



SECTION 7

Green Globes SI Program

LEARNING OBJECTIVES

- Identify the features and eligibility .
- Explain the Environmental Assessment Areas.
- Understand the two assessment processes and describe the differences.

Green Globes for Sustainable Interiors is used to assess and certify tenant improvement projects, fit-outs and remodels. It guides the integrated design process through each phase of the project and measures intended performance.

Program Features

The Green Globes for Sustainable Interiors is unique in that there are two paths to certification. The preferred path is a Stage I Design Review and Stage II On-Site Assessment that works similar to the NC assessment process. The alternative method is a Final CD Assessment & Certification which includes a document review performed after construction is complete.

SURVEYS

All of the Green Globes features discussed earlier apply to SI; however, the Green Globes for Sustainable Interiors includes three online surveys instead of four.

- Pre-Design
- Construction Documents
- Post Construction

The Schematic Design survey present in the NC program, is not part of SI.

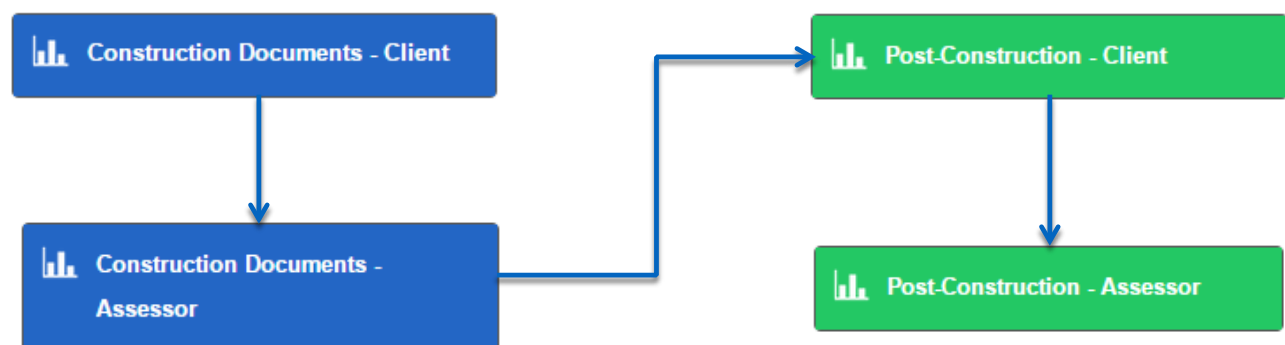
Just like with NC, the Pre-Design (PD) survey is optional and not scored. It is designed to help project teams early in the construction process understand the Green Globes assessment requirements.

The next two surveys, Construction Documents (CD), and Post Construction (PC) are identical and dependent upon the certification path chosen, are required as part of the assessment process. Each contains scoring, and has two versions that are retained part of the project record; one for the client and one for the assessor.

Information Flow

Stage I Design Review and Stage II On-Site Assessment Information Flow

The information flow works the same as for NC; information flows between versions surveys during the assessment process as indicated in the diagram below. This automatic population saves time for both the user and assessor, as only responses that have changed from the prior submission require updates. Only one survey is available to edit at any given time.



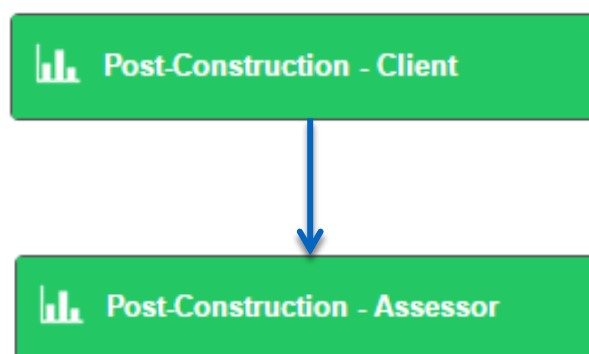
Once the user completes and submits the Construction Documents survey, GBI releases the assessor Construction Documents survey. The client CD responses flow to the assessor's version of the survey. Once submitted, the user has view access only, and the assessor can make updates.

After the assessor completes and submits the Construction Documents survey, GBI will release the client Post Construction survey. The assessor CD responses flow to the client Post Construction survey. Once released, the assessor has view only access, and the user can make updates.

The completion and submission of the Post Construction surveys works the same as the Construction Documents surveys.

Final CD Assessment & Certification Information Flow

In this option, only completion of the Post Construction survey is required for certification. GBI will complete both the client and assessor versions of the Construction Documents survey. After construction is complete, the user will complete the Post Construction survey and submit it online. The information flows from the client survey to the assessor survey during the assessment process as indicated in the diagram below.



Pre-Design Survey (PD)

The Pre-Design survey includes questions about the project scope such as developer commitments, intentions, and objectives. As previously mentioned, the Pre-Design survey is not scored nor is completion required for certification. However, if teams register their project in the early stages it is strongly encouraged to complete this first survey in order to maximize the benefits of the Green Globes assessment process.

The user must select “Save & Continue” at the bottom of each page to save responses and advance to the next page.

The screenshot shows the "Pre-Design" survey interface. On the left is a sidebar with navigation options: "Basic Information", "Pre-Design", "PRINTABLE BLANK SURVEY", "PROJECT MANAGEMENT", "Integrated Design Process", "Environmental Management During Construction", "Environmental Purchasing", "Commissioning", "ENERGY", "WATER", "MATERIALS & RESOURCES", "EMISSIONS", "INDOOR ENVIRONMENT", "SURVEY COMPLETION", "PRINTABLE SURVEY WITH RESPONSES", "Construction Documents - Client", and "Construction Documents - Assessor". The main content area is titled "Project Management: Integrated Design Process" and shows a progress indicator of "0% COMPLETION". It contains several survey questions with radio button options (Yes, No, Maybe) and a "Save & Continue" button at the bottom.

Construction Documents Survey (CD)

Criteria within this survey are allocated specific point values according to the response provided (Yes, No, N/A, or a threshold value). The user must select “Save & Continue” at the bottom of each page to save responses and advance to the next page.

The Green Globes online system automatically calculates the projected Green Globes score based upon the entered responses to the survey questions. Each time the user saves, the projected score updates accordingly. The system also indicates what percentage of the survey has been completed depending upon the total number of questions answered and saved. Moreover, many of the criteria are accompanied by helpful “ToolTips” that provide guidance, additional information, or detailed explanation. ToolTips can be viewed by hovering your cursor over a criteria number. In addition, all ToolTips as well as supplemental guidance information can be found in the [Green Globes for Sustainable Interiors Technical Reference Manual](#), which is available for download from the GBI website.

Post Construction Survey (PC)

The Construction Documents survey and Post Construction survey within Green Globes SI are identical. However, the former is used by the assessor to perform the Stage I Design Review whereas the Post Construction survey is used to perform the Stage II On-Site Assessment or a Final CD Assessment after building construction and commissioning are complete. If the Stage I Design Review and Stage II On-Site Assessment path is selected, the Post Construction survey should be updated with any items that may have changed during the construction process due to modifications to the budget, design, owner requirements, etc. including any improvements made to the design or assessor recommendations that were implemented. If the Final CD & Certification path is selected, the Post Construction survey should be complete according to the final construction.

PROJECTS PAGE

Similar to NC, after payment is received for the project registration, users have the ability to access the online surveys and connect a project name. Once the project name is added, users can access their Projects Page. This page displays the following:

Project Name

Client Name

Project Condition

- Active - the project is pending completion of the assessment process. The online survey is accessible for edits by the authorized group depending upon project status
- Completed - project assessment process complete. Evaluation accessible, but no edits allowed

Project Status

The following statuses only apply to projects completing a Design Review:

1. Pending Client CD Submission: This is the default status for all projects. The Construction Documents–Client survey is still in process and the client must complete and submit the survey to GBI for review before progressing to the next step of the assessment process. The client has access to edit and submit the Construction Documents–Client survey.
2. Scheduling Stage I Assessment: The client has completed and submitted the Construction Documents–Client survey to GBI for review. GBI will confirm with the client that the survey and documentation are ready for assessor review before assigning a third-party Green Globes Assessor to the project and scheduling the Stage I review. The client has access to view the Construction Documents–Client survey but can no longer make edits.
3. Stage I Assessment: GBI has assigned a Green Globes Assessor to the project and released the Construction Documents–Assessor survey, which has been populated with the client’s responses from the Construction Documents–Client survey. The assessor will be in contact with the client to discuss the timing and method of delivery for required documentation. When documentation is received, the assessor completes the Design Review, which includes updating the Construction Documents–Assessor survey with his/her findings and writing the assessment report. The client has access to view the assessor’s survey but cannot make any edits.
4. Stage I Report Review: The third-party assessor has submitted the Construction Documents–Assessor survey and Stage I Report to GBI for review. The client has access to view the assessor’s survey but cannot make any edits.

The following statuses apply to all Sustainable Interiors Projects

1. Pending Client Post Construction survey Submission:
 - For projects with a Design Review: GBI has reviewed and issued the Stage I report to the client and provided the client access to the Post Construction–Client survey. This survey contains all responses from the Construction Documents–Assessor survey. The client will review the Post Construction–Client survey and make updates in accordance with final building construction and submit the completed survey to GBI for review.
 - For projects completing a Final CD Assessment and Rating only: Because the client has chosen not to pursue a Design Review, this is the preliminary status for the project. The client will complete the Post Construction–Client survey in accordance with final building construction and submit the completed survey to GBI for review.

2. **Scheduling Stage II Assessment:** The client has completed the Post Construction–Client survey and submitted it to GBI for review. GBI will contact the client to formally schedule the final assessment. The client has access to view the Post Construction–Client survey but can no longer make edits.
3. **Stage II Assessment:** GBI has scheduled the final assessment (either the site visit or the Final CD Assessment). The assigned assessor has performed or is about to perform the assessment, after which he/she will update the Post Construction–Assessor survey and write the final report containing the recommended score and rating. The client has access to view the assessor’s survey but cannot make any edits.
4. **Stage II Report Review:** The third-party assessor has submitted the Post Construction–Assessor survey and final report to GBI for review. The client has access to view the assessor’s survey but cannot make any edits.
5. **Certified:** The assessment is complete, and the project has met the minimum requirements for Green Globes certification.
6. **Verified:** The assessment is complete, but the project did not meet the 35 minimum requirements for Green Globes certification.

Enter Project

From this screen, when you select “Enter Project” you will move to the Project Dashboard.

PROJECT DASHBOARD

Each SI project in the Green Globes online system has its own Project Dashboard, which can be accessed by clicking on “Enter Project” from the Green Globes SI Projects Page. If you’re within a survey, you can access the Project Dashboard by clicking on your project name in the black header near the top of the page.

From the Project Dashboard, you can access the Basic Building Information as well as the surveys. (Please note that the Post Construction survey will not be available until after the Stage I third-party assessment is complete when the Design Review and On-Site assessment certification path is selected.)

The dashboard also provides a progress tracker to display the percentage of questions complete as well as the projected score for the Construction Documents and Post Construction surveys based on the current user responses.

Project Status			
Active, Pending Client PC Survey Submission			
Surveys			
Status key: = User Edit = Assessor Edit = Admin Review = Completed			
Basic Information and Pre-Design may always be updated while project is active.			
Name	Progress	Score	
Basic Information	100%		Enter Survey
Pre-Design	100%		Enter Survey
Construction Documents - Client	100%	67%	Enter Survey
Construction Documents - Assessor	100%	67%	Enter Survey
Post Construction - Client	100%	67%	Enter Survey

Color coding is used to indicate the status of the surveys:

- Pink: User Edit - The user has access to make updates.

- Purple: Assessor Edit - The assessor has access to make updates.
- Yellow: Admin Review - GBI has access to view, approve or reject submission back to the submitter.
- Green: Completed - GBI has accepted the submission and the project moves to the next status. No user can make edits.

Select the “Enter Survey” button to access the corresponding survey.

PRINTABLE SURVEY WITH SCORES

All versions of the CD and Post Construction surveys include a Printable Survey with Scores output which displays all criteria, saved responses, applicable points, and scored points. It also includes the overall projected applicable and scored points, the percentage of survey completion and the overall rating percentage.

Construction Documents - Client
Printable Survey with Scores

Test Project GGP Training
ACME Construction
Report Generated: 18 Mar 2016

This document provides an preliminary Green Globes score based upon the answers selected in the corresponding online survey. The final Green Globes score and rating will be based upon third-party verification and provided within the assessor's Stage II report.

	Overall Score %	Overall Applicable and Scored Points	Progress and Score %
OVERALL SCORE - 71%	776	548	98% COMPLETION
1 PROJECT MANAGEMENT - 80%	65	52	71% SCORE
1.1 INTEGRATED DESIGN PROCESS (IDP)	20	10	
1.1.1 Integrated Design Meetings	6	0	
1.1.1.1 Was an integrated design process (IDP) employed, which included a minimum of three of the following key design disciplines involved in the project? (check as many key disciplines below as apply)	6	0	
1.1.1.1.1 • Acoustics Consultant, Acoustician, or Special Systems Engineer?			
1.1.1.1.2 • Architect or Interior Designer?			
1.1.1.1.3 • Building Facilities Manager?			
1.1.1.1.4 • Commissioning Agent?			
1.1.1.1.5 • Contractor?			

Area Score points to Overall Score %

Area Applicable and Scored Points points to Overall Applicable and Scored Points

Section Applicable and Scored Points points to 1.1 INTEGRATED DESIGN PROCESS (IDP)

Sub-section Applicable and Scored Points points to 1.1.1 Integrated Design Meetings

Response points to the Yes/No radio buttons in the criteria table

Criteria Applicable and Scored Points points to the applicable and scored points columns in the criteria table

NAVIGATION

Left Navigation

The functionality of the left sidebar mirrors NC. It allows you to jump between surveys, assessment areas and their corresponding sections.

Logo Links

At the top of every page is GBI and Green Globes logos. Clicking on the either will take you to our website, www.thegbi.org.

Selecting Projects on the top right will link to the Project Page.

The screenshot shows the top of the application with the Green Building Initiative and Green Globes logos on the left, and navigation links for HELP, PROJECTS (highlighted with a red box), and LOG OUT on the right. Below the header is a 'Projects' section with a table. The table has columns for Name, Client, Condition, Status, and Actions. One project is listed: 'Test Project GGP Training' by 'ACME Construction' in 'Active' condition with a status of 'Pending Client CD Submission'. An 'Enter Project' button is in the Actions column. Below the table, a message states: 'You are currently approved for 1 projects, and have 1 added.'

Name	Client	Condition	Status	Actions
Test Project GGP Training	ACME Construction	Active	Pending Client CD Submission	Enter Project

The sidebar contains a vertical list of navigation items. At the top is 'Basic Information' with a house icon. Below it is 'Pre-Design' with a document icon. Then 'Construction Documents - Client' with a bar chart icon, which is expanded to show 'PRINTABLE BLANK SURVEY', 'PROJECT MANAGEMENT', 'Integrated Design Process' (with sub-items: 'Environmental Management During Construction', 'Environmental Purchasing', 'Commissioning'), 'ENERGY', 'WATER', 'MATERIALS & RESOURCES', 'EMISSIONS', and 'INDOOR ENVIRONMENT'. Below these are 'SURVEY COMPLETION' and 'PRINTABLE SURVEY WITH SCORES'. At the bottom is 'Construction Documents - Assessor' with a bar chart icon.

