B3 GUIDELINES PROJECT ROLE:

Guideline Leader

AGENDA

1. What is a Guideline Leader?
2. How to fulfill a Guideline Leader's responsibilities
   - Navigating the B3 Guidelines Tracking Tool
   - Coordinating Design and Construction Phase Compliance
   - Phase Review and Approval
   - Variance and Non-Compliance Guidance

For more information about the State of Minnesota's B3 programs and tools, visit: B3mn.org

www.b3mn.org/guidelines/alldocuments/

WHAT IS A GUIDELINE LEADER?

CATHOLIC CHARITIES

ROTARY LIFT
ROTARY LIFT
ROTARY LIFT

Kendall's ACE Hardware

RESPONSIBILITIES OF GUIDELINE LEADERS

The Guideline Leader has five primary responsibilities:

1. Project Set-up
2. Coordinating Design and Construction Phase Compliance
3. Completing Guideline Documentation
4. Phase Review and Approval
5. Variance Coordination and Review

SELECTING A GUIDELINE LEADER

Guideline Leaders:

- Have strong management and authority skills, as well as a strong understanding of their individual project.
- Ideally have experience with sustainable building design and/or rating system documentation.
- Must understand the intent of the B3 Guidelines, such as design strategies, compliance thresholds, and documentation needed.

Team members can transition in and out of the Guideline Leader role to ensure the best fit at that project phase. The Guideline Leader can also serve additional roles on the project team.

NAVIGATING THE B3 GUIDELINES TRACKING TOOL

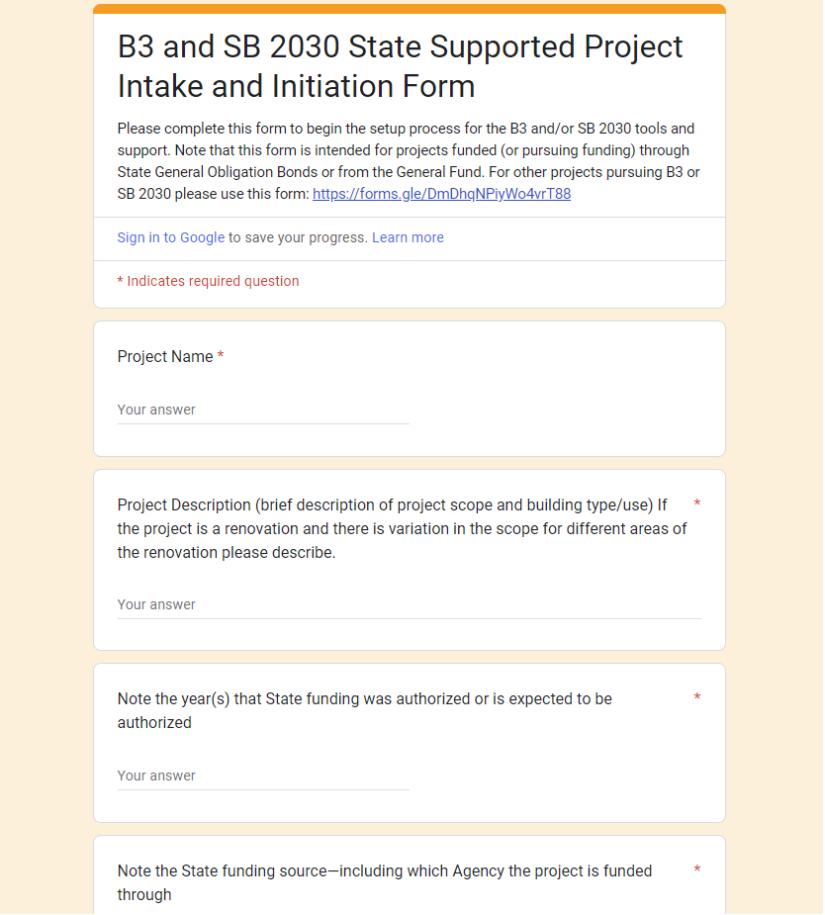
www.trackingtool.b3mn.org

PROJECT SET-UP: PROJECT INTAKE FORM

It is the responsibility of the Guideline Leader to initiate project setup.

1) Submit the Project Intake Form available on the B3 Guidelines website, choosing the appropriate form based on whether the project is state-funded or fee-applied.

   - Guideline Leaders will report the expected size and scope of their project, informing which guidelines will appear on the B3 Guidelines Tracking Tool project dashboard.
   - If the project's exact scope is unknown, potentially relevant guidelines will be included until confirmed otherwise.
   - It may take up to five business days for the project file to be established.



B3 and SB 2030 State Supported Project Intake and Initiation Form

Please complete this form to begin the setup process for the B3 and/or SB 2030 tools and support. Note that this form is intended for projects funded (or pursuing funding) through State General Obligation Bonds or from the General Fund. For other projects pursuing B3 or SB 2030 please use this form: https://forms.gle/DmDhqNPiyWo4vrT88

Sign in to Google to save your progress. Learn more

* Indicates required question

Project Name *

Your answer

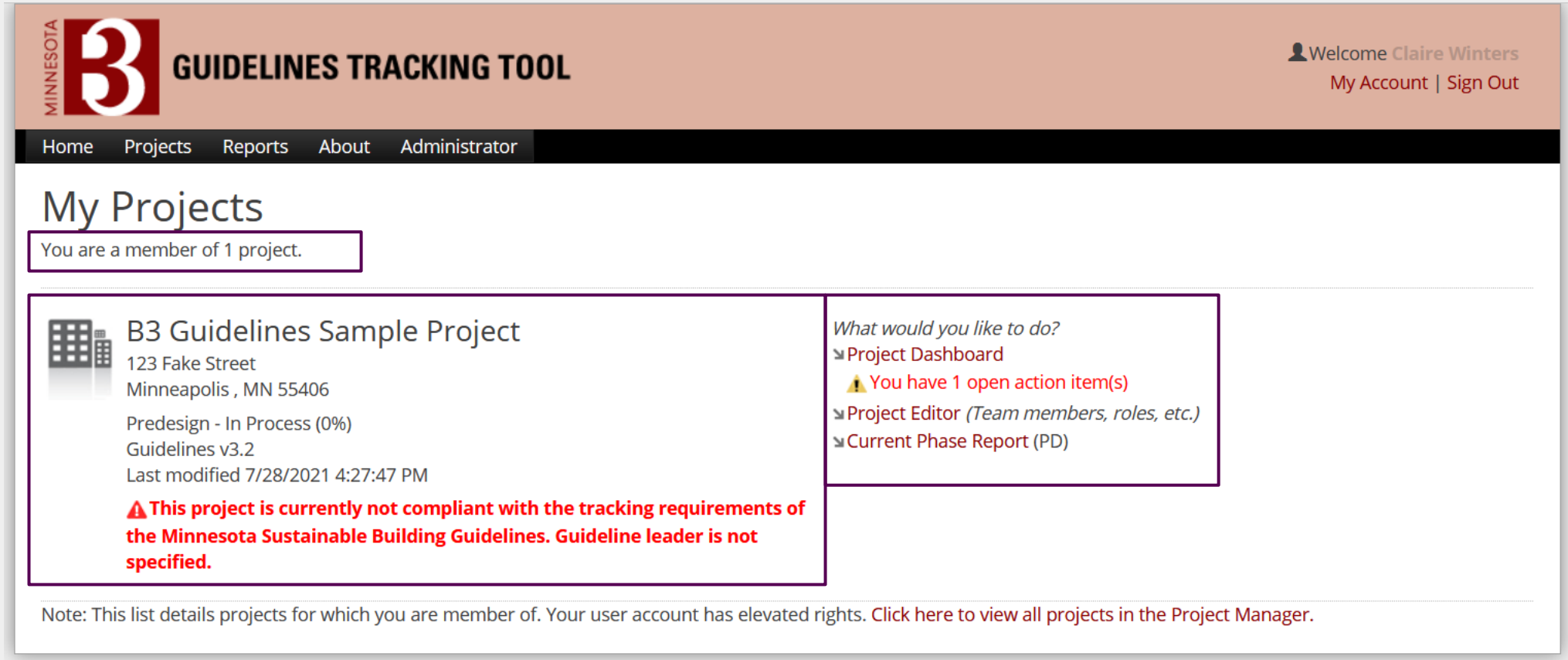
Project Description (brief description of project scope and building type/use) If the project is a renovation and there is variation in the scope for different areas of the renovation please describe. *

Your answer

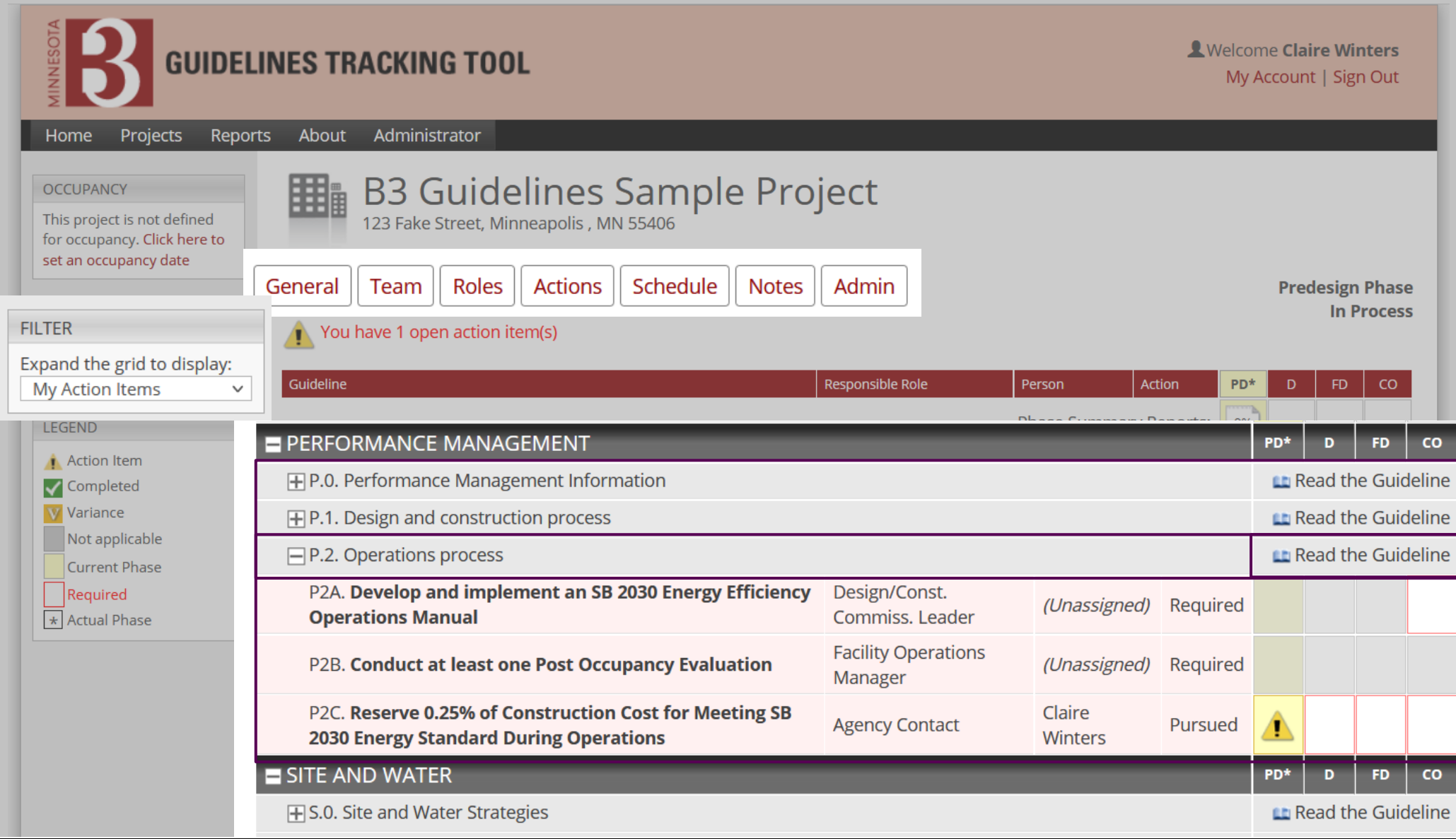
Note the year(s) that State funding was authorized or is expected to be authorized *

