

Operations Manual Suite | Tables of Contents

OVERVIEW – OPERATIONS MANUAL SUITE

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Company Overview

- Welcome | Introduction
- Company History
- Mission | Vision | Values
- Corporate Culture
- Our People
 - Organizational Charts
 - Contact Information

Operations Manual Suite

- Introduction
- Purpose of the Operations Manual Suite
- Operations Manual Suite Editorial Board
- Operations Manual Suite Review Process

General

- Overview | Operations Manual | Policies and Procedures
- Operations Manual Distribution and Review
 - Acknowledging Receipt of Operations Manual
 - Acknowledging Updated Policies

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CORPORATE POLICIES

Administrative

- Access Control
- Company Credit Cards
- Company Tools, Equipment, and Supplies
- Expense Reimbursement
- Inclement Weather
- Physical and Environmental Security
- Records Retention

Contracting and Procurement

- Contracting for Goods and Services
- Electronic Signatures
- General Purchasing Procedures
- Signature and Approval Thresholds
- Sustainable Materials and Procurement

Corporate Accounting

- Accounts Payable
- Accounts Receivable
- Cash Receipts and Deposits
- Corporate Budgeting
- Corporate Financial Reporting
- Financial Information System
- General Accounting Procedures
- Internal Controls and Auditing

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- Business Travel
- Mileage Reimbursement
- Reimbursable Travel Expenses and Forms

Diversity, Equity, and Inclusion (DEI)

- DEI Statement/Policy
- Bias Mitigation Strategies
- Cultural Sensitivity Training
- Diversity Hiring Practices
- Diversity, Equity, and Inclusion (DEI)

Education and Training

- Learning & Development

Environmental, Social & Governance (ESG)

- Carbon Footprint Tracking and Reporting
- Environmental, Social, and Governance (ESG) Strategy

Health & Wellness Programs

- Employee Wellness Programs
- Fitness Programs
- Healthy Work Environment Policies
- Mental Health Initiatives
- Work-Life Balance Initiatives

Human Resources

- Benefits
 - 401(k) Plan
 - Benefits Eligibility
 - COBRA
 - Disability Insurance
 - Employee Assistance Program
 - Group Life Insurance
 - Health Care Flexible Spending Account (FSAs)
 - Health/Dental/Vision Insurance
 - Holidays
 - Life Insurance
 - Paid Time Off
 - Retirement Plans
 - Vacation Accrual
 - Workers Compensation
- Career Path Development Programs
- Employee Discounts
- Employee Industry Designations and Certifications
- Employee Mentorship Programs

- Employee Suggestion Program
- Employment Eligibility
- General Policies and Procedures
- HR File Access
- Lactation Support for Nursing Mothers
- Layoffs and Furloughs
- Leave
 - Bereavement Leave
 - Family and Medical Leave (FMLA)
 - Jury Duty
 - Leaves of Absence
 - Military Leave (USERRA)
- New Hire
 - Authorization for Prior Employer to Release Information
 - Criminal Background Checks
 - Authorization for Background Check
 - Employment Verifications and References
 - Job Offer Letter
- Payroll Procedures
 - Paycheck Distribution
 - Payroll Deductions
 - Timekeeping
- Performance Management
 - Performance Evaluations
 - Performance Reviews
 - Progressive Discipline
- Promotions and Advancement
- Recruiting
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 - Internal Employee Application Process
- Telecommuting
- Termination
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 - Information to Release to Future Employers
 - Rehiring
 - Return of Company Property
 - Unemployment Compensation
- Terms and Conditions of Employment
- Wage and Classification Procedures
 - Attendance
 - Bonuses
 - Breaks and Lunch Periods

- Compensation
- Essential Employees
- Exempt and Non-exempt Employee Definitions
- Hours of Work, Overtime, Overtime Pay, and Compensatory Time
- Job Descriptions/Position Profiles
- Part-time Positions
- Position Classifications
- Temporary Positions
- Work Dress Code

