

1. Business of the Building: Financial Acumen 16%

1.1 Economic aspects of sustainable investments 3%

1.1.1 Understand the ROI of high-performance improvements

1.1.1.1 Work to maximize financial performance through improved resource use

1.1.2 Knowledge of rebate programs and tax incentives

1.1.2.1 Research and apply for rebates for water and energy investments

1.1.2.2 Take advantage of tax incentives for sustainability investments

1.1.3 Knowledge of financing approaches to sustainability initiatives

1.1.3.1 Leverage financing resources, including internal capital budgets, off-sheet financing, and utility and tax rebate programs, among others, in order to mitigate overall costs of high-performance projects

1.2 Accounting principles 5%

1.2.1 Knowledge of financial reports

1.2.1.1 Review and analyze income statements, balance sheets, accounts receivable and accounts payable, general ledger, and other financial statements

1.2.1.2 Forecast financial performance based on analysis of financial reports

1.2.2 Knowledge of basic accounting

1.2.2.1 Analyze and approve monthly financial statements in cooperation with accounting department

1.2.2.2 Practice industry standard accounting principles

1.2.2.3 Identify expenditures as either operating expenses or capital expenses

1.2.3 Working knowledge of accounting software

1.2.3.1 Use accounting software to review and (or) run monthly reports, pro forma, budgets, and track AR, AP, and other financial documents

1.2.3.2 Input data and extract reports using spreadsheets and (or) accounting software

1.3 Financial management and reporting 7%

1.3.1 Knowledge of asset management and ability to support the asset management team

1.3.1.1 Anticipate Asset Manager needs

1.3.1.2 Plan for the long-range financial performance of overall asset(s)

1.3.1.3 Understand owner's financial goals

1.3.2 Knowledge of budgeting principles

1.3.2.1 Develop and manage to capital budgets and operating budgets

1.3.2.2 Facilitate 90-day cash flow, capital projections, and other forecasting

1.3.2.3 Prepare annual operational plans

1.3.2.4 Analyze historical financial data in order to effectively plan

1.3.3 Ability to meet financial fiduciary responsibilities

1.3.3.1 Successfully implement the business plan including operational and (or) client goals, budgets and cash flow objectives

1.3.3.2 Assist senior management in understanding and working with the client to determine the goals and objectives for the financial performance of the real estate asset

1.3.3.3 Maintain complete and accurate records compiled in accordance with generally accepted procedures and provide them to the client or employer with comment on a regular basis

1.3.4 Ability to communicate financial information

1.3.4.1 Simplify and articulate financial analysis for an audience who does not possess financial acumen as a competency

1.3.5 Knowledge of financing strategies

1.3.5.1 Calculate the time value of money for capital investments

1.3.5.2 Amortize loan payments

1.3.5.3 Perform financial calculations including present value, net present value, internal rate of return, and discounted cash flows

1.3.5.4 Evaluate highest and best use for potential commercial real estate investments

1.4 Environmental impact of the property manager 1%

1.4.1 Awareness of the relationship between the building and the community

1.4.1.1 Illustrate how social and environmental returns enhance ROI for a stronger overall investment

1.4.1.2 Understand and tackle building performance issues that impact local environmental issues and global climate change

2. Business of the Building: Lease Management **11%**

2.1 Language of leases **4%**

2.1.1 Knowledge of market data

- 2.1.1.1 Assist with collection and coordination of market data, including market rents and operating expense estimates

2.1.2 Knowledge of various lease types and lease clauses

- 2.1.2.1 Distinguish among various lease types
- 2.1.2.2 Read, understand, interpret, and communicate to others contents of lease
- 2.1.2.3 Clearly define and track (i.e., administer and manage) rights of the lessor and lessee, including rights of refusal, exclusives, signage, parking, co-tenancy, and lease renewal terms
- 2.1.2.4 Ensure adherence to code entitlements
- 2.1.2.5 Understand and administer insurance provisions

2.1.3 Knowledge of space allocation best practices

- 2.1.3.1 Ability to read stacking plans and floor plans
- 2.1.3.2 Anticipate and plan for the changing space needs and expectations of multiple tenants
- 2.1.3.3 Understand the application of floor measurement standards

2.2 Management and execution of lease terms **7%**

2.2.1 Ability to manage and execute the financial terms of a lease

- 2.2.1.1 Calculate tenant billing
- 2.2.1.2 Administer escalation schedules, stepped rent, and late fees
- 2.2.1.3 Calculate CPI adjustments
- 2.2.1.4 Verify accuracy of collections
- 2.2.1.5 Use productivity applications to manage a tenant portal