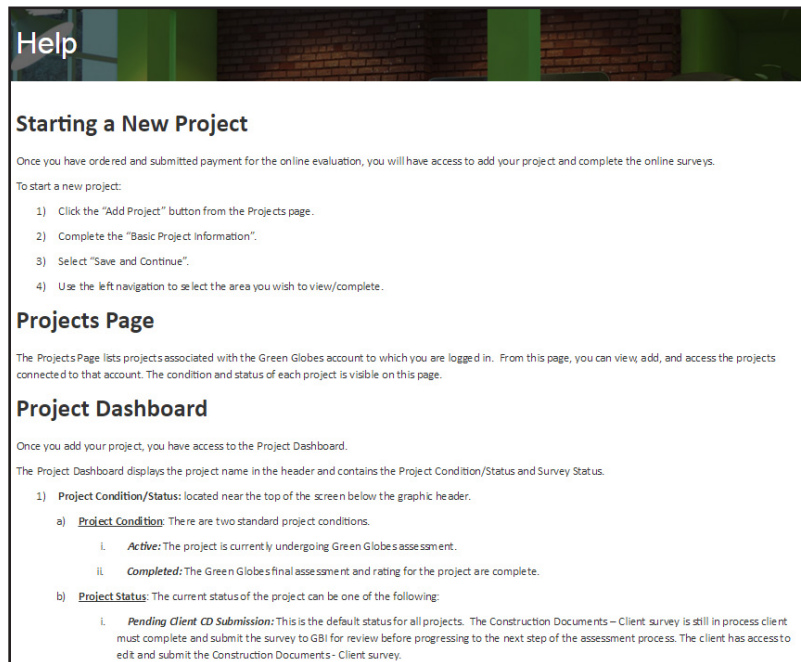
COLLABORATION

The SI survey is designed to be complete by the Integrated Design Team. As a result, GBI created the opportunity for the project owner to provide access to team members within their own GBI Account to complete the responses for their assigned area. You can view who has been assigned collaborator access. The individual from whose account the project was ordered will show as the project owner, all others who have been granted collaborator access will show beneath the owner. It is important that a single user is in the same section of the survey making updates at any given time to minimize the chance users are erroneously overwriting responses.

The screenshot shows the details for 'Test Project GGP Training'. At the top is an 'EDIT NAME' button. Below are fields for 'Status' (Active - Legacy), 'Type' (Green Globes for Sustainable Interiors (GG SI)), and 'Project Registration' with a 'REGISTER PROJECT' button. On the right, a red box highlights the 'Collaborators' section, which lists 'Dianne Elliott (owner)', 'John Smith', and 'Torrey Keene', with an 'EDIT' button at the bottom.

HELP PAGE

At the top of every page is a link to the Help Page. This page includes information regarding how to start a new project, complete the survey as well as the definitions for items within the Project Dashboard.



Eligibility Guidance

Green Globes for Sustainable interiors is used to assess and certify tenant improvement projects, fit-outs and remodels. A project that typically undergoes assessment under this program has the following characteristics:

- Is located in the U.S. or within a U.S. Territory.
- Is at least 400 gross square feet.
- Has been occupied no more than 18 months at the time the assessment is ordered. (Buildings occupied longer than 18 months should undergo Green Globes assessment for existing buildings.)
- Is a space within a permanent enclosed structure.
- Has a contiguous project boundary. Interior spaces must not be a "checkerboard" group of offices for example, with non-certified spaces in between.
- Is typically designed for human occupancy with HVAC and water.

More details regarding eligibility can be found in the [Green Globes Building Eligibility Guidance](#) document located in the Training & Resources\User Resources\Downloads link on GBI website.

Tasks & Estimated Time Commitments

Although the time line of each Green Globes SI assessment and certification project is unique, the entire process generally can be completed in 4-6 months (excluding construction time) for the Design Review and On-Site Assessment certification path. The Final CD Assessment path may be complete in as little as three months. The certification time line is largely dependent upon the client in regards to the availability of building information and the organization of Construction Documents and other supporting documentation.

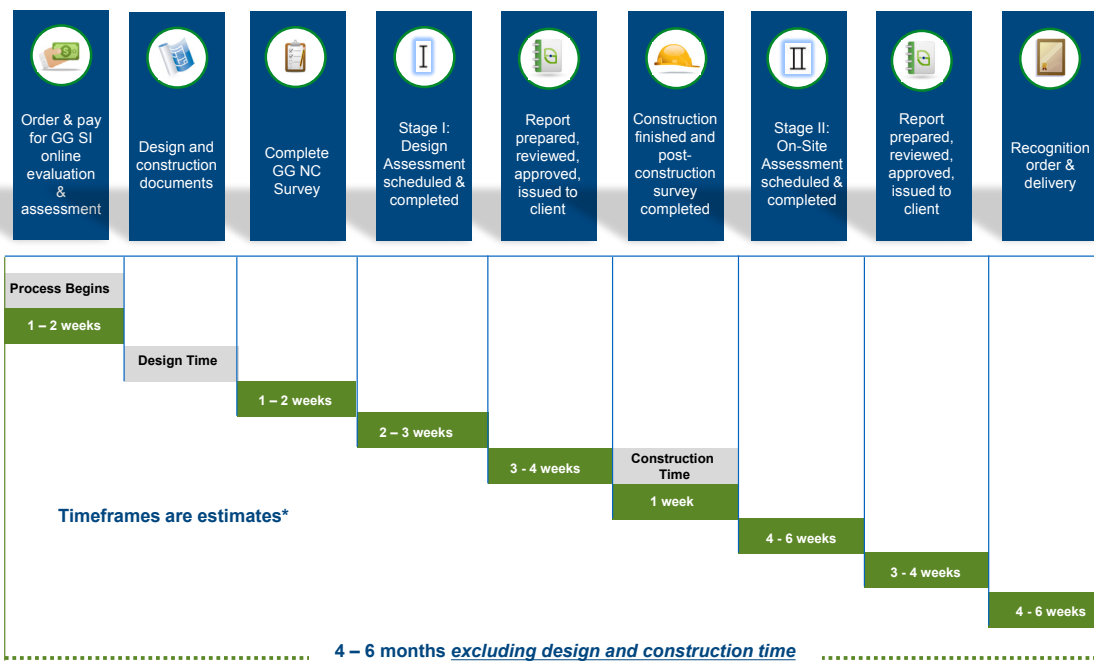
The Green Globes

SI process was developed to coincide with the traditional phases of interior design and construction.

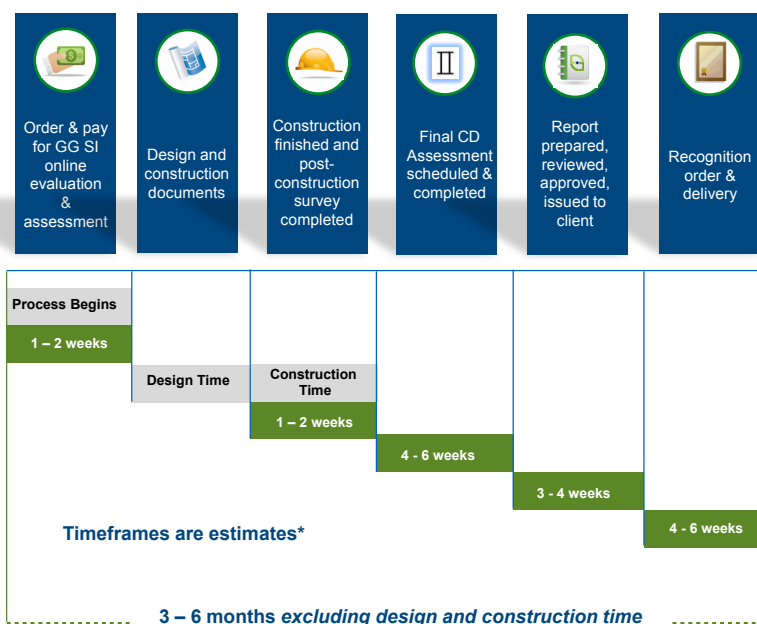
It emphasizes an integrated design process that enables project teams to focus on sustainability early on, giving them options when considering various

sustainable measures and allowing them to evaluate and rate the benefits of different design scenarios. By receiving feedback from Green Globes before critical and final decisions are made, design teams can maximize time and cost savings opportunities.

Design Review and On-Site Assessment



Final CD & Assessment



The table below lists the specific tasks GGPs may perform when taking a building through the Green Globes SI process. Before the project begins, the client and the GGP agree to the scope of services to be provided, and GGPs provide an estimate of the number of work-hours required to complete that scope of work. Clients may elect to perform all of the GGP (user) functions themselves, assign part of the project to a GGP, or assign the entire project to the GGP.

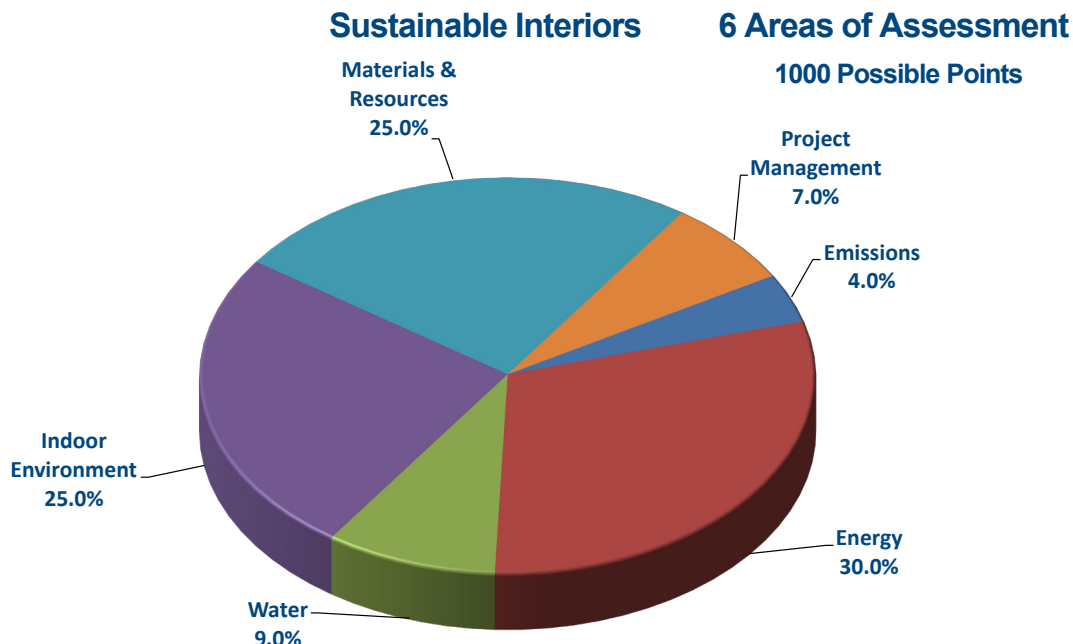
The tables below present a range of work-hours for an interiors project where the role of the GGP is that of a “Green Facilitator.” However, the number of hours required can vary greatly depending on the building size, characteristics and complexity as well as the level of required documentation readily available from the client. As expert users of Green Globes, GGPs will be able to perform the required project tasks more efficiently than untrained users due to the GGP’s thorough understanding of the process and familiarity with the available tools.

Green Globes Projects Tasks for SI (Design and On-Site)	Estimated Work Hours
Project management & client meetings	6 - 16
Gather and assemble data for the online survey	5 - 10
Complete online surveys	5 - 14
Prepare documentation package for the assessor for Stage I Design Review	10 - 20
Prepare documentation package for the assessor for Stage II On-Site review	4 - 14
Plan and attend the Stage II On-Site Assessment	4 - 12
Post assessment action items (review report and share results)	4 - 8
Recognition	1
Total Hours	39 - 95

Green Globes Projects Tasks for SI (Final CD)	Estimated Work Hours
Project management & client meetings	6 - 16
Gather and assemble data for the online survey	5 - 10
Complete online surveys	5 - 14
Prepare documentation package for the assessor review	4 - 14
Post assessment action items (review report and share results)	4 - 8
Recognition	1
Total Hours	25 - 53

Assessment Areas

The 1000 points possible within the Green Globes for Sustainable Interiors program are distributed among six assessment areas. Energy has the largest percentage of points followed by Indoor Environment and Materials and Resources. The latter two are more heavily weighted in SI than in NC.



PROJECT MANAGEMENT

Green Globes addresses management topics as critical aspects of assessment, incorporating them under a major topical section rather than as innovative or extra credit. Sound management practices inevitably lead to positive outcomes. The SI program enhances management concepts by measuring adherence to the incorporation of an integrated design process (IDP), including the use of pre-design and progress meetings as well as the establishment of IDP performance goals. It also incorporates measurement of the use of environmental management during construction which includes the requirement of the General Contractor to utilize and document specific policies, practices, and strategies. Other topics covered include building materials and envelope that prevent and control mold, and practices to maintain good indoor air quality (IAQ).

ENERGY

This area addresses, primarily on a prescriptive basis, energy demand, metering, building opaque envelope, HVAC systems and controls.

WATER

Green Globes SI addresses water consumption prescriptively through water conserving fixtures and equipment.

MATERIALS & RESOURCES

Green Globes SI covers materials within the Interior Fit-Out (the interior partitions, finishes, and furnishings used within the Building Assembly). This area looks at the whole building life cycle including recycled content in addition to construction waste management and operational waste.

EMISSIONS

Emissions addresses the storage for hazardous materials, storage, management, and pest control.

INDOOR ENVIRONMENT

Within Indoor Environment, Green Globes SI reviews the ventilation; air quality, air exchange intakes and exhausts, source control and the measurement of indoor pollutants including VOCs, fungus, mold, CO₂, tobacco, and radon. Also covered is the use of an integrated pest management strategy, as well as thermal and acoustic comfort.

Assessment Guidance

TENANT RULES

One challenge specific for SI projects is consideration of policies that impact the entire building but may be outside of the control of the tenant. The client may need to meet with the facility manager to answer some questions and get documentation regarding the tenant rules. For example, policies that impact products used in housekeeping and pest control, as well as recycling practices. Another example is regarding a policy that requires all new equipment purchases to be based on energy efficient criteria, such as ENERGY STAR® or other applicable standards.

Assessment Process

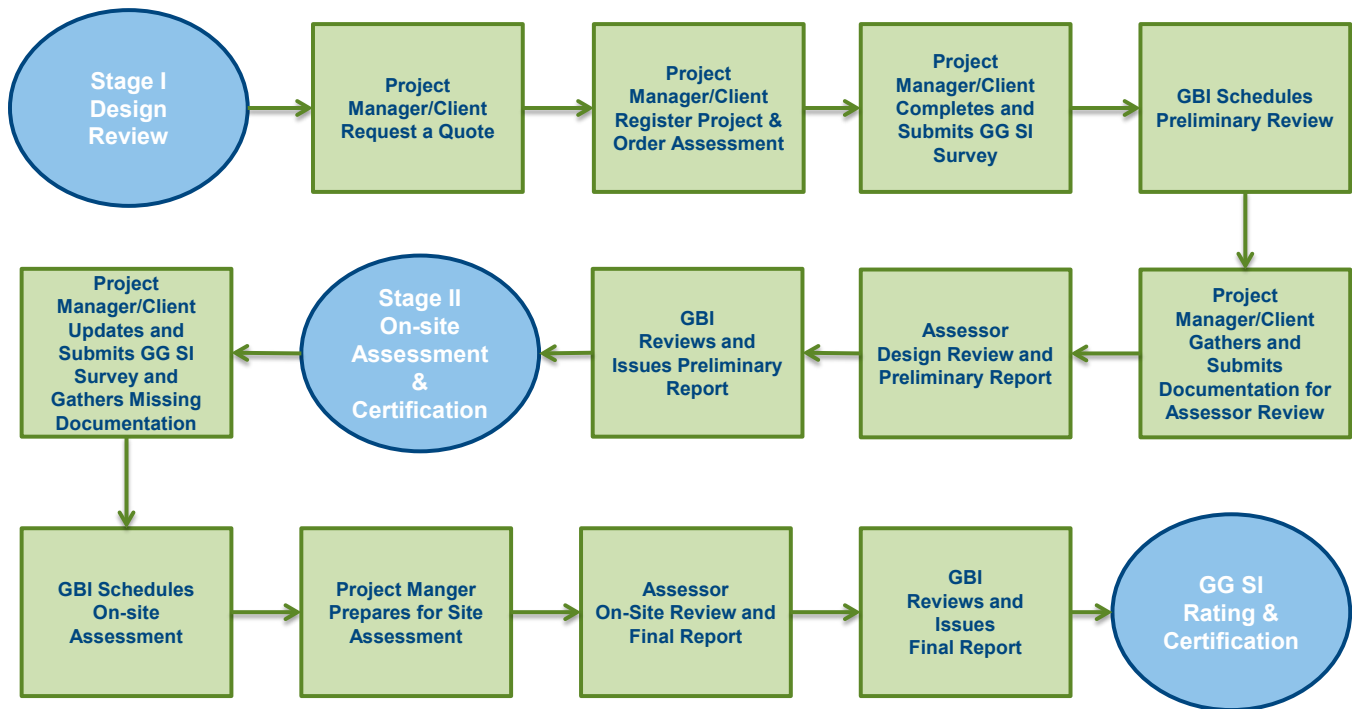
ASSESSMENT PROCESS MAPS

The Green Globes for Sustainable Interiors has two paths to certification;

1. Design Review and On-Site Assessment & Certification which includes two mandatory reviews like NC, a Stage I Design Review and a Stage II On-Site Assessment.
2. Final CD Assessment & Certification which includes one mandatory document review post-construction.