Information Technology

- Access Authorization to Digital Data and Systems
- Automated Intelligence
- Cloud Computing
- Cybersecurity Incident Response
- Email
- File Sharing
- General Policies & Procedures
- Information, Computing, and Network Resource Security
 - IT Security Incident Reporting and Response
- Information Security and Cybersecurity
 - Cybersecurity Best Practices
 - Data Classification and Security
 - Network Monitoring and Incident Reporting
 - Protected Data Security
 - Remote Access and VPN Protocols
- Information Technology Use
- Internet Access
 - Wi-Fi
- IT Disposal
- System Development and Maintenance
- Telecommunications
 - Mobile Phones, Tablets, and Devices
 - Telephone Use
- Use of Company Equipment and Electronics
- Video Conferencing

Marketing & Communications

- Advertising
- Crisis Communications
- External Communications

- Internal Communications
- Marketing
- Social Media

Risk Management

- Certificates of Insurance
- Incident Reporting
- Insurance Requirements
- OFAC Compliance
- Real Estate Investment Trust (REIT) Compliance
- Risk Management Program Overview

Stakeholder Relations

- Board of Directors/Investor Presentations
- Investor Relations
- Partnerships and Joint Ventures

Workplace Compliance Programs

- Accepting and Giving Entertainment or Gifts
- Accommodation for People with Disabilities
- Affirmative Action
- Automobile Use
- Code of Conduct and Business Ethics
 - Business Ethics
 - Code of Conduct
- Compliance Statement
- Conflict Resolution
- Conflicts of Interest
- Consensual Romantic Relationships
- Discrimination, Harassment, and Sexual Harassment
- Drugs and Alcohol: Drug-Free Workplace
 - Employee Agreement and Consent to Drug and/or Alcohol Testing
- Employee and Employer Confidentiality
- Employment Relationship: At-Will Employment
- Equal Employment Opportunity
- Fraud
- Investigations
- Nepotism and Employee Relationships
- Non-Compete Agreement
- Non-Solicitation
- Open Door Policy

- Reporting
- Substance Abuse
- Tobacco-Free Workplace
- Video Surveillance and Physical Searches
- Weapons at Work
- Workplace Professionalism and Company Representation
- Workplace Violence
- Workplace Visitors

STANDARD PRACTICE MANUAL – PROPERTY/PORTFOLIO OPERATIONS

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PROPERTY/PORTFOLIO POLICIES

Building Maintenance

- Asphalt and Concrete System Maintenance
- Central Plant and Service Area Maintenance
- Commissioning, Retro-Commissioning, and Continuous Commissioning
- Electrical System Maintenance
- Elevators and Escalator System Maintenance
- Engineering Recordkeeping
- HVAC System Maintenance
- Maintenance Inspections
- Maintenance Overview
 - Proactive – Preventative and Predictive Maintenance
 - Reactive
- Parking System Maintenance
- Plumbing System Maintenance
- Roof System Maintenance

Business Plans and Reforecasts

- Budgeting for Capital Improvements
- Budgets & Business Plans
- Reforecasts

Construction

- Architects/Engineers
- Bidding
- Building Standards
- Building-Specific Construction Rules
- Certificates of Occupancy
- Commissioning
- Construction Inspections
- Contracting
- General Contractor Qualifications
- Lien Waivers
- Major Capital Renovation Guidelines
- Permits
- Processing Capital Project Invoices
- Project Management Best Practices
- Punch Lists
- Scheduling
- Substantial Completion
- Sustainable Construction Practices
- Tenant Approval of Construction Drawings
- Tenant Impact Assessment During Projects
- Test and Balance Reports
- Work Letters

Contracts and Contract Services

- Approval Thresholds
- Contracting for Goods and Services
 - Bidding and Vendor Selection
- Preventing Co-Employment Relationships with Vendors
- Service Contract Administration
- Terminating Contracts for Cause/Convenience
- Third-Party Vendor Monitoring and Audits
- Vendor Certificates of Insurance
- Vendor Due Diligence
- Vendor Onboarding and Offboarding
- Vendor Risk Management Policies