2.2.2 Ability to enforce lease provisions

- 2.2.2.1 Oversee the tenant move-in process
- 2.2.2.2 Develop tracking procedures and compliance notification for tenants
- 2.2.2.3 Oversee lease termination and move out process

2.2.3 Ability to create and manage lease abstracts

- 2.2.3.1 Understand a lease abstract in order to bill correctly
- 2.2.3.2 Managing from a lease abstract to administer and enforce the lease terms
- 2.2.3.3 Draft lease abstracts
- 2.2.3.4 Validate the rent rolls to ensure accuracy

2.2.4 Ability to understand the financial performance of tenants

- 2.2.4.1 Obtain required financial reports from tenants, including retail sales and tenant financials

3. Building Operations: Policies and Procedures **18%**

3.1 Environmental impact of the property manager **2%**

3.1.1 Awareness of best practices for purchasing durable goods

- 3.1.1.1 Trace the environmental footprint of products through the supply chain

3.1.2 Knowledge of benchmarking practices

- 3.1.2.1 Implement benchmarking protocols and strategies to improve operational performance and reduce energy demand and use
- 3.1.2.2 Illustrate the value of high-performance projects through operational-focused and asset-focused industry benchmarks and tools

3.2 Risk management **5%**

3.2.1 Knowledge of business continuity strategies

- 3.2.1.1 Prepare an emergency response and preparedness plan
- 3.2.1.2 Integrate recovery procedures into continuity strategies
- 3.2.1.3 Distribute call list for first responders' needs
- 3.2.1.4 Perform drills for fire, active shooter, and other crisis response

3.2.2 Ability to manage properties to mitigate risk

- 3.2.2.1 Conduct property walk-through inspections to identify potential hazards to the physical property and the tenants, guests, and visitors
- 3.2.2.2 Perform audits of all fire and life safety systems and procedures per policies and (or) local codes
- 3.2.2.3 Understand specific insurance policies and reporting requirements covering the property
- 3.2.2.4 Identify and rectify potential hazards

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3.2.2 Knowledge of types of insurance and associated processes

- 3.2.2.1 Identify all potential insurance needs
- 3.2.2.2 Administer insurance claims process
- 3.2.2.3 Provide financial and physical data for underwriting
- 3.2.2.4 Provide updates with major changes in occupancy
- 3.2.2.5 Communicate and demonstrate needs with broker (or risk) management carrier
- 3.2.2.6 Assess premises liability

3.3 Regulatory compliance

3%

3.3.1 Knowledge of Federal, state, provincial, and municipal rules and regulations

- 3.3.1.1 Evaluate and administer compliance with guidelines and requirements, including local building and health codes, EPA, OSHA, and other regulatory bodies

3.3.2 Knowledge of incident recordkeeping and reporting requirements

- 3.3.2.1 Document and report as required for regulatory compliance

3.4 Voluntary compliance

1%

3.4.1 Awareness of environmental stewardship, governance, and other standards

- 3.4.1.1 List the merits and challenges of voluntary standards, including Energy Star, LEED, WELL, SITES, GRESB, BOMA BEST, BOMA 360, Living Buildings, and others
- 3.4.1.2 Explore property operations designed to support green building and other energy and resource conservation initiatives (e.g., LEED, BOMA 360, Energy Star, etc.)

3.5 Ethical best practices

2%

3.5.1 Awareness of industry ethical standards

- 3.5.1.1 Conduct business in a manner displaying the highest degree of professional behavior, bringing credit to the profession and the industry
- 3.5.1.2 Speak truthfully and act in accordance with accepted principles of honesty and integrity
- 3.5.1.3 Strictly adhere to laws, regulations, codes, and ordinances in the operation of property or equipment
- 3.5.1.4 Fully disclose to the client any known conflicts of interest
- 3.5.1.5 Maintain as confidential any legitimate business information provided in confidence
- 3.5.1.6 Adhere to a property management code of ethics, such as the BOMI International Code of Professional Ethics and Conduct

3.6 Security

5%

3.6.1 Knowledge of building security plans and procedures surrounding occupant safety

- 3.6.1.1 Communicate with building occupants to ensure comprehension of security and safety policies and protocols
- 3.6.1.2 Respond to emergencies and threats per security plans and procedures
- 3.6.1.3 Alert authorities in the event of an active shooter or other incident