Your answer

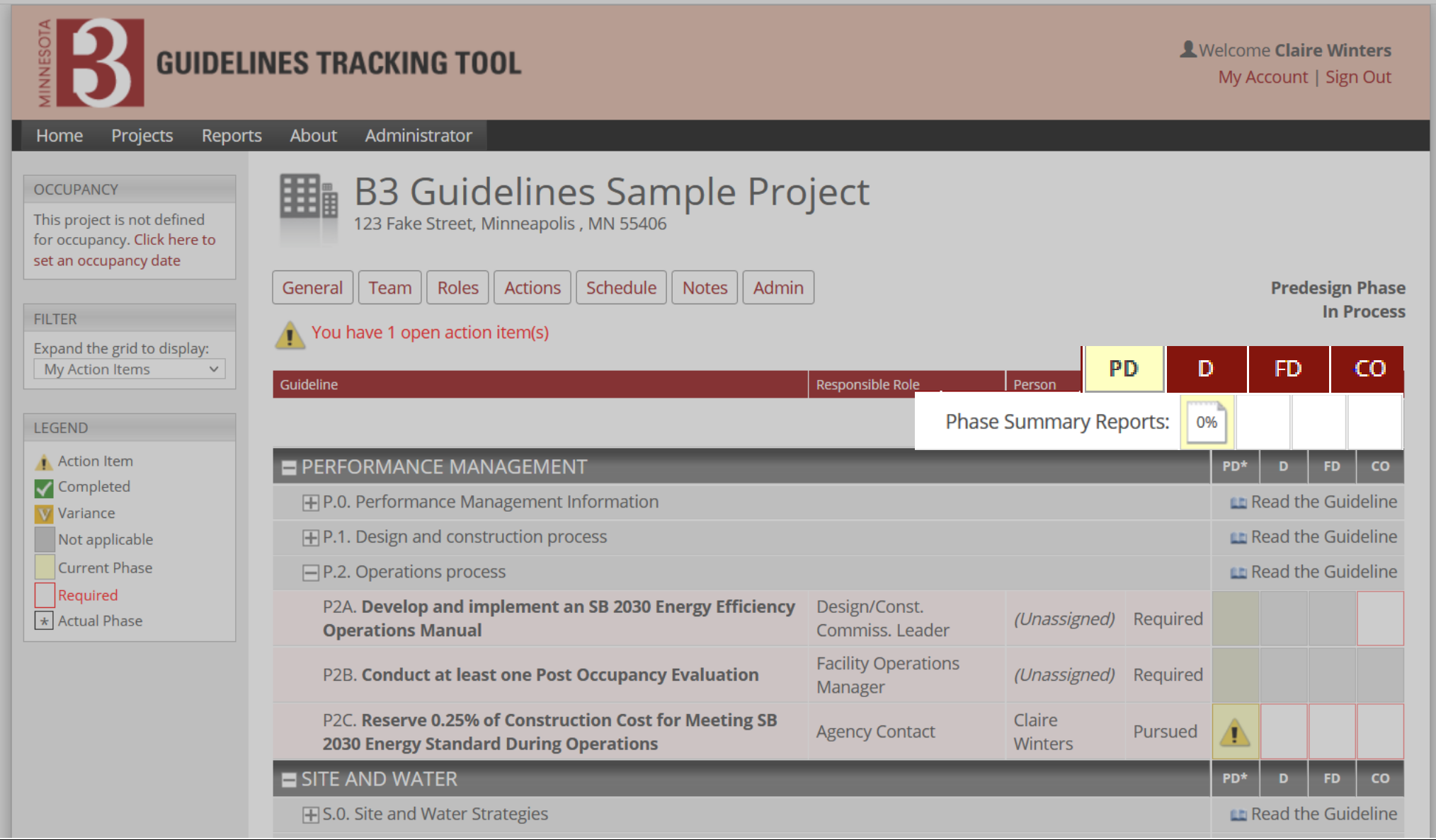
Note the State funding source—including which Agency the project is funded through *



LANDING SCREEN



PROJECT DASHBOARD

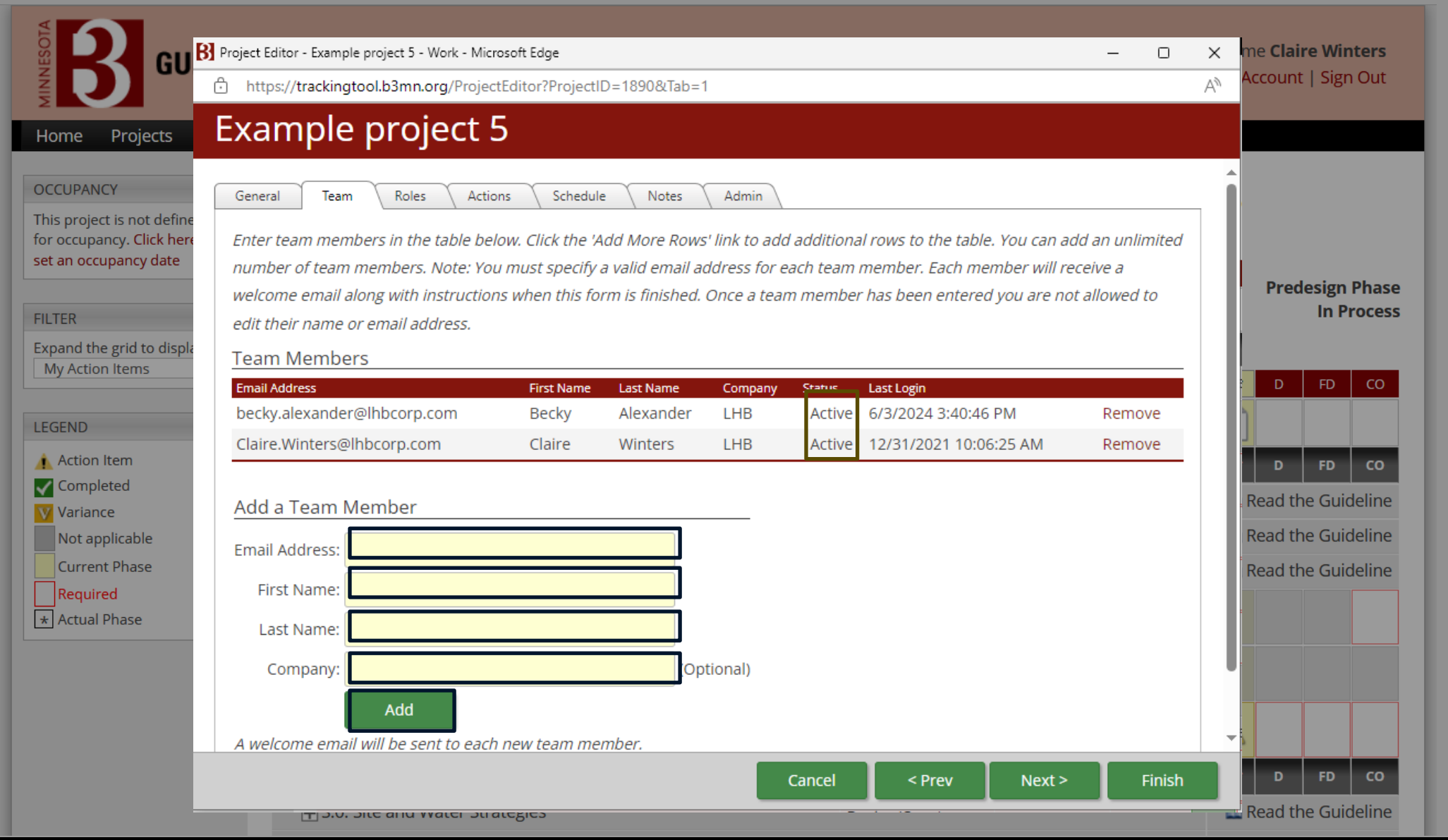


PROJECT DASHBOARD: CONTINUED

PROJECT SET-UP: ADDING TEAM MEMBERS

2) Add team members.

- Guideline Leaders are responsible for populating the project file with the names and emails of all team members that require access to the B3 Guidelines Tracking Tool.

