

**Property Management Audit Program - Schedule**

Customer: \_\_\_\_\_

Dates of Visit:

AREA	SERVICE PROVIDER	CLIENT	SUBJECT	PRE-VISIT	Day 1	Day 2	Day 3
Goals/Objectives			Review business objectives.				
			Identify key building issues.				
			Understand organization structure.				
			Discuss acceptable solutions.				
Schedule Key Interviews			Property Manager				
			Plant Operations & Maintenance Manager				
			One Maintenance Mechanic				
			Project Manager				
			Janitorial Manager				
			Landscape Contractor				
Building Tour			Tour main building.				
			Tour Tenant Space				
Organizational Structure			Review in-house skill levels, wage scale, union issues.				
			Review managers/supervisors/hourly ratios.				
			Understand division of responsibility.				
			Review training, career pathing, turnover.				
Budgeting/Reporting			Review reporting system.				
			Understand process for monitoring expenditures and variance reporting.				
Work Order			Review work order system, process, reports.				

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System			Review customer service, dispatch process.				
Maintenance & Operations			Understand unique building requirements.				
			Review preventive vs. responsive work orders.				
			Review electric services and lighting.				
			Review HVAC systems.				
			Review environmental and life safety operations and maintenance procedures.				
			Review sprinkler system.				
			Review fire protection.				
			Review elevators				
			Review trash removal and recycling.				
			Review parking lots and roads.				
			Review pest control.				
			Identify/review other special systems: >Compressed Air >Deionized Water >Sewage Treatment >Process Gases				
Contract Administration			Identify services contracted.				
			Review key contracts, benchmark to market.				
			Review contract bid process and controls.				
Materials Mgmt			Review role in contract services specs/bids/negotiation.				
			Review role in purchasing supplies.				
Security			Review security strategy.				
			Review organization and costs/contract.				

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Janitorial / House Services			Review technology being used.				
			Review organization and costs/contract.				
			Assess quality.				
			Understand customer service, performance criteria.				
Grounds			Review pest control and window washing processes.				
			Review organization and costs/contract.				
			Assess scope of services.				
Energy			Review snow removal process.				
			Obtain rate analysis, utility bill information.				
			Review lighting configuration.				
			Review Energy Management System.				
Tax & Insurance			Identify conservation initiatives.				
			Understand how manages property taxes.				
Project Management			Review insurance costs.				
			Determine in-house resources.				
Regulatory Compliance			Review project mgmt process: bidding, cost commitment tracking, change order processing, closing, etc.				
			Review other areas of risk: ADA, site safety, asbestos, CFC, etc.				
Building Planning			Review building planning process.				
			Determine resources involved in implementing moves.				