3.6.2 Knowledge of physical security issues

- 3.6.2.1 Understand security issues related to the building's physical plan, parking facilities, building access, lighting, and other areas
- 3.6.2.2 Verify application of access control measures, including building entrances, elevators, and tenant space
- 3.6.2.3 Work with security personnel to ensure physical security of the building
- 3.6.2.4 Use CCTV and other devices to monitor building access

3.6.3 Awareness of a building's data security risks

- 3.6.3.1 Work with information systems staff or vendors to ensure firewall integrity and digital security of the building's energy management, fire and (or) life safety, and other connected systems

4. Building Operations and Maintenance

21%

4.1 Human factors in high-performance operations

1%

4.1.1 Awareness of the impact of air quality on occupant performance

- 4.1.1.1 Benchmark absenteeism and other performance measures
- 4.1.1.2 Monitor a productivity dashboard

4.2 Environmental impact of the property manager

4%

4.2.1 Knowledge of energy usage and strategies within the building

- 4.2.1.1 Pursue property operations designed to support LEED, Energy Star, and other energy and resource conservation initiatives

4.2.2 Awareness of water use in a building

- 4.2.2.1 Implement water conservation efforts

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- 4.2.2.2 Evaluate storm-water management harvesting systems
- 4.2.2.3 Distinguish between gray water and black water reuse purposes

4.2.3 Knowledge of waste management

- 4.2.3.1 Prioritize reduction, reuse, and recycling to minimize a building's waste stream

4.2.4 Knowledge of the impact of transportation on a building's environmental footprint

- 4.2.4.1 Develop a commuting plan that reduces the use of single occupant vehicles through public transportation, ride sharing, and other strategies
- 4.2.4.2 Factor access of transportation into the decision-making process for property investments

4.3 Whole-building perspective to building operations

2%

4.3.1 Ability to employ a whole-building sustainability perspective

- 4.3.1.1 Explore sustainable opportunities to improve building operations in areas including energy, lighting, water use, building envelope, waste management, and other critical areas

4.3.2 Knowledge of high-performance and sustainability strategies

- 4.3.2.1 Build an effective sustainable operating plan with a focus on purchasing, green cleaning, indoor air quality, fundamentals for interior and exterior maintenance, and vendor management
- 4.3.2.2 Engage stakeholders, including occupants, vendors, and owners and investors, to ensure adoption and full integration of high-performance initiatives

4.4 Building systems

4%

4.4.1 Understanding of systems approach in the built environment

- 4.4.1.1 Anticipate and predict occupant and system needs
- 4.4.1.2 Ensure optimal functioning of building systems
- 4.4.1.3 Oversee management of the full spectrum of building systems, including landscaping, elevators, security, HVAC, cleaning, fire and life safety, signage, window cleaning, and others

4.4.2 Knowledge of building systems optimization

- 4.4.2.1 Troubleshoot issues in order to interface with engineering or other technical staff

4.4.3 Awareness of evolving building technologies

- 4.4.3.1 Monitor building technology advancements and opportunities for building systems and building operations improvement
- 4.4.3.2 Benchmark current building performance against potential capital investments

4.5 Contract strategies

5%

4.5.1 Knowledge of contracting process

- 4.5.1.1 Create scope of work
- 4.5.1.2 Review specifications prepared for service contracts
- 4.5.1.3 Select qualified vendors to solicit bids
- 4.5.1.4 Release the request for proposal
- 4.5.1.5 Work with upper management to analyze responses and select provider
- 4.5.1.6 Negotiate service agreements
- 4.5.1.7 Monitor vendor performance to assure full compliance with standards established within the service agreement
- 4.5.1.8 Conduct an annual review of all contracts and bidding in accordance with client requirements

4.5.2 Knowledge of contract negotiation

- 4.5.2.1 Compare in-house against contract services
- 4.5.2.2 Analyze data and needs to competitively bid and negotiate contracts with key outside contractors for services
- 4.5.2.3 Negotiate the deal
- 4.5.2.4 Participate in the negotiation of service contracts with outside vendors to achieve the highest levels of performance at the best value

4.5.3 Knowledge of contract implementation

- 4.5.3.1 Oversee performance of contracts and ensure contractor performance
- 4.5.3.2 Ensure contractor and subcontractor activities are being properly coordinated
- 4.5.3.3 Monitor performance of maintenance contracts
- 4.5.3.4 Ensure certificates of insurance meet owners requirements
- 4.5.3.5 Coordinate expenditure bidding, processing, and reporting of contracted services, purchase order requests, and tenant billable request within approved budgets
- 4.5.3.6 Review and monitor service requests to ensure prompt and accurate handling of work

