



BOMA INTERNATIONAL

FOUNDATIONS of **REAL ESTATE MANAGEMENT**®

High-Performance Training for
High-Performance Real Estate Teams

**COURSE FORMAT
AND LOGISTICS
FOR SITE COORDINATOR**

This manual has been produced to assist Site Coordinators with hosting the *Foundations of Real Estate Management* courses at their Local BOMA or entity. This manual contains the following guidelines and information:

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For more information, please contact education@boma.org.

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Getting Started

Before planning and scheduling your first *Foundations* course, review the materials and discuss the program goals and processes with your leadership team. The clear support of the leadership is critical to the success of any undertaking, and continuing education is no exception. Depending on the size and complexity of your local association, your leadership team may include officers, executive committee, education committee, membership committee, young professionals committee, staff, etc. The goal here is to get all the leaders pointed in the same direction before you proceed.

Some key discussion points:

- **What are the goals for offering this program? Some possible goals are:**
 - Membership development/recruitment
 - Young professionals' development/recruitment
 - Help members satisfy continuing education requirements.
 - Position/reinforce BOMA brand.
 - Revenue for BOMA
 - Provide instructor opportunities for BOMA members, including allied/vendor members.
 - Opportunity to promote other BOMA products and services to new audience.
 - Complement other local offerings.
- **What are the participation and financial goals?**
 - How many participants do you hope to attract/need to attract?
 - Is your goal to break even, subsidize, or generate surplus revenue?
 - Do you want to offer sponsorships?
 - Do you want to offer scholarships?
- **Who is your target market? BOMA International suggests:**
 - Commercial real estate professionals with less than 5 years of experience
 - Experienced professionals (great refresher course, fills in training gaps)
 - Junior and assistant property managers
 - Administrative assistants
 - Building engineers and vendor reps.
 - Learners
 - Don't forget to target member companies to promote the concept of adopting *Foundations* for training of all new employees. Offer incentives and group discounts.
- **Do you have a sufficient instructor pool?**
 - Local members
 - Suppliers
 - Will you need to access national instructors?
- **Other**
 - How often do you want to conduct this course?
 - Where will you conduct the course? Member buildings (recommended); hotels; other?
 - How will you measure your success?

Course Scheduling and Planning Logistics

Scheduling

The local host association is responsible for scheduling and should select the scheduling format that best suits its needs. BOMA International does not recommend splitting the modules into two classes unless both halves can be offered in that same week. We also do not recommend extending the course beyond ten weeks. See “Site Coordinator’s Course Implementation Checklist” in the appendix for guidance.

When possible, schedule the classes in different buildings to allow learners to experience a variety of building systems and best practices. Meeting space (conference rooms, etc.) in member buildings is often available free of charge to BOMA locals, and learners enjoy visiting and touring various buildings. Members also love the opportunity to highlight their properties.

For the building tour, please encourage the host building’s property management and engineering teams to lead the tour at their building. Consider breaking the class into smaller groups to make the property tours more effective. (It is challenging to get 20 learners into a small mechanical room – and difficult for the “tour guide” to speak to a large group over loud equipment.) Although doing so requires more coordination, the learners undoubtedly get a better experience. See “Building Tour” in the Appendix for details.

Classroom Setup/Audio-Visual/Food and Beverage

The classroom should be set up to facilitate group discussion. Depending on the size of the class, conference, hollow-square, or crescent round sets may be preferable. Classroom locations must be able to accommodate or provide audio-visual equipment, i.e., projector, screen, microphone (if needed), and flip chart or chalk board; as well as food and beverage needs, i.e., continental breakfasts, lunches, and breaks. A registration desk will also be needed for the first day of class. See “Site Coordinator On-site Checklist” in the appendix for helpful guides.

Learner Materials

The *Foundations* book consists of a 643-pages and comes in a 3-ring binder. It is available in a printed hardcopy or digital copy for each learner to choose. BOMA local associations hosting the program purchase the learner book from BOMA International. Each learner must have their own copy given by the site coordinator.

An online ancillary of additional resource materials is available online for download prior to class. Learners will be provided with a link to access these materials. Local associations will also have access to these materials and can choose to download and print these materials for their learners if they wish.

Registration Fees/Sponsorships

Local associations hosting the program establish their own registration fees. Locals are encouraged to obtain sponsorships to offset program costs. See “Sample Course Budget” in the appendix for guidance.

Program Components

Format

Foundations of Real Estate Management is a 7-module, average 26-hour introductory course for commercial real estate management. It is designed to be delivered live in classroom settings through BOMA local associations. Small class sizes (no more than 30) are recommended in order to facilitate learning, discussion and team activities. Average class size at BOMA Georgia has been 15-20 learners.

