

BOMA Local Association Baseline Service Standards Recommendations

Background

In May 2006, the BOMA ONE Task Force released the final report titled “A Strategic Planning Framework for the Future”. During the Town Hall meeting at the Annual Conference in Dallas, the Task Force requested that the BAE Council begin development of the minimum standards as defined in GOAL II of the Report. GOAL II is titled “Consistent Service Delivery Across All Markets. The goal was assigned a Priority 1 status with a short term timeline of July 2007.

In August 2006, BOMA International Chairman and Chief Elected Officer, Kurt Padavano, on behalf of the Executive Committee, asked the BAE Council to “finalize minimum standards for service delivery for associations affiliated with BOMA.” As a starting point, the BOMA One Task Force recommended their “stated proposed strategies to set minimum standards... The result would be that wherever and whenever a member interacted with BOMA, they would have the same quality of experience.”

The BAE BOMA ONE Task Force chaired by Jim Moody, Atlanta began work in August 2006. In order to assure the input of a variety of locals by both size and geography The Task Force was comprised of 1 large local, (Jim Moody, Atlanta) 2 medium sized locals (Pat Wittmeyer, Greater Buffalo & Sharon Moran, Southern Connecticut) and 2 small locals (Karen Basista, Dayton & Lianna Collinge, South Puget Sound). During the Leadership Conference in October 2006, the Task Force facilitated a brainstorming session with all of the BAEs. When Jim Moody resigned his position in late 2006, Rod Kauffman, Seattle/King County graciously agreed to pick up the torch. During the Winter Business Meeting in January 2007, the BAE Council discussed the first draft of the proposed set of minimum service standards.

During both sessions the BAEs agreed that minimum service standards were needed. Concerns were raised that some locals might be unable to meet the standards and questioned the consequences of this. As a result of these concerns a suggestion was made to reduce the number of mandatory baseline standards while adding a set of best practices in the areas identified as important to consistent service standards across all markets.

Following the Winter Business Meeting session, members of the BOMA One Task Force, the Executive Committee and the BAE Council approached the BAE Officers and the BAE BOMA ONE Task Force members. These individuals expressed their concerns that the GOAL II portion of BOMA One was being diminished by reducing the standards to best practices. At the same time most reiterated that:

- The BOMA One-Goal II was to provide “Consistent Service Delivery Across All Markets”
- The standards will be phased in over time
- A menu of support options will be developed by the Association Services Division at BOMA International to help locals achieve the standards

Since the Winter Business Meeting the BAE BOMA ONE Task Force and Officers have worked together to combine the intent of BOMA One (Consistent Service Delivery Across All Markets) with the suggestions, recommendations and concerns raised during the two BAE Sessions. The result is attached. We hope that you will review these Baseline Standard documents carefully and share them with your local Boards. We value your input! Please contact Janice Parham, BAE Council Chair, BOMA Greater Cleveland at 216-575-0305 or jparham@bomacleveland.org with any comments or constructive criticism.

Remember that our goal is to strengthen the entire BOMA network through Consistent Service Delivery Across All Markets.

BOMA Local Association Baseline Service Standards Recommendations

Recommended Compliance Date January 2010

In addition to the BOMA International US Federation Agreement with Local BOMA Associations and in addition to the requirements for operating as a 501 C(6) each BOMA local association shall establish and maintain the following baseline service standards:

Marketplace Image and Branding

BOMA One Charge: Facilitate information access for its members to the entire BOMA network, including an up-to-date Web site. ↓

1. Web site - each Local Association shall maintain a local web site. (Note: BOMA International provides a web site service in support of local BOMA associations)
 - ✓ Web site to include:
 - About BOMA - mission and purpose information
 - Contact BOMA information (Local and International)
 - Benefits of BOMA membership
 - Membership information and how to apply
 - Calendar of events
 - List of local leadership
 - Link to BOMA International's site
 - Display the BOMA International logo and the term "Federated with BOMA International" on the Splash/Home page of the Local's web pages

BOMA One Charge: Adhere to the BOMA identity standards, including the use of a common new BOMA mark (with some personalization capability such as adding name of the city) ↓

2. Logo and identifying marks - each Local Association is free to use its own unique identifying marks and each local shall promote the BOMA International logo as follows:
 - ✓ Displayed on the splash/home page of the local's web site with contact information or link to BOMA International. (Locals shall comply with the currently established rules and specifications for the use of BOMA International's Logo when being used).
 - ✓ Locals shall include on official documents, stationary, press releases, marketing pieces etc. the BOMA International's logo and the tag line "Federated with BOMA International"

Best Practice Voluntary Standard – Logos and Identifying Marks

- ✓ When a local has the opportunity to update their logo – consider using the same logo style as BOMA International to promote common branding over time (example below)



BOMA One Charge: Promote the industry and BOMA in the local market. ↓

3. Public Relations

- ✓ Promote BOMA International in their local marketplace and promote the local's and the International's goals and purposes*

Member Services

BOMA One Charge: Conduct regularly scheduled networking opportunities. ↓

1. Events & Meetings - each Local Association shall:

- ✓ Conduct at least four general membership meetings or similar or equivalent events each year.