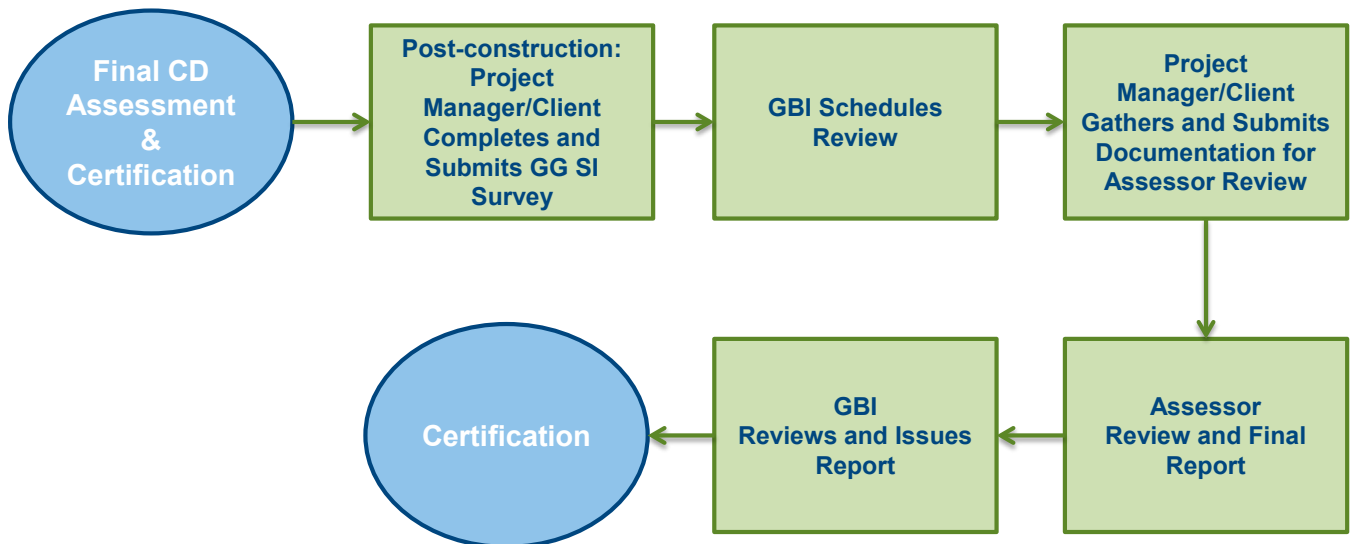
Design Review and On-Site Assessment & Certification Map

The process map below provides an overview of the process for the Design Review and On-Site Assessment & Certification path. An optional additional preliminary review done at the Pre-Design stage or an additional review done during the Design stage is available for purchase for an additional fee.



Final CD Assessment & Certification Map

The process map below provides an overview of the process for the Final CD Assessment & Certification path. This path is only recommended to be used by teams with vast experience using the Green Globes SI program.



REQUEST & VIEW A QUOTE

Every assessment must have a quote which will be used when ordering the assessment.

Create a GBI Account

To request a quote the project manager will need to create a GBI Account. To create an account, follow these steps:

From the GBI website, www.thegbi.org select "Create Account".



Complete the account information.

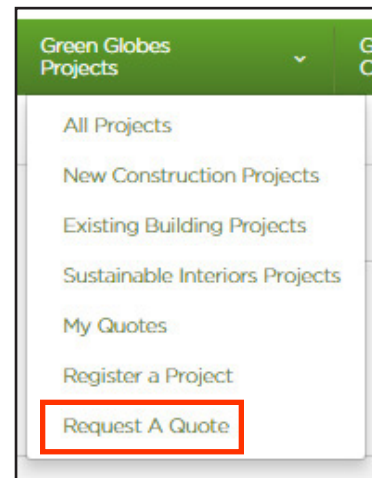
The image shows the 'Create Account' form. At the top are two buttons: 'Create Account' and 'Log In'. Below them is a section for 'Required fields' with the following labels and input fields: 'Username: *', 'Email Address: *', 'First Name: *', 'Last Name: *', 'Company: *', and 'Title:'. Each label has a red asterisk indicating it is required. The input fields are white with rounded corners and some have small icons (like an eye for password visibility) on the right.

Read and accept the terms of service. Enter the CAPTCHA and select "Create Account".

The image shows the bottom part of the account creation form. It includes a 'Password: *' field and a 'Confirm password: *' field. Below these is a section titled 'Terms of service:' which contains a scrollable area with the text of the 'WEB SITE USER AGREEMENT'. Underneath the terms is a checkbox labeled 'Accept terms of service? *'. Below that is a CAPTCHA section with the text 'Enter the characters from the picture below' and a small image showing the characters 'said54'. At the bottom is a yellow button labeled 'CREATE ACCOUNT'.

Request a Quote

To request a quote, login to your GBI Account.
From the green toolbar, hover over Green Globes Projects
and select “Request a Quote”.



You can select a previously created project
from the drop down list, or create a new one.

If you create a new project, add your project
name and select the program type from the
drop down list.

A screenshot of a web form titled "Select a current project, or create a new one?". The form is divided into two main sections. The first section, "Select a Project from Your List:", includes a dropdown menu labeled "Select a Project...". The second section, "Or Create a New Project", contains a text input field with the placeholder "Test Project GGP Training" and a dropdown menu labeled "Select a Type...". The dropdown menu is open, showing a list of project types: "Green Globes for New Construction", "Green Globes for Existing Buildings", "Green Globes for Existing Buildings (Healthcare)", "Green Globes for Sustainable Interiors", "Guiding Principles Compliance for New Construction", and "Guiding Principles Compliance for Existing Buildings". The "Or Create a New Project" section is highlighted with a red rectangular border.

Select “Create New Project”.

A screenshot of the same web form as above. In this view, the "Or Create a New Project" section is expanded. Below the "Select a Type..." dropdown, there is a prominent orange button labeled "CREATE NEW PROJECT". This button is highlighted with a red rectangular border.

Complete the Quote Form. Please be sure to enter integers only in the square footage field (no commas or periods). Note that Google Chrome seems to work better than Firefox for completing the form.

Request A Quote

Basic Project Information

Project Name *
Test Project GGP Training

Project Type *
New Construction/Major Renovation/Addition

Check if applicable:

☐ Federal Government Project ☐ Healthcare Project ☐ Recertification Project

Project Registration Date (actual or anticipated) **Anticipated Assessment Order Date**

When the form is complete, select “Submit Quote Request”.

Building Management Company **Building Manager Name**

Building Manager Email **Building Manager Phone**

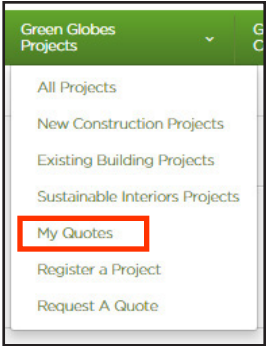
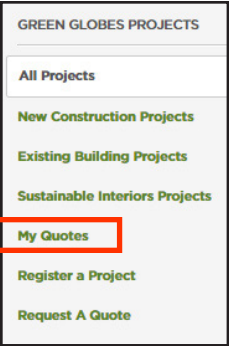
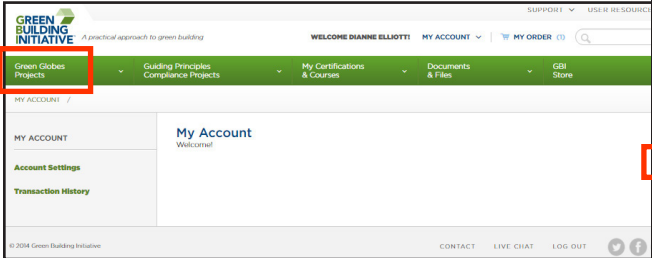
SUBMIT QUOTE REQUEST

Please note that most Green Globes SI clients prefer to order the Stage I Design Assessment and Stage II On-Site Assessment at the same time in order to lock in the current prices. Therefore, all quotes will include both stages unless otherwise requested.

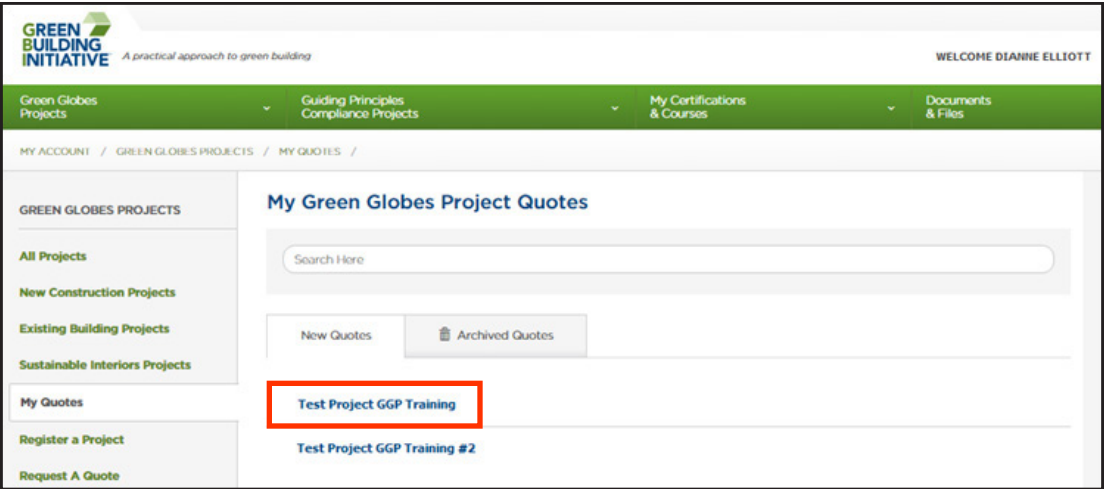
GBI will prepare a formal quote within two business days of receiving the quote request. The quote will be visible from within GBI Account of the person who requested the quote. In addition, GBI will send the quote in PDF format via email.

View a Quote

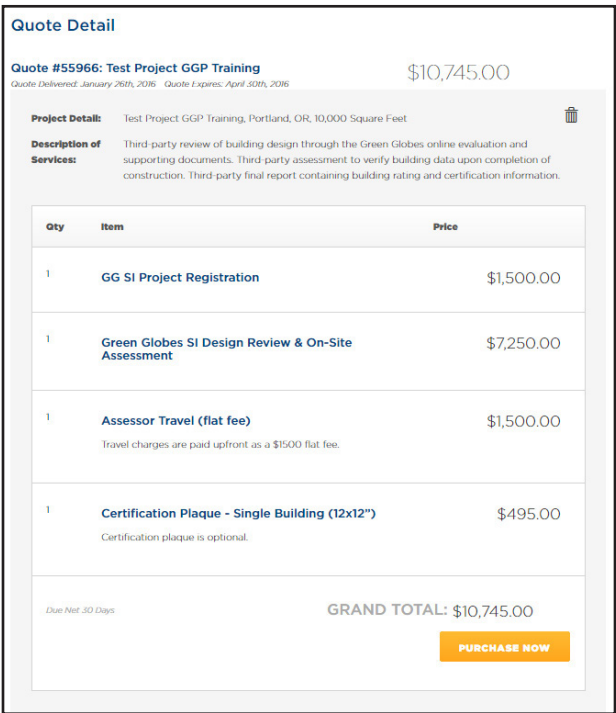
To view your quotes, access your GBI Account and select “Green Globes Projects” in the green toolbar. From the left navigation select “My Quotes”. Or you may hover over the Green Globes Projects and from the fly out menu select “My Quotes”.



Select the project from the list for which you wish to view the quote.



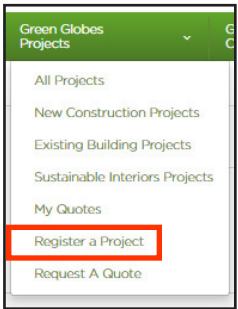
The quote will display.



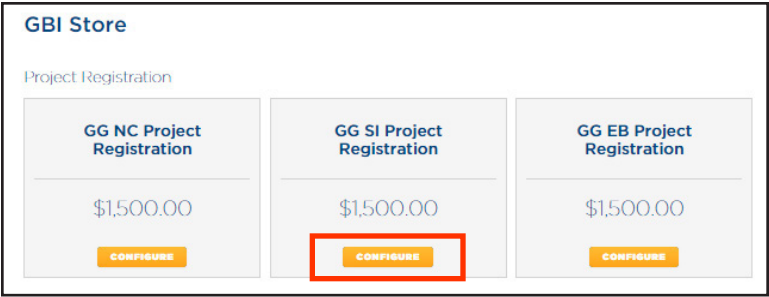
REGISTER A PROJECT

Some clients elect to register their project and submit payment to gain access to the online survey in advance of purchasing an assessment.

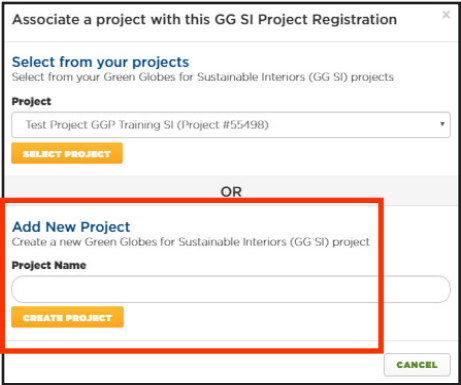
If you wish to register a project prior to purchasing an assessment, hover over the Green Globes Projects link in the green toolbar and select "Register a Project".



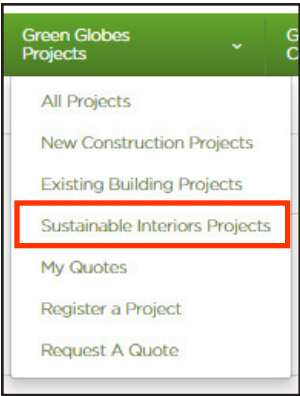
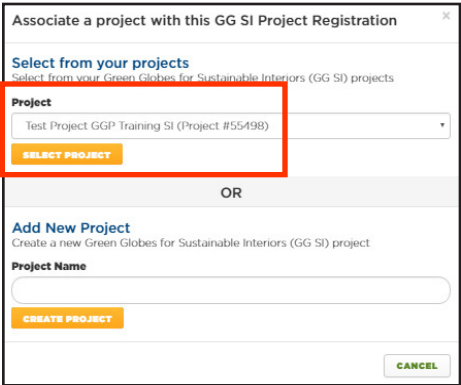
From the GBI Store, select “Configure” under the header GG SI Project Registration.



Under the Add New Project section, enter the project name and select “Create Project”.