Target Audience

The primary target audience for *Foundations* is any commercial real estate professional with less than 5 years' experience in the industry. This program is ideal for junior or assistant property managers, as well as administrative assistants, learners, building engineers, and supplier reps; in short, anyone interested in learning more about the management and operation of commercial buildings, or a career in commercial real estate. More experienced professionals can also benefit from the program, as the comprehensive curriculum provides a great refresher and fills in training gaps.

Curriculum

Foundations of Real Estate Management (“*Foundations*”) is a comprehensive introduction to commercial real estate covering topics in broad areas. *Foundations* was originally developed by the Building Owners and Managers Association of Georgia (BOMA Georgia) under the name Property Management101 (PM 101). The content was revised and expanded by BOMA International in 2007 for national and international distribution. BOMA International has continued to revise and update *Foundations*, with new editions being released in 2012, 2017 and 2022. The curriculum is divided into 7 modules, each 5-6 hours average in length. See curriculum outline at the end of this section.

- Module 1: Introduction to Real Estate Management
- Module 2: Property Types
- Module 3: Creating Value
- Module 4: Protecting the Asset
- Module 5: Accounting, Reporting and Budgeting
- Module 6: The Building and Its Systems
- Module 7: Property Services

The curriculum is available only as a package; all modules must be offered. Local associations cannot offer just selected modules, and not the others.

Post-training Materials

Exams

There is no end exam for this course. Some locals hold a “recognition ceremony” and list students completing the program on their Web site and/or in local newsletters or other communications. This provides valuable recognition for the students and highlights the course to other BOMA local members.

BOMA International is looking into incorporate a learning activity for the instructors to use to engage the learners’ participation either during each module or at the end of the course. Once the information is confirmed, we will communicate it with all site coordinators.

Continuing Education Credits

Learners who complete the course by attending and participating in all seven modules will be provided with a Certificate of Attendance to verify that they attended this program. Please contact education@boma.org to obtain Certificate of Attendance with the list of students’ full name (first, middle initial, last).

All courses offered by BOMA International qualify for credits required to renew industry designations, such as RPA, FMA, SMA, CPM, ARM and SIOR.

In addition, learners wishing to obtain continuing education credit approval for *Foundations* for real estate license renewal in their state will be responsible for making the application to the appropriate state agency. BOMA International will support this effort by ensuring they have all the information needed to apply (except for instructor information and credentials, which the local is responsible for securing). BOMA Atlanta has been able to secure 24 CEU credits in the State of Georgia.

Evaluations

BOMA International will provide to the Site Coordinator, two SurveyMonkey evaluation forms to distribute to students and instructors at the conclusion of the course. The feedback will help us improve our processes and procedures for the *Foundations* course.

Instructor Materials and Helpful Instructor Information

Local associations hosting the program are responsible for selecting instructors. We recommend you consider local members, including allied members for selected topics.

A well-prepared, experienced instructor is pivotal for the success of any education program. Maintaining enthusiasm and a positive attitude, responding to questions, posing provocative cases, eliciting participation, and coaching learners through application are all part of an effective teacher's skillset.

Below is some helpful guidance for identifying and qualifying faculty. We will also be pleased to acquire and share referrals from other local associations as the program moves into active implementation.

Why Use a Local Instructor?

- Helps keep costs down and tuition affordable (no travel costs).
- Involves local members in showcasing buildings where classes will be held.
- Provides local principal and vendor members with opportunities to establish relationships with local members, especially new members or prospects.
- Establishes relationships between participants and local members for mentoring, membership development, and networking.
- Provides participants with an insider's look at the local environment.

Who Can Be Sourced as An Instructor?

- **Local principal members**
 - Appropriately qualified local leaders, committee chairs, and other active members.
 - Recent local graduates of RPA, CPM, CCIM, and other programs may also make good instructors.
 - Members with appropriate industry credentials (RPA, CPM, CCIM, etc.) should be approached.
 - "Gen B" members.
 - Members who have worked on committees and local events.
 - Ask around: Your key leadership members will have attended conferences, workshops, meetings, training sessions, industry gatherings – they are probably aware of the "bright lights" in the local arena and know who to ask.
 - Consider issuing a "call for instructors" to your membership.
- **Other course instructors**
 - Instructors who teach real estate courses in your area (i.e., for RPA, CPM, CCIM and others).
 - Real estate faculty from local community colleges or universities.
- **Allied members**
 - Your allied members will likely welcome an opportunity to teach the sessions that pertain to their services or products (i.e., HVAC, elevators/escalators, pest management, etc.), and may offer their services free of charge. Be sure to counsel them in advance about not "selling" their company's products and services.