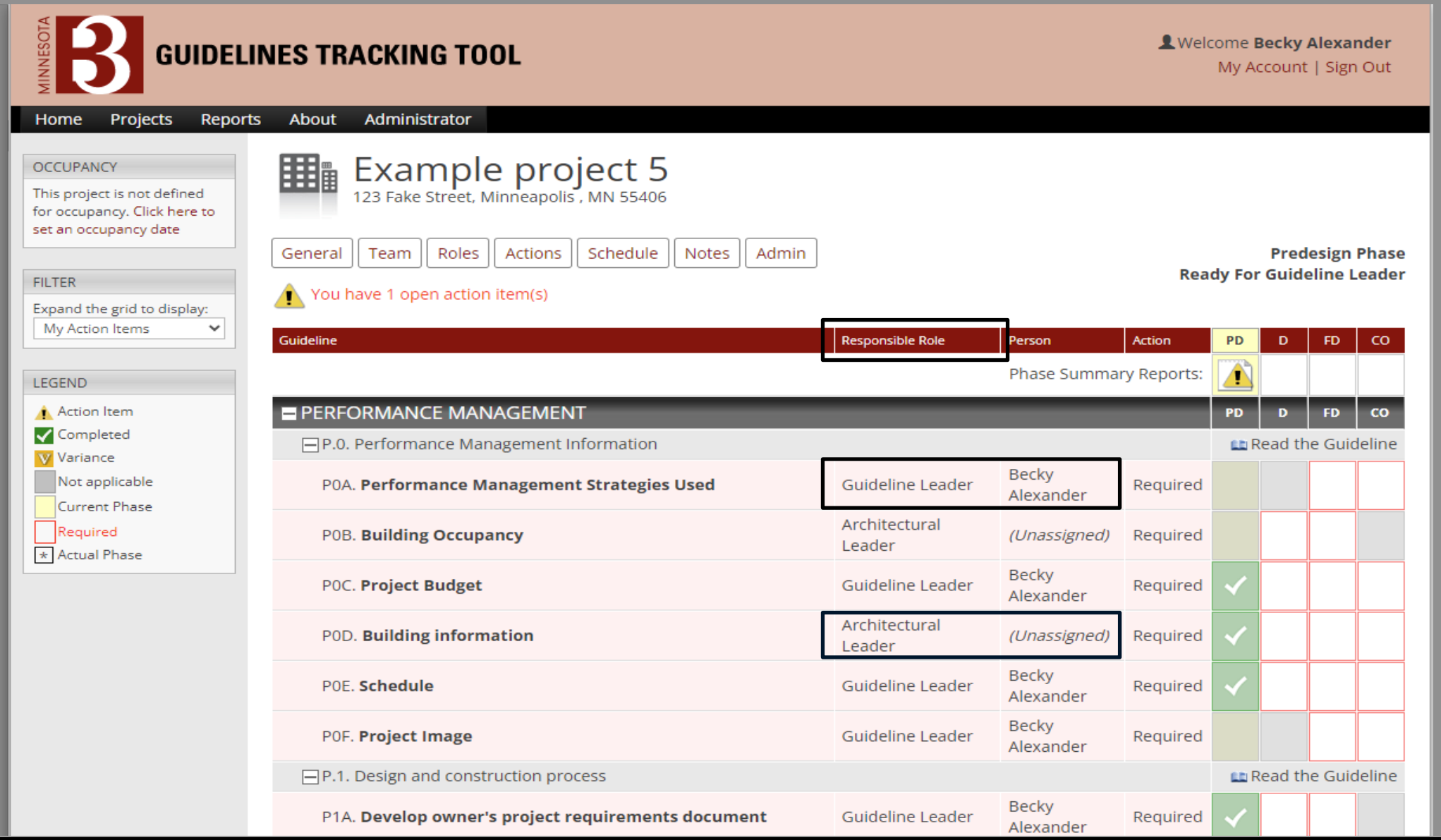


ADDING TEAM MEMBERS IN THE B3 TRACKING TOOL

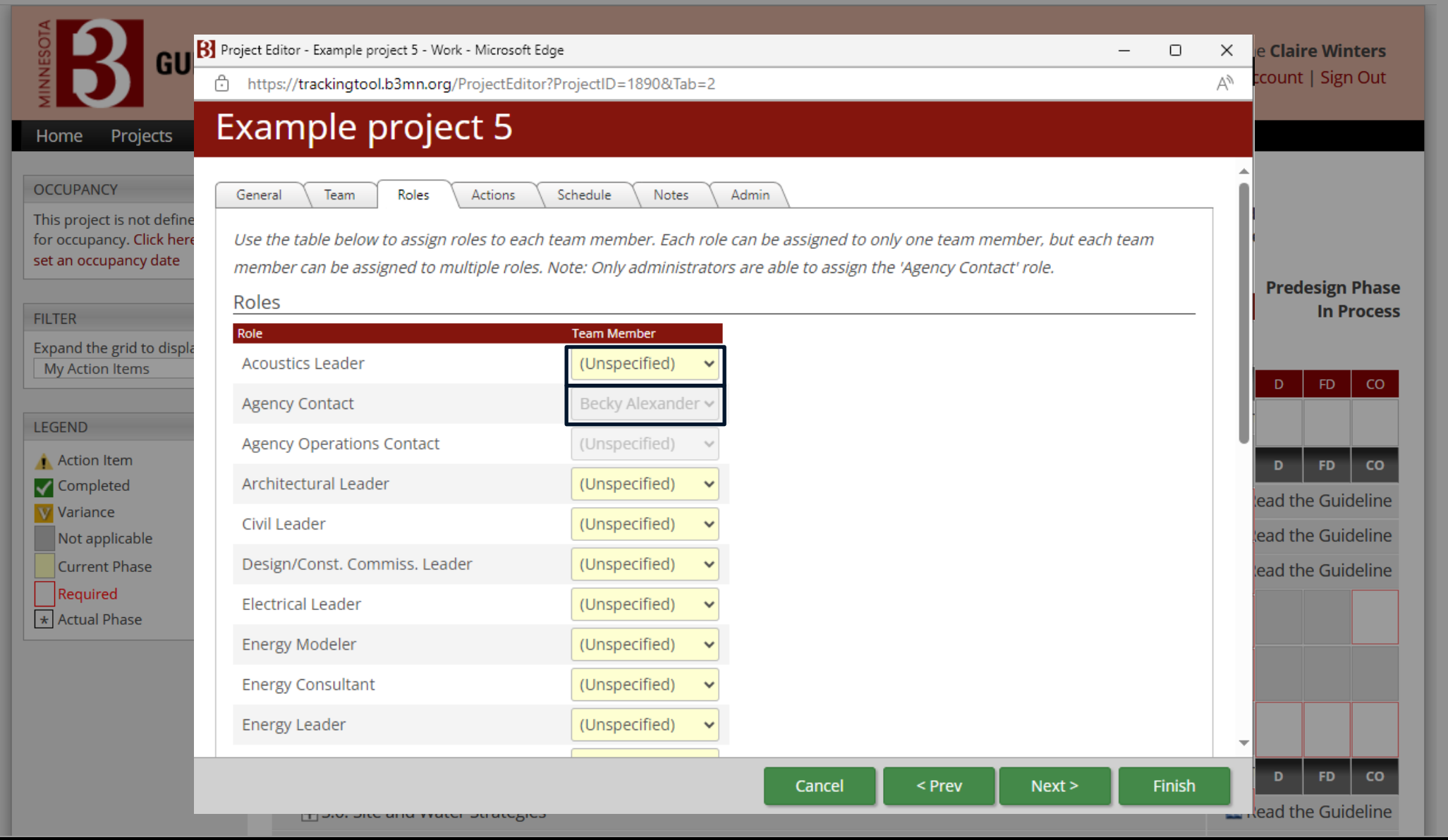
PROJECT SET-UP: ASSIGNING ROLES

3) Assign roles.

- Guideline Leaders are responsible for assigning team member roles within the Tracking Tool.
- Team members can play multiple roles or no roles, as long as all roles with an open action item in the current project phase are filled.



ASSIGNING ROLES IN THE B3 TRACKING TOOL

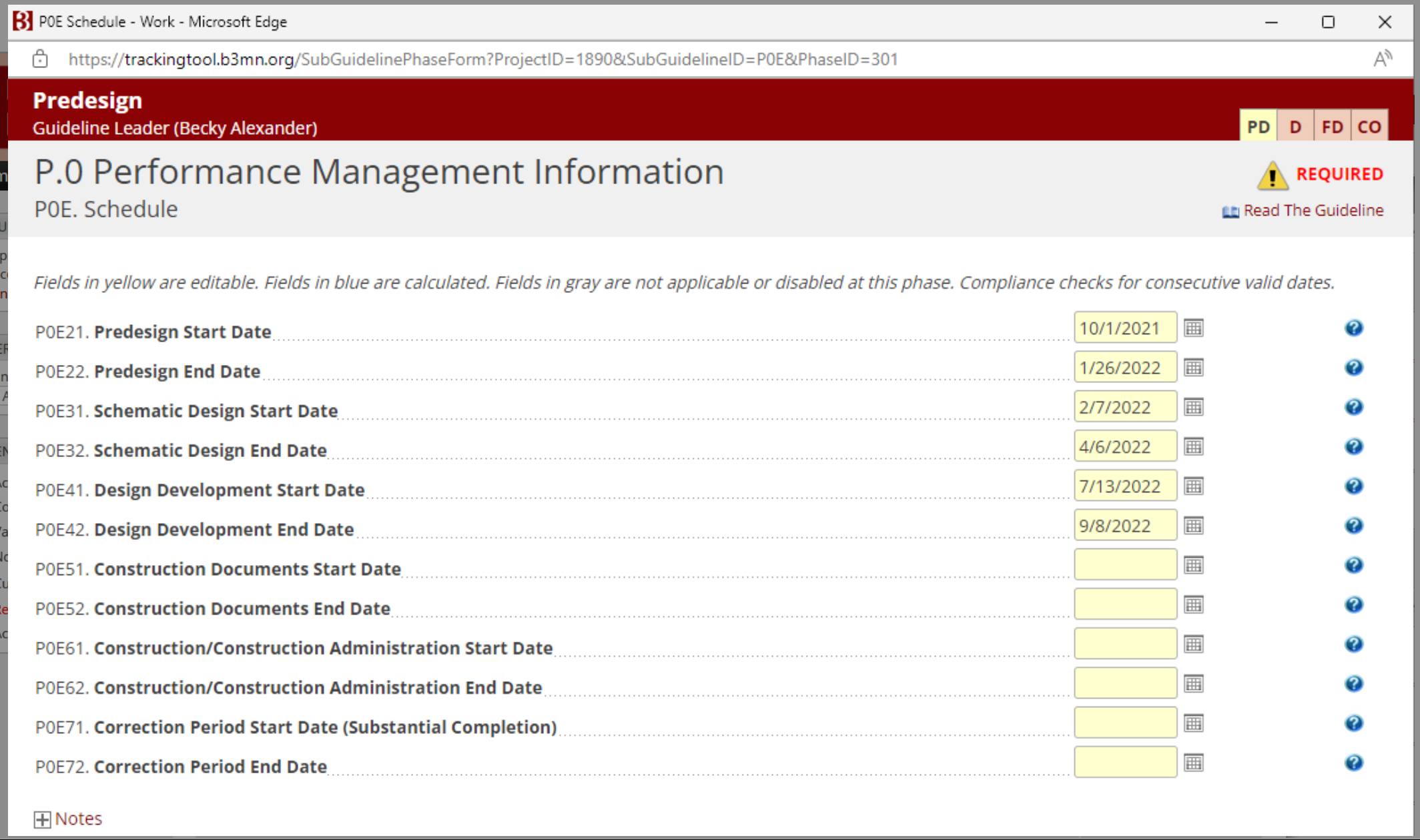


ASSIGNING ROLES IN THE B3 TRACKING TOOL: CONTINUED

PROJECT SET-UP

3) Define the schedule.

- Guideline Leaders are responsible for providing and updating the project schedule.
- Updating the schedule allows for accurate project tracking and helps the project team meet deadlines.



DEFINING THE SCHEDULE IN THE B3 TRACKING TOOL

COORDINATING DESIGN AND CONSTRUCTION PHASE COMPLIANCE

OVERVIEW

The Guideline Leader must ensure that their project team understands the B3 guideline requirements, incorporates them into their design, and submits complete and timely compliance documentation to the B3 Guidelines Tracking Tool.

- Prioritize communication about B3 Guidelines compliance with their project team.
- Communicate with other parties, such as the B3 Guidelines Administrators, project owner, and project Agency Contact.
- Coordinate variance requests and manage submissions.
- Serve as a resource for other project team members.

