



LEED Pilot Credit Library

Pilot Credits 5 & 6: Preliminary Integrative Project Planning & Design

This credit is available for pilot testing by the following LEED project types:

- New Construction
- Core and Shell
- Schools
- Commercial Interiors

Credit 5

(This is a prerequisite and must be completed if projects plan on pursuing Credit 6)

Intent

To maximize opportunities for integrative, cost-effective adoption of green design and construction strategies. To utilize innovative approaches and techniques for green design and construction.

Requirements

Use cross discipline design and decision making, beginning in the programming and pre-design phase. At a minimum, ensure the following process:

- **Preliminary Rating Goals.** As early as practicable and preferably before Schematic Design, conduct a Preliminary LEED meeting including a minimum of four key project team members, including the Owner or Owner's representative. As part of the meeting, create a LEED® action plan that, at a minimum, includes the following:
 - The targeted LEED award level (Certified, Silver, Gold, or Platinum);
 - The LEED credits that have been selected to meet the targeted award level; and
 - The primary responsible party selected to meet the LEED requirements for each prerequisite or selected credit.
- **Integrative Project Team.** Assemble and involve a minimum of four of the following project team members from the list below, including the Owner or Owner's representative, and as many as feasible.
 - Owner or Owner's Representative
 - Owner's capital budget manager
 - Architect or building designer
 - Mechanical Engineer
 - Electrical Engineer
 - Structural engineer
 - Energy Modeler
 - Equipment Planner
 - Acoustical Consultant
 - Telecommunications Designer
 - Controls Designer
 - Building science or performance testing



LEED Pilot Credit Library

- Green building or sustainable design consultant
 - User groups
 - Facility managers
 - Housekeeping staff
 - Functional and space programmers
 - Interior designer
 - Lighting consultant
 - Commissioning agent
 - Community representatives
 - Civil engineering, landscape architecture, habitat restoration, or land planning
 - Construction Management or General Contractor
 - Life cycle cost analysis; construction cost estimating;
 - Other disciplines appropriate to the specific project type.
- **Owner's Project Requirements Document.** Prepare an Owner's Project Requirements document for the project.
 - **Design Charette.** As early as practicable and preferably before schematic design, conduct at least one full-day integrative design workshop with the Integrative Project Team as defined above. The goal of the workshop shall be to optimize the integration of green strategies across all aspects of the building design, drawing on the expertise of all participants.

Potential Technologies & Strategies

- Reinforce corporate/institutional commitments to environmental health and community responsibility.
- Use cross discipline design, decision-making, and charrettes. Use goal-setting workshops and build a team approach to the project.
- Prepare checklists for points and strategies prior to beginning the design process; refer to the checklist at milestones during the design process.
- Engage owner, staff, contractors, user groups and community groups, educating them on the benefits of green design and bringing them into the design process at key points in the decision-making process.
- Participate in peer-to-peer information exchange and problem solving.
- Consider performance-based incentives in professional contracts that reward achievement of Integrative Design Goals and Project Vision. Incentives may be based on life cycle cost-based equipment and material selection, levels of achievement in LEED, or comparisons to benchmarks of existing facility performance or combinations of these and other benchmarks.
- Contractually apportion professional fees to create specific line items for the Integrative Design Charette and subsequent monitoring and follow-up meetings. Integrative Design may benefit from re-apportioning design fees to provide a higher percentage early in the process leading to stronger integration and streamline in subsequent design stages.
- Consider seeking foundation support for integrative design initiatives.



LEED Pilot Credit Library

Credit 6

(This credit cannot be pursued without also completing Credit 5)

Intent

To maximize opportunities for integrative, cost-effective adoption of green design and construction strategies. Utilize innovative approaches and techniques for green design and construction.

Requirements

Use cross discipline design and decision making for all phases of design and construction. At a minimum, ensure the following process:

- Achieve *Pilot Credit 5: Preliminary Integrative Project Planning & Design*
- Actively involve all team members referenced above in at least three of the following phases of project design and construction process:
 - Conceptual/schematic design
 - LEED planning
 - Preliminary design
 - Energy/envelope systems analysis or design
 - Design development
 - Final design, construction documents and specifications
 - Construction Administration
- Conduct meetings with the project team at least monthly to review project status, introduce new team members to project goals, discuss problems encountered, formulate solutions, review responsibilities, and identify next steps. In these meetings, utilize the process framework established by the ANSI Market Transformation to Sustainability Guideline Standard March 2007 revision for distribution Whole System Integration Process (WSIP).

Potential Technologies & Strategies

- Reinforce corporate/institutional commitments to environmental health and community responsibility.
- Use cross discipline design, decision-making, and charrettes. Use goal-setting workshops and build a team approach to the project.
- Prepare checklists for points and strategies prior to beginning the design process; refer to the checklist at milestones during the design process.
- Engage owner, staff, contractors, user groups and community groups, educating them on the benefits of green design and bringing them into the design process at key points in the decision-making process.
- Participate in peer-to-peer information exchange and problem solving with other project teams implementing sustainable design, construction and operations.
- Consider performance-based incentives in professional contracts that reward achievement of Integrative Design Goals and Project Vision. Incentives may be based on life cycle cost-based equipment and material selection, levels of achieve-



LEED Pilot Credit Library

ment in LEED, or comparisons to benchmarks of existing facility performance or combinations of these and other benchmarks.

- Contractually apportion professional fees to create specific line items for the Integrative Design Charette and subsequent monitoring and follow-up meetings. Integrative Design may benefit from re-apportioning design fees to provide a higher percentage early in the process leading to stronger integration and streamline in subsequent design stages.
- Consider seeking foundation support for integrative design initiatives.