal and Loading Dock Areas			
Tenant Amenities			
Preventive Maintenance Manual			
SOP Manual/Documentation of Standard Operating Procedures (online or printed)			
Regular Financial Reports/Accounting Software			
Purchase Policies			

evidence of the moratorium, a copy of the previous year's fire drill, and documentation around any virtual drills of digital training.

as one of the judges for the local BOMA TOBY Awards Program, I have inspected the above indicated areas at the building site using BOMA International's "The Outstanding Building of the Year" program

Judge's Name (please print): Judge's Signature: Date:

TOBY AWARD SPONSOR



## **Virtual Inspection**

#### Security/Life Safety

y/ Life Survey		
Access Control/Lobby	P,S	P = PHOTO
Professionalism of Staff	P,S	1 111010
Cameras	D	
After Hours Access	D	S = TOUR BY SCREEN
Security Manual/Emergency Procedures	D	SHOT
Staff Training and Development	D	3001
Access Control/Loading Dock	P,S	
Fire and Life Safety Equipment	D,S	D = DOCUMENTS
Fire Safety Plan	D	
Emergency Generator (cleanliness, testing procedures, safety)	P,D	SHARED VIA SCREEN
Evidence of Evacuation Drills conducted within past	D	
Evidence of Evacuation Drins conducted within past 24 months	7	
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## **Fire Drills**

AWARDS

If an evacuation drill is unable to be performed due to jurisdictional moratoriums, please provide evidence of the moratorium, and a copy of the previous year's fire drill, and documentation around any virtual drills or digital training.

.ocal/City/Jurisdiction:						
Category:						
Areas Inspected (All items are required for eligibility to compete if applicable to the property type )	Yes	N/A	Comments			
Entrance /Main Lobby						
Security/Life Safety						
Management Office						
Elevators						
Multi-Tenant Corridors						
Restrooms						
Stainwells						
Typical Tenant Suite						
Central Plant/Engineering Office						
Equipment Rooms/Service Areas						
Evidence of Evacuation Drills conducted within past 12 months*						
Roof						
Parking facilities (grade only if Owner/Agent Operated)						
Landscaping/Grounds						
Refuse Removal and Loading Dock Areas						
Tenant Amenities						
Preventive Maintenance Manual						
SOP Manual/Documentation of Standard Operating Procedures (online or printed)						
Regular Financial Reports/Accounting Software						
Purchase Policies						
<ul> <li>If an evacuation drill is unable to be performed due to jurisdictional morato evidence of the moratorium, a copy of the previous year's fire drill, and docur drills of digital training.</li> </ul>						
Judge's Affidavit						

TOBY INSPECTION VERIFICATION

s one of the judges for the local BOMA TOBY Awards Program, I have inspected the above indicated reas at the building site using BOMA International's "The Outstanding Building of the Year" program

Judge's Name (please p

Judge's Signature:

BOMA



## **Virtual Inspection**



**Requirements:** 

All mandatory documentation

Evacuation Drills Financial Reports SOP Manual Purchase Policies PM Manual

Photos to show features of the building as identified in TOBY guidelines.

Screen share to show areas of the building – virtual walk-through



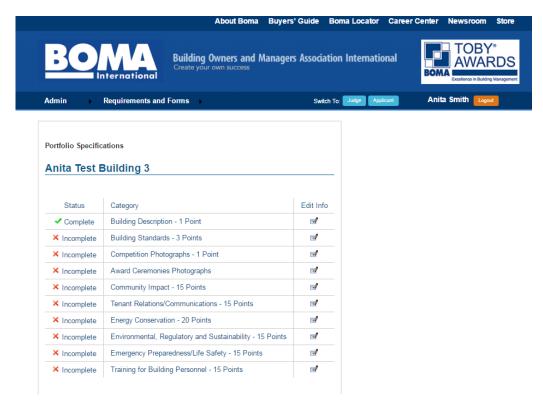
#### Section 3: BEST PRACTICES





#### **TOBY Portal**

# Using the International Portal





#### **TOBY Portal**

How do you use attachments to supplement your application?

How do judges use your attachments and how important are they?



Types of Attachments Site Plan Building & Team Photos Statement of Energy Performance Tenant Event Examples Organizational Chart & More



# Which Categories Present the Greatest Challenge?

#### **Community Impact**



**Tenant Relations** 

**Energy Conservation** 



Environmental, Regulatory Sustainability & Waste



Emergency Preparedness & Life Safety



**Building Personnel Training** 





#### **EARTH Award – ADDITIONAL CATEGORIES**

Reduction of Environmental Risk



Water Conservation

٦P

**Energy Conservation** 



**Interior Finish** 



Recycling



Indoor Air Quality/ Green Cleaning



Occupant Communication/ Education

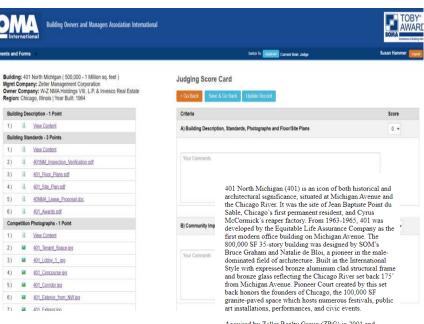
Case Study





#### **Best Practices for Online Portal**

- Create as a Word document and copy/paste into the portal
- Be aware of the specific word count: these word counts are different for each category
- Upload attachments as directed
- Chronicle outcomes
- Write in active voice



Acquired by Zeller Realty Group (ZRG) in 2001 and Walton Street Capital in 2017, 401 has been continually redeveloped with modern mechanical systems and



#### **Other Stakeholders**

Include vendors, service providers and other stakeholders (including tenants and owners) to help prepare and share in the success





#### Volunteer to be a TOBY Judge





- Important to help fellow property management teams to achieve this prestigious award
- Enhances the property management field and advances the promotion of best practices
- Provides valuable service, support and advice to fellow property managers
- Provides celebration opportunities with peers
- Encourage those who need to keep trying
- Supports and promotes excellence in building management.

#### **Final Thoughts**

TOBY is not a "beauty" contest, but....

Goal is to win locally but keep progressing to Regional & International

Images are critical for Regional & International Judging

Customize the application to your building

Make it a Management Team Decision and Effort



#### **Questions for You.**

Are you Still on the Fence About Applying for TOBY?

What's the Worse Thing that Could Happen if you Enter?

Do you Hate to "Not Win?"





Building Owners and Managers Association International



HOME FAQS FEES AND DEADLINES ENTRY REQUIREMENTS



#### Find all TOBY information at https://toby.boma.org





### **Questions?**