Giants Ridge Ski Chalet and Event Center
Photo courtesy of LHB

INTERNAL COMMUNICATIONS

The Guideline Leader should proactively communicate about B3 Guidelines compliance with the project team. This may include:

- Coordinating a B3 Guidelines kick-off meeting
- Ensuring the B3 guidelines are regularly discussed at project meetings
- Supporting an interdisciplinary, participatory team approach.

Ridgewater College
Photo courtesy of LHB

EXTERNAL COMMUNICATIONS

The Guideline Leader should proactively communicate with the project owner and B3 Guidelines Administrators. This may include:

- Confirming that project owners understand the B3 Guidelines requirements and how these will impact the project.
- Communicating with B3 Guidelines Administrators, depending on project needs.
  - Changes to project's status
  - Decisions about project scope
  - SB 2030 strategy meeting
  - Questions from project team members
  - Questions unanswered by available online resources

B3 Guidelines Administrator email:

guidelines@b3mn.org

MANAGING VARIANCES & SUBMISSIONS

The Guideline Leader should:

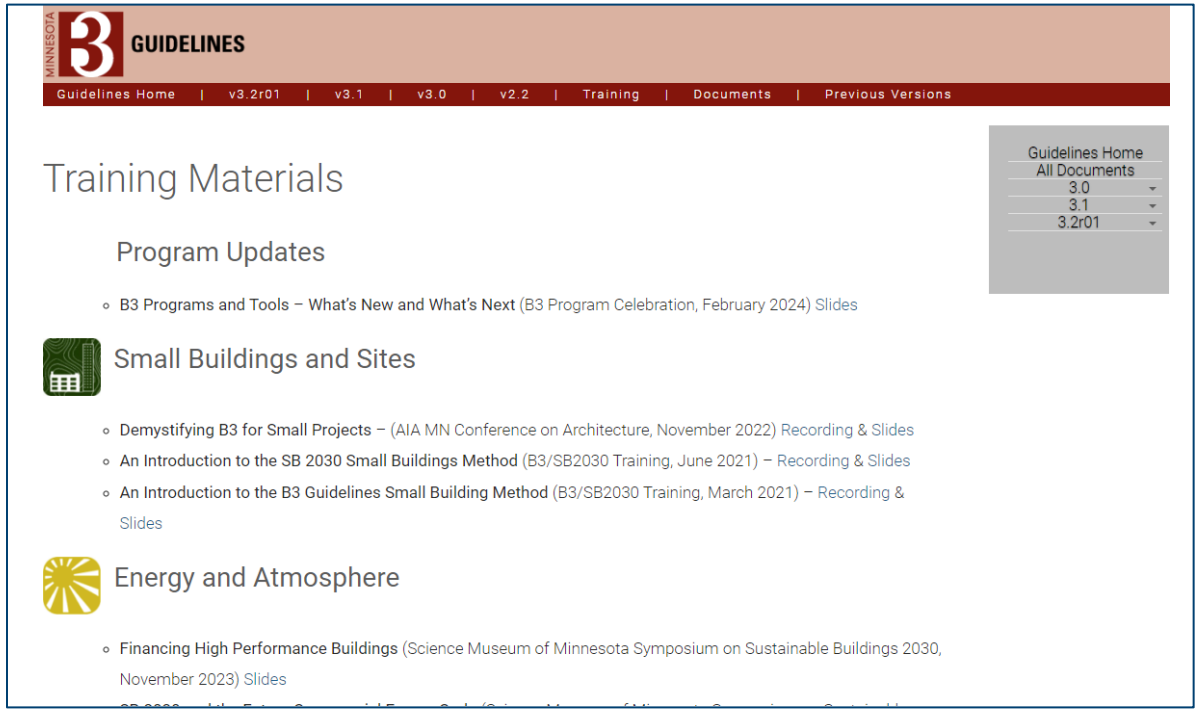
- Work with the project team to identify requirements that may require a full or provisional variance.
- Set and enforce deadlines for submitting documentation to the B3 Guidelines Tracking Tool.

Bemidji State University, Memorial Hall
Photo courtesy of LHB

SHARING RESOURCES

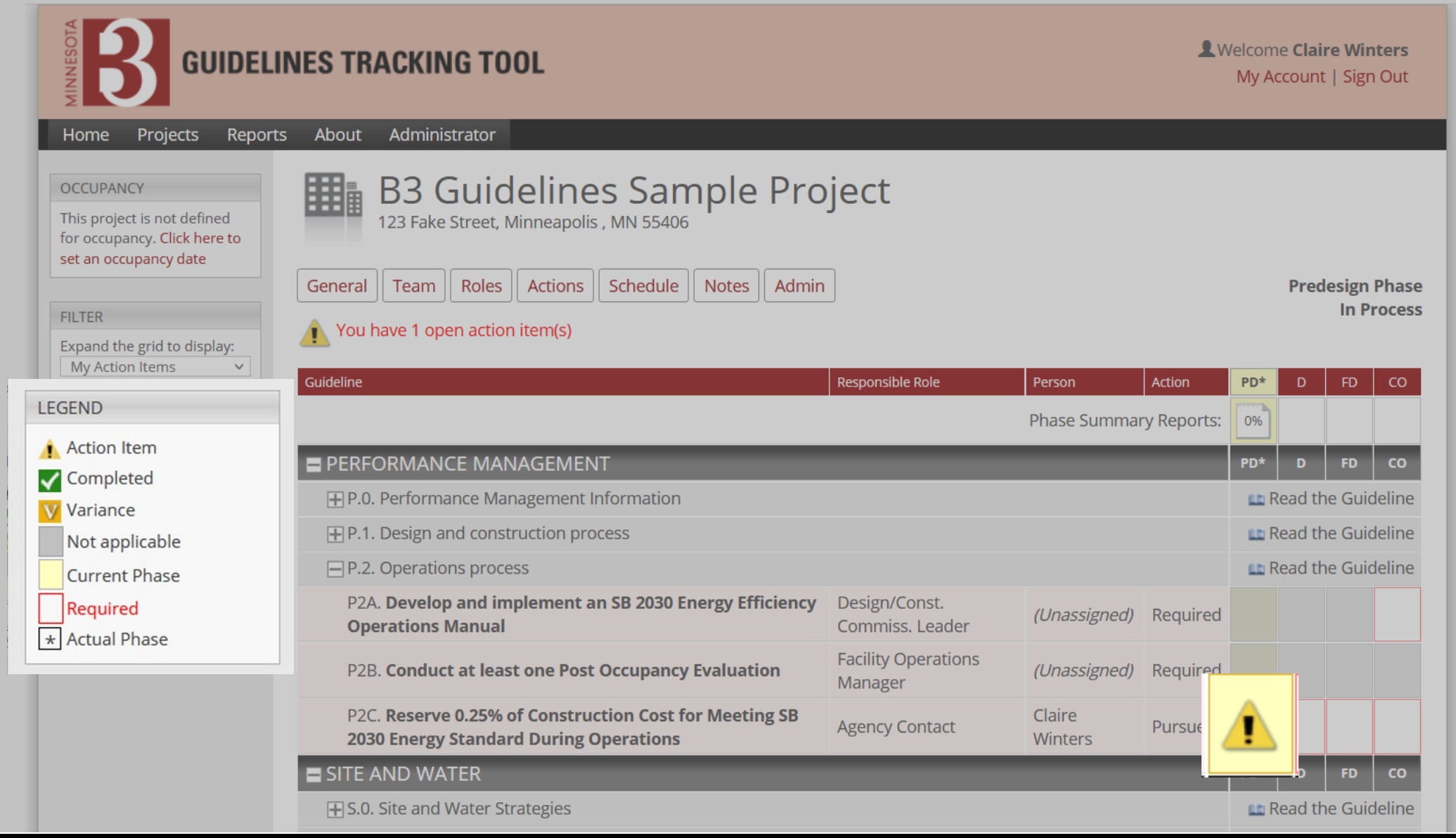
The Guideline Leader should serve as a resource for the project team. This may include:

- Sharing knowledge directly with team members.
- Coordinating a question-and-answer session with the B3 Guidelines Administrators.
- Connecting team members with additional resources, such as the B3 Guidelines training manuals or B3 Guidelines website.
- Maintaining continuity within the project team.

