



LEED Management Services

## **Top-Ten Tips for First-Time LEED Teams**™

Presented at the AIA New Mexico State Convention October 2005

Originally published by McGraw-Hill

Updated April 12, 2007

By Valerie Walsh, LEED Accredited Professional

As the number of Colorado USGBC LEED® projects begins to increase, this is a good time to review the experiences of first-time LEED teams who've learned some valuable lessons. While your team may come together out of its desire to create a green or sustainable project – how well you manage the process and documentation will largely determine whether it earns LEED certification. A successful team will understand from the start that LEED projects require a whole-systems design approach, and will depend throughout on collaborative, interactive, and multidisciplinary teamwork. Here are ten tips that will guide your first-time team.

### **1) Plan Early.**

A common mistake for first-time teams is trying to work LEED goals into a project that is too far along in the design process. Make the decision to pursue LEED certification as early as possible, ideally in pre-design. Design strategies should be developed collaboratively from the start. The best results are achieved when the design is a result of the team's sustainable objectives and goals, rather than trying to shoehorn LEED features into a set design, or "chase" points to make them fit. The owner's sustainable priorities will be your guide.

### **2) Delegate or Hire a LEED Manager.**

Skanska USA LEED construction manager Steve Gourley on the Duke University LEED project offers this advice: "*You (owners) need a LEED Champion to facilitate the LEED part of the contract, keep the ball rolling, organize meetings, track deliverables, and be the prime point of contact for the owner...*". The LEED Manager knows where you need to go and how to get you there. While all teams benefit with a LEED Manager driving the boat, it is essential for first-time LEED teams. The most important thing is to have one qualified person responsible for coordinating, tracking, and reviewing the LEED requirements and submittals for the whole team all the along the way.

### **3) Start with an Eco-Charrette.**

"*Hold charrettes early and often and be certain that the gamut of stakeholders are active participants*" advises Professor Brian Dunbar, USGBC LEED Faculty and



director of the Institute for the Built Environment at CSU. Prior to any drawings, gather the entire team of design and construction professionals as well as the owner, occupants, maintenance personnel and perhaps even local officials, community members, utility company rep, or product manufacturers for a pre-design charrette. The length and frequency of charrettes will vary based on the size and scope of the project. Ideally they will occur in each design phase. Also consider a team tour of an exemplary facility to inspire integrated thinking and to see what works in your area.

#### **4) Get some (or more) LEED training.**

Attend a LEED workshop (cost about \$375 including materials) or arrange for a private seminar for your office or team members new to LEED. Become a LEED Accredited Professional (exam fee \$250 for USGBC members). Both found at [www.usgbc.org](http://www.usgbc.org). The updated v2.2 LEED Professional Accreditation Study Guide (\$50) is available through the USGBC Colorado Chapter to assist in becoming an effective LEED AP and includes a practice test and new EB and CI sections. The LEED-NC Technical Review workshop, amongst many others, periodically comes to Colorado through the local Chapter. Check the USGBC website for national workshop locations and schedule. The USGBC has a new LEED study course online as well. Buy and study the USGBC LEED-NC Reference Guide currently in Version 2.2 (\$150 member price). Attend the annual USGBC Greenbuild conference for a powerhouse experience of sustainability and LEED. The Colorado Chapter has monthly presentations worth attending. While charrettes often include an introduction to LEED for first-time teams, I recommend prepping before then to be ready to hit the ground running. My ideal LEED team would all be LEED AP's as a starting point.

#### **5) Include LEED Requirements and Specs in RFPs, bid packages, and Construction Documents.**

LEED Requirements directly impact numerous Specification sections, in addition to the Division 1 section dedicated to LEED Requirements. It is most important to include what submittals will be required of each team member and their vendors in the specs and bid package. Additionally, contractors are probably not accustomed to submitting Management Plans for Construction Waste or Indoor Air Quality (IAQ) as a requirement.

Purchase or develop contract specifications for LEED Requirements, including sample management plans and templates for the contractor. MasterSpec for LEED Requirements is one such product. The update for LEED-NC v2.2 is expected to be released by summer 200 and is expected to include LEED-CI, LEED-EB, and LEED-CS. Research building materials and products early, as they typically impact numerous credit point outcomes, and request product submittals from the contractor for approval well in advance too. Monthly progress reports from the General Contractor are important to write into the specs to gauge whether they are on track for achieving project goals. Supply the project specific LEED Letter Templates for Contractor's in bid packages so they get a look at what type of submittals and backup data will be required of them.