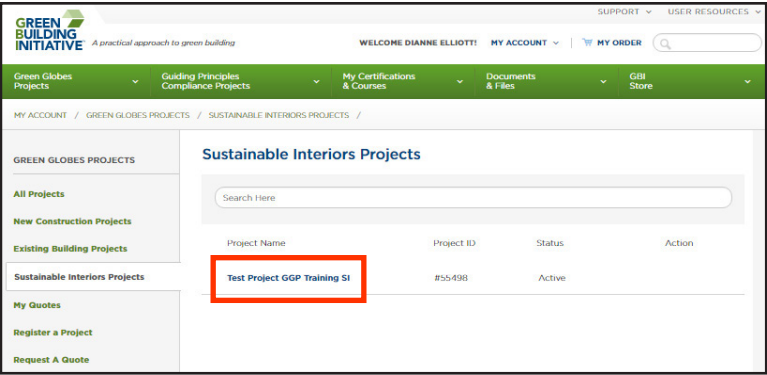


If you have already added your project name but did not complete your project registration, your project name will be in your project list. From the Associate your Project screen under “Select from your projects” section, choose the project from your drop down list and click “Select Project”.



An alternative method to select your project is to go to your list of Green Globes projects by hovering over Green Globes Projects in the green toolbar and select “Sustainable Interiors Projects”.

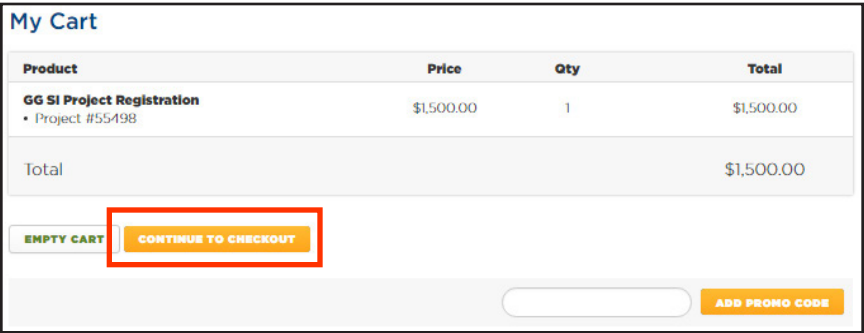
From your project list, click on the project you wish to register.



Select “Register Project”.



Select “Continue to Checkout”.



GBI Store Checkout

Billing Information

Name:

Address:

City:

Postcode:

Country:

State:

Phone:

Email:

Shipping Details

☒ Same as Billing Details

Name:

Address:

City:

Postcode:

Country:

State:

Phone:

Complete your billing and shipping information and select “Continue”.

Read and Accept the End User License Agreement and select “Place Order”.

GBI Store Checkout

Billing Details

Shipping Details

Dianne Elliott

1234 Sustainability Avenue

Portland 97239

Oregon

United States

5032740448

dianne@thegbi.org

Dianne Elliott

1234 Sustainability Avenue

Portland 97239

Oregon

United States

5032740448

End User License Agreements:

Green Globes Assessment Services Agreement. This Assessment Services Agreement (this "Agreement") is between you, on behalf of yourself and, if you are entering into this Agreement in the course and scope of your employment, on behalf of your employer (collectively, "Customer") and Green Building Initiative, Inc., an Oregon public benefit nonprofit.

Accept End User License Agreements?

Payment

Online credit card payments are not permitted for amounts of \$5000 or more. Your order will be invoiced.

PO Number (optional)

W-9 Needed?

No

BAC

PLACE ORDER

Order Summary

Product	Total
1 x GG SI Project Registration • Project #55498	
1 x Green Globes SI Design Review & On-Site Assessment	\$7,250.00
1 x Assessor Travel (flat fee)	\$1,500.00
1 x Certification Plaque - Single Building (12x12")	\$495.00
Total	\$10,745.00

ORDER AN ASSESSMENT

When ready, you may order the third-party assessment online through the GBI website using the following steps. (Note: for large orders of multiple buildings, GBI can place the orders on your behalf for a nominal administrative fee.) The project should be ordered against the same account connected to the quote and if applicable, the previously ordered project registration.

If your quote included a project registration in addition to an assessment, you can register your project and order the assessment at the same time. To order the assessment, follow these steps:

From the account the quote is attached, log in from www.thegbi.org. Hover over Green Globes Projects in the green toolbar and select “My Quotes”.

Green Globes Projects

All Projects

New Construction Projects

Existing Building Projects

Sustainable Interiors Projects

My Quotes

Register a Project

Request A Quote

Select the project for which you wish to purchase the assessment.

GREEN BUILDING INITIATIVE

A practical approach to green building

WELCOME DIANNE ELLIOTT

Green Globes Projects

Guiding Principles Compliance Projects

My Certifications & Courses

Documents & Files

MY ACCOUNT / GREEN GLOBES PROJECTS / MY QUOTES

GREEN GLOBES PROJECTS

All Projects

New Construction Projects

Existing Building Projects

Sustainable Interiors Projects

My Quotes

Register a Project

Request A Quote

My Green Globes Project Quotes

Search Here

New Quotes

Archived Quotes

Test Project GGP Training

Test Project GGP Training #2

Review the quote and ensure this is the assessment you wish to purchase the quote and select “Purchase Now”.

Quote Detail

Quote #55966: Test Project GGP Training

Quote Delivered: January 26th, 2016 Quote Expires: April 30th, 2016

\$10,745.00

Project Details:

Test Project GGP Training, Portland, OR, 10,000 Square Feet

Description of Services:

Third-party review of building design through the Green Globes online evaluation and supporting documents. Third-party assessment to verify building data upon completion of construction. Third-party final report containing building rating and certification information.

Qty	Item	Price
1	GG SI Project Registration	\$1,500.00
1	Green Globes SI Design Review & On-Site Assessment	\$7,250.00
1	Assessor Travel (flat fee) Travel charges are paid upfront as a \$1500 flat fee.	\$1,500.00
1	Certification Plaque - Single Building (12x12") Certification plaque is optional.	\$495.00

Due Net: 30 Days

GRAND TOTAL: \$10,745.00

PURCHASE NOW

Review the order, select your payment option, then click “Continue to Checkout”.

My Cart

Quote #55966: Test Project GGP Training

Product	Price	Qty	Total
GG SI Project Registration • Project #55498	\$1,500.00	1	\$1,500.00
Green Globes SI Design Review & On-Site Assessment	\$7,250.00	1	\$7,250.00
Assessor Travel (flat fee)	\$1,500.00	1	\$1,500.00
Certification Plaque - Single Building (12x12")	\$495.00	1	\$495.00
Subtotal			\$10,745.00
Total			\$10,745.00

Payment Options

☒ Use One Payment Method.
Pay Full Amount of \$10,745.00 by Credit Card or receive an Invoice

☐ Use Two Payment Methods
Pay for all Project Registrations with a credit card payment of \$1,500.00 and receive an invoice for \$9,245.00. You will gain immediate access to those items purchased.

EMPTY CART

CONTINUE TO CHECKOUT

GBI Store Checkout

Quote #55966: Test Project GGP Training

Product	Price	Qty	Amount
GG SI Project Registration	\$1,500.00	1	\$1,500.00
Green Globes SI Design Review & On-Site Assessment	\$7,250.00	1	\$7,250.00
Assessor Travel (flat fee)	\$1,500.00	1	\$1,500.00
Certification Plaque - Single Building (12x12")	\$495.00	1	\$495.00
Subtotal			\$10,745.00
Order Total Due Now			\$10,745.00

RETURN TO CART

CONTINUE

Select “Continue”.

Complete the billing and shipping information and select “Continue”.

GBI Store Checkout

Billing Information

Shipping Details

Name

Dianne Elliott

Address

Sustainability Drive

City

Portland

Postcode

97239

Country

United States

State

Oregon

Phone

5032740448

Email

dianne@thegbi.org

☐ Same as Billing Details

Name

Address

City

Postcode

Country

United States

State

Select...

Phone

RETURN TO CART

CONTINUE

GBI Store Checkout

Billing Details

Shipping Details

Dianne Elliott

Sustainability Drive

Portland 97239

Oregon

United States

5032740448

dianne@thegbi.org

Dianne Elliott

Sustainability Drive

Portland 97239

Oregon

United States

5032740448

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Green Globes Assessment Services Agreement This Assessment Services Agreement (this "Agreement") is between you, on behalf of yourself and, if you are entering into this Agreement in the course and scope of your employment, on behalf of your employer (collectively, "Customer") and Green Building Initiative, Inc., an Oregon public benefit nonprofit

Accept End User License Agreements?

Payment

Online credit card payments are not permitted for amounts of \$5000 or more. Your order will be invoiced.

PO Number (optional)

W-9 Needed?

No

BACK

PLACE ORDER

Order Summary

Product	Total
1 x GG SI Project Registration • Project #55498	\$1,500.00
1 x Green Globes SI Design Review & On-Site Assessment	\$7,250.00
1 x Assessor Travel (flat fee)	\$1,500.00
1 x Certification Plaque - Single Building (12x12")	\$495.00
Total	\$10,745.00

Review your order. Read and Accept the End User License Agreement and select “Place Order”.

A GBI staff member will contact you via email to confirm receipt of your order, outline your next steps, and answer any questions.

DESIGN REVIEW & ON-SITE ASSESSMENT: STAGE I DESIGN REVIEW

The first certification path, Design and On-Site Assessment begins with the Stage I Design Review. The purpose of this review is to provide project teams/clients a preliminary look at how the design complies to the Green Globes SI criteria.

Complete the Construction Documents Survey

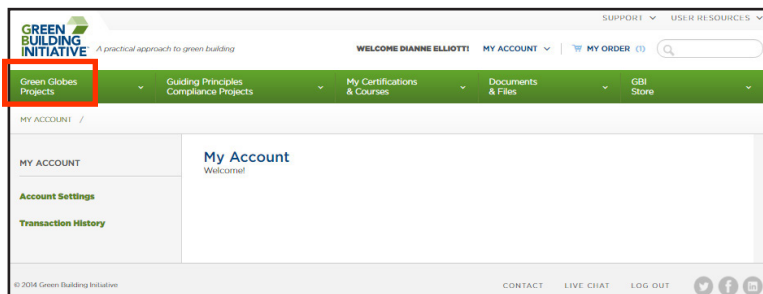
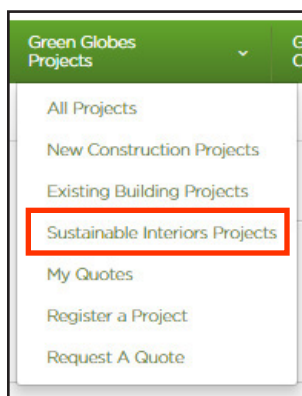
Every assessment starts with the completion and submission of the Construction Documents-Client online survey. The survey is accessible once the project registration is paid.

The survey should be complete when there is a set of drawings for review. It can be done with an earlier drawing set or after construction documents are complete. It is strongly recommended the survey be completed by the project team; with questions being assigned and addressed by the parties responsible for that area in the design and construction process.

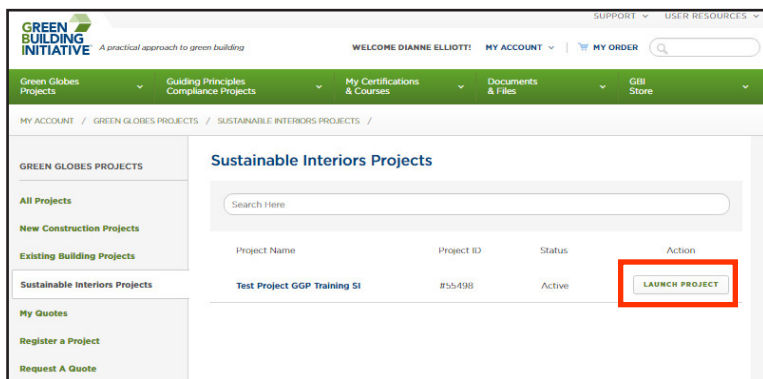
Add Project and Complete Basic Project Information

The first task is to connect your project to the survey. To add your project, login to the GBI Account from which the assessment and/or project registration were ordered.

Select “Green Globes Projects” from the green toolbar.

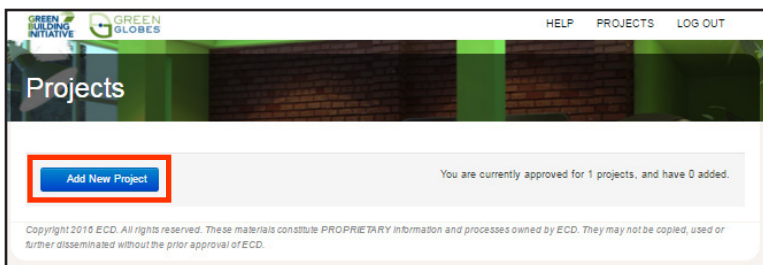


Select “Sustainable Interiors Projects”.



Select “Launch Project” next to the project you wish to open.

Select “Add New Project”.



At the top of the screen select the radial button to indicate you intend to complete a full assessment on this project. Complete the remainder of the Basic Building Information and select “Save & Continue”.

You will now have access to the left navigation and to access the surveys.

As a reminder, the Construction Documents and Post Construction surveys are required for certification when the Design Review and On-Site Assessment certification path is selected. Access to the Post Construction survey is only available after the Stage I Design Review is complete.

When the Final CD Assessment path is selected, GBI will complete the Construction Documents survey for both the client and assessor versions, which will enable access to the Post Construction survey.

Access the Surveys in Subsequent Sessions

If you have previously added your project and entered your basic building information, you will not be automatically directed to the Basic Building Information page. Once you select “Launch Project” you will be directed to the Project Dashboard where you can select “Enter Survey” next the survey you wish to enter.

Name	Progress	Score	
Basic Information	100%		Enter Survey
Pre-Design	100%		Enter Survey
Construction Documents - Client	100%	57%	Enter Survey
Construction Documents - Assessor	100%	57%	Enter Survey
Post Construction - Client	100%	57%	Enter Survey

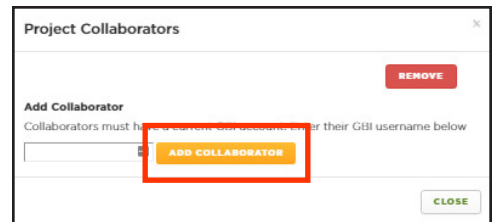
Add Collaborators

In addition, if you have other team members who require access to the surveys, you may add them as collaborators. From your project page, click on the name of the project.

Project Name	Project ID	Status	Action
Test Project GGP Training SI	#55498	Active	LAUNCH PROJECT

Select “Edit” under the Collaborator section.

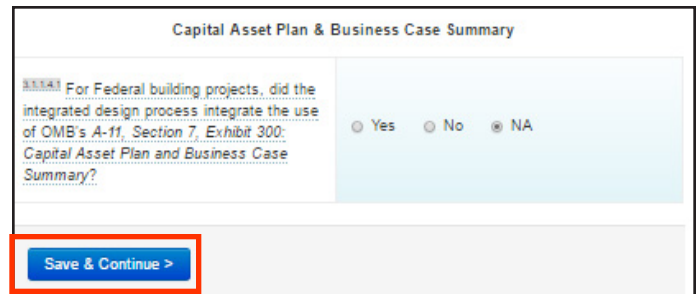
Enter the GBI Account User Name for the person for whom you wish to grant access. Select “Add Collaborator”.



Save Responses

Criteria are allocated specific point values according to the response provided (Yes, No, N/A, or a threshold value).