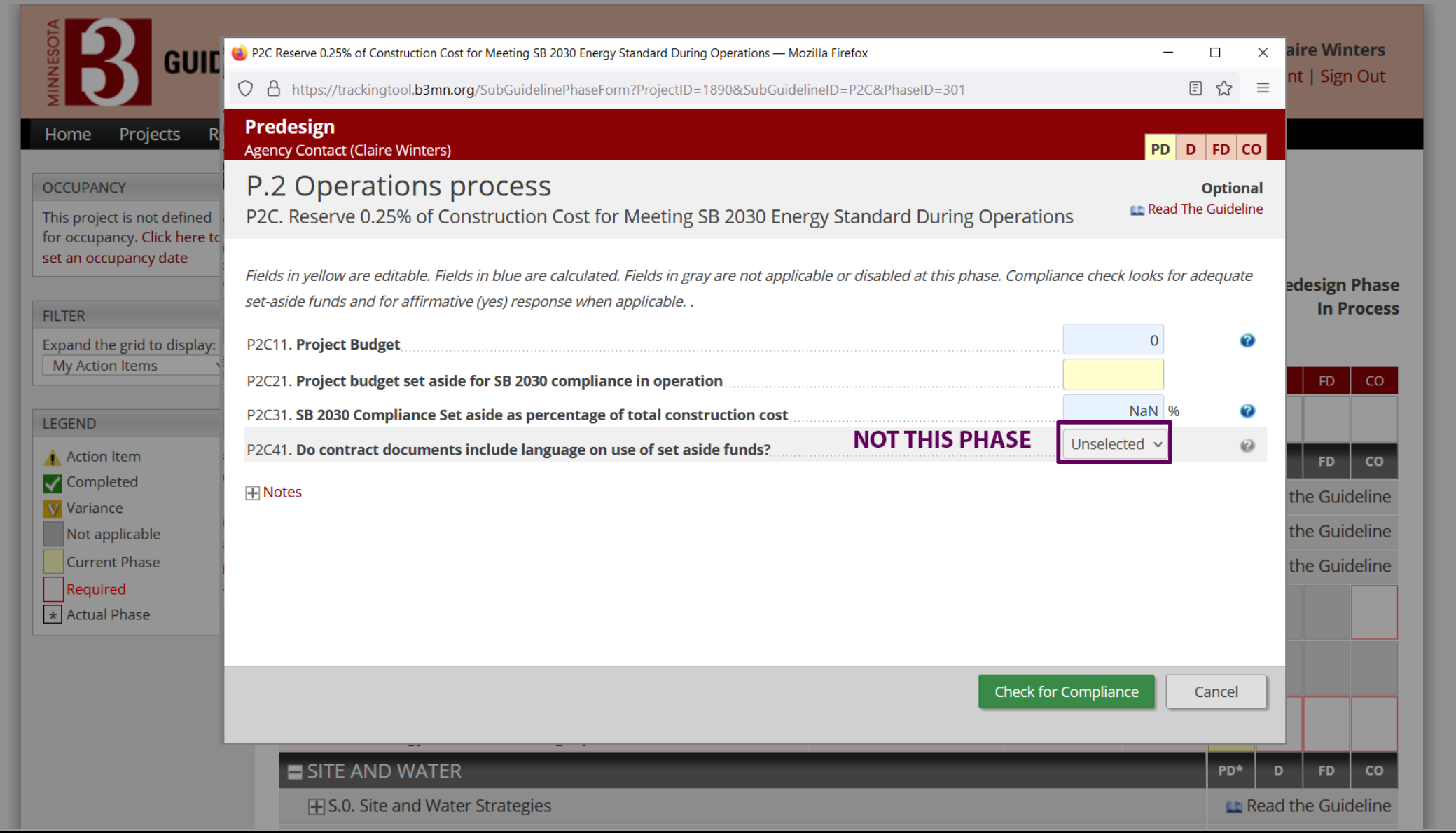


www.b3mn.org/guidelines/training-and-education/

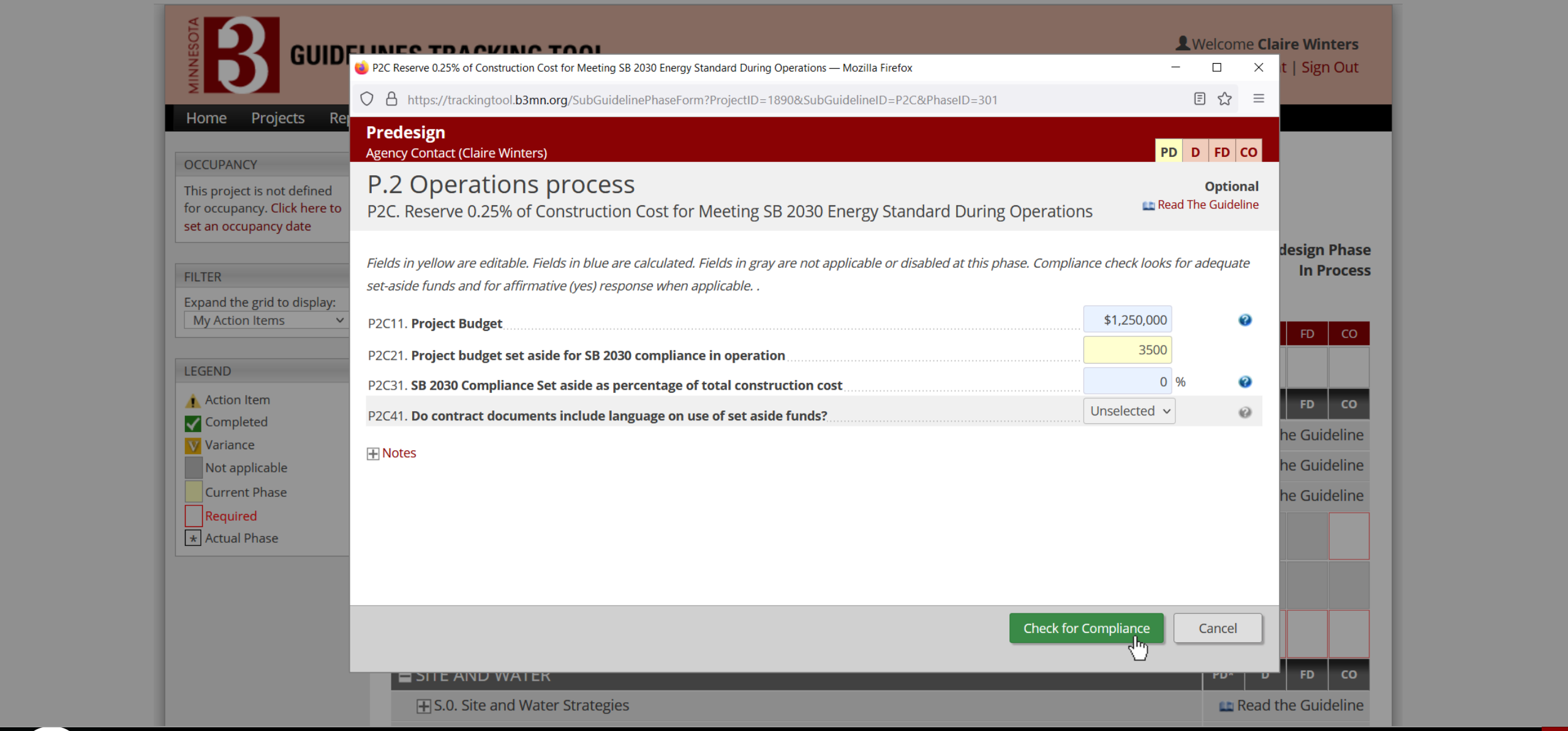
GUIDELINE DOCUMENTATION



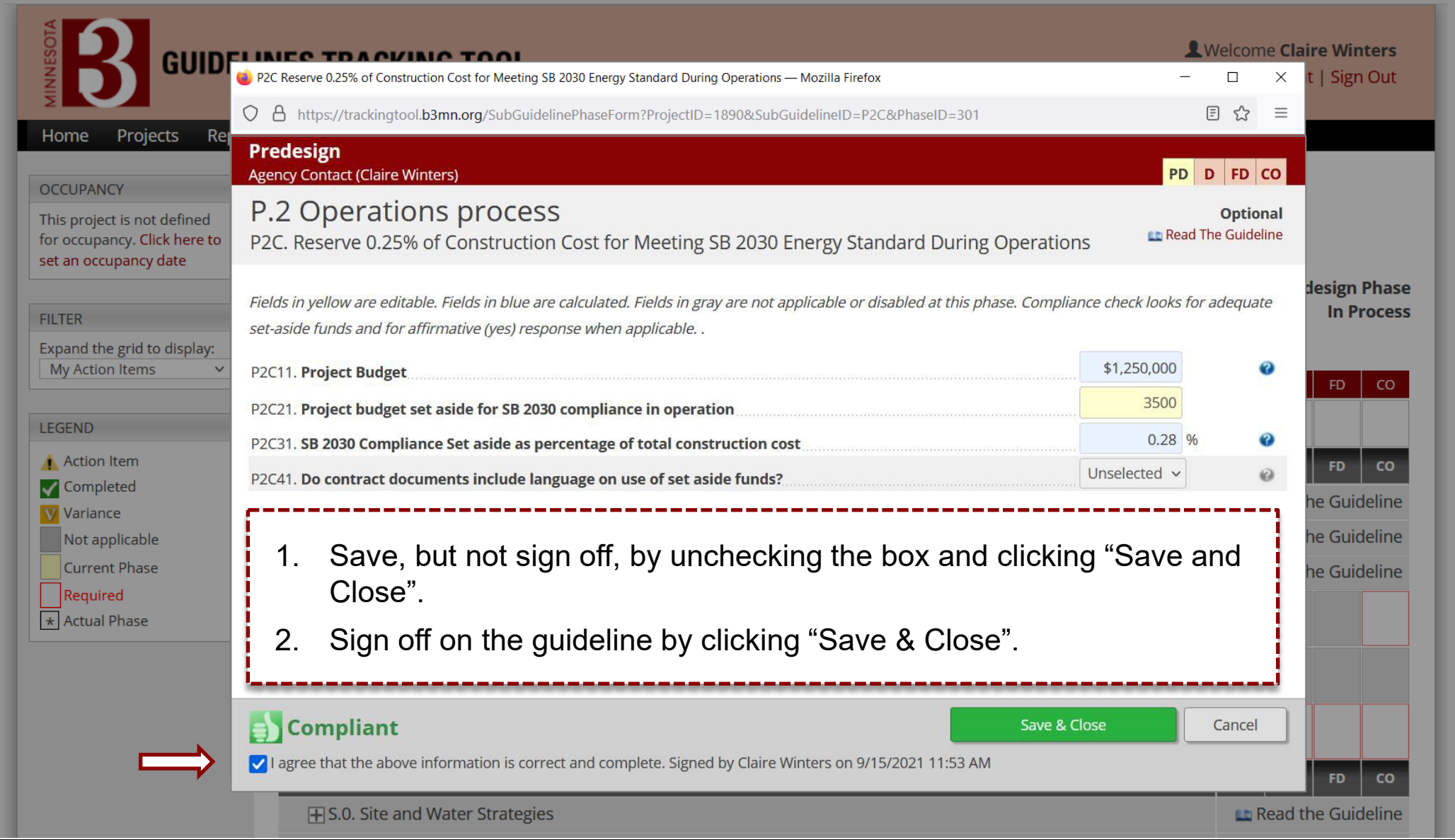