How Can We Help Instructors Prepare to Teach?

Instructors are provided with a guide which includes the learner material, copies of the PowerPoint slides, and instructor guidelines. The curriculum is well-organized and easy to read and understand; in addition, each session includes learning objectives. The level and depth of the content is basic and does not require special advanced knowledge or skills.

Your instructors should thoroughly review the materials well in advance of the programs so they can reflect on the knowledge and skills being addressed and consider ways to individualize their presentations to take maximum advantage of their strengths.

The teaching task is composed of two components: content and process.

- The **content components** include general and specialized knowledge of the field, regulatory and legal requirements, owner/tenant relations, physical plant operations, staff management, finances, etc. Your instructor need not be an expert in all subjects, although they ought to have significant experience in property management and real estate administration. This is an introductory course, so anyone with significant general experience will be familiar with the material.

The workbook that accompanies the program includes seven modules; each module includes from four to seven chapters, and there are several property tours. Instructors need not prepare any new material for the programs; as a national series, *Foundations* provides the content necessary to ensure that participants cover the same material in all locations. However, instructors are encouraged to add examples and case studies from their experience to reinforce information and concepts described in the material.

- The **process components** include the teaching and presentation skills necessary to capture and engage the attention of professional audiences, deliver the content, and support the variety of learners as they work to absorb the material.

What Makes a Good Instructor?

- Well-organized and prepared.
- Knowledgeable about the subject, the courseware, and the audience.
- Understands that this is a national curriculum and agrees to “teach from the book” rather than go off script into other areas.
- Has an engaging and responsive personality.
- Interjects personal case studies and experience to reinforce theoretical or abstract elements.
- Arrives on time and stays on schedule.
- Engages learners in discussion, is interested in their points of view, and remains sensitive to their individual situations, learning styles, and personalities.
- Is sensitive to individuals’ backgrounds and is equally accepting of all kinds of people.

- Encourages questions and elicits the contributions and opinions/experiences of all participants in the class.

Instructor Materials

Instructor materials consist of:

- One free *Foundations* book that can be shared amongst different instructors.
- Accompanied downloadable PowerPoint slides for each of the modules.

Cost for additional instructor *Foundations* book:

- Black and White hardcopy - \$80 plus shipping
- Colored hardcopy - \$172 plus shipping

Appendix

Building Tours

Building tours are a critical component of this program because they reinforce classroom learning.

Use the Property Tour Checklists in the Addendum to guide your property tours:

- **Property Tour I | Property Management Office**
 - This “property tour” is designed to give learners information about the building(s) they manage.
 - Learners should complete the checklist with their on-site property management and building engineering team members – ideally, their senior property manager and chief engineer.
 - The instructor can discuss the findings at a later class session if time permits.
- **Property Tour II | HVAC, Domestic Water, Fire Alarm/Fire Sprinkler, and Main Electric Room**
 - Depending on the course schedule, instructors might want to coordinate this tour:
 - **In sections** (most preferred but often requiring more coordination with the building team) – conduct a property tour immediately after the classroom learning (finish the HVAC lecture and then inspect the HVAC system components at the building)
 - **As a daily tour** – conduct a property tour at the end of each day and review all systems covered during that day.
 - **As a single tour at the end of the course** (least preferred but sometimes the easiest to schedule)
 - Do your best to show a variety of building system components.
 - For example, if the host building uses rooftop units for HVAC, consider:
 - Choosing buildings to host future class sessions with different types of mechanical equipment – like cooling towers, chillers, fan coil units, etc. Incorporate these HVAC system components in future tours at those buildings.
 - Coordinating the tour to incorporate other area buildings (ideally within walking distance of the host building) that use different building systems.
- **Property Tour III | Elevators/Escalators, Roof Systems, Solid Waste/Recycling, and Janitorial Services**
 - As noted above, consider options to show different systems throughout the course.
 - For example, try to show both hydraulic and traction elevators.
- **Property Tour IV | Engineering**
 - This property tour is designed to give learners information about the engineering services at the building(s) they manage.
 - Learners should complete the checklist with their on-site building engineering team members – ideally, their chief engineer.
 - While it might be possible to cover some of these topics during a property tour of the host building(s), learners will get more value from this tour if they discuss these topics with their chief engineer.