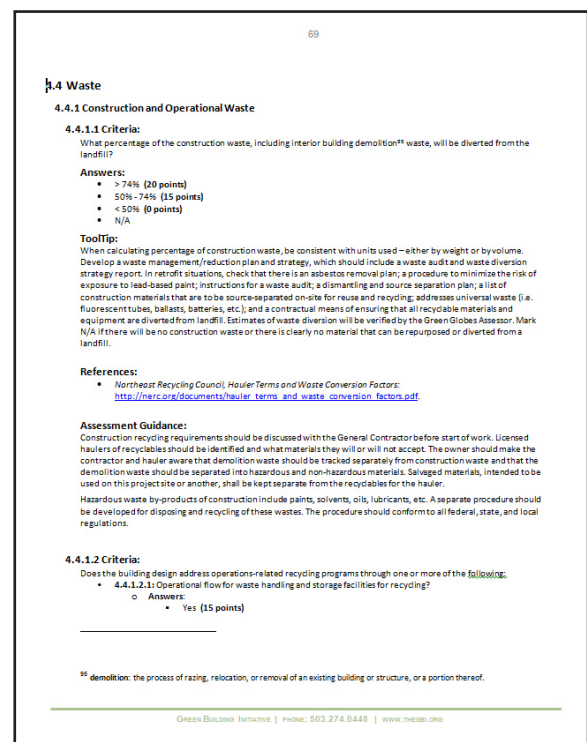
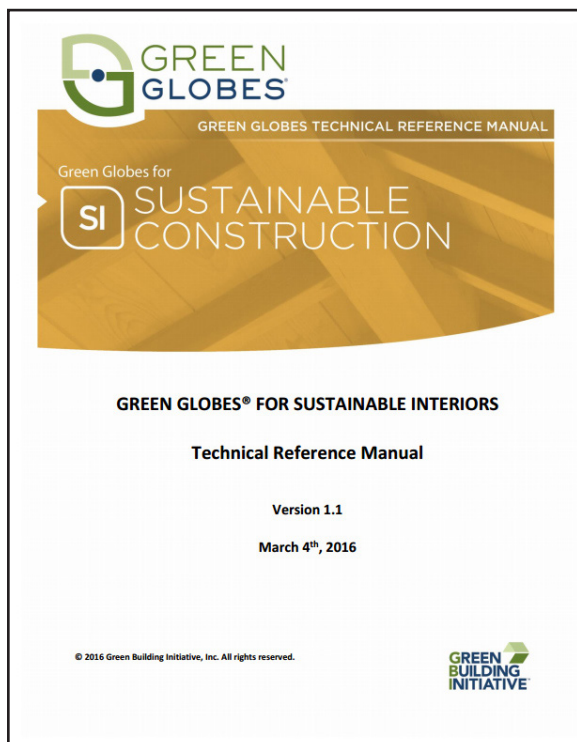
You must select “Save & Continue” at the bottom of each page to save your responses and advance to the next page.



The Green Globes online system is interactive and automatically calculates the projected Green Globes score based upon your responses to the Construction Documents survey questions. Each time you save a page of responses within the Construction Documents survey, the projected score updates accordingly. The system also indicates what percentage of the survey has been completed depending on the total number of questions answered and saved.

SI Technical Reference Manual

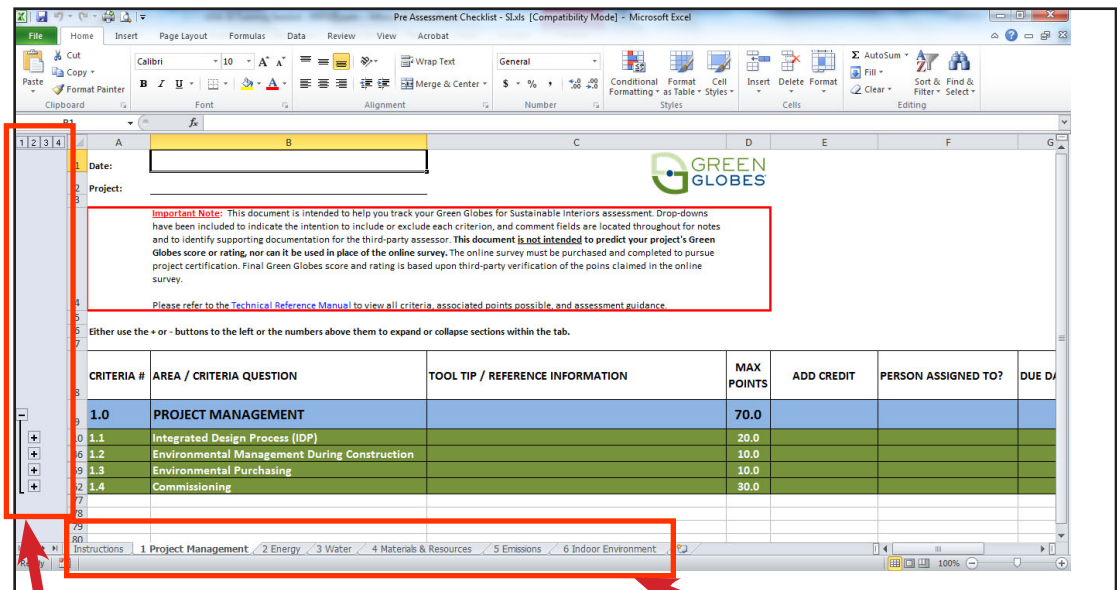
We recommend you use the [Green Globes SI Technical Reference Manual](#) when completing your survey which is available online. It contains all of the criteria for the SI program with possible responses and associated points. Tooltips, assessment guidance and reference material links are also provided.



Pre-Assessment Checklist

The project manager and team should utilize the [GG SI Pre-Assessment Checklist](#) (available for download online) to record the specific document and location within that document that supports their responses. This checklist can then be used to assist the team when gathering documentation to submit to the assessor. It is recommended the team include this file with the documentation packet submission to assist the assessor in locating the specific documentation used to support the response. It is NOT intended to be used as scoring tool, as it does not contain threshold values for individual responses.

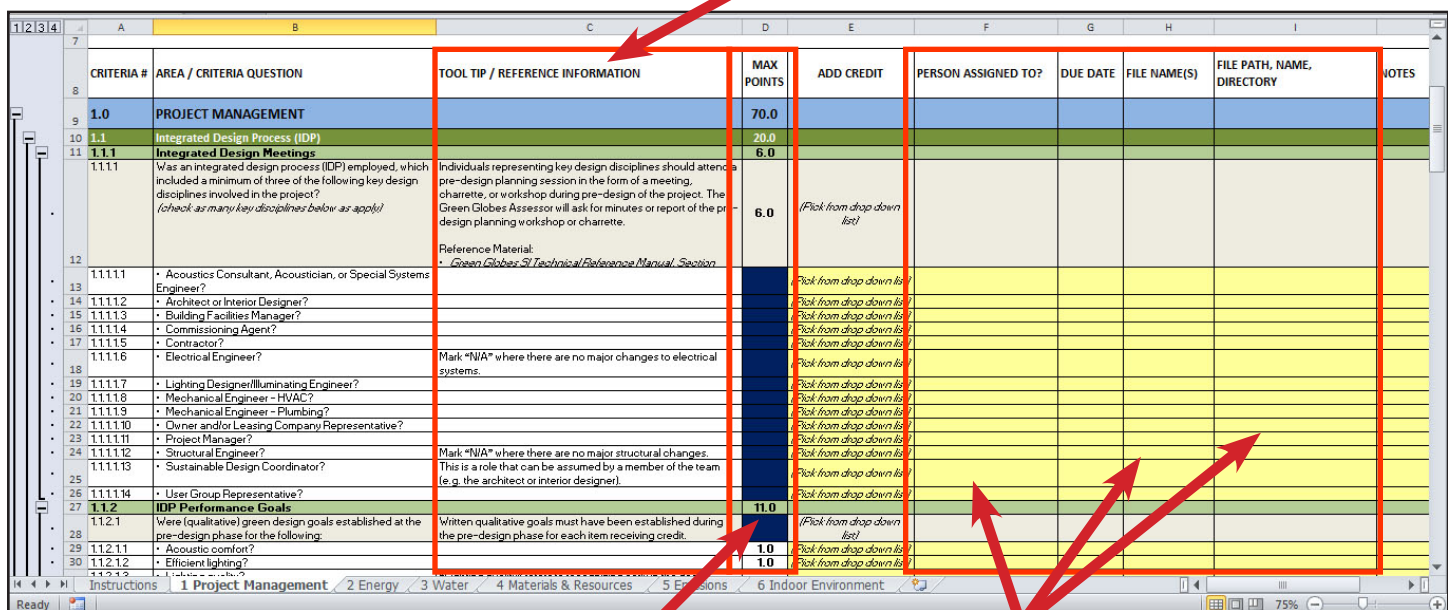
The GG SI Pre-Assessment Checklist is an Excel-based document that includes one tab for each Environmental Assessment Area. The file includes expandable sections to be able to view each criterion, associated ToolTips and maximum possible points.



[Expandable Sections](#)

[6 Tabs for Assessment Areas](#)

[ToolTips](#)



[Maximum Possible Points](#)

[Assign Tasks and Record Documentation](#)

Submit the Construction Documents Survey

When your assessment is paid and your supporting documentation is available, please submit your completed Construction Documents survey for review.

To submit your survey, select the “Survey Completion” link from the left navigation bar. Once submitted, your Construction Documents survey will lock and you will no longer be able to edit your responses.



SURVEY COMPLETION

OVERALL COMPLETION: 83%

The following pages have outstanding items that have not been completed:

Page
Indoor Environment: Source Control and Measurement of Indoor Pollutants
Indoor Environment: Lighting Design and Systems
Indoor Environment: Thermal Comfort
Indoor Environment: Acoustic Comfort

The project/building owner or designated representative should be provided a final opportunity to review and approve the proposed submission to avoid potential conflicts later in the project delivery process. In addition, did all requisite building professionals provide input and review the final survey responses, including any or all of the following personnel as applicable to the project?

- Owner or Owner's Representative
- Architect
- Project Sustainability Coordinator
- Mechanical Engineer
- Energy Engineer (if different from above)
- Civil Engineer
- Structural Engineer
- Electrical Engineer
- Commissioning Authority
- Lighting Engineer
- Landscape Architect
- Acoustics Engineer
- Interior Designer

☐ Yes, the survey has been reviewed by all requisite building professionals and the project owner/representative, as applicable.

Required answers for this survey are only 83% complete. If you wish to submit this survey for assessor review at this time, please check the box below to acknowledge that you are submitting an incomplete survey, and then click the button below.

☐ Yes, I wish to submit this incomplete survey for assessor review.

Submit Survey for Assessor Review

Verify that the survey has been reviewed by all of the necessary project team members and check the appropriate box.

If your survey is not 100% complete, you will have links at the top of the page. Selecting the link will take to the location of the criteria that require completion. If your survey is complete, the overall completion will indicate 100%.

If you would like to submit an incomplete survey you must check the box to confirm that is your desire.

When ready, select “Submit Survey for assessor Review” button at the bottom of the screen.

Scheduling the Design Review

To schedule your assessment, call or email GBI. Your GBI Project Manager will reach out to the pool of certified third-party Green Globes Assessors (GGA's) to determine who is available and best suited for your project. Once secured he/she will assign an assessor to your project and email a scheduling letter that provides the assessor's contact information and the official date on which the Stage I review will begin. Your assigned assessor will contact you to discuss the specific details of the assessment, such as how to transmit your construction documents.

From: Dianne Elliott
Sent: Thursday, April 30, 2015 11:24 AM
To: client@sustainability.com
Cc: Dianne Elliott; Jenna Middaugh; Mark Daniel Russell
Subject: GBI Green Globes for Sustainable Interiors Design Review Assessment for the Green Building

Client,

The attached letter introduces Mark Russell, your assigned assessor for the SI Design Review Assessment of the Green Building in Portland OR. Per our conversations, you have completed and submitted your construction documents online self-evaluation and have indicated the construction documents are available for assessor review. We have the Document Review scheduled to begin May 8, 2015. Our records reflect construction completion is expected to complete near April/May 2016.

Mr. Russell will be in contact with you shortly to advise you on the assessment process and discuss the timing and method of delivery for the documentation. Please feel free to contact him at any time.

If I can be of any further assistance, please let me know.

Best Regards,

Dianne Elliott | Customer Service Manager | Green Building Initiative
5410 SW Macadam Avenue | Suite 150 | Portland, OR 97239

503.274.0448 x105
www.thegbi.org | www.facebook.com/GreenBuildingInitiative



April 30, 2015

Client
Sustainability Construction
client@sustainability.com
(555) 555-5555

Re: Green Globes® for Sustainable Interiors Design Assessment of the Green building at 111 SW Park Ave in Portland OR 97205.

Dear Client,

The assessment of the Green building will be completed by Mark Russell, the Green Globes Assessor assigned to your project. Mark can be reached at russ1307@unm.edu and (505) 277-1948 if you have any questions regarding the assessment. We have scheduled the Design Assessment to commence on May 8, 2015.

During the Design Review, Mark will review your project documentation and the information you entered in the Green Globes online survey noting items where documentation provides verification and items still requiring verification during the site assessment. In addition, he will provide a preliminary projected Green Globes score. Please reference the [GG SI Pre-Assessment Checklist](#) for specific documentation needed for the assessment and provide copies of all documentation to the assessor as soon as possible. Please work with your assessor to determine the timing, method of delivery and specific documentation required for submission.

We have the following contact information for you on file: Client, client@sustainability.com and (555) 555-5555. If this information is not correct, please let us know immediately.

We look forward to working with you on this project!

Best Regards,

Dianne Elliott | Customer Service Manager | Green Building Initiative
P.O. Box 80010 | Portland, OR 97280

503.274.0448 x105
www.thegbi.org | www.facebook.com/GreenBuildingInitiative

P.O. Box 80010, Portland, OR 97280 | Phone: 503.274.0448 | www.thegbi.org

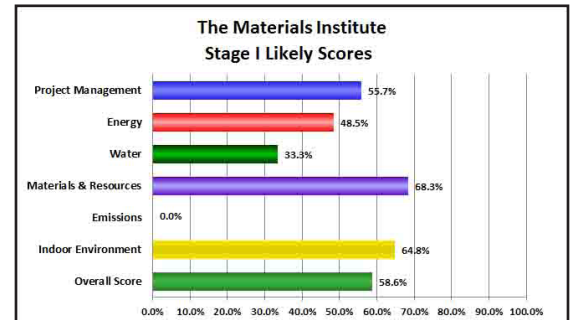
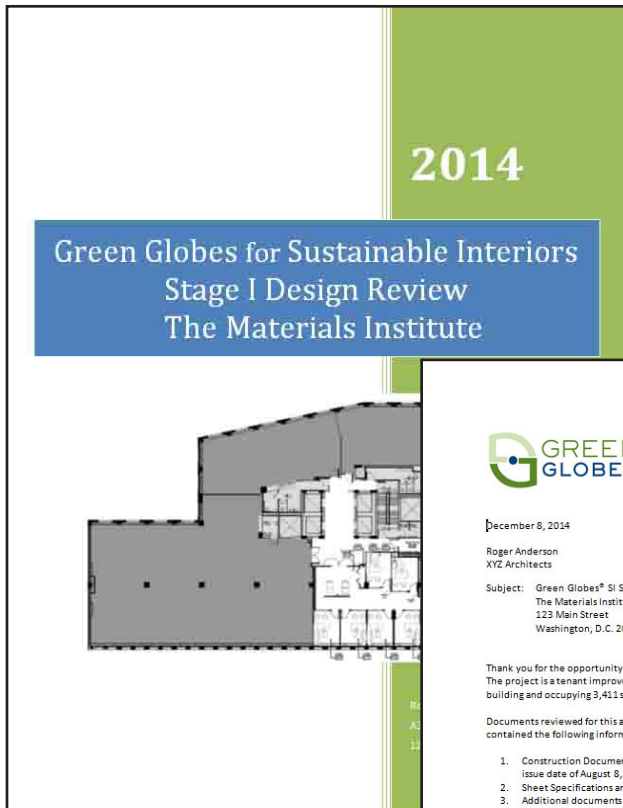
Gather & Submit Documentation

You will ensure all documentation that verifies the survey responses is gathered and ready for submission and communicate with the assessor regarding the timing and method of delivery. Some assessors prefer a half-set of drawings, others are fine with electronic submissions. Common methods of CD transmission include using a file-sharing service or setting up an FTP site.