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- 4.5.3.7 Monitor all service, maintenance, and construction contracts, reporting on incomplete projects with respect to outstanding bills, backorder items, lien waivers, as-builts, revised completion timing, etc.
- 4.5.3.8 Coordinate and review performance of contractors and vendors, and provide evaluations and reports

4.6 Project management 1%

4.6.1 Knowledge of construction project management principles and practices

- 4.6.1.1 Develop a resource plan with overall accountability for delivering a completed project, which meets customer requirements within set budgets and schedules
- 4.6.1.2 Implement and manage portfolio wide special initiatives and projects, as directed
- 4.6.1.3 Perform project management functions related to tenant construction and property capital projects consistent with applicable building codes
- 4.6.1.4 Manage tenant work in compliance with leases and work letter agreements to ensure tenant acceptance, timely completion and occupancy and rent commencement
- 4.6.1.5 Understand the management of contractors and subcontractors
- 4.6.1.6 Minimize impact on other tenants

4.7 Property maintenance 2%

4.7.1 Knowledge of maintaining a property that includes all building equipment, systems, interior environments, and exterior grounds

- 4.7.1.1 Lead a property management team that regularly inspects, evaluates, and maintains all building equipment, systems, interior environments, and exterior grounds to ensure that the appearance and operation of the property(s) meet or exceed owner's standards

4.8 Capital projects 2%

4.8.1 Knowledge of managing capital improvements and construction projects

- 4.8.1.1 Evaluate projects with the view of the owner's goals and objectives
- 4.8.1.2 Ensure capital projects, including building improvements and leasehold improvements, are properly implemented
- 4.8.1.3 Contract, coordinate, and oversee all tenant improvements, major repair and maintenance work, capital improvement plans, bids, contracts, and work with the support of in-house construction manager, if required, based on magnitude and complexity of work
- 4.8.1.4 Transition property from development and construction to routine operations

5. Building Relationships: Internal 16%

5.1 Economic aspects of sustainable investments 1%

5.1.1 Ability to communicate the value of investments in sustainability

- 5.1.1.1 Identify and engage business stakeholders by demonstrating the value of investments from the perspective of social, environmental, and economic factors
- 5.1.1.2 Address methods for marketing project successes to key stakeholders through quantifiable results and performance reporting

5.2 Ownership relations 4%

5.2.1 Awareness of ownership goals and objectives

- 5.2.1.1 Consult with owner to clearly understand ownership goals and business plan for each asset
- 5.2.1.2 Monitor the market to anticipate changes in ownership requirements

5.2.2 Understanding of fiduciary relationships

- 5.2.2.1 Provide reports and presentations to keep owner informed
- 5.2.2.2 Maintain an ongoing professional and fiduciary relationship with the owner
- 5.2.2.3 Be proactive and responsive to owners' needs and requests

5.3 Occupant relations 5%

5.3.1 Understanding of occupant requirements and needs

- 5.3.1.1 Confer with occupants to establish working expectations
- 5.3.1.2 Establish and maintain an open relationship with occupants, and ensure that all services and needs are met and in compliance with leases

5.3.2 Awareness of developing trust through strong service levels

- 5.3.2.1 Develop and implement a comprehensive customer service program, including but not limited to, personal contact with tenants, and overseeing activities to promote tenant satisfaction
- 5.3.2.2 Distribute, review, and analyze customer satisfaction surveys
- 5.3.2.3 Conduct periodic visits, inspections, and surveys
- 5.3.2.4 Provide ongoing two-way communication with occupants

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5.3.2.5 Analyze and resolve all tenant conflicts in a professional and timely manner

