



B3 GUIDELINES PROJECT ROLE:

Team Member

AGENDA

1. What is a Team Member?
2. How to fulfill the responsibilities of a Team Member
 - Navigating the B3 Guidelines Tracking Tool
 - Completing Guideline Documentation
 - 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/](http://www.b3mn.org/guidelines/alldocuments/)



WHO IS A TEAM MEMBER?



RESPONSIBILITIES OF TEAM MEMBERS

Team Members have three primary responsibilities:

1. Understanding their Specific Role and Responsibilities
2. Completing Guideline Documentation
3. Appropriately Requesting Variances

OVERVIEW OF TEAM MEMBER ROLES

Team Members can be assigned a variety of roles, based on their experience and skills.

- Each Team Member can play multiple roles or no roles, as long as all roles with an open action item in the current project phase are filled.
- The roles required for projects may vary based on project type and phase.
- Projects with a limited scope may have just a few roles filled, while more complex projects may fill nearly all roles.

<https://www.b3mn.org/guidelines/training-and-education/>

Roles	
Role	Team Member
Acoustics Leader	Becky Alexander ▼
Agency Contact	Becky Alexander ▼
Agency Operations Contact	(Unspecified) ▼
Architectural Leader	(Unspecified) ▼
Civil Leader	(Unspecified) ▼
Design/Const. Commiss. Leader	(Unspecified) ▼
Electrical Leader	(Unspecified) ▼
Energy Modeler	(Unspecified) ▼
Energy Consultant	(Unspecified) ▼
Energy Leader	(Unspecified) ▼
Facility Operations Manager	(Unspecified) ▼
Guideline Leader	(Unspecified) ▼
Guideline Operations Leader	(Unspecified) ▼
Interior Design Leader	(Unspecified) ▼
Landscape Leader	Becky Alexander ▼
Mechanical Leader	(Unspecified) ▼
Operations Commissioning Leader	(Unspecified) ▼
Owner	(Unspecified) ▼
Planner	(Unspecified) ▼
Project Observer	(Unspecified) ▼
SB 2030 Approver	Pat Smith ▼
Structural Leader	(Unspecified) ▼
(Custom Role 1)	(Unspecified) ▼
(Custom Role 2)	(Unspecified) ▼
(Custom Role 3)	(Unspecified) ▼

ENERGY-RELATED ROLES

There are three energy-related roles assigned within the B3 Guidelines Tracking Tool.

- **Energy Leader:** team member responsible for ensuring all energy-related guidelines are complete.
 - The Energy Leader is assigned guidelines by default. They may or may not be supported by a modeler/consultant.
- **Energy Modeler:** the team member responsible for creating and editing models used to establish energy targets and compliance.
- **Energy Consultant:** a team member or entity that provides energy consultation services beyond B3 energy modeling requirements.

ROLES WITHOUT GUIDELINE ASSIGNMENTS

While most Team Member roles have specific guidelines assigned to them, a few do not. This includes the:

- Owner
- Project Observer
- Planner
- Custom Roles

Although these roles are not assigned guidelines by default, it may still be helpful for the Guideline Leader to manually assign guidelines to these roles.

ROLES THAT MAY REQUIRE GUIDANCE

Most roles in the B3 Tracking Tool can be filled by a person of the project team with relevant experience/skills.

- Other roles may not have an obvious “match” to a member of the project team, potentially requiring the help of an outside consultant.
- Roles where project teams may benefit from the help of a consultant may include:
 - Acoustics Leader
 - Design/Construction Commissioning Leader
 - Energy Leader



NAVIGATING THE B3 GUIDELINES TRACKING TOOL

www.trackingtool.b3mn.org



My Projects

You are a member of 1 project.



B3 Guidelines Sample Project

123 Fake Street
Minneapolis , MN 55406

Predesign - In Process (0%)

Guidelines v3.2

Last modified 7/28/2021 4:27:47 PM

⚠ This project is currently not compliant with the tracking requirements of the Minnesota Sustainable Building Guidelines. Guideline leader is not specified.

What would you like to do?