Assessor Review & Third-Party Report

Upon submission of your Construction Documents survey, your responses are used to populate a separate version of the survey that your assessor can view and edit. Once your assessor has received all required documentation, he/she will review and compare the information provided with your survey responses. The assessor will update any responses that are incorrect or cannot be verified. He/she will document items that are yet to be verified to include in the Stage I Design Review Report.

The assessor will write a formal report that summarizes the results of the Stage I Design Assessment, provides a projected Green Globes rating, identifies the project features and criteria still requiring verification, as well as offers improvement recommendations that can be implemented before the Stage II On-Site Assessment. Please note that the Stage I report is non-binding and only provides an estimate of the Green Globes rating that the building is likely to achieve if the current survey responses can be verified during the Stage II site visit. The primary purpose of the Stage I review is to provide feedback on where the project currently stands in regards to achieving Green Globes certification.



GBI Report Review & Issuance

In the last step of the Stage I Design Review, GBI will review the report for consistency, for technical incongruence, grammar and aesthetics. We will notify the assessor regarding any clarification requests or needed updates. If required, the assessor will update and resubmit the report. We will review the report for to ensure the updates are complete. Once approved, we will issue to the project manager by email a PDF version of the final Design Review Report with any applicable attachments. The project team will want to review the report to see what items still require verification

December 8, 2014
Roger Anderson
XYZ Architects

Subject: Green Globes® SI Stage I Assessment
The Materials Institute
123 Main Street
Washington, D.C. 20005

Thank you for the opportunity to complete a Green Globes Stage I assessment of The Materials Institute. The project is a tenant improvement of existing office space located on the top floor of an eight-story building and occupying 3,411 square feet. The Use Group is "Business" and the Construction Type is 1A.

Documents reviewed for this assessment were submitted electronically on September 29, 2014, and contained the following information:

- Construction Documents including Architectural, Mechanical, and Electrical, dated August 8, 2014.
- Sheet Specifications are contained within the drawings noted above.
- Additional documents provided by XYZ through November 20, 2014.

The Green Globes online survey was reviewed in addition to the documents.

The Green Globes for Sustainable Interiors (SI) Stage I assessment is a review of Construction Documents online survey as well as documentation of the facility construction drawings, book specifications, and other design considerations.

Users find the Stage I review extremely helpful when it occurs prior to actual construction. The building appears to be on target to achieve a certified rating as information will be needed prior to the Stage II assessment, which occurs at the Stage II assessment includes an on-site walkthrough, review of additional documents, and interviews of key team members.

Based upon the Stage I review, my preliminary assessment is that you should achieve a Green Globes rating of 59%, as shown in the following chart. The 434 points verified at this Stage I review (207) and the points likely to be verified at the Stage II review (227) are shown in the following chart.

INSERT ASSESSOR'S COMPANY LETTERHEAD
2 | Page

COMMISSIONING (3 Points)

Commissioning Requirements (0 out of 24 Points)
The online survey states that there were no requirements for a commissioning process. At this point in the project's progress it is too late to consider adding same. Future projects (expansion, relocation) should consider this process for its beneficial value to the construction outcomes and operations efficiencies.

Training (0 out of 3 Points)
The vast majority of mechanical and electrical work concerns tie-ins and expansions to existing systems. No Owner training is specified in the documents, certainly none that references ASHRAE Guidelines, although it is likely that some will be undertaken. This item can be reviewed on-site.

Operations and Maintenance Manuals (3 out of 3 Points)
An Operations and Maintenance Manual will be completed and submitted to the building owners upon completion of construction, as part of the project closeout procedure for the construction team. This item can be reviewed on-site.

Verification Required at Stage II: 14 Points

The following items will be necessary for Stage II review. Some items may be submitted prior to that time if they are available.

- Environmental Goals – Provide documentation to verify what the metrics were, how they were decided by the Team, and how they were to be met. (3 Points)
- IDP Progress Meeting - Document design progress meetings demonstrating IDP, addressing environmental management, including environmental policy, training plans and schedules, environmental assessment and resulting risk strategies. Additionally, provide the roles and responsibilities and reporting structure to implement the environmental plan, and checklist to identify corrective steps of deficiencies and compliance records documents. (3 Points)
- Document Owner's Post-Occupancy environmental purchasing plans. (5 Points)
- Provide Operations and Maintenance Manuals onsite for verification and review. (3 Points)

Suggestions for Improvement (Future Projects):

- Elaborate on Division 01 documentations as to how the Sustainable Intent is communicated to the Contractor(s) to alert their increased record keeping and reporting responsibilities for waste management, material purchases and delivery.
- Consider Commissioning of mechanical and electrical equipment and systems to verify that the Basis of Design and the installed systems will conform to the Owner's Performance Requirements.

Area Summary: 39 likely achievable points out of 70 applicable points = 56%

INSERT ASSESSOR'S COMPANY LETTERHEAD
7 | Page

documents and determine if any recommendations will be implemented prior to construction completion to ensure the most sustainable building and highest possible Green Globes score for the finished building.

DESIGN REVIEW & ON-SITE ASSESSMENT: STAGE II ON-SITE ASSESSMENT

Once construction is essentially complete through the punch list, the Post Construction survey is updated, and documentation identified is missing is gathered, it is time to perform Stage II On-Site Assessment. The purpose of the On-Site Assessment is to verify the level of compliance to the Green Globes criteria which results in the final assessment rating and certification level (certification is based upon a minimum score of 35%).

Complete the Post Construction Survey

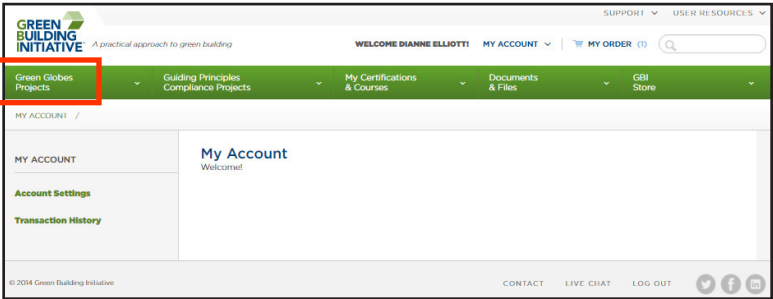
To reiterate, the Construction Documents survey and Post Construction survey within Green Globes SI are identical. When the assessor finalizes edits to his/her version of the Construction Documents survey at the end of the Stage I review, he/she will submit the survey. GBI will review and release the survey, which will populate the client version of the Post Construction survey with the assessor responses, and allow the client access for review and edit.

Prior to the site visit, the project manager will update the online Post Construction-Client survey with any changes since the Stage I Design Review. The benefit of automatically populating the Post Construction survey from the assessor’s Construction Documents survey is that you do not have to re-enter all of your survey responses after construction is complete—you only need to update items that may have changed during the construction process due to modifications to the budget, design, owner requirements, etc.

When ready to schedule the assessment, the project manager will submit the Post Construction online survey to GBI who will release it to the assigned assessor.

To access and update your Post Construction survey follow these instructions:

Login to your GBI Account and select “Green Globes Projects”. If you have many projects, you may want to filter them by project type and select “Sustainable Interiors”.



From the project list, select “Launch Project” next to the project you wish to access.

Green Globes Projects			
Search Here			
Project Name	Project ID	Status	Action
Test Project	#44294	Certified	LAUNCH PROJECT
Test Project GGP Training	#54875	Active	LAUNCH PROJECT
Test Project GGP Training SI	#55498	Active	LAUNCH PROJECT
Test Project GGP Training - EB	#55587	Active	LAUNCH PROJECT
Test Project GGP Training #2	#55940	Active	LAUNCH PROJECT

Click “Enter Project”.

Projects				
Projects				
Name	Client	Condition	Status	Actions
Test Project GGP Training		Active	Pending Client PC Survey Submission	Enter Project

The dashboard will now show the Post Construction Client survey, and it will be pink indicating the user may now edit the survey. Select “Enter Survey”.

Project Status			
Active, Pending Client PC Survey Submission			
Surveys			
Status key: ■ = User Edit ■ = Assessor Edit ■ = Admin Review ■ = Completed			
Basic Information and Pre-Design may always be updated while project is active.			
Name	Progress	Score	
Basic Information	100%		Enter Survey
Pre-Design	100%		Enter Survey
Construction Documents - Client	100%	87%	Enter Survey
Construction Documents - Assessor	100%	87%	Enter Survey
Post Construction - Client	100%	87%	Enter Survey

Post-Construction - Client

Project Management: Integrated Design Process

Projects / Test Project GGP Training / Post-Construction - Client

Basic Information

Pre-Design

Construction Documents - Client

Construction Documents - Assessor

Post-Construction - Client

1.1 INTEGRATED DESIGN PROCESS (IDP)

1.1.1 Integrated Design Meetings

XXXX Was an integrated design process (IDP) employed, which included a minimum of three of the following key design disciplines involved in the project? (check as many key disciplines below as apply)

☐ Yes

☒ No

XXXX

Acoustics Consultant, Acoustician, or Special Systems Engineer?

☐ Yes

☒ No

XXXX

Architect or Interior Designer?

☐ Yes

☒ No

XXXX

Building Facilities Manager?

☐ Yes

☒ No

☐ NA

XXXX

Commissioning Agent?

☐ Yes

☒ No

XXXX

Contractor?

☐ Yes

☒ No

XXXX

Electrical Engineer?

☐ Yes

☒ No

☐ NA

PROJECT MANAGEMENT

Integrated Design Process

Environmental Management During Construction

Environmental Purchasing Commissioning

ENERGY

WATER

MATERIALS & RESOURCES

EMISSIONS

INDOOR ENVIRONMENT

SURVEY COMPLETION

PRINTABLE SURVEY WITH SCORES

Select the sections you wish to update, and the criteria will appear on the right. Review and select the appropriate responses.

Select “Save & Continue” to save your selections and advance to the next page.

Capital Asset Plan & Business Case Summary

XXXX For Federal building projects, did the integrated design process integrate the use of OMB's A-11, Section 7, Exhibit 300: Capital Asset Plan and Business Case Summary?

☐ Yes

☐ No

☒ NA

Save & Continue >

SECTION 7 | Green Globes SI Program

Page 105

Submit the Post Construction Survey

When you are ready to schedule the site visit, submit the Post Construction survey the same way you did for the Construction Documents survey using the Survey Completion Link in the left navigation. Verify the survey has been reviewed by the appropriate team members, and that you wish to submit the survey. Select “Submit Survey for assessor Review”. This will lock the survey, and you will no longer be able to make edits.

Post-Construction - Client

PRINTABLE BLANK SURVEY

PROJECT MANAGEMENT

Integrated Design Process

Environmental Management During Construction

Environmental Purchasing Commissioning

ENERGY

WATER

MATERIALS & RESOURCES

EMISSIONS

INDOOR ENVIRONMENT

SURVEY COMPLETION

PRINTABLE SURVEY WITH SCORES

The project/building owner or designated representative should be provided a final opportunity to review and approve the proposed submission to avoid potential conflicts later in the project delivery process. In addition, did all requisite building professionals provide input and review the final survey responses, including any or all of the following personnel as applicable to the project?

- Owner or Owner's Representative
- Architect
- Project Sustainability Coordinator
- Mechanical Engineer
- Energy Engineer (if different from above)
- Civil Engineer
- Structural Engineer
- Electrical Engineer
- Commissioning Authority
- Lighting Engineer
- Landscape Architect
- Acoustics Engineer
- Interior Designer

☒ Yes, the survey has been reviewed by all requisite building professionals and the project owner/representative, as applicable.

Required answers for this survey are only 0% complete. If you wish to submit this survey for assessor review at this time, please check the box below to acknowledge that you are submitting an incomplete survey, and then click the button below.

☒ Yes, I wish to submit this incomplete survey for assessor review.

Submit Survey for Assessor Review

Gather & Submit Documentation

The project manager will ensure all documentation identified as missing in the Stage I Design Report is available and ready to provide to the assigned assessor. To make the site visit more efficient, it is recommended the project manager discuss with the assessor submitting the missing documentation in advance of the visit.

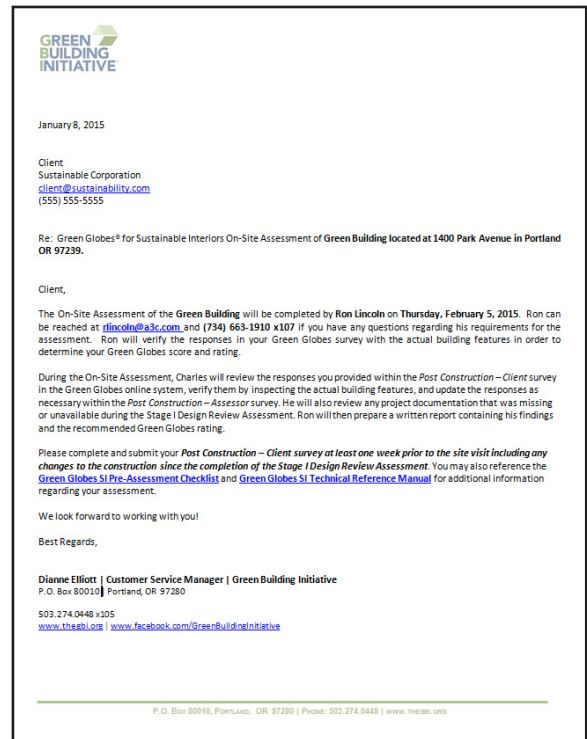
Schedule On-Site Assessment

Next, contact GBI to schedule your Stage II On-Site Assessment. (If you did not order and pay for the Stage II assessment along with the Stage I assessment, then you will need to do so at this time. Please contact GBI for a current quote.)

Provide your preferred date range for the site visit, and GBI will reach out to your assigned assessor regarding his/her availability to identify a date that is mutually amenable. Keep in mind that a minimum of one month advance notice is required for scheduling.

Your GBI Project Manager will send out a scheduling letter confirming the assessment date and location and reiterating the assessor's contact information. The assessor will contact you to discuss specific details of the assessment, including the itinerary, recommended participants, etc..

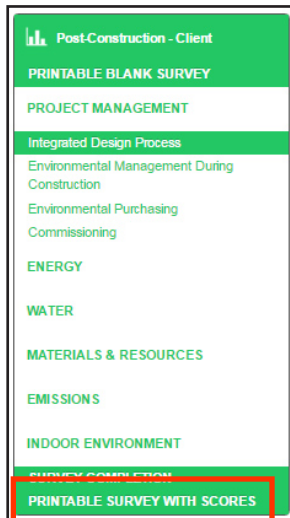
Scheduling: Email and Letter Sample



Prepare for Site Visit

When preparing for the Stage II On-Site Assessment, you should organize the assessment documentation in the order of the criteria within the survey.

To help with the organization process, you can print a copy of the survey with your responses by clicking “Printable Survey with Scores” from the Post Construction section of the left sidebar.



You should also secure a meeting room and arrange for all key personnel to be available during the assessment. The length of the site visit will vary depending on building size and the level of document organization, but a typical site assessment of a 50,000 SF building takes approximately 4 hours.

Schedule a guided site tour. It should be organized so that the building walk-through occurs in an efficient and orderly sequence and the items to be inspected are seen throughout a single path. The assessor should not have to retrace his/her steps unless certain building features need to be revisited.

The assessor will contact the project manager to discuss the site visit and provide an agenda in advance.

Assessor On-Site Assessment

During the on-site visit the assessor will verify conformance to the assessment criteria and determine point awards based upon additional documentation and the physical inspection of the building and site. The site visit consists of three phases: the Introductory Meeting, the Building/Site Tour and the Closure Meeting.

Introductory Meeting

On the day of the site visit, you should meet the assessor at a pre-determined time and place. The assessor will begin with a brief meeting with key project personnel, which should include an introduction of team members. He/she will review the survey and the supporting documentation, specifically addressing items identified in the Design Review Report as still needing verification. He/she will note all documentation still lacking. Please discuss all relevant changes that occurred during the construction phase (post Stage I Design Review). Discuss any non-applicables and address any questions.