5.3.3 Knowledge of strategies for maintaining high occupancy rates

5.3.3.1 Develop an effective retention plan to meet approved budget targets

5.4 Staff administration 6%

5.4.1 Knowledge of applying techniques for supervision, management, and leading

5.4.1.1 Conduct interviews, hire, and train employees

5.4.1.2 Plan, assign, delegate, and direct work

5.4.1.3 Lead by example to maintain a positive image in daily work both internally and externally

5.4.1.4 Motivate, empower, coach, and counsel staff in the achievement of performance goals

5.4.1.5 Manage the employee performance process

5.4.2 Knowledge of staff development needs

5.4.2.1 Promote continuous education for all on-site personnel

5.4.2.2 Coach and mentor staff

5.4.3 Awareness of team building purposes and practices

5.4.3.1 Build teams across functions

5.4.3.2 Coordinate among property teams and departments to build teamwork and help ensure optimal results

5.4.4 Commitment to career and self development

5.4.4.1 Pursue personal learning and development

5.4.4.2 Seek mentorship

5.4.4.3 Develop career goals to further knowledge and skills

5.4.5 Knowledge of human resources laws and best practices

5.4.5.1 Exercise onboarding practices, including recruitment, interviewing, placement, and orientation

5.4.5.2 Ensure fair hiring and compensation practices

5.4.5.3 Recognize and resolve any harassment and discrimination issues

5.4.5.4 Develop employees through counseling, training and education, and mentoring

5.4.5.5 Train staff on compliance with company policies

6. Building Relationships: External 11%

6.1 Human factors in high-performance operations 1%

6.1.1 Understanding of the impact the property and business practices has on the local community

6.1.1.1 Discover opportunities to engage the local community

6.1.1.2 Collaborate on efforts that are mutually beneficial to area businesses

6.2 Asset manager as a real estate client 4%

6.2.1 Knowledge of asset manager's role, responsibilities, and objectives

6.2.1.1 Establish a strong working relationship with the asset manager

6.3 Professional networking 1%

6.3.1 Understanding the value of peer networks

6.3.1.1 Identify a network of colleagues for support and advice

6.3.2 Awareness of the value of professional associations

6.3.2.1 Identify and join appropriate professional organizations (e.g., BOMA, IREM, etc.)

6.3.2.2 Actively participate as part of relationship building (e.g., join work groups, committees, and boards)

6.3.3 Ability to seek expertise

6.3.3.1 Cultivate relationships with insurance, legal experts, and industry consultants

6.4 Civic involvement 1%

6.4.1 Awareness of political representatives and community groups

6.4.1.1 Maintain awareness of a PR plan for key representatives and community groups

6.4.1.2 Inform stakeholder of issues affecting their interests

6.4.1.3 Communicate with representatives regarding relevant issues

6.4.2 Awareness of civil services impact on building safety

6.4.2.1 Build relationships between first responders and management

6.5 Media relations 1%

6.5.1 Awareness of the impact media interactions can have on the property

6.5.1.1 Adhere to company policies for media relations

6.5.1.2 Adhere to company policies for social media interactions

6.6 Vendors relationships 3%

6.6.1 Understanding vendor operations and capabilities

- 6.6.1.1 Provide feedback both positive and constructive to vendor
- 6.6.1.2 Monitor and provide feedback on vendor performance
- 6.6.1.3 Manage vendor relationships to ensure full value of contracts
- 6.6.1.4 Anticipate and resolve potential issues in vendor performance

7. Integrated Competencies 7%

7.1 Communication 2%

- 7.1.1 Speak clearly and confidently
- 7.1.2 Actively listen to others
- 7.1.3 Communicate in writing clearly and concisely
- 7.1.4 Present ideas professionally
- 7.1.5 Conduct difficult conversations in a professional manner
- 7.1.6 Make recommendations and influence decisions

7.2 Organization 2%

- 7.2.1 Make productive use of time in a dynamic work environment
- 7.2.2 Move quickly from one task, assignment, or responsibility to another
- 7.2.3 Analyze and coordinate projects with detailed complexity
- 7.2.4 Adjust quickly to changing priorities
- 7.2.5 Plan and set objectives and goals; develop schedules and assignments; scope tasks and projects
- 7.2.6 Make appropriate decisions in limited time and highly complex environment

7.3 Service orientation 1%

- 7.3.1 Foster a sense of community and belonging among staff, vendors, and tenants
- 7.3.2 Demonstrate sincerity and empathy
- 7.3.3 Follow up and follow through with key stakeholders
- 7.3.4 Take initiative
- 7.3.5 Demonstrate a strong work ethic
- 7.3.6 Assess situations and respond appropriately
- 7.3.7 Act with integrity and in an ethical manner
- 7.3.8 Maintain composure while working under pressure
- 7.3.9 Provide excellent customer service

7.4 Innovation 2%

- 7.4.1 Be agile and think on your feet
- 7.4.2 Confidently tackle difficult or ambiguous situations
- 7.4.3 Explore options by thinking critically with an open mind and inquiring mindset
- 7.4.4 Apply practical intelligence and common sense
- 7.4.5 Utilize systems thinking to understand the impact of decisions
- 7.4.6 Identify creative solutions to complex problems
- 7.4.7 Collaborate in a team environment
- 7.4.8 Keep up to date on new and emerging trends in technologies and processes