PROJECT DASHBOARD



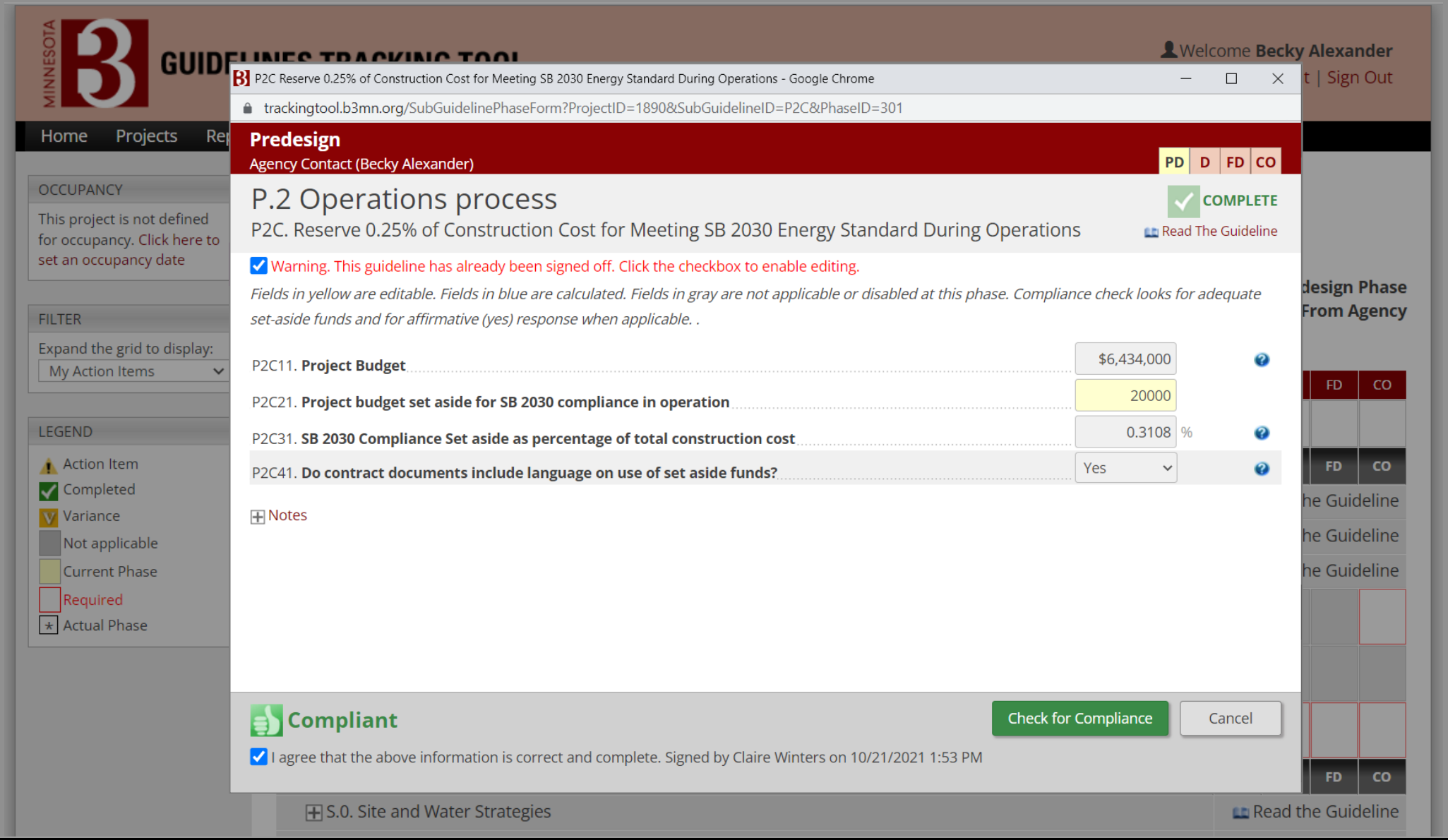
GUIDELINE DOCUMENTATION IN THE B3 TRACKING TOOL: CONTINUED



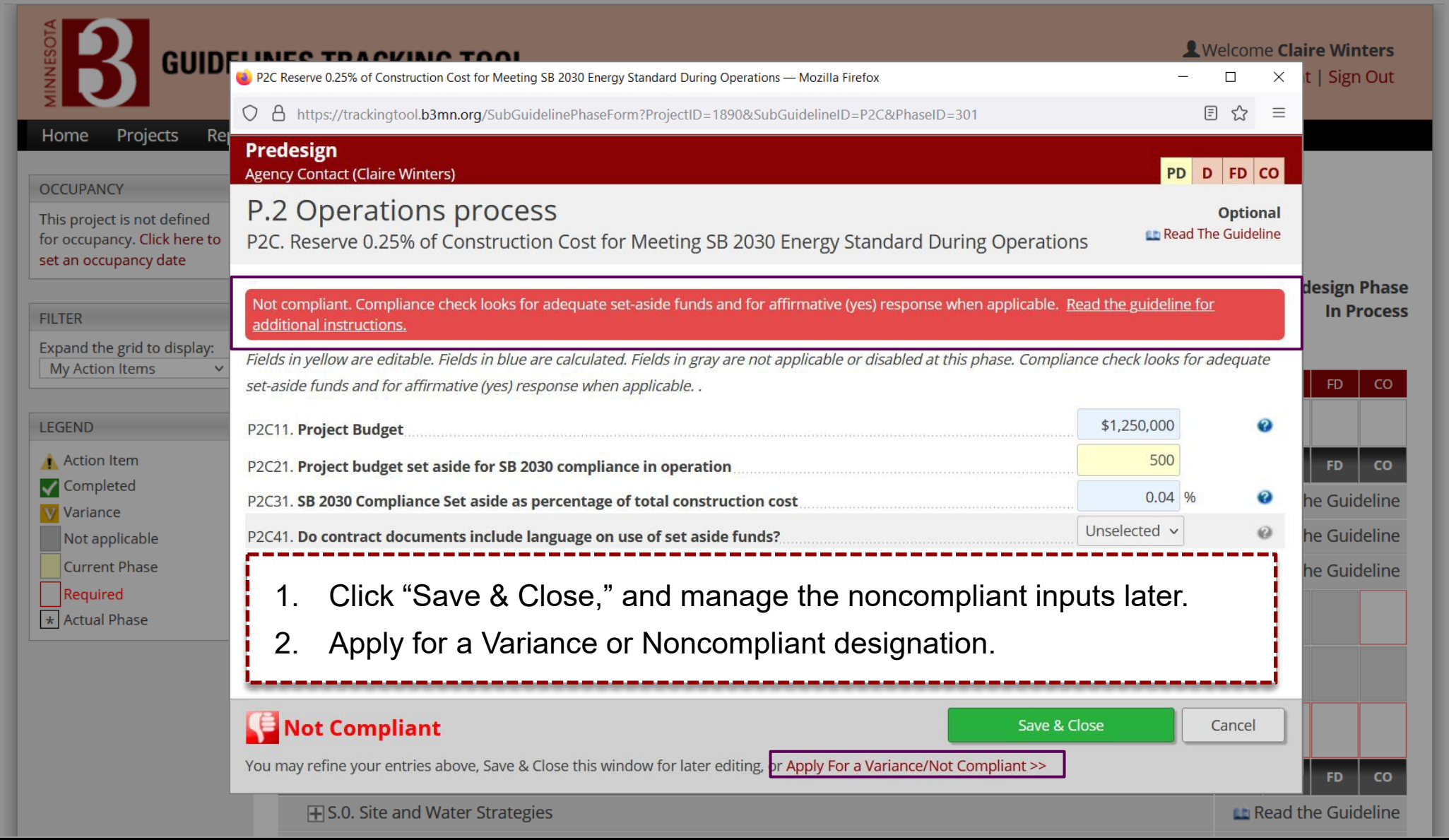
GUIDELINE DOCUMENTATION: CHECK FOR COMPLIANCE



