



# BOMA OFFICE INCOME & EXPENSE

## QUESTIONNAIRE

Data for Calendar or Fiscal Year 2019

(\* = Required Question)

\*Property Name \_\_\_\_\_

\*Street Address \_\_\_\_\_

\*City \_\_\_\_\_

\*State/Province \_\_\_\_\_

\*Zip/Postal Code \_\_\_\_\_

CoStar Number \_\_\_\_\_

### Step 1: Contact Information

#### Create an Account or Login

Name \_\_\_\_\_

Company Name \_\_\_\_\_

Address \_\_\_\_\_ Suite \_\_\_\_\_

City \_\_\_\_\_

State/Province \_\_\_\_\_ Zip/Code \_\_\_\_\_

BOMA Member? Yes  No  Email \_\_\_\_\_

\*Select who will receive access to the Expense Performance Comparison (EPC):

You

Someone Else: 1. First Name \_\_\_\_\_

2. Last Name \_\_\_\_\_

3. Phone ( ) \_\_\_\_\_

\*4. Email \_\_\_\_\_

**Deadline April 3, 2020**



## Step 2: Building Information I

### Building Area Information

\*1. Building Area Measurement (*Please indicate the measuring unit of your reporting data.*)

- Sq. Feet       Sq. Meters

\*2. Floor Measurement Method:

- BOMA Rentable 2017—Method A     BOMA Rentable 2017—Method B  
 BOMA Rentable 2010—Method A     BOMA Rentable 2010—Method B  
 BOMA Rentable (1996)     BOMA Rentable (1989)     GSA     New York (REB 68)  
 BOMA Usable     Not Sure / Don't Know     Other \_\_\_\_\_

\*3. Office Rentable Area \_\_\_\_\_ SF/SM

4. Retail Rentable Area \_\_\_\_\_ SF/SM

5. Other Rentable Area \_\_\_\_\_ SF/SM

\*6. Total Rentable Area \_\_\_\_\_ SF/SM

### Parking Information

7. Number of Parking Stalls \_\_\_\_\_

\*8. Number of Free-Standing Buildings \_\_\_\_\_ (max of 10)

9. Year Property Opened \_\_\_\_\_

10. Number of Floors Above Ground \_\_\_\_\_ (max of 120)

### Location Information

\*11. Location:       Downtown Area       Suburban Area

12. Location Type:     Urban Area     Campus-Like Setting     Neither

13. Property Class:     Class A     Class B     Class C

\*14. Property Type:     General Multi-Tenant     75% Medical     75% Financial  
 75% Government Occupied     75% Industrial     Corporate Facility  
 Single Purpose (please specify): \_\_\_\_\_  
 Other (please specify): \_\_\_\_\_

\*15. Lease Type:     Triple Net     Modified Gross     Full Service

Other (please specify): \_\_\_\_\_

**Deadline April 3, 2020**



### Step 3: Building Information II

(\* = Required Field)

\*1. Ownership Type:

- Institutional Investor     REIT     Corporate/Owner-Occupier     Government  
 Hospital     Nonprofit     Private Owner/Partnership/LLC     Developer  
 Do Not Know     Other \_\_\_\_\_

2. Is this property operated by third party management? \_\_\_\_\_

**Please indicate the percentage of office rentable area occupied by the following types of tenants:**

3. Total Number of Office Tenants \_\_\_\_\_  
4. Total Number of Retail Tenants \_\_\_\_\_  
5. Average Annual # of On-site Tenant Employees \_\_\_\_\_  
6. Number of On-site Maintenance / Engineering FTEs \_\_\_\_\_  
7. Size of Owner Office \_\_\_\_\_ SF/SM  
8. Will the property income figures include rental charges for owner-occupied space \_\_\_\_\_?

#### Occupancy

- \*9. Average Office Occupancy Rate for the year (NOT vacancy rate) \_\_\_\_\_ %  
10. End-of-Year Occupancy Rate (NOT vacancy rate) \_\_\_\_\_ %  
11. Average Retail Occupancy Rate for the year (NOT vacancy rate) \_\_\_\_\_ %  
12. End-of-Year Retail Occupancy Rate (NOT vacancy rate) \_\_\_\_\_ %

#### Leasing Information

13. Rentable Area Leased for the year \_\_\_\_\_ SF/SM  
14. Year-End Asking Rents \$ \_\_\_\_\_

#### Energy and Sustainability Information

15. Is this property ENERGY STAR certified?     Yes     No  
16. Does your building benchmark its energy performance using a tool such as EPA's Portfolio Manager?     Yes     No  
17. If your building uses Portfolio Manager, what is your ENERGY STAR® score?  
[Answer must be a whole number 1 to 100.] \_\_\_\_\_

