

# Operations Manual Suite | Tables of Contents

## OVERVIEW – OPERATIONS MANUAL SUITE

### Copyright and Indemnification/Liability Disclaimer

#### 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

## Copyright and Indemnification/Liability Disclaimer

## 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

### Corporate Travel

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

## **Diversity, Equity, and Inclusion (DEI)**

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

## **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 HR 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
- Internal Employee Application Process
- Payroll Procedures
  - Paycheck Distribution
  - Payroll Deductions
  - Timekeeping
- Performance Management
  - Performance Evaluations
  - Performance Reviews
  - Progressive Discipline
- Promotions and Advancement
- Recruiting
- Retirement Recognition
- Telecommuting
- Termination
  - Exit Interviews
  - 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 (AI)
- 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

### **Stakeholder Relations**

- Board of Directors, Investment Committee, and Investor Presentations
- Investor Relations
- Partnerships and Joint Ventures

### **Workplace Compliance Programs**

- Accepting and Giving Entertainment or Gifts
- Accommodating People with Disabilities
- Affirmative Action
- Automobile Use
- Code of Conduct and Business Ethics
- 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 (EEO)
- 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

## Copyright and Indemnification/Liability Disclaimer

## 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
- 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 Procedures
- Tenant 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

## Copyright and Indemnification/Liability Disclaimer

### 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

## Copyright and Indemnification/Liability Disclaimer

- **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
  - Role of Tenant Emergency Coordinators
- **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
  - Tenant Responsibilities in an Emergency
- **Hazardous Material Spill/Exposure Procedures**
  - Decontamination and Emergency Response
  - Evacuation or Shelter-in-Place Instructions
  - Identifying Hazardous Material Incidents
  - Reporting Hazardous Material Spills
  - Tenant Responsibilities During Hazardous Material Incidents



- **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
  - Reporting Damage or Safety Concerns
  - Returning to the Building After an Emergency
  - Tenant Business Continuity Plans
  
- **Severe Weather Emergency Procedures**
  - Communication During Severe Weather
  - Evacuation Procedures (If Necessary)
  - Procedures for Tornadoes, Hurricanes, and Severe Storms
  - Role of the Property Manager in Weather-Related Emergencies
  - Shelter-in-Place Procedures
  
- **Shelter-in-Place Procedures**
  - Communication During Shelter-in-Place
  - Shelter Locations and Requirements
  - Tenant Actions During Shelter-in-Place Scenarios
  - When to Shelter-in-Place
  
- **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
  - Power Outages
  - Tenant Actions During Utility Failures
  - Water Supply Issues
  
- **Glossary of Emergency Terms**
  - Definitions of Common Emergency Terms
  - Explanation of Emergency Response Concepts

## MULTIFAMILY-SPECIFIC POLICIES

- **Accessibility and ADA Compliance**
  - 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**
  - Pest Management
  - Waste Disposal and Recycling
  
- **Pet Policies**
  - Common Area Pet Rules
  - Pet Screening and Deposit Requirements
  
- **Property Maintenance and Unit Turnover**
  - 24/7 Emergency Maintenance Protocols
  - Apartment Unit Turnover Procedures
  - Proactive Maintenance for Apartment Units
  - Seasonal Maintenance Tasks
  
- **Rent Collection and Late Payment Policies**
  - Eviction Policies
  - Late Payment Fees and Penalties
  - Rent Collection Procedures
  - Rent Control and Stabilization Compliance
  
- **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
  - Tenant Events and Community Engagement
  
- **Tenant Leasing and Renewal Procedures**
  - Lease Agreement Templates
  - Lease Renewal Procedures
  - Subleasing and Assignment of Lease
  - Tenant Screening Policies
  
- **Utility Billing and Management**
  - Shared Utility Monitoring
  - Utility Billing Procedures

## RETAIL-SPECIFIC POLICIES

### Copyright and Indemnification/Liability Disclaimer

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

## INDUSTRIAL-SPECIFIC POLICIES

### Copyright and Indemnification/Liability Disclaimer

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