BOMA One Charge: Provide a defined program of educational opportunities, including opportunities to participate in professional designation/certification program(s). ↓

2. Education - each Local Association shall:

- ✓ Promote BOMA International's educational programming, audio seminars, advanced education programs etc, (when such programming does not conflict with local programs).
- ✓ Provide local BOMA members with at least 20 hours of educational programming annually. (E.g. through locally offered seminars, partnering with nearby BOMA Locals or other partners, BOMI or other designation programs, hosting packaged programs, BOMA International audio seminars, brown bag educational lunches, etc.
- ✓ Provide information to their members about access to professional development courses and seminars in their local marketplace.

BOMA One Charge: Promote global and national BOMA events and facilitate information access for its members to the entire BOMA network. ↓

3. Networking - each Local Association shall:

- ✓ Promote BOMA International's Annual meetings (Convention/Congress, Winter Business Meeting and National Issues Conference) in their local
- ✓ Promote Regional/state BOMA leadership meetings in their local market (if applicable)

BOMA One Charge: Encourage participation in industry research, including the EER. ↓

4. Data, research, publications - each Local Association shall:

- ✓ Promote BOMA International's EER, Standard Method in their local market
- ✓ Promote in the local marketplace other BOMA International publications and links to BOMA and industry advisories by informing members at least twice annually as to where and how to access these publications via BOMA International's web site

5. Committees - each Local Association shall:

- ✓ Maintain an active Board of Directors that meets officially at least four times per year.
- ✓ Maintain an active and regularly meeting government affairs or legislative committee
- ✓ Maintain a committee or sub-committee focused on membership services and membership growth

BOMA One Charge: Have regularly scheduled communication with members. ↓

6. Information & Communications - each Local Association shall:
 - ✓ Maintain active and regular communications with local members via a newsletter, or e-newsletter, or regular mailings, or broadcast faxes, or a similar regular communication mechanism at least once per month.

Advocacy

BOMA One Charge: Have a structured advocacy program. ↓

1. Government Affairs - each Local Association shall:
 - ✓ Keep local members informed of significant advocacy issues
2. Reporting on legislative and regulatory issues - each Local Association shall:
 - ✓ Report state government affairs activities to BOMA International at least twice per year via a format to be determined (for states with more than one local association only one report needs to be generated)
3. Government affairs events and information - each Local Association shall:
 - ✓ Participate in at least one structured advocacy event each year
 - ✓ Inform members of available grass-roots lobbying tools, such as Cap Wiz and BOMA International's Legislative Action Resource Center

Best Practices Voluntary Standards – Advocacy and Government Affairs

- ✓ *Promote participate in at least one advocacy day each year either at the state capitol, or in district, or as part of BOMA International's in district government affairs day*

Leadership, Management, Membership & Communications

BOMA One Charge: A local should have at least one part-time professional staff person (through dedicated staff, BOMA association management services, shared professional staff or some other arrangement). ↓

1. Association administrative management - each Local Association shall:
 - ✓ Maintain at least one full or part-time administrator to manage local BOMA business affairs. This can be a dedicated professional staff person, contracted administrator, contracted services from a nearby BOMA or BOMA International or other such arrangement that ensures regular and consistent attention to local business affairs).
 - ✓ Establish a contact phone number, email address, and mailing address where the public and members can expect reasonable ability to communicate with the local association in a timely manner.
2. Representation at BAE meetings - each Local Association shall:
 - ✓ Ensure the attendance and participation of a local representative (BAE or other sanctioned representative) for at least one official BAE meeting each year.

BOMA One Charge: Send a member representative to at least one Board of Governor's meeting each year. ↓

3. Principal leadership - each Local Association shall:
- ✓ Ensure the attendance and participation of a local representative (who meets the qualifications of a Governor) for at least one Board of Governor's meeting each year.

BOMA One Charge: Maintain a sound financial operation. ↓

4. Financial operation - each Local Association shall:
- ✓ Maintain a sound financial position that includes the following:
 - Operate with a formal budget that includes an established annual earnings goal
 - Conduct an annual compilation, review, or audit of the books by an independent party or committee
 - Maintain budget/services growth policy that supports organizational fiscal security
 - Maintain compliance with federal and state and local tax filing requirements

Best Practice Voluntary Standard –Reserve policy and goals

- ✓ *Develop a cash reserve goal and investment policy that endeavors to reach and maintain a ratio of 35% or more of available cash assets as compared to anticipated annual operating expenses.*

BOMA One Charge: Keep membership information up-to-date in a local and international directory (printed or online). ↓

5. Membership Management - each Local Association shall:
- ✓ Maintain a majority (no less than 51%) of membership as principal members
 - ✓ A Principal member shall serve as the top elected officer
 - ✓ Maintain a local active membership of no less than 30 members
 - ✓ Maintain an accurate and up to date leadership roster for BOMA International to ensure leaders receive important communications.
 - ✓ Maintain an accurate and up to date membership roster for BOMA International to ensure members receive important communications.

BOMA One Charge: Conduct an annual planning process. ↓

6. Strategic Planning - each Local Association shall:
- ✓ Develop a business plan that directs resources toward compliance with these baseline standards and advances toward attainment of the best practices recommendations in this document:

* Indicates that the standard needs to be defined in more detail after the final Outline document has been approved

[The Baseline Standards do not include the BOMA One charge to have a governance structure and bylaws because it is required via incorporation as a 501 C(6).