Emergency Management

- Building Emergency Systems
- Command Post/Emergency Operations Center (EOC)
 - Coordination with Local Authorities
- Communicating the Plan
- Compliance with Regulatory Requirements
- Crisis Communications Plan
- Emergency Communication Systems and Equipment
- Emergency Evacuation Drills
- Emergency Planning Process
 - Planning
 - Implementation
 - Recovery
- Emergency Plans
 - Active Shooters
 - Bio-hazardous Materials
 - Bomb Threats
 - Civil Disturbances
 - Crime
 - Earthquakes
 - Elevator Entrapments
 - Explosions
 - Fires
 - Flooding
 - Hazardous Materials
 - Hurricanes
 - Medical Emergencies
 - Other Severe Weather
 - Snow/Ice
 - Spill Containment
 - Terrorism
 - Tornados
- Emergency Plan Training
- Emergency Preparedness Overview
- Emergency Preparedness Materials and Equipment
- Emergency Response Team
 - Contact List
 - Duties
 - Equipment List
 - Members
 - Organizational Chart
 - Shelter in Place

- Evacuation Plan
 - Evacuating Disabled Occupants
 - Floor Wardens
 - Full Building Evacuation
 - Partial Building Evacuation
- Stakeholder Emergency Manuals
- Utility and Power Management:

Environmental Compliance

- Asbestos
- Mold
- Underground Storage Tanks
- Mercury/Fluorescent Lighting
- E-Waste
- CFC- and HCFC-containing Refrigerants
- Indoor Air Quality (IAQ)

Fire & Life/Safety Systems

- Emergency Generator Maintenance and Testing
- Fire Alarm System
- Fire and Smoke Doors
- Fire Corridors
- Fire Dampers
- Fire Partitions, Fire Stops, and Demising Walls Installation and Maintenance
- Private Fire Hydrant Maintenance and Testing
- Sprinkler and Suppression System
 - Fire Pumps
 - Standpipe System

Lease Administration

- Assignments and Subleases
- Collections
- Commencement Letters
- Early Lease Termination
- Lease Abstracts
- Lease Defaults
- Lease Expiration Tracking and Notifications
- Lease Files
- Lease Renewals and Extensions
- Leasing Commissions
- Operating Expense Recoveries

- Security Deposits/Letters of Credit
- Tenant Move In/Move Out Procedures

Management Office Operations

- Petty Cash
- Property Inspections and Audits
- Property Management Agreement and Abstract
- Property Management Office Administration
- Property Taxes
- Property Website
- Real Estate Licenses
- Tenant Contacts
- Tenant Handbooks
- Work Order System

Marketing and Leasing

- Marketing Strategy
- Media and Public Relations

Property Accounting and Reporting

- Accounts Payable
- Accounts Receivable
- Bank Accounts
- Capital Expenses
- Chart of Accounts
- Internal Controls
- Monthly Reporting

Property Operations

- Access Control Management
- BOMA 360 Performance Program
- BOMA BEST Program
- Engineering Uniforms
- Inventory Management
- Landscaping
- Licenses and Permits
- Loading Dock and Delivery Procedures
- Snow Removal
- Sustainability Practices
- Tree Risk Management Program
- Waste Management and Recycling Programs

Sustainability and Environmental Compliance

- Commissioning, Retro-Commissioning, and Continuous Commissioning
- Energy Audits and Benchmarking (separate from ENERGY STAR)
- Energy Management & Efficiency
- EnergyStar® Benchmarking
- Environmental Impact Assessments
- Green Building Certifications
- Renewable Energy Initiatives
- Waste Management and Recycling Programs
- Water Conservation Practices

Security

- Front Desk/Lobby Desk Procedures
- Hiring Armed v. Unarmed Security Guards
- Incident Reporting by Security
- Post Scheduling
- Security Guard Post Orders
- Security Procedures
- Security Video Monitoring

Technology and Innovation (PropTech)

- Building Automation Systems (BAS) and Energy Management Systems (EMS)
- Internet of Things (IoT) for Building Management
- PropTech Implementation Guidelines
- Smart Building Technology Maintenance
- Smart Building Technology Management