**6) Hire experienced LEED consultants.**

LEED has spawned a new field of specialists that will help you achieve sustainable and LEED goals. Be prepared for some new team members. LEED specialists can include daylighting/electrical engineers, energy modelers & analysts, sustainable technology designers, commissioning authorities, sustainable design charrette leaders, and the LEED Manager or Consultant.

**7) Document as you go.**

Gather the submittals necessary for certification all along the way. If you wait until the end of the project you will be chasing down recycled content cut sheets, MSDS forms for VOC content, GreenGuard certificates, or FSC wood chain-of-custody certificate numbers from vendors who have new work on their radar and will therefore be harder to obtain.

Be familiar early with the LEED Letter Templates and requirements that you are responsible for submitting and the documentation that may accompany them so you know what to compile or calculate. If you are the LEED Manager, create a simple checklist to track receipt, review and completion of each credit point submittal. Study the “Submittal Documentation” section of each credit point and Prerequisite in the Reference Guide in addition to the LEED Letter Templates. The Reference Guide is available online to the Project Administrator of a registered LEED project. As of June 2006, a non-interactive PDF version of the Letter Templates is now available on the USGBC website for anyone to see. Only registered projects have access to the interactive Letter Templates which include calculators.

If your project is v2.1 and registered prior to December 31, 2005, be familiar with the Audited Credit Requirements that you will be expected to provide in the review process following your certification submittal. It can be found online with some digging at [www.usgbc.org](http://www.usgbc.org) under LEED Certification Process.

LEED-Online is the new streamlined LEED certification web tool that the USGBC released in mid-2006 for NC v2.2, CI, and EB. LEED-Online for CS is currently in Beta testing. It is a big improvement from the old system for certification submittals that used cumbersome Excel Letter Templates and all backup documentation were bulky paper-intensive submittals in 3-ring binders. The new worksite allows team members to upload the required Letter Templates and required submittal documents on this central project website. Another feature is that of the two-phase certification submittals. The design submittals may be submitted separately from construction submittals for USGBC review.

**8) Build-in extra points for LEED certification.**

Plan on USGBC denying 3-4 points that you submit, at least for the fully-audited program preceding LEED-Online. Study the Credit Interpretation Requests & Rulings (CIRs) on the USGBC site to get a good idea about which approaches and design strategies fly and which get shot down. The Innovation points can be more unpredictable than others. Also shoot for another 3 or 4 points that you'd like to achieve but for various reasons, may not materialize prior to submittal. Consider



targeting one full certification level higher than you would be satisfied with. If you should find yourself short at the end, purchasing renewable energy credits (RECs) for the extra Green Power credit has turned into an “insurance” point for some teams. Go to [www.green-e.org](http://www.green-e.org) for more information on purchasing green power.

### **9) Bring-in the Commissioning Authority early.**

Teams new to LEED may overlook the need to bring the Commissioning Authority (CxA) in during the early design phase to document the owner’s energy-related project requirements. The CxA needs to review both the Owner’s Project Requirements (OPR) as well as the Basis of Design (BoD) at specific stages. The Commissioning requirements need to be in the construction documents. The CxA role continues through the design and construction phases and in the case of the Enhanced Commissioning point, through the first year of post-occupancy.

Make certain that you understand who is qualified to serve as the Commissioning Authority. The v2.2 Reference Guide has a very thorough explanation on this and the requirements of both the Fundamental Commissioning (EAp1) and Enhanced Commissioning (EAc2) credit. As an example, the Enhanced Commissioning credit requires the CxA to be from an independent firm who is not involved in the project design or management and cannot be hired by the firms holding construction contracts. The Fundamental CxA in some cases may be from the same firm of a project team member, but this Prerequisite needs to be reviewed carefully for compliance. Visit the [www.usgbc.org](http://www.usgbc.org) website under LEED-NC for a chart entitled “Who can serve as the Commissioning Authority?”

Fundamental Commissioning of the Building Energy Systems is a Prerequisite of LEED and one that you can’t backtrack on if you haven’t incorporated it from the start.

### **10) Stay current.**

Become familiar with the USGBC website, [www.usgbc.org](http://www.usgbc.org). It is where you register your LEED project. It is a wealth of information on everything LEED, including the reference guides, LEED rating systems and application guides now active, in pilot, or under development; registered and certified projects; events, sustainable industry resources, news, reports, research, case studies, member’s directory, LEED AP listings, and more. Members, subscribers and/or registered projects have more access to these online resources. LEED Letter Templates, Reference Guides, Errata and Credit Interpretation Rulings (CIRs) are found here, but Letter Templates and CIRs can now be accessed on the LEED-Online workspace for managing your LEED project more centrally.

