

Appendix: Consultant Scope of Work

Sustainable Building Consultant

The primary objective of Sustainable Building Consultant is to work with the project team to ensure achievement of all owner project requirements related to sustainability. These requirements include planning, delivery and documentation for The City's Minimum Sustainability Performance Requirements and any green building certification objectives.

Abbreviations

- APEGA (Association of Professional Engineers and Geoscientists of Alberta)
- NECB (National Energy Code of Canada for Buildings)
- LEED (Leadership in Energy and Environmental Design)
- OPR (Owner's Project Requirements)
- PM (Project Manager)
- SBP (Sustainable Building Policy)

Qualifications

The Sustainable Building Consultant team may be made up of multiple subject matter experts to address all aspects of sustainability for the project. The Consultant's team lead, that will act as the primary point of contact to The City, must have at least five years of sustainable building consultant experience on at least five projects. All other team members must demonstrate they have sustainable building consultant experience on at least two projects within the past five years.

Professional credentials such as P.Eng., through APEGA, and AAA, through the Alberta Association of Architects are considered an asset but are not a requirement.

The Sustainable Building Consultant team lead on LEED projects, must be a LEED Accredited Professional (LEED AP).

Requirements

The Sustainable Building Consultant is responsible for coordinating any necessary work with the commissioning team, the energy modeling team, and the rest of the project team. Lines of communications shall be established at the initiation of the project.

All reports, meeting minutes, and deliverables prepared by the Sustainable Building Consultant shall be provided directly to The City Project Manager (PM) and the SBP Steward. Meeting minutes at all sustainability specific meetings are the responsibility of the Sustainable Building Consultant.

General Requirements

The Sustainable Building Consultant is responsible for developing sustainability related deliverables at each major milestone. This includes but is not limited to providing an updated SBP Compliance Workplan. The Sustainable Building Consultant is responsible for working with the coordinating professional of record, and the rest of the project team, throughout the various stages of the project to ensure agreed upon sustainability requirements, objectives and decisions are understood by the rest of the project team and are accurately reflected in the project documents (drawings, specifications reports, etc.). Any discrepancies shall be noted and reported to the owner.

The Sustainable Building Consultant is responsible for preparing the sustainability specifications for inclusion in the project specification package. The first draft of the sustainability specifications shall be provided no later than the start of the construction documents stage. Provide all versions of the sustainability specifications to The City PM, The SBP Steward and the coordinating professional of record for review and inclusion in the project specification package.

Sustainability Requirements Tracking Sheet

The Sustainable Building Consultant is responsible for recording and monitoring all sustainability related requirements and objectives. This shall be delivered in the form of a Sustainability Requirements Tracking Sheet. Any decisions or adjustments on these objectives over the course of the project shall be recorded and include a history of any Sustainability Requirements adjustments.

SBP Compliance Workplan Requirements

An SBP Compliance Workplan shall be created and updated at each major milestone of the project and shall include at a minimum:

- All steps to achieve the Minimum Sustainability Performance Requirements including:
 - A list of the requirements
 - Status
 - Required deliverables
 - Project team members responsible for completing each deliverable
 - Anticipated timeframes to complete each deliverable
 - Identified risks
- If applicable, a green building certification planning summary document that includes but is not limited to:
 - Certification program and required level of certification
 - Requirements at each major milestone
 - Targeted and/or anticipated strategies or credits
 - Status (i.e., updated LEED scorecard)
 - A list of required deliverables
 - Team members responsible for each deliverable
 - Expected and/or required timelines to complete each deliverable
 - Identified risks

Sustainability Design Workshop Requirements

Prior to the release of the schematic design report, host a sustainability design workshop (aka charrette), and necessary follow-up meetings, with all relevant members of the project team to develop strategies to accomplish the sustainability objectives identified in the Sustainability Requirements Tracking Sheet including the Minimum Sustainability Performance Requirements and any green building certification objectives. Document the discussed strategies in the SBP Compliance Workplan.

For LEED projects develop strategies and documentation as required by the LEED Integrative Process credit.

LEED Certification Requirements

Projects pursuing LEED certification shall follow the split review path. This option provides The City and Project Team better clarity on the status and risk in achieving certification objectives/requirements at the end of the design stage. The Sustainable Building Consultant is responsible for working with the project team and prepare all required LEED design and construction application documentation.

The Sustainable Building Consultant is responsible for registering the project, using LEED Online, under the project selected version of LEED. The City is a CaGBC member and under the current fee structure is eligible for discounted

member rates. The Sustainable Building Consultant shall check-in with the SBP Steward, prior to registering the project, to ensure the project is registered under the discounted rates. Ensure City staff, including the PM and The Policy Steward, have LEED Online access by adding them to the project team.

Submit the LEED design application via LEED Online before the completion of the Construction Documents phase. All targeted credits identified by the LEED rating system, as applicable for submission in the design application, must be included in this submission.

Submit the LEED construction application, as early as possible in the construction administration phase of the project. Target certification timeframes for The City are one year after substantial completion.

The Sustainable Building Consultant is responsible for responding to all USGBC reviewer comments on the LEED applications as appropriate to complete the LEED certification process. The owner shall be kept up-to-date on the status of the certification process.

For LEED projects the Sustainable Building Consultant is responsible for reviewing, discussing and if needed submitting any relevant Credit Interpretation Requests (CIR).

Sustainability Specifications Requirements

Prepare sustainability specifications for inclusion in the design documents. Provide all versions of the sustainability specifications to The City PM, SBP Steward and the coordinating professional of record for review and inclusion in the project specification package.

Construction Administration Requirements

Host a sustainability construction kick-off workshop with the general contractor, relevant trades, and The City to review the OPR, contractor scopes and finalize any construction related sustainability strategies not yet fully developed. Establish lines of communication and define appropriate sustainability reporting periods (i.e. monthly, quarterly, etc.).

Work with the project team and provide construction sustainability update reports to The City PM and the SBP Steward. Copy the coordinating professional of record and the general contractor. Provide the reports in accordance with the agreed upon reporting periods. These reports shall include the current detailed status of all construction related sustainability items, including Minimum Sustainability Performance Requirements, throughout the construction process. If the project is pursuing LEED certification, the reports will include but are not limited to, the following LEED credits:

- Building Life-Cycle Impact Reduction / Interiors Life-Cycle Impact Reduction
- Building Product Disclosure and Optimization – Environmental Product Declarations
- Building Product Disclosure and Optimization – Sourcing of Raw Materials
- Building Product Disclosure and Optimization – Material Ingredients
- Construction and Demolition Waste Management
- Construction Indoor Air Quality Management Plan
- Low-Emitting Materials

Close Out Requirements

At project closeout The Sustainable Building Consultant shall prepare and submit all documentation required to demonstrate compliance with The Sustainable Building Policy in the form of a SBP Compliance Submission to The City PM and The SBP Steward. This will require close collaboration with the design and construction teams. The SBP Compliance Submission shall report on the final results of the requirements and objectives established in the Sustainability OPR Tracking Sheet.

Deliverables

- Sustainability Requirements Tracking Sheet, updated at major milestones
- SBP Compliance Workplan, updated at major milestones
- Sustainability Design Workshop Meeting Minutes
- LEED Documentation (if applicable)
- Sustainability Specifications
- Construction Sustainability Update Reports
- SBP Compliance Submission

References

- LEED v4 Reference Guide, U.S. Green Building Council, 2017
- LEED v4.1 Reference Guide, U.S. Green Building Council, 2019
- Sustainable Building Policy, City of Calgary, 2024