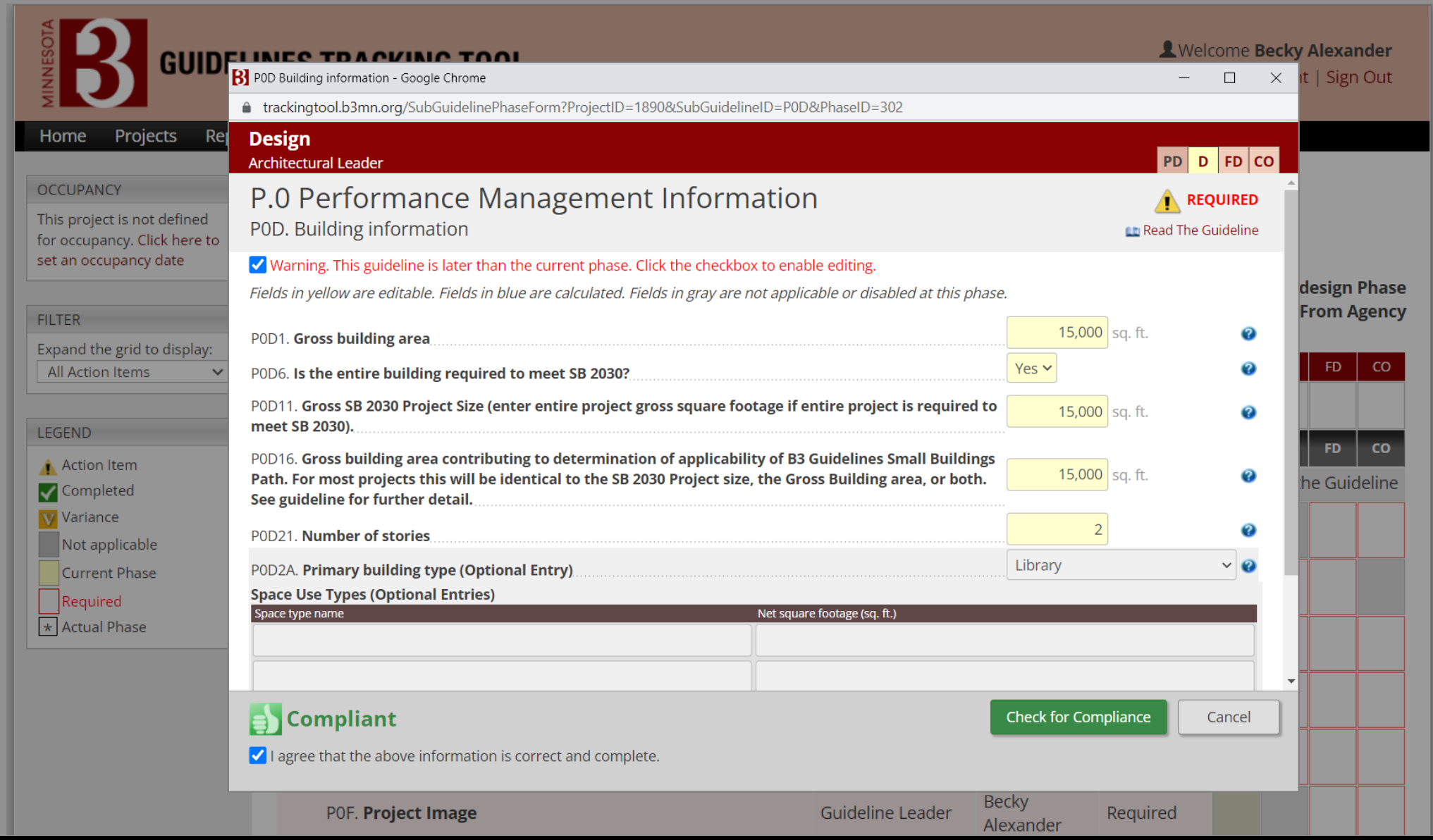
GUIDELINE DOCUMENTATION: SAVING, CLOSING, AND SIGNING OFF



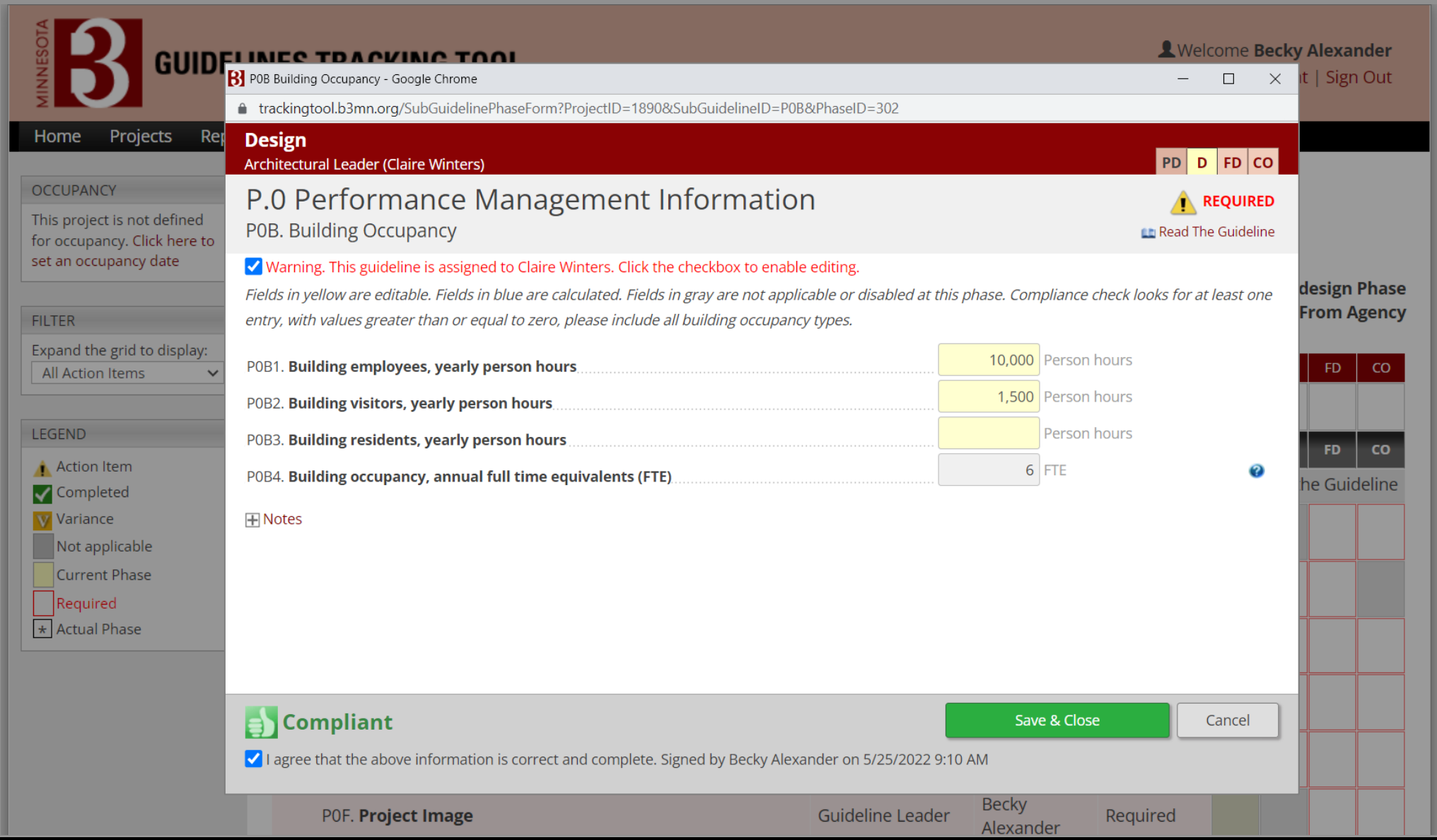
GUIDELINE DOCUMENTATION: REVISING



GUIDELINE DOCUMENTATION: NONCOMPLIANCE



GUIDELINE DOCUMENTATION: ADDITIONAL NOTES



GUIDELINE DOCUMENTATION: COMPLETING OTHER ASSIGNMENTS

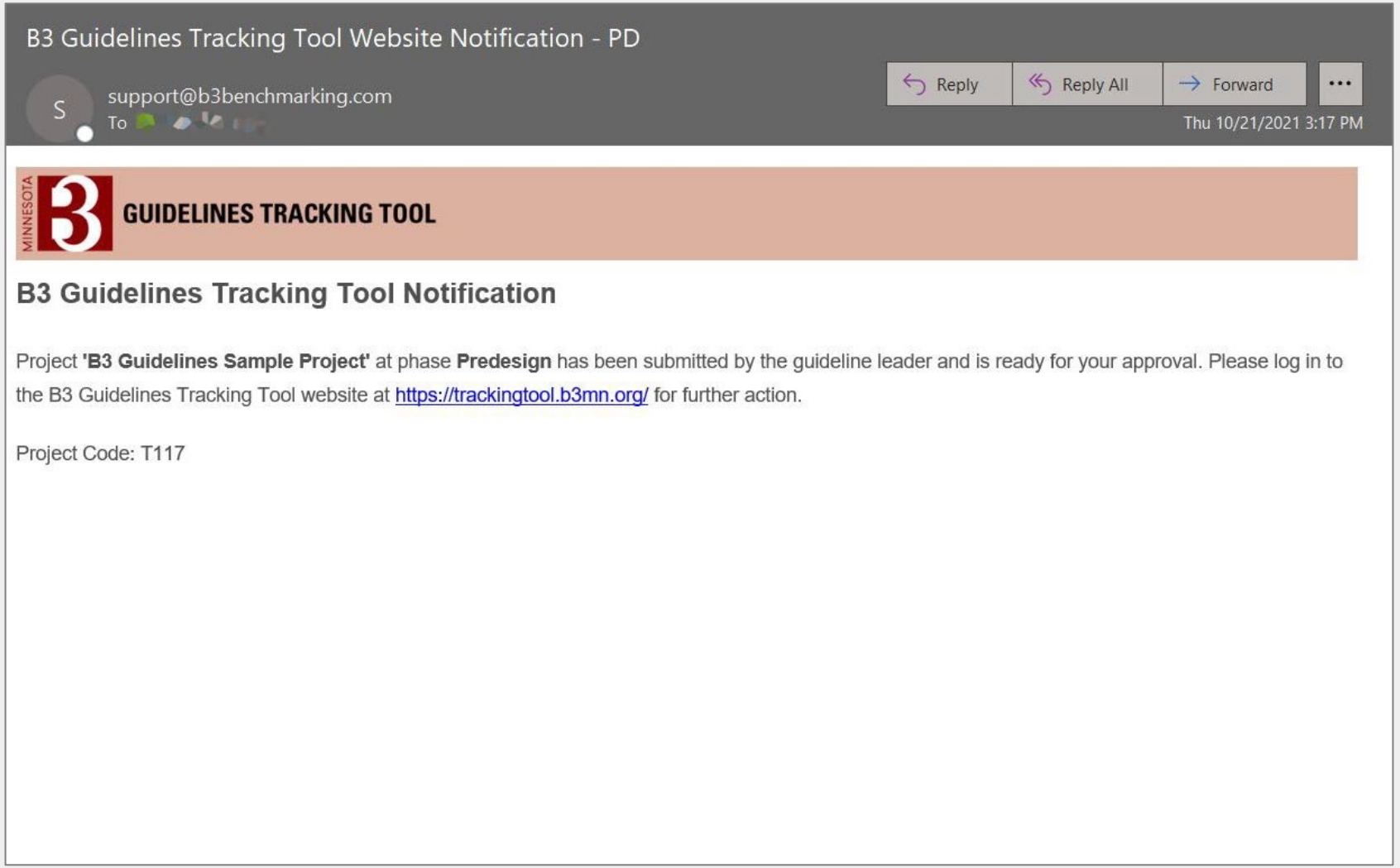
PHASE REVIEW

PHASE REVIEW AND APPROVAL: OVERVIEW

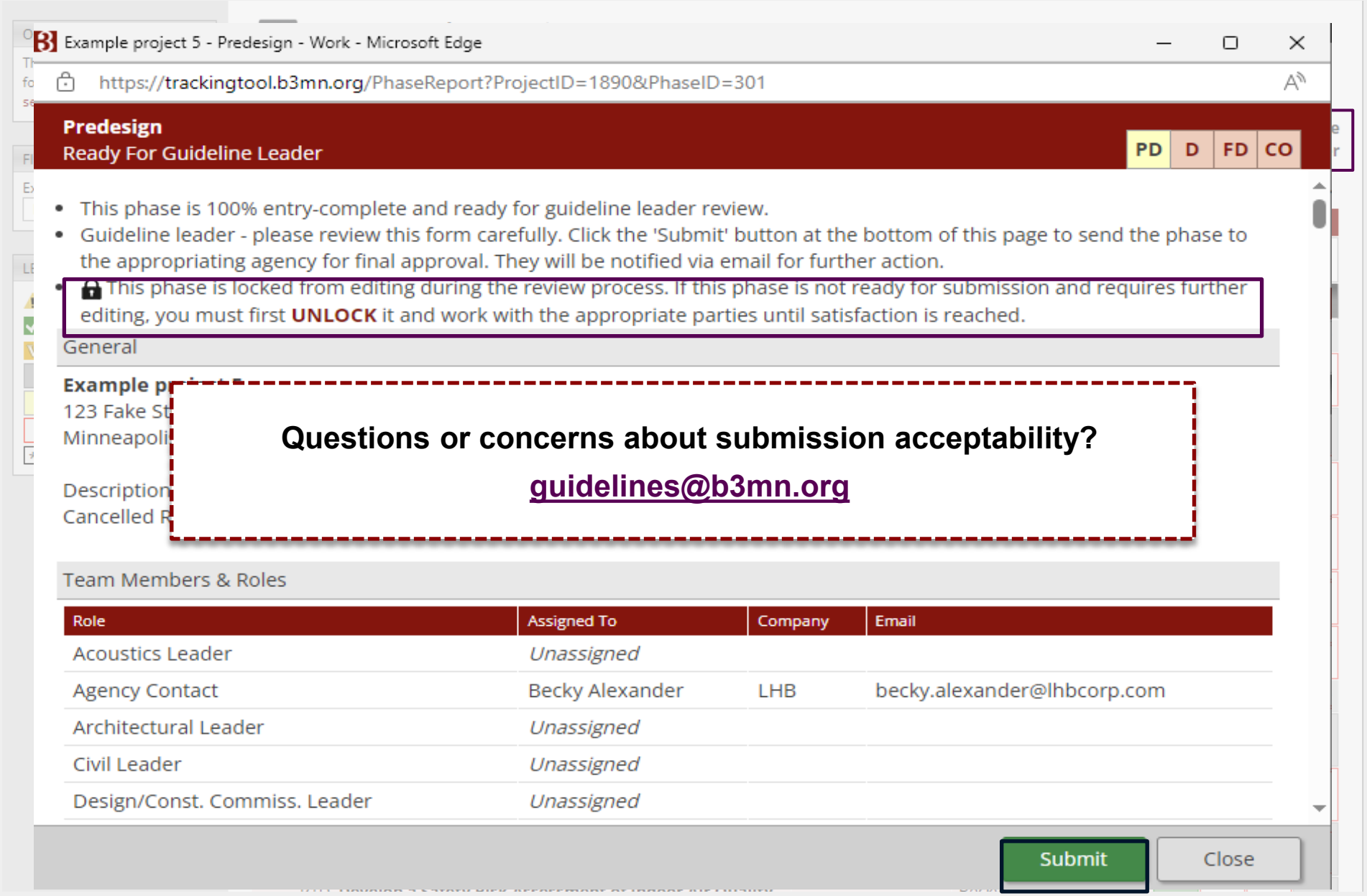
- Confirms the completeness and accuracy of all the information submitted for the current phase.
- The project's Guideline Leader and Agency Contact review the information via the Phase Summary Report.
- This step helps identify potential issues before it's too late in the design process to change them.

PHASE REVIEW AND APPROVAL STEPS

1. Project team completes documentation and sign-off for all applicable guidelines and phase is locked for review.
2. Guideline Leader reviews Phase Summary Report.
3. B3 Administrators provide limited review of specific inputs, including SB 2030.
4. Agency Contact reviews Phase Summary Report and variances.