- The instructor can discuss the findings at a later class session if time permits.
- **Property Tour V | Parking, Security, and Pest Control**
 - Try to choose host properties that have:
 - Different types of parking systems (surface parking, garages, decks, etc.)
 - Security control rooms and layered security applications
 - Visible pest control measures

Because building tours are a vital component of the *Foundations of Real Estate Management*®, BOMA International recommends conducting classes in member buildings (TOBY™-winning or other “best-in-class” buildings).

Site Coordinator's Course Implementation Checklist

Each individual has their own planning strategy and applications to host the *Foundations* course training efficiently. This checklist is to help guide all site coordinators in initiating and implementing the Foundations course only. However, all **red font listings** represent deadlines for communicating with BOMA International (scheduling, ordering materials, and reporting).

Step 1: Three to four months out

- Choose program dates and select operating model (i.e., every Friday for 5 Fridays; 2 days a week for 2 ½ weeks; etc.)
- Confirm training location(s).
- Confirm instructor(s).
- Confirm building tour locations.
- Develop budget; determine registration fees.
- Develop marketing/promotion plan.

Step 2: One to two months out

- Report class dates, locations, and completed Foundations book order form to education@boma.org. BOMA International will process all orders within one week upon receiving the order form.
- Receive books from BOMA International (Check on delivery; notify BOMA International if any books have not arrived).
- Begin marketing/promotion.
- Confirm registrations as received; provide instructions for accessing online resource materials.
- Confirm sponsors.
- Apply to state licensing board for continuing education approval (if applicable)

Step 3: Minimum one month out

- Provide instructors with instructor manual; provide instructions for accessing online PowerPoint slides and teaching guidelines.
- Arrange catering (i.e., continental breakfast, lunches, breaks)
- Arrange for audio-visual equipment (projector, screen, microphone, flip chart or chalk board)
- Arrange transportation (if building tours are off-site)
- Purchase “supplies” for learning assessment; other supplies

Step 4: Minimum two weeks out

- Check in with instructors/answer questions/provide support.

Step 5: One week out

- Reconfirm locations, AV, catering, building tours, transportation.
- Check in with instructors and local BOMA reps.
- Write up introductions for instructors.
- Print miscellaneous instructor materials (additional materials instructors may want to provide)

- Print/obtain other miscellaneous materials (local program promotions, membership brochures, etc.)

Step 6: Two to three days out

- Final check on everything in step five.
- Pack books and supplies for the course.

Step 7: Day of training

- Arrive at least two hours early to check setup and arrangements.
- Set up registration desk (first day only)
- Greet and check-in learners; provide books (first day only)
- Introduce instructors.
- Monitor program throughout day.
- Present closing remarks including evaluation links and Certificate of Attendance.

Step 8: Two to three days before training ends

- Obtain learner and instructor evaluation links from BOMA International at education@boma.org.
- In the same email request to obtain evaluation links, please send a list of learners wishing to obtain Certificate of Attendance to BOMA International and obtain group's unique code.
 - List should include full name, title, organization, email address. **NOTE:** Only learners attending the training in its entirety can receive the Certificate of Attendance. No exceptions can be made.

Step 9: Final Day of training or one day after training

- Distribute evaluation URL along with Certificate of Attendance language provided from BOMA International to all learners.
- Provide information and instructions on recognition, if any (i.e., recognition ceremony at local event; Web and/or newsletter article, etc.)

Site Coordinator's On-site Checklist

We recommend you arrive at the meeting location at least two hours in advance of the training's start time, and remain with the class throughout the entire program (to provide speaker support, answer questions, provide direction, etc.)

Day 1

Registration Desk

- ☐ Cash box, credit card machine, onsite registration forms, receipts (if accepting on-site registrations)
- ☐ Learner manuals
- ☐ Laptop with access to learner roster to check registration confirmations, information, etc.
- ☐ Name badges
- ☐ Table tents
- ☐ Supplies (pads, pencils, local brochures and other materials)

Classroom Setup

- ☐ Check room set-up, AV, signage.
- ☐ Check in with building tour guide; reconfirm time and location
- ☐ Check food and beverage (F&B) deliveries throughout day
- ☐ Provide opening comments/greetings; acknowledge and thank sponsor(s), building reps.
- ☐ Greet and intro speakers.
- ☐ Remind learners of date and location of next class.
- ☐ Remind learners to take their course manuals and other materials with them but also don't forget to bring them back for the next class.
- ☐ Collect name badges and table tents to setup for the next class.