Building/Site Tour

After the meeting, you or a designated representative will take the assessor on a guided tour of the interior space, common areas, and site. During the tour, the assessor will need full access to all relevant areas. He/she will document findings, and take pictures of verified project features. The assessor will strive to be minimally intrusive but may need to inspect conference rooms and secure areas of the facility.

Below is a sample list of items the assessor will review or inspect for verification during the site visit:

Project Management

- A variety of meeting minutes from the design and construction phases. He/she will pay close attention to the attendees to verify they match the online survey. He/she will look for topics covered to confirm that the sustainable aspects were addressed.
- The final Commissioning report. He/she will pay attention to the areas that have been evaluated to make sure they match the online survey.

Energy

- You will need to demonstrate the automated systems during the walk through.
- He/she will inspect for lighting controls.

Water

- He/she will want to see cut sheets to determine fixture water flows when values are not stamped on the fixtures. In many cases, the construction contractor can provide packaging that includes appropriate values.
- He/she will want to understand the ownership of irrigation systems to determine who is responsible

for improvements.

Materials and Resources

- He/she will want to see that the LCA data was developed prior to the construction phase to compare a baseline alternative to the planned design. After the construction phase, EPD's or third party certification are acceptable.
- Spreadsheets can be used to demonstrate the percentage of materials in compliance versus total materials.
- Minimized use of raw materials requires the owner to explain the standard procedure and then demonstrate how they have provided a material or resource savings.

Emissions

- He/ she will look for verification that the remote commercial refrigerating system equipment was tested prior to the building's occupancy.
- He/she will also look for evidence of monitoring for leak detection.
- He/she will visit all janitor's closets on the site visit. Often, they may have a combination of techniques being used in which they are not all compliant with the requirements.

Indoor Environment

- He/she will fully review the HVAC operation sequence to understand the air flows and enable accurate analysis of the air intake and exhausts.
- Product cut sheets or samples of product containers available on the walk-through can provide details on VOC.
- He/she will look for reference specifications such as ASHRAE 55-2010 on the drawings.

Closure Meeting

When the tour is finished, the assessor will conduct a closure meeting to review the findings, provide feedback regarding points the client is seeking, and identify items still requiring verification documentation. He/she will set expectations for the next steps, including the time line for submission of missing items and report delivery.

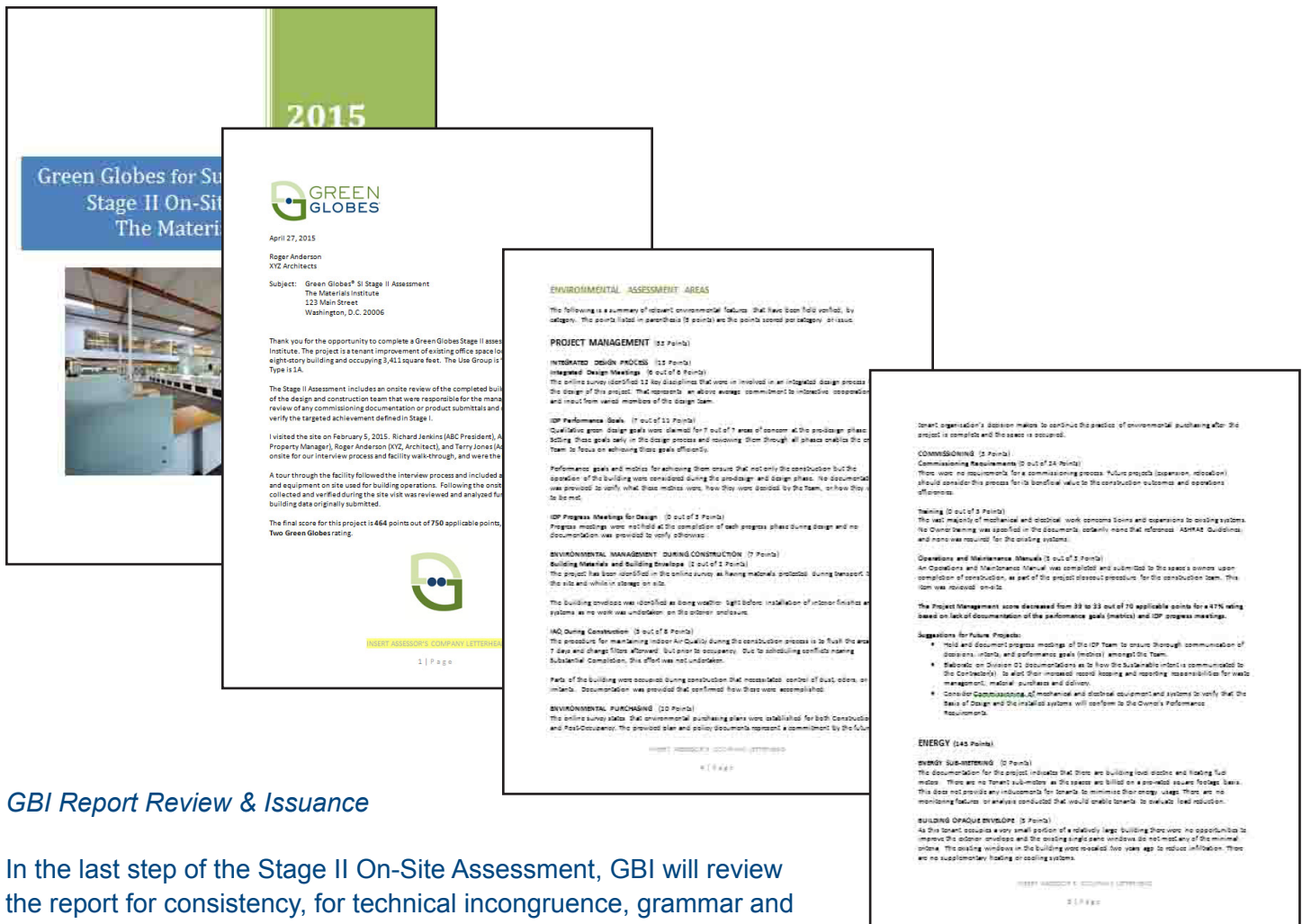
DESIGN REVIEW & ON-SITE ASSESSMENT: POST ON-SITE ASSESSMENT

Missing Documentation

Any additional documentation requested by the assessor should be sent as soon as possible after the assessment (usually within one week, unless otherwise agreed upon with the assessor). It is important to communicate any delays in the delivery of this documentation. The assessor cannot give credit for any items that cannot be validated. Delays in document submission will result in delays to the Stage II On-Site Assessment Report and Green Globes certification. Please note that failure to deliver supporting documentation within a reasonable time frame will result in the report being issued without the associated points.

Third-Party Report

Upon receiving all additional documentation, the assessor will make any last updates to the Post Construction survey. The assessor will use his/her professional judgment as necessary to account for any non-applicable criteria that cannot be accommodated by the online survey and will identify the resulting Green Globes score and rating. Within four weeks of the site visit (or four weeks after the receipt of any missing documentation, whichever is later), the assessor will create a detailed Stage II On-Site Assessment Report and submit it to GBI for review. The report contains the official Green Globes score, rating, and logo. It identifies any discrepancies between the client's version of the Post Construction survey and the assessor's version and contains recommendations for future sustainability improvements.



GBI Report Review & Issuance

In the last step of the Stage II On-Site Assessment, GBI will review the report for consistency, for technical incongruence, grammar and aesthetics. We will notify the assessor regarding any clarification requests or needed updates. If required, the assessor will update the report and submit to GBI. We will review the report to ensure the updates are complete. Once approved, we will issue a PDF of the final assessment report to the project manager by email.

Upon receipt, the project manager is responsible for reviewing the report and identifying any areas in which they have questions or would like clarification. If there are any noted discrepancies, they must contact both the assessor and GBI within two weeks and provide documentation that supports additional credit. The assessor and GBI will promptly address any discrepancies. For additional details, please refer to the [GBI Assessment Discrepancy Resolution & Appeal Guidelines](#).

FINAL CD ASSESSMENT

The purpose of this review is to provide a documentation review post construction to verify the project compliance to the Green Globes SI criteria. **This path does not include a preliminary review of the designs or a site assessment.** As a result, the process is less interactive, with no communication with the assessor prior to construction completion. In addition, there is a greater responsibility on the project manager to provide documentation that supports what was actually implemented, as the assessor will not have the opportunity to perform a physical inspection. As a result, this path should only be used by teams with vast experience with this program.

Complete the Post Construction Survey

This Construction Documents survey is not used as part of the Final CD Assessment. As a result, GBI will submit both the client and assessor version which will release the Post Construction-Client survey to the user.

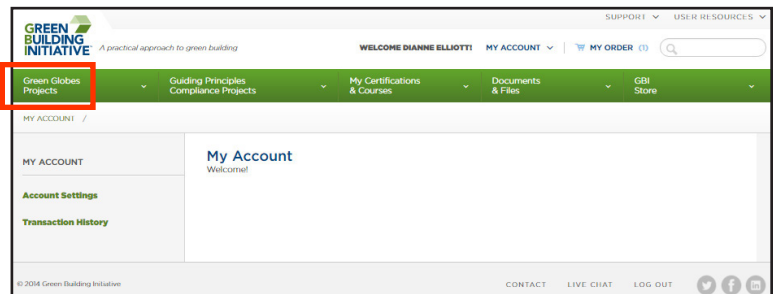
As a result, every assessment using this method begins with the completion and submission of the Post Construction-Client online survey instead of the Construction Documents survey.

The survey should be complete after construction is complete and documentation to support all responses is available for review. It is strongly recommended the survey be completed by the project team; with questions being assigned and addressed by the parties responsible for that area in the design and construction process.

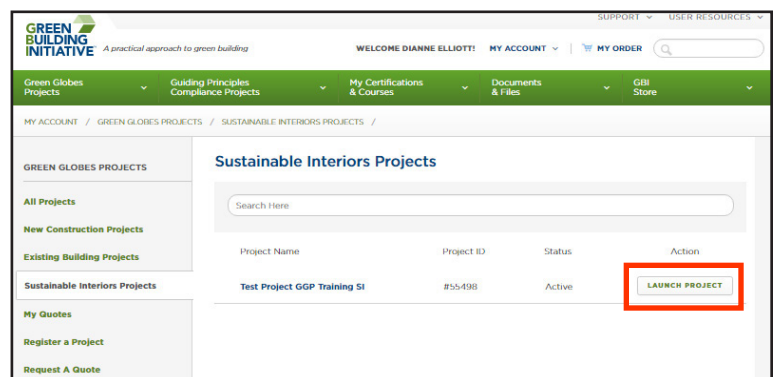
Add Project and Complete Basic Project Information

The first task is to connect your project to the survey. To add your project, login to the GBI Account from which the assessment and/or project registration were ordered.

Select “Green Globes Projects” from the green toolbar.

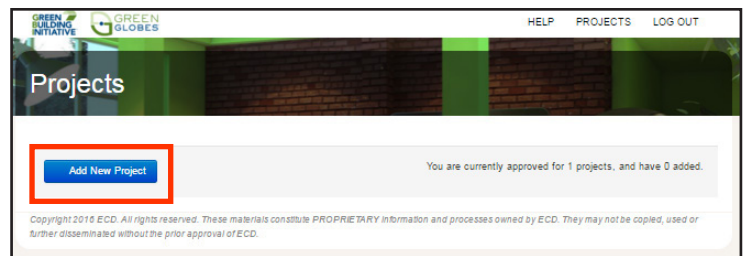


Select “Sustainable Interiors Projects”.



Select “Launch Project” next to the project you wish to open.

Select “Add New Project”.



At the top of the screen select the radial button to indicate you intend to complete a full assessment on this project. Complete the remainder of the Basic Building Information and select “Save & Continue”.

You will now have access to the left navigation and to access the surveys. **Notify your GBI Project Manager after you complete your Basic Project Information as we will need to complete the Construction Documents survey for both the client and assessor versions to enable access to the Post Construction survey.**

Access the Surveys in Subsequent Sessions

If you have previously added your project and entered your basic building information, you will not be automatically directed to the Basic Building Information page. Once you select “Launch Project” you will be directed to the Project Dashboard where you can select “Enter Survey” next the survey you wish to enter.

Add Collaborators

In addition, if you have other team members who require access to the surveys, you may add them as collaborators. Please refer to page 98 in this section for detailed instructions.

Name	Progress	Score	
Basic Information	100%		Enter Survey
Pre-Design	100%		Enter Survey
Construction Documents - Client	100%	67%	Enter Survey
Construction Documents - Assessor	100%	67%	Enter Survey
Post Construction - Client	100%	67%	Enter Survey

Save Responses

Criteria are allocated specific point values according to the response provided (Yes, No, N/A, or a threshold value).

You must select “Save &Continue” at the bottom of each page to save your responses and advance to the next page.

The Green Globes online system is interactive and automatically calculates the projected Green Globes score based upon your responses to the Post Construction survey questions. Each time you save a page of responses within the Post Construction survey, the projected score updates accordingly. The system also indicates what percentage of the survey has been completed depending on the total number of questions answered and saved.

SI Technical Reference Manual

We recommend you use the [Green Globes for Sustainable Interiors Technical Reference Manual](#) when completing your survey which is available online. It contains all of the criteria for the SI program with possible responses and associated points. Tooltips, assessment guidance and reference material links are also provided.

GREEN GLOBES® FOR SUSTAINABLE INTERIORS

Technical Reference Manual

Version 1.1

March 4th, 2016

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4.4 Waste

4.4.1 Construction and Operational Waste

4.4.1.1 Criteria:

What percentage of the construction waste, including interior building demolition⁹⁵ waste, will be diverted from the landfill?

Answers:

- > 74% (20 points)
- 50% - 74% (15 points)
- < 50% (0 points)
- N/A

ToolTip:

When calculating percentage of construction waste, be consistent with units used – either by weight or by volume. Develop a waste management/reduction plan and strategy, which should include a waste audit and waste diversion strategy report. In retrofit situations, check that there is an asbestos removal plan; a procedure to minimize the risk of exposure to lead-based paint; instructions for a waste audit; a dismantling and source separation plan; a list of construction materials that are to be source-separated on-site for reuse and recycling; addresses universal waste (i.e. fluorescent tubes, ballasts, batteries, etc.); and a contractual means of ensuring that all recyclable materials and equipment are diverted from landfill. Estimates of waste diversion will be verified by the Green Globes Assessor. Mark N/A if there will be no construction waste or there is clearly no material that can be repurposed or diverted from a landfill.

References:

- Northeast Recycling Council, *Hauler Terms and Waste Conversion Factors*: http://nerc.org/documents/hauler_terms_and_waste_conversion_factors.pdf

Assessment Guidance:

Construction recycling requirements should be discussed with the General Contractor before start of work. Licensed haulers of recyclables should be identified and what materials they will or will not accept. The owner should make the contractor and hauler aware that demolition waste should be tracked separately from construction waste and that the demolition waste should be separated into hazardous and non-hazardous materials. Salvaged materials, intended to be used on this project site or another, shall be kept separate from the recyclables for the hauler.

Hazardous waste by-products of construction include paints, solvents, oils, lubricants, etc. A separate procedure should be developed for disposing and recycling of these wastes. The procedure should conform to all federal, state, and local regulations.

4.4.1.2 Criteria:

Does the building design address operations-related recycling programs through one or more of the following:

- 4.4.1.2.1: Operational flow for waste handling and storage facilities for recycling?
 - o **Answers:**
 - Yes (15 points)

⁹⁵ demolition: the process of razing, relocation, or removal of an existing building or structure, or a portion thereof.