Tenant Experience, Tenant Relations & Tenant Retention

- Corporate Tenant Relations
- Diversity, Equity, and Inclusion (DEI) in Tenant Services
 - Inclusive Tenant Engagement Practices
- Quiet Zones and Meeting Space Optimization
- Tenant Amenities and Management
- Tenant Communications
- Tenant Council
- Tenant Experience
- Tenant Portals and Digital Services:
- Tenant Retention Strategies
- Tenant Satisfaction Surveys
- Workspace Customization Policies

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Safety and OSHA Compliance

- Accident and Incident Reporting
- Compliance Measurements
- Emergency Procedures
- Regulatory Compliance
- Regulatory Programs
 - ANSI/IWCA I-14 Compliance
 - Arc Flash & Electrical Safety
 - Bloodborne Pathogens (BBP)
 - Confined Spaces
 - Exit Routes
 - Fall Protection
 - Fire Safety
 - Hazardous Communications (HAZCOM)
 - Hazardous Waste Disposal
 - Hot Work and Fire Protection
 - Ladder Safety
 - Lifting and Carrying
 - Lock Out/Tag Out (LOTO)
 - Medical and First Aid
 - Personal Powered Platforms
 - Personal Protection Equipment (PPE)
 - Respiratory Protection
 - Walking and Working Surfaces
- Return to Work
- Safety
 - Compliance/Site-Specific Compliance
 - General Safety Procedures
- Safety Orientation
- Safety Training for Employees
 - OSHA 10-Hour Course for General Industry
 - Training Matrix by Position
- Workplace Postings

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- **Introduction**
 - Importance of Tenant and Employee Preparedness
 - Overview of Emergency Procedures
 - Purpose of the Tenant Emergency Manual
 - Role of Tenants, Employees, and the Company During Emergencies

- **Active Shooter/Workplace Violence Procedures**
 - Contacting Emergency Services
 - Coordination with Law Enforcement
 - Immediate Actions to Take (Run, Hide, Fight)
 - Recognizing an Active Shooter or Violent Incident
 - Securing Work Areas

- **Bomb Threat Procedures**
 - Evacuation Procedures for Bomb Threats
 - Recognizing and Responding to a Bomb Threat
 - Reporting the Threat to Authorities
 - Returning to the Building After a Bomb Threat
 - Search Procedures (If Applicable)

- **Emergency Contacts**
 - List of Key Emergency Contacts (Property Manager, Security, Maintenance)
 - Local Emergency Services Contacts (Fire, Police, Medical)
 - Tenant Emergency Contacts (Internal Tenant Teams)

- **Emergency Drills and Training**
 - Emergency Response Training for Employees
 - Evacuation Drill Schedules and Tenant Participation
 - Reporting Participation and Feedback from Drills
 - Tenant Emergency Coordinator Training

- **Emergency Notification Systems**
 - Alarm Systems and Announcements
 - Overview of the Building's Emergency Notification Systems
 - Tenant Communication Channels
 - Testing and Maintaining the Notification System

- **Emergency Preparedness Tips for Tenants**

- Emergency Resources and Information
- How to Prepare Your Office Space for Emergencies
- Safety Tips for Employees

- **Emergency Resources**
 - AED Locations and Usage
 - Emergency Kit Recommendations for Tenants
 - Fire Safety Equipment (Extinguishers, Alarms, Sprinklers)
 - First Aid Resources

- **Evacuation Procedures**
 - Building Evacuation Routes and Maps
 - Evacuation Drills and Tenant Responsibilities
 - Evacuation Procedures for Tenants and Employees
 - Evacuation Procedures for Visitors and Contractors
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- **Fire Emergency Procedures**
 - Evacuation Due to Fire
 - Fire Alarm Activation
 - Identifying a Fire Emergency
 - Immediate Tenant Actions
 - Re-entry Procedures After a Fire Emergency
 - Use of Fire Extinguishers (if trained)