Days 2-4

Classroom Setup

- ☐ Repeat day one making sure that all students are checked in. If anyone is absent, please make sure to mark it on your learner roster as this person may not be eligible for Certificate of Attendance. **NOTE:** Only learners attending the training in its entirety can receive the Certificate of Attendance. No exceptions can be made.
- ☐ Set up table tent cards.

Day 5

- ☐ Repeat day one making sure that all students are checked in.
- ☐ Check in with building tour guide; reconfirm time and location
- ☐ Check F&B deliveries throughout day
- ☐ Provide opening comments/greetings; acknowledge and thank sponsor(s), building reps

- ☐ Re-distribute name badges and table tents.
- ☐ Distribute evaluation URL along with Certificate of Attendance language provided from BOMA International to all learners.
- ☐ Provide information and instructions on recognition, if any (i.e., recognition ceremony at local event; Web and/or newsletter article, etc.)

Sample Course Budget

The following budget is based on an average class size of 12 learners. This budget is provided only as a guide. Local BOMAs set registration fees and set sponsorship rates; registration fees and sponsorship rates are not prescribed by BOMA International.

Revenue

12 learners @ \$550	\$6,600
Sponsorships 3 @ \$500	\$1,500
Total Revenue	\$8,100

Expenses

12 learner manuals @ \$275	\$3,300
Instructor manual (additional)	\$ 275
*Instructor fees @ \$250/day	\$1,250
*Meeting facilities	\$ 0
*Transportation	\$ 0
*Marketing	\$ 500
*F&B @ \$25/day x 2 days	\$ 600
*Audio visual equipment @ \$50/day	\$ 250
Misc. supplies @ \$5/learner	\$ 60
Misc.	\$ 500
Total Expenses	\$6,735
Total Net Revenue	\$1,365

*Assumptions:

- Instructor fees: assumes local instructors only, and that some will volunteer (no fee)
- Meeting facilities: assumes classes will meet in member buildings; therefore, meeting facilities will be free of charge.
- Transportation costs: assumes building tours conducted on-site; no transportation to other locations needed.
- Marketing: expenses include limited printing/mailing; electronic marketing will be utilized
- Food and Beverage (F&B) assumes at least 3 out of 5 days F&B will be provided free of charge by the host building.
- Audio Visual: assumes building and/or local can provide some of the equipment, thus reducing rental charges/needs.

Marketing and Promotion Guidelines

Marketing for *Foundations* should be a continuous process. Please update the Canva Form with your *Foundation* course's information to be used as needed. Once your local decides to offer the program, you should incorporate information about the course on your website, in membership materials, and in newsletters and other communications to members. For specific scheduled programs, you should begin your marketing no later than 2 months out (and preferably 3-4 months out) to ensure that companies and prospective learners have adequate time to plan for the expenditure and time out of the office.

Target Audience

The primary target audience for *Foundations* is any commercial real estate professional with less than 5 years' experience in the industry. This program is ideal for junior or assistant property managers, as well as administrative assistants, learners, building engineers, and supplier reps; in short, anyone interested in learning more about the management and operation of commercial buildings, or a career in commercial real estate. More experienced professionals can also benefit from the program, as the comprehensive curriculum provides a great refresher and fills in training gaps.

Marketing/Promotion Strategies and Tips

- Build an area on your website about the *Foundations* course, including course description, upcoming schedule, fees, location, how to register, who to contact for more info, etc.
- Send regular e-mail promotions to members and prospects.
- Distribute flyers and make announcements at monthly luncheons and other events, particularly other education seminars.
- Take advantage of local newsletters and other regular communications to members—insert a flyer or include ads promoting the *Foundations* course.
- Consider advertising in local newspapers, business publications, and/or local college publications to reach learners and others who may be interested in a career in commercial real estate; submit an article to the local business journal.
- Schedule meetings with member companies to discuss benefits of incorporating *Foundations* into their corporate training programs; offer group discounts and other incentives.
- Target your marketing beyond current members—prospects, non-member seminar and event attendees, learners, civic organizations.
- Don't forget to promote the program to your allied members and building engineers.
- Offer scholarships or other incentives.
- Collect testimonials from learners who take the course and use them in your marketing.
- Conduct "certificate ceremony" at local luncheon or other event to raise visibility for the program.
- Publish a follow-up report/story in your local newsletter after each course; include statements and testimonials from learners; share reports of promotions and new jobs as a result of taking the course.
- Ask learners taking the course to refer others; ask for contact information for referrals so that you can reach out to new prospects directly.
- Ask your Young Professionals committee to help you promote the program and identify prospective learners.
- Enlist your instructors to help identify prospective learners.