Sign up for the electronic USGBC Newsletter. Check out the published studies to help you present LEED to clients with confidence such as Examining the Cost of Green, Making the Business Case for LEED, and others under Member Resources. GreenerBuildings.com is a free online newsletter the USGBC has become associated with recently.



Get on a Corresponding Committee with USGBC to stay current with your particular area of interest. There are 25 such committees ranging from schools, state & local government, laboratories, lodging, and healthcare facilities to name a few. It is a selective way to focus your LEED interests. The USGBC online chat sessions are a good way to learn more about a new LEED program and get questions answered for your project in real time. The new Member Circles are underway for direct contact with other members.

Become a member of the Colorado Chapter of the USGBC to connect with active professionals and receive communications of valuable local talks, seminars, events, tours and more. Monthly chapter presentations are a good way to learn and network green. Join online through the USGBC site under the “Chapters” link. Don’t forget about the Green Drinks networking get-together every month too!

Also check out [www.BuildingGreen.com](http://www.BuildingGreen.com), the authoritative information source on environmental building and authors of GreenSpec, Environmental Building News (EBN), Green Building Advisor and over 100 Case Studies. Try out their list of free content for non-subscribers that includes a sample newsletter, the latest GreenSpec products with reviews and manufacturer links, case studies, and their EBN bulletin.

Their online BuildingGreen Suite by subscription is an invaluable design resource for sustainable and LEED projects that I have come to rely on. One of the Suite products is the online GreenSpec directory, searchable by LEED credit, CSI designation, green attribute, homebuilder category, or by U.S. EPA CPG Recycled Content Products listing. It also includes Guideline Specification language. The EBN newsletter is cutting-edge unbiased journalism with no advertising. BuildingGreen is listed as a resource under countless credit points in the USGBC Reference Guides.

Subscribe to GreenSource Magazine [www.greensourcemag.com](http://www.greensourcemag.com) launched in June 2006 brought to you by a great team of McGraw-Hill and BuildingGreen, Inc. Environmental Design & Construction Magazine [www.EDCmag.com](http://www.EDCmag.com) now covers residential along with commercial high-performance building and are LEED oriented. Attend a green building conference. The US Green Building Council’s annual Greenbuild Conference & Expo will be in Chicago November 7-9, 2007. Attendance was over 13,000 at Greenbuild 2006 in Denver. Don’t miss it!

**Challenge your team!** You’ll be surprised at the sustainable solutions you’ll discover together and the spirit that is created once you’ve established your vision and intention for the project.

-continued-





Valerie Walsh is an independent LEED manager and specialist in Colorado and New Mexico. Valerie manages and coordinates the LEED process with teams on projects ranging from commercial and government to historic renovation and retail/campus applications. Valerie is a LEED Accredited Professional and has written the “Road Map to LEED® Certification”.

Valerie was Director of Publication for the first GreenSpec national directory in 1996, and currently serves on the Education Committee for the Colorado Chapter of the US Green Building Council. She is also a graduate of the CSU Green Building Certificate Program; the Succeed at LEED advanced program, and The Natural Step.

In June 2007, Valerie will have completed the “How-To Guide to LEED Certification for State of New Mexico Buildings”, an educational Clean Energy Grant in collaboration with the NM Attorney General.

Prior to founding LEED Management Services she was a pioneering green builder in Santa Fe and owned Green Horizon for 18 years. Her national speaking engagements and published work on green and solar building began in 1980.

Her “Top-Ten Tips for First-Time LEED Teams” first appeared in McGraw-Hill’s Colorado Construction Journal Green Building Special Edition.



LEED  
Management  
Services

Valerie Walsh,  
LEED AP

ValWalsh@  
leedmanagement.com

LEED Projects serving as the primary LEED Consultant and Project Administrator:

**The Villagra Building for the New Mexico Attorney General**, NM State Capitol Complex, Santa Fe; LEED-CI Gold Certified (first Gold in New Mexico; third LEED certified building in New Mexico)

**Wild Oats Markets**, Boulder, CO; registered LEED-NC v2.2 Retail Pilot

**Santa Fe Farmers’ Market Institute**, Santa Fe, NM; registered LEED-CS v2.0

**City/County of Denver**, Willis Case Golf Clubhouse; registered LEED-NCv2.2

**The Kinship Institute**, Santa Fe County

LEED Management Services Professional Memberships:

US Green Building Council

US Green Building Council - New Mexico Chapter

US Green Building Council - Colorado Chapter

Boulder Green Building Guild

CORE, Connected Organizations for a Responsible Economy

Rocky Mountain Climate Organization

FINCA

***LEED Management Services is a carbon-neutral business, powered by wind!***

i  
g  
h  
t

