LEED PROCESS GUIDELINES

1.1 Planning / Project Team Selection

Sustainable design and LEED requirements are most efficient and economical to integrate into a project’s scope when the process begins early.

a. PM / Owner need to write the LEED Narrative for the project
b. PM / Owner determines programmatic requirements and LEED goals, discuss with TSG representative
c. PM accurately describes programmatic requirements and LEED goals in RFP
d. PM / Owner conducts interviews and selects A/E, CM & Commissioning Team(s)
e. The Project Team designates the LEED Administrator (typically the A/E firm) for the project
f. The LEED Administrator Registers the project with the USGBC

To better understand timelines for LEED deliverables and an outline of entity roles and responsibilities; please visit the University’s LEED Certification Matrix

1.2 Schematic Design (SD) Phase

This is most efficient and economical point to establish LEED goals and strategies for the project. Establishing clear LEED goals in the Schematic Design phase will allow for items to be properly accounted for in the construction budget early in the project process.

a. LEED Administrator schedules a Design Charrette using the Proposed Scorecard with Project Team
b. LEED Administrator updates the LEED Scorecard with Charrette-identified Goals and issues a report to the Project Team outlining selection choices.
c. LEED Administrator provides access to Project Team and assigns responsibilities, PM to have Manager rights

1.3 Design Development (DD) Phase

This phase is crucial in designing a high-performance, sustainable building. Typically, strategic decisions are made during the design phase as a result of engineering modeling and cost estimation.

a. LEED Coordinator will ensure project team members have access to LEED Online and LEED Template files
b. LEED Administrator shall submit the ‘Design Phase Review Package’ to the USGBC
c. By the end of DD Phase, the Project Team should have a confirmed LEED Scorecard, clear strategies toward LEED Certification, and a understanding of budget impacts

1.4 Construction Documents / Bidding (CD) Phase

It is critical that all LEED requirements show up in both the construction drawings and specifications at the CD phase. The specifications are critical to successfully implementing LEED requirements during construction and should clearly indicate which LEED Credits should be documented in each specification division.

a. Project Team to clearly describe LEED Requirements in the Construction Documents & Specifications
b. LEED Administrator to submit the ‘LEED Action Plan’ within seven (7) days from ‘Notice to Proceed’ demonstrating how all LEED Prerequisites and Credits will be achieved;
and should include: 1) LEED Materials Schedule of Values (SOV), 2) LEED Submittal Log, 3) Waste Management Plan & Reports

c. LEED Administrator shall separately identify LEED labor & materials on Schedule of Values for items in Divisions 2-10 & 31-33

1.5 Construction Administration / Project Completion & Occupancy

The best strategy to ensure successful implementation of LEED requirements during construction is to establish open lines of communication and clear understanding of LEED deliverables and their associated timelines. When construction and final cleaning are complete the LEED Administrator, PM and Owner will conduct a systems and maintenance review, and prepare a Punch List of items that need to be corrected prior to building occupancy

a. Project Team will schedule a sustainable design kick-off meeting with all contractors (general contractor, sub-contractors, major trades & disciplines) within sixty (60) days from the ’Notice to Proceed’ to review the LEED Scorecard and confirm all Construction Phase LEED Prerequisites and Credits

b. LEED Administrator to submit: Construction Waste Management Plan, Sediment and Erosion Control Plan (SEC) & Indoor Air Quality (IAQ) Management Plan w/ Low-Emitting Controls section if applicable

c. Contractors shall hold weekly LEED Coordination Meetings, and shall provide monthly LEED Progress Reports with payment requests showing actual LEED construction & purchasing activities per the LEED Action Plan

d. LEED Administrator shall submit the ’Construction Phase Review Package’ to the USGBC

e. LEED Administrator, PM and Owner will develop and implement an Education and Outreach plan for building occupants and maintenance staff.

1.6 LEED Mandatory Points

a. All LEED construction projects shall pursue the following LEED points:
   - Optimize energy performance - minimum enhancement of 10%
   - Enhanced commissioning
   - Enhanced refrigerant management
   - Construction waste management
   - Low-emitting materials
   - Indoor air quality assessment
   - Thermal comfort
## LEED CERTIFICATION MATRIX: v2.2

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### Project Team
- Pre-Phase (AD Team establishes preliminary sustainable design strategy)
- Participate in multi-disciplinary design review
- Integrate LEED requirements with design, develop Alternative Compliance Paths, Innovative Design Strategies
- Document sustainable plans and drawings specifications
- Contractor and Subcontractor LEED Orientation
- Complete Construction Phase documentation (General Contractor, Sub-Contractors, CECs)
- Design Team reviews LEED Revise for compliance
- Assist in Construction Phase clarifications
- Assist Design with Thermal Comfort Survey

### Owner
- Establish LEED Goals, Integrate sustainable design into LEED Process
- Pay ‘Registration Fee’ and ‘Certification Fee’ to USGBC
- Pay USGBC for Design Phase Review
- Pay USGBC for Construction Phase Review
- Conduct Thermal Comfort Survey

### Award Project
- Issue RFQ for Commissioning Services
- LEED Check-In Meetings
- Pre-Bid Meeting

### LEED Coordinator
- Assist with preliminary sustainable design strategy, integrate with project
- Review with Design Team: Goal Setting, LEED Requirements, Schedules, Responsibilities, CECs
- Facilitate Design Review
- Register Project with USGBC
- Setup Project & Team on LEED Online
- LEED Kick-Off Meeting
- Review for LEED Compliance
- Submittals
- Construction Documents
- Submittals
- LEED Ready
- Research and submit OIPs as needed
- Assist Construction Team and CEA with Construction Phase Documentation