- **General Emergency Procedures**
 - Communication During an Emergency (Alarms, Notifications, etc.)
 - Emergency Assembly Points
 - Evacuation Responsibilities
 - Reporting an Emergency
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- **Hazardous Material Spill/Exposure Procedures**
 - Decontamination and Emergency Response
 - Evacuation or Shelter-in-Place Instructions
 - Identifying Hazardous Material Incidents
 - Reporting Hazardous Material Spills
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- **Important Forms and Checklists**
 - Bomb Threat Response Checklist
 - Emergency Contact Information Form
 - Fire Incident Reporting Form
 - Medical Emergency Response Checklist
 - Tenant Evacuation Drill Feedback Form

- **Medical Emergency Procedures**
 - Contacting Emergency Medical Services
 - First Aid Resources and AED Locations
 - Identifying a Medical Emergency
 - Reporting Medical Emergencies
 - Steps to Take During a Medical Emergency

- **Post-Emergency Procedures**
 - Insurance and Legal Considerations for Tenants
 - Property Manager's Role in Post-Emergency Assessments
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 - Returning to the Building After an Emergency
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- **Severe Weather Emergency Procedures**
 - Communication During Severe Weather
 - Evacuation Procedures (If Necessary)
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- **Shelter-in-Place Procedures**
 - Communication During Shelter-in-Place
 - Shelter Locations and Requirements
 - Tenant Actions During Shelter-in-Place Scenarios
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- **Tenant Emergency Coordinator Program**
 - Communication Between Tenant Emergency Coordinators and the Property Manager
 - Roles and Responsibilities of Tenant Emergency Coordinators
 - Selecting and Training Emergency Coordinators

- **Utility Failure Procedures**
 - Communication During Utility Failures
 - Gas Leaks and Utility-Related Hazards
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- **Glossary of Emergency Terms**
 - Definitions of Common Emergency Terms
 - Explanation of Emergency Response Concepts

MULTIFAMILY-SPECIFIC POLICIES

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 - Accessible Unit Management
 - Common Area Accessibility
- **Affordable Housing Compliance**
 - Affordable Housing Program Compliance
 - Income Verification and Eligibility
 - Rent Cap Compliance
- **Amenity Management**
 - Amenity Maintenance
 - Amenity Reservation System
 - Amenity Rules and Usage Policies
 - Resident Wellness and Lifestyle Programming
 - Shared Space Etiquette and Safety
 - Short-Term Rental Protocols (Air BNB, etc.)
- **Community and Property Marketing**
 - Leasing and Marketing Campaigns
 - Model Unit Setup and Management
- **Legal and Regulatory Compliance**
 - Fair Housing Act Compliance
- **Move-In and Move-Out Procedures**
 - Tenant Move-In Checklist
 - Tenant Move-Out Damage Assessment
 - Tenant Move-Out Process
- **Noise and Neighbor Disputes**
 - Dispute Resolution Between Residents
 - Noise Control Policies
 - On-Site Staff Training for Sensitive Tenant Issues
- **Parking Management**
 - Tenant Parking Allocation and Enforcement

- **Pest Control and Waste Management**
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 - Common Area Pet Rules
 - Pet Screening and Deposit Requirements

- **Property Maintenance and Unit Turnover**
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 - Apartment Unit Turnover Procedures
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 - Seasonal Maintenance Tasks

- **Rent Collection and Late Payment Policies**
 - Eviction Policies
 - Late Payment Fees and Penalties
 - Rent Collection Procedures
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- **Resident Safety and Security**
 - Building Security Procedures
 - Fire Safety and Evacuation Plans
 - Key and Access Control System Management

- **Tenant Communication and Engagement**
 - Handling Tenant Complaints
 - Resident Experience Enhancements
 - Tenant Communication Systems
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- **Tenant Leasing and Renewal Procedures**
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 - Lease Renewal Procedures
 - Subleasing and Assignment of Lease
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- **Utility Billing and Management**
 - Shared Utility Monitoring
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RETAIL-SPECIFIC POLICIES

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- Foot Traffic and Security Surveillance
- Merchandising and Aesthetic Standards
- Seasonal Marketing and Promotions Management

INDUSTRIAL-SPECIFIC POLICIES

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- Environmental Compliance for Hazardous Materials
- Risk Management and Monitoring of Tenant Warehouse Use