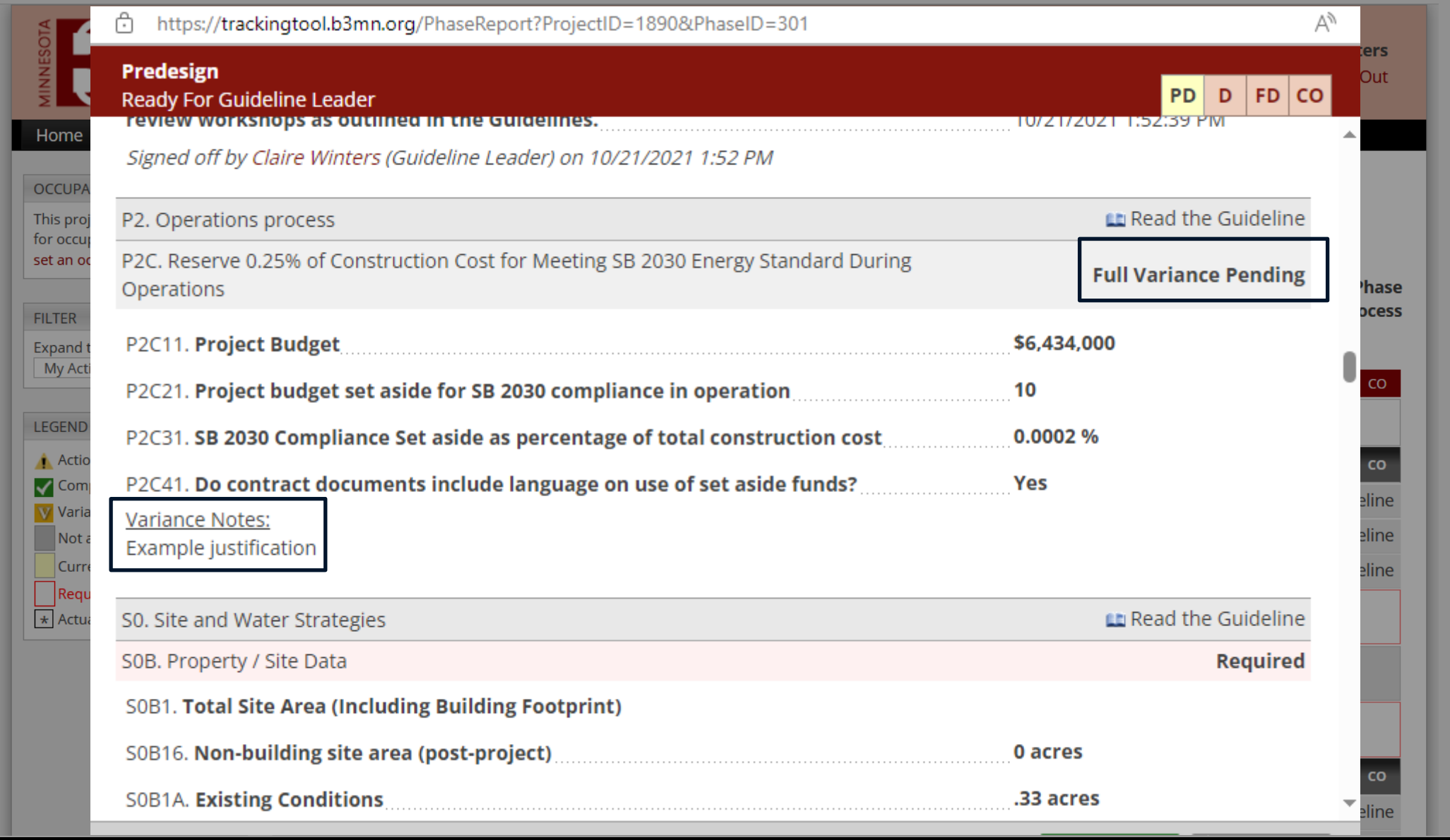
PHASE SUMMARY REVIEW: READY NOTIFICATION



PHASE SUMMARY REVIEW: SUBMISSION PROCESS

REVIEWING VARIANCE REQUESTS

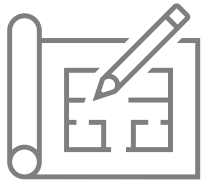
Guideline Leader	Agency Contact
Ensure requests meet program requirements	
Ensure project information is accurately represented	
Identify opportunities to use provisional variances rather than full variances	
Work with team members to remedy issues	Formally approve or reject the variance request



REVIEWING VARIANCE REQUESTS IN THE B3 TRACKING TOOL

OTHER VARIANCE OUTCOMES

OUTSIDE OF PROJECT SCOPE?



Contact B3 Guidelines Administrators for review (guidelines@b3mn.org)

UNSURE OR UNABLE TO DETERMINE VALIDITY?

Contact B3 Guidelines Administrators for a second opinion (guidelines@b3mn.org)

VARIANCE AND NON-COMPLIANCE GUIDANCE

www.trackingtool.b3mn.org

WHAT IS A VARIANCE?

A variance is a tool used by projects requiring an accommodation to the B3 performance thresholds and/or documentation schedule.

VARIANCE TYPES

PROVISIONAL VARIANCE

- A temporary variance that allows for a required guideline to be completed later
- Only apply to phase requested in
- May be re-requested as needed
- May not be requested during the last phase a guideline is required

FULL VARIANCE

- Permanent
- Used for conflicts with the intended use (program) of a building or site
- Used for technological limitations
- Project teams are meant to pursue creative solutions to meet the intent of the guidelines as much as possible

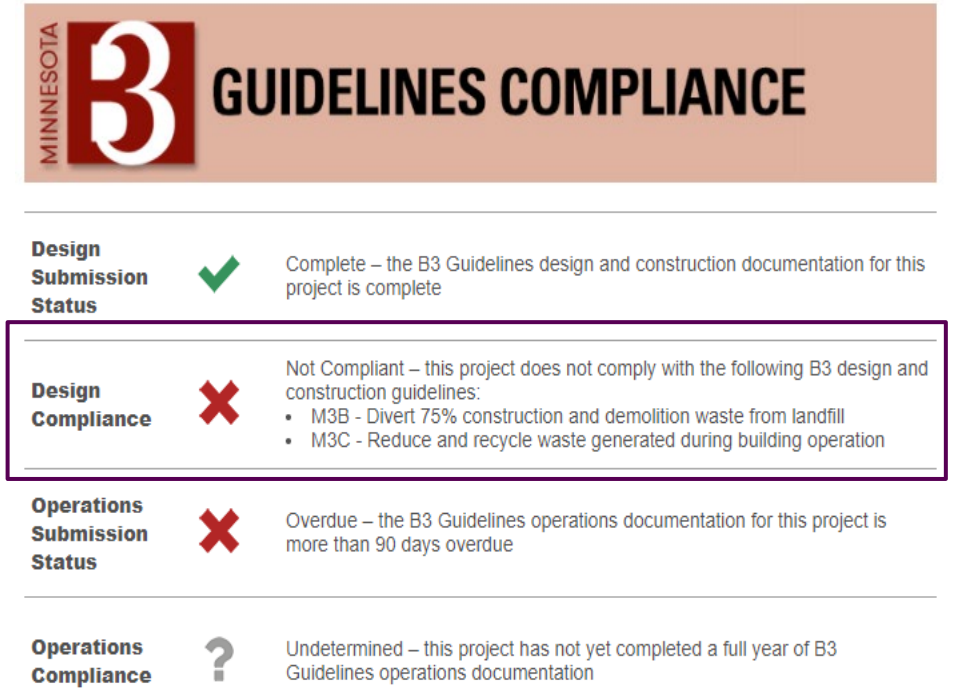
VARIANCE EXCLUSIONS

Full variances should not be requested for the following reasons:

1. Budgetary or project schedule constraints
2. Requirements missed by a project team that cannot be addressed later
3. Conflict with typical design or construction processes
4. Small or irregular sites
5. Recommended guidelines
6. The guideline is unrelated to or outside of the project scope

NON-COMPLIANCE

- If the project team can't document compliance with a guideline and there is no satisfactory reason why a variance should be considered, the project will be designated as Not Compliant with the guideline.
- This designation is only available at the last phase the guideline is required and should be used as a last resort.
- Non-compliant designations are shown publicly on the B3 Case Studies Database.



VARIANCE REQUEST PROCESS

Variance requests are processed within the B3 Guidelines Tracking Tool:

1. The project team submits a variance request
2. The variance request is reviewed by the project's Guideline Leader, the B3 Guidelines Administrators, and the Agency Contact
3. The Agency Contact determines whether to approve or reject the variance request

WHAT TO INCLUDE IN A VARIANCE REQUEST?

PROVISIONAL VARIANCE

- Clearly identify the reason for the variance.
- Describe next steps for complying with the guideline.

NON-COMPLIANT DESIGNATION

- Describe why this is necessary.

Provide supporting documentation

FULL VARIANCE

- Clearly identify the reason for the variance, describing how it meets one of the program's allowed justifications.
- Describe how reasonable alternative approaches were exhausted and creative solutions were explored.
- Identify a modified performance level or compliance method that will be pursued.

ACCEPTABLE EXAMPLE: PROVISIONAL VARIANCE

"The project team has not been able to document full compliance with the daylighting requirements during schematic design. Our daylight model currently shows achievement of spatial daylight autonomy in 40% of regularly occupied space, which does not meet the minimum requirement of 50%. We will continue to work through this during design development by evaluating window size and placement and the potential for toplighting through daylight monitors and/or solar tubes."

Reason for a variance

Next steps

ACCEPTABLE EXAMPLE: FULL VARIANCE

"The project team is requesting a full variance for the 75% construction waste diversion requirement due to technological limitations of the local market. The project is located in rural Minnesota and there are limited recycling facilities available. The project team engaged a C&D waste diversion consultant to evaluate options for the primary waste streams expected from the project (concrete, wood products, cardboard/paper, and gypsum board). They found that cardboard/paper, metals, and plastics are accepted at a local recycling facility if they are source-separated. They also found a farm operator that would accept gypsum board directly to use as a soil amendment. However, they were unable to find any facilities within 60 miles that would accept concrete or wood products (other than in waste-to-energy applications). Our revised approach was to utilize on-site sorting of recyclable materials and maximize the recycling rates for these material categories, with regular status checks at construction meetings. While this approach enabled us to achieve diversion rates above 95% in these categories, due to the large volume of concrete demolished, the project's overall diversion rate was only 68%."

Reason for variance

Alternative approach/creative solution

Modified performance level

UNACCEPTABLE FULL VARIANCE EXAMPLES

“We couldn’t meet the 75% waste diversion threshold because we are located in rural Minnesota.”

“The project schedule cannot accommodate the time required for daylight modeling.”

“The contractor did not track waste diversion for this project.”

Questions about variances?

Contact the B3 Guidelines Administrators:

guidelines@b3mn.org

CONCLUSION

1. Guideline Leader's role
2. Guideline Leader's responsibilities
    1. Project Set-up
    2. Coordinating Design and Construction Phase Compliance
    3. Completing Guideline Documentation
    4. Phase Review and Approval
    5. Variance Coordination and Review

Visit our website:
B3mn.org

Contact the B3 Guidelines Administrators:
guidelines@b3mn.org