

Review and Audits of any or all of the following Property & Facility Management Policies, Procedures and Systems

Acquisitions & Transitions – Assist in assessing potential acquisition properties and in the transition including:

- Budget & operational review
- Capital and major expense review
- Contracts and contractors
- Staffing
- Transition checklist
- Transition implementation

Budgets

- Expense & Revenue
- Capital budgets
- Bidding process
- Reports – monthly & quarterly
- Reforecasts – quarterly
- Budget execution

Contracts & Agreements

- Continuing service agreements
- Leases
- License agreements
- Management Agreement
- Roof antenna license
- Scopes of work

Construction

- Construction agreements
- Construction manual and procedures
- Operational Design review
- Tenant construction manual & procedures

Engineering & Maintenance - Review existing operations & recommend changes to improve productivity and reduce expenses.

- Preventative Maintenance Program
- Procurement – potential use of procurement company
- Scheduling
- Site plans designating physical systems
- Specifications & Scopes of Work
- Vehicles & Equipment
- Work Order

Insurance

- Certificate of Insurance tracking
- Coverage compliance
- O&M – water, mold, lead
- Reporting & Claims

Marketing

- Advertising
- Brochures/directories
- Events
- Holiday décor
- Social media
- Web-site

Policies & Procedures

- Property Management
- Life Safety Manual
- Emergency Manuals
- Tenant Construction Handbook
- Tenant Handbook
- O&M Program –water, mold, lead
- C.A.R.E. (tracking/dealing with customer concerns)
- Surveys – Tenant, Owner/Partner

Programs & Systems – Determine quality and efficacy of existing programs.

Recommend alternatives for simplifying and for improved accuracy and tracking.

- AP
- AR
- Barricade program
- Construction
- Lease Administration
- Emergency Notification
- Filing System – hard/electronic including leases, contracts, communications, etc.)
- Graphic site plan for physical systems
- Insurance certificate tracking
- Lease Administration
- Operational Design
- Parking – deck, metered, valet
- Preventative Maintenance
- Reporting – standardized & custom
- Specialty Leasing & Sponsorship
- Procurement – National company for increased purchasing power/savings
- Reporting – Standardized & custom (monthly, quarterly, forecast, sales, etc.)
- Specialty Leasing
- Sponsorships
- Vehicular & Pedestrian Counters/Tracking
- Visitor Access

Security & Life Safety

- Life Safety Policies & Procedures
- Emergency Manuals/Procedures
- Rules of Conduct and Respect
- Parental Guidance Program
- Vehicles & Equipment

Staff & HR

- In-house versus contract services
- Staffing levels
- Job descriptions and responsibilities
- Organizational chart
- Compensation schedules
- Hiring staffs
- Staff Assessments and Surveys
 - Tenant & Owner
 - Review form
 - Life Style Inventory

Tenant

- Dispute resolution
- Sales analysis & reporting
- Lease compliance
- Market/competition
- Tenant mix
- Tenant relations & retention
- Tenant surveys
- Visitor Access