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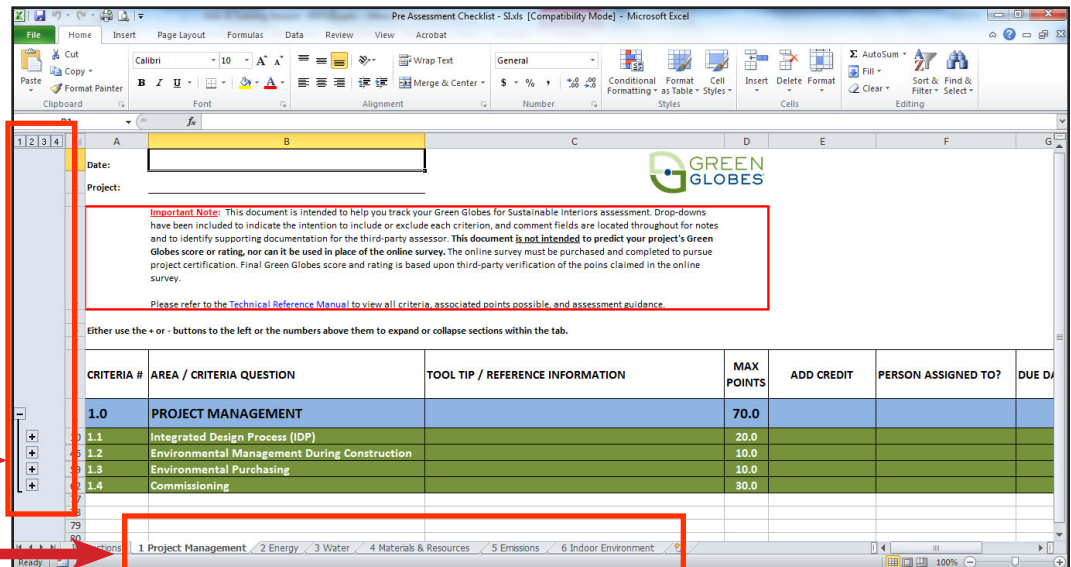
Pre-Assessment Checklist

The project manager and team should utilize the [GG SI Pre-Assessment Checklist](#) (available for download online) to record the specific document and location within that document that supports their responses. This checklist can then be used to assist the team when gathering documentation to submit to the assessor. It is recommended the team include this file with the documentation packet submission to assist the assessor in locating the specific documentation used to support the response. It is NOT intended to be used as scoring tool, as it does not contain threshold values for individual responses.

The GG SI Pre-Assessment Checklist is an Excel-based document that includes one tab for each Environmental Assessment Area. The file includes expandable sections to be able to view each criterion, associated ToolTips and maximum possible points.

[Expandable Sections](#)

[6 Tabs for Assessment Areas](#)



[ToolTips](#)

This screenshot provides a detailed view of the criteria table. Red boxes highlight the 'TOOL TIP / REFERENCE INFORMATION' column, the 'MAX POINTS' column, and the 'PERSON ASSIGNED TO?' column. Red arrows point to these columns from the labels 'ToolTips', 'Maximum Possible Points', and 'Assign Tasks and Record Documentation'.

CRITERIA #	AREA / CRITERIA QUESTION	TOOL TIP / REFERENCE INFORMATION	MAX POINTS	ADD CREDIT	PERSON ASSIGNED TO?	DUE DATE	FILE NAME(S)	FILE PATH, NAME, DIRECTORY	NOTES
1.0	PROJECT MANAGEMENT		70.0						
1.1	Integrated Design Process (IDP)		20.0						
1.1.1	Integrated Design Meetings		6.0						
1.1.1.1	Was an integrated design process (IDP) employed, which included a minimum of three of the following key design disciplines involved in the project? (check as many key disciplines below as apply)	Individuals representing key design disciplines should attend a pre-design planning session in the form of a meeting, charrette, or workshop during pre-design of the project. The Green Globes Assessor will ask for minutes or report of the pre-design planning workshop or charrette.	6.0						
1.1.1.1.1	Acoustics Consultant, Acoustician, or Special Systems Engineer?	Reference Material: Green Globes SI Technical Reference Manual, Section							
1.1.1.1.2	Architect or Interior Designer?								
1.1.1.1.3	Building Facilities Manager?								
1.1.1.1.4	Commissioning Agent?								
1.1.1.1.5	Contractor?								
1.1.1.1.6	Electrical Engineer?	Mark "N/A" where there are no major changes to electrical systems.							
1.1.1.1.7	Lighting Designer/Illuminating Engineer?								
1.1.1.1.8	Mechanical Engineer - HVAC?								
1.1.1.1.9	Mechanical Engineer - Plumbing?								
1.1.1.1.10	Owner and/or Leasing Company Representative?								
1.1.1.1.11	Project Manager?								
1.1.1.1.12	Structural Engineer?	Mark "N/A" where there are no major structural changes.							
1.1.1.1.13	Sustainable Design Coordinator?	This is a role that can be assumed by a member of the team (e.g. the architect or interior designer).							
1.1.1.1.14	User Group Representative?								
1.1.2	IDP Performance Goals		11.0						
1.1.2.1	Were qualitative green design goals established at the pre-design phase for the following:	Written qualitative goals must have been established during the pre-design phase for each item receiving credit.							
1.1.2.1.1	Acoustic comfort?		1.0						
1.1.2.1.2	Efficient lighting?		1.0						

[Maximum Possible Points](#)

[Assign Tasks and Record Documentation](#)

Submit the Post Construction Survey

When your assessment is paid, the project construction is complete, and your supporting documentation is available, please submit your completed Post Construction survey for review.

To submit your survey, select the “Survey Completion” link from the left navigation bar. Once submitted, your Post Construction survey will lock and you will no longer be able to edit your responses.

Post-Construction - Client
PRINTABLE BLANK SURVEY
PROJECT MANAGEMENT
Integrated Design Process
Environmental Management During Construction
Environmental Purchasing
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ENERGY
WATER
MATERIALS & RESOURCES
EMISSIONS
INDOOR ENVIRONMENT
SURVEY COMPLETION
PRINTABLE SURVEY WITH SCORES

SURVEY COMPLETION

OVERALL COMPLETION: 83%

The following pages have outstanding items that have not been completed:

Page
Indoor Environment: Source Control and Measurement of Indoor Pollutants
Indoor Environment: Lighting Design and Systems
Indoor Environment: Thermal Comfort
Indoor Environment: Acoustic Comfort

The project/building owner or designated representative should be provided a final opportunity to review and approve the proposed submission to avoid potential conflicts later in the project delivery process. In addition, did all requisite building professionals provide input and review the final survey responses, including any or all of the following personnel as applicable to the project?

- Owner or Owner's Representative
- Architect
- Project Sustainability Coordinator
- Mechanical Engineer
- Energy Engineer (if different from above)
- Civil Engineer
- Structural Engineer
- Electrical Engineer
- Commissioning Authority
- Lighting Engineer
- Landscape Architect
- Acoustics Engineer
- Interior Designer

☒ Yes, the survey has been reviewed by all requisite building professionals and the project owner representative, as applicable.

Required answers for this survey are only 83% complete. If you wish to submit this survey for assessor review at this time, please check the box below to acknowledge that you are submitting an incomplete survey, and then click the button below.

☒ Yes, I wish to submit this incomplete survey for assessor review.

Submit Survey for Assessor Review

Verify that the survey has been reviewed by all of the necessary project team members and check the appropriate box.

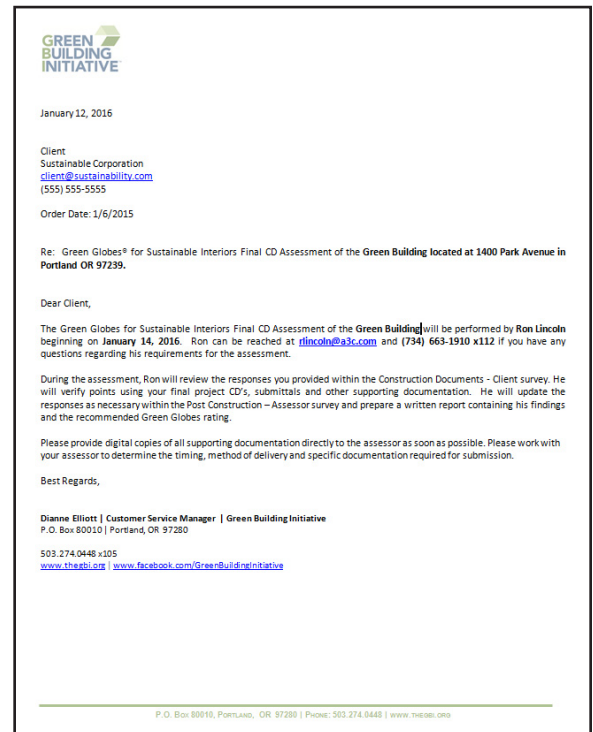
If your survey is not 100% complete, you will have links at the top of the page. Selecting the link will take to the location of the criteria that require completion. If your survey is complete, the overall completion will indicate 100%.

If you would like to submit an incomplete survey you must check the box to confirm that is your desire.

When ready, select “Submit Survey for assessor Review” button at the bottom of the screen.

Scheduling the Final CD Assessment

To schedule your assessment, call or email GBI. Your GBI Project Manager will reach out to the pool of certified third-party Green Globes Assessors (GGA's) to determine who is available and best suited for your project. Once secured he/she will assign an assessor to your project and email a scheduling letter that provides the assessor's contact information and the official date on which the Final CD review will begin. Your assigned assessor will contact you to discuss the specific details of the assessment, such as how to transmit your supporting documentation.



Gather & Submit Documentation

You will ensure all documentation that verifies the survey responses is gathered and ready for submission and communicate with the assessor regarding the timing and method of delivery. Some assessors prefer paper documents, others are fine with electronic submissions. Common methods of document transmission include using a file-sharing service or setting up an FTP site.

Assessor Review

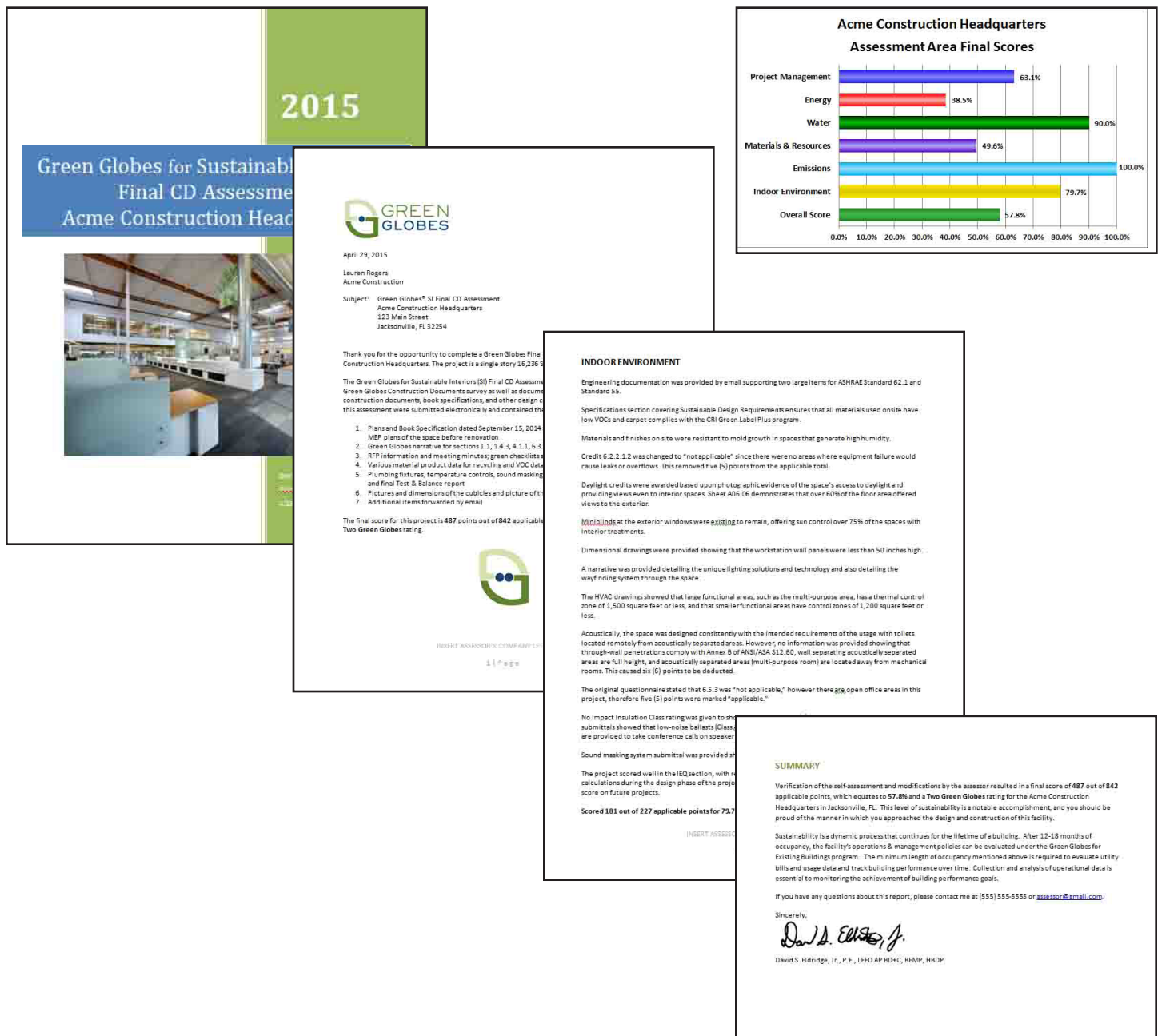
Upon submission of your Post Construction survey, your responses are used to populate a separate version of the survey that your assessor can view and edit. Once your assessor has received the submitted documentation, he/she will review and compare the information provided with your survey responses. If there is documentation missing, he/she will send an inquiry allowing the project manager the opportunity to submit additional supporting information. Any additional documentation requested by the assessor should be sent as soon as possible (usually within one week, unless otherwise agreed upon with the assessor). It is important to communicate any delays in the delivery of this documentation. The assessor cannot give credit for any items that cannot be validated. Delays in document submission will result in delays to the Final CD Assessment Report and Green Globes certification. Please note that failure to deliver supporting documentation within a

reasonable time frame will result in the report being issued without the associated points.

Once the review is complete, the assessor will update any responses within the Post Construction survey that are incorrect or cannot be verified.

Third-Party Report

The assessor will use his/her professional judgment as necessary to account for any non-applicable criteria that cannot be accommodated by the online survey and will identify the resulting Green Globes score and rating. Within four weeks of the receipt the documentation, the assessor will create a detailed Final CD Assessment Report and submit it to GBI for review. The report contains the official Green Globes score, rating, and logo. It identifies any discrepancies between the client's version of the Post Construction survey and the assessor's version and contains recommendations for future sustainability improvements.



In the last step of the Final CD Assessment, GBI will review the report for consistency, for technical incongruence, grammar and aesthetics. We will notify the assessor regarding any clarification requests or needed updates. If required, the assessor will update and resubmit the report. We will review the report for to ensure the updates are complete. Once approved, we will issue to the project manager by email a PDF version of the Final CD Assessment Report.

BENCHMARKING & EB CERTIFICATION

As previously explained, the intention of the Green Globes SI program is to evaluate sustainable design and intended performance. Therefore, the logical next step is to evaluate operations, management, and actual building performance during occupancy. GBI recommends that all buildings certified under Green Globes SI start tracking and benchmarking energy and water performance data within the Green Globes EB online evaluation immediately after the initial “data normalization period” (usually after the first six months of occupancy). Creating a baseline of the building’s actual performance and tracking ongoing data helps owners/facility managers track their return on investment in sustainable measures and develop action plans to further improve sustainability. Building owners/managers are encouraged to track performance data for three consecutive years and then pursue formal third-party assessment and EB certification. This three-year cycle of benchmarking and Green Globes assessment is intended to continue over the entire service life of the building. Specific information about the Green Globes EB program and process can be found in Section 8 of the GGP training manual.