**Deadline April 3, 2020**



\*18. Has this property earned BOMA's 360 designation?  Yes  No

19. LEED Program Participation: \_\_\_\_\_ [New Construction, Existing Building, Core and Shell or None]

20. LEED Achievement:  Certified  Silver  Gold  Platinum

### Step 4: Income Information

1) Office Rent: \_\_\_\_\_  Override Auto-Sum \_\_\_\_\_ Total \$

1. Base Rent \$ \_\_\_\_\_

2. Pass-Thrus \$ \_\_\_\_\_

3. Escalations \$ \_\_\_\_\_

4. Lease Cancellations \$ \_\_\_\_\_

5. Rent Abatements (-) \$ \_\_\_\_\_

*Total Office Rent (Sum of 1-5) \$ \_\_\_\_\_*

2) Retail Rent \$ \_\_\_\_\_  Override Auto-Sum \_\_\_\_\_ Total \$

3) Other Rent \$ \_\_\_\_\_  Override Auto-Sum \_\_\_\_\_ Total \$

4) Telecom Income \_\_\_\_\_  Override Auto-Sum \_\_\_\_\_ Total \$

1. Rooftop Income \$ \_\_\_\_\_

2. Wire / Riser Access Income \$ \_\_\_\_\_

*Total Telecom Income (Sum of 1-2) \$ \_\_\_\_\_*

5) Miscellaneous Income

1. Gross Parking Income \$ \_\_\_\_\_

2. Tenant Service Income \$ \_\_\_\_\_

3. Miscellaneous Income \$ \_\_\_\_\_

*Total Miscellaneous Income (Sum of 1-3) \$ \_\_\_\_\_*

Total Rental Income (Sum of Office, Retail & Other Rent) \$ \_\_\_\_\_

Total Income (Sum of Telecom & Misc. Income) \$ \_\_\_\_\_

**Deadline April 3, 2020**



## Step 5: Expense Information (Expenses in Whole Dollars)

### 1) Cleaning Expenses

1. Payroll, Taxes, Fringes \$ \_\_\_\_\_

2. Routine Contracts \$ \_\_\_\_\_

3. Window Washing \$ \_\_\_\_\_

4. Other Specialized Contracts \$ \_\_\_\_\_

5. Supplies / Materials \$ \_\_\_\_\_

6. Trash Removal / Recycling \$ \_\_\_\_\_

7. Miscellaneous/ Other \$ \_\_\_\_\_

*Total Cleaning Expenses (Sum of 1-7) \$ \_\_\_\_\_*

### 2) Repair / Maintenance Expenses

1. Payroll, Taxes, Fringes \$ \_\_\_\_\_

2. Elevator \$ \_\_\_\_\_

3. HVAC \$ \_\_\_\_\_

4. Electrical \$ \_\_\_\_\_

5. Structural / Roofing \$ \_\_\_\_\_

6. Plumbing \$ \_\_\_\_\_

7. Fire / Life Safety \$ \_\_\_\_\_

8. General Building Interior \$ \_\_\_\_\_

9. General Building Exterior \$ \_\_\_\_\_

10. Parking Lot \$ \_\_\_\_\_

11. Miscellaneous / Other \$ \_\_\_\_\_

*Total R/M Contracts (Sum of 1-11) \$ \_\_\_\_\_*

### 3) Utility Expenses

1. Total Electricity \$ \_\_\_\_\_

3. Gas \$ \_\_\_\_\_

4. Fuel Oil \$ \_\_\_\_\_

5. Steam \$ \_\_\_\_\_

6. Chilled Water \$ \_\_\_\_\_

**Deadline April 3, 2020**



7. Water / Sewer \$ \_\_\_\_\_

*Total Utilities Expenses (Sum of 1-7) \$ \_\_\_\_\_*

4) Roads / Grounds Expense

1. Landscaping \$ \_\_\_\_\_

2. Snow Removal \$ \_\_\_\_\_

3. Miscellaneous / Other \$ \_\_\_\_\_

*Total Roads/Grounds Expenses (Sum of 1-3) \$ \_\_\_\_\_*

5) Security Expenses

1. Payroll, Taxes, Fringes \$ \_\_\_\_\_

2. Contracts \$ \_\_\_\_\_

3. Equipment \$ \_\_\_\_\_

4. Miscellaneous / Other \$ \_\_\_\_\_

*Total Security Expenses (Sum of 1-4) \$ \_\_\_\_\_*

6) Administrative Expenses

1. Payroll, Taxes, Fringes \$ \_\_\_\_\_

2. Management Fees \$ \_\_\_\_\_

3. Professional Fees \$ \_\_\_\_\_

4. General Office Expenses \$ \_\_\_\_\_

5. Employee Expenses \$ \_\_\_\_\_

6. Miscellaneous / Other \$ \_\_\_\_\_

*Total Administrative Expenses (Sum of 1-6) \$ \_\_\_\_\_*

7) Fixed Expenses

1. Real Estate Taxes \$ \_\_\_\_\_

2. Personal Property Tax \$ \_\_\_\_\_

3. Other Tax \$ \_\_\_\_\_

4. Building Insurance \$ \_\_\_\_\_

5. License / Fees / Permits \$ \_\_\_\_\_

*Total Fixed Expenses (Sum of 1-5) \$ \_\_\_\_\_*

**Deadline April 3, 2020**



8) Directly Expensed Leasing

1. Payroll \$ \_\_\_\_\_

2. Commission / Fees \$ \_\_\_\_\_

3. Advertising / Promotion \$ \_\_\_\_\_

4. Professional Fees \$ \_\_\_\_\_

5. Tenant Improvements \$ \_\_\_\_\_

6. Other Leasing Costs \$ \_\_\_\_\_

*Total Leasing Expenses (Sum of 1-6) \$ \_\_\_\_\_*

9) Amortized Leasing

1. Commissions / Fees \$ \_\_\_\_\_

2. Tenant Improvements \$ \_\_\_\_\_

3. Other Leasing Costs \$ \_\_\_\_\_

*Total Amortized Leasing (Sum of 1-3) \$ \_\_\_\_\_*

10) Parking Expenses

1. Total Parking Expenses \$ \_\_\_\_\_

11) Telecom Expense

1. Total Telecom Expense \$ \_\_\_\_\_

**Step 6: Confirmation**

Please review the data submitted for accuracy. Note that we may have flagged certain data for specific review. Once you have reviewed all your data, please print a copy of this confirmation page, for your records. Then, click “Submit” to assure that your submissions is complete. Once you click “submit,” your survey will be locked and you will not be permitted to make changes to your submission. If you determine that you need to make a change to your survey once it’s been submitted, please contact BOMA at [eer@boma.org](mailto:eer@boma.org).

**Deadline April 3, 2020**