➤ [Project Dashboard](#)

⚠ You have 1 open action item(s)

➤ [Project Editor](#) *(Team members, roles, etc.)*

➤ [Current Phase Report](#) (PD)

Note: This list details projects for which you are member of. Your user account has elevated rights. [Click here to view all projects in the Project Manager.](#)



GUIDELINES TRACKING TOOL

Welcome **Claire Winters**
[My Account](#) | [Sign Out](#)

[Home](#) [Projects](#) [Reports](#) [About](#) [Administrator](#)

OCCUPANCY

This project is not defined for occupancy. [Click here to set an occupancy date](#)



B3 Guidelines Sample Project

123 Fake Street, Minneapolis , MN 55406

[General](#) [Team](#) [Roles](#) [Actions](#) [Schedule](#) [Notes](#) [Admin](#)

Predesign Phase
In Process



You have 1 open action item(s)

FILTER

Expand the grid to display:

[My Action Items](#)

LEGEND

- Action Item
- Completed
- Variance
- Not applicable
- Current Phase
- Required
- Actual Phase

Guideline	Responsible Role	Person	Action	PD*	D	FD	CO
-----------	------------------	--------	--------	-----	---	----	----

PERFORMANCE MANAGEMENT

P.O. Performance Management Information

Read the Guideline

P.1. Design and construction process

Read the Guideline

P.2. Operations process

Read the Guideline

P2A. Develop and implement an SB 2030 Energy Efficiency Operations Manual

Design/Const.
Commiss. Leader

(Unassigned)

Required

P2B. Conduct at least one Post Occupancy Evaluation

Facility Operations
Manager

(Unassigned)

Required

P2C. Reserve 0.25% of Construction Cost for Meeting SB 2030 Energy Standard During Operations

Agency Contact

Claire
Winters

Pursued



SITE AND WATER

S.O. Site and Water Strategies

Read the Guideline



PROJECT DASHBOARD



OCCUPANCY

This project is not defined for occupancy. [Click here to set an occupancy date](#)

FILTER

Expand the grid to display:
[My Action Items](#)

LEGEND

- Action Item
- Completed
- Variance
- Not applicable
- Current Phase
- Required
- Actual Phase



B3 Guidelines Sample Project

123 Fake Street, Minneapolis , MN 55406

- [General](#) [Team](#) [Roles](#) [Actions](#) [Schedule](#) [Notes](#) [Admin](#)

You have 1 open action item(s)

Predesign Phase
In Process

				PD	D	FD	CO
Guideline				Responsible Role	Person	Phase Summary Reports:	
						0%	
PERFORMANCE MANAGEMENT				PD*	D	FD	CO
+ P.0. Performance Management Information				Read the Guideline			
+ P.1. Design and construction process				Read the Guideline			
- P.2. Operations process				Read the Guideline			
P2A. Develop and implement an SB 2030 Energy Efficiency Operations Manual				Design/Const. Commiss. Leader	(Unassigned)	Required	
P2B. Conduct at least one Post Occupancy Evaluation				Facility Operations Manager	(Unassigned)	Required	
P2C. Reserve 0.25% of Construction Cost for Meeting SB 2030 Energy Standard During Operations				Agency Contact	Claire Winters	Pursued	
SITE AND WATER				PD*	D	FD	CO
+ S.0. Site and Water Strategies				Read the Guideline			



UNDERSTANDING ASSIGNED ROLES AND RESPONSIBILITIES

1. View assigned roles using the B3 Guidelines Tracking Tool.

Example project 5

General Team Roles Actions Schedule Notes Admin

Use the table below to assign roles to each team member. Each role can be assigned to only one team member, but each team member can be assigned to multiple roles. Note: Only administrators are able to assign the 'Agency Contact' role.

Roles

Role	Team Member
Acoustics Leader	(Unspecified) ▼
Agency Contact	Becky Alexander ▼
Agency Operations Contact	(Unspecified) ▼
Architectural Leader	Claire Winters ▼
Civil Leader	Claire Winters ▼
Design/Const. Commiss. Leader	(Unspecified) ▼
Electrical Leader	Becky Alexander ▼
Energy Modeler	Claire Winters ▼
Energy Consultant	Becky Alexander ▼
Energy Leader	Claire Winters ▼
Facility Operations Manager	Becky Alexander ▼
Guideline Leader	Claire Winters ▼
Guideline Operations Leader	Claire Winters ▼
Interior Design Leader	Becky Alexander ▼
Landscape Leader	Becky Alexander ▼

REVIEWING ASSIGNED GUIDELINES

2. View assigned guidelines using the B3 Guidelines Tracking Tool.
 - Each phase in the B3 Guidelines Tracking Tool requires project team members to complete documentation.
 - There are four phases in the Tracking Tool: predesign, design, final design, and closeout.



GUIDELINES TRACKING TOOL

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OCCUPANCY

This project is not defined for occupancy. [Click here to set an occupancy date](#)

FILTER

Expand the grid to display:
My Action Items

LEGEND

- Action Item
- Completed
- Variance
- Not applicable
- Current Phase
- Required
- Actual Phase



B3 Guidelines Sample Project

123 Fake Street, Minneapolis , MN 55406

[General](#) [Team](#) [Roles](#) [Actions](#) [Schedule](#) [Notes](#) [Admin](#)



You have 1 open action item(s)

**Predesign Phase
In Process**

Guideline	Responsible Role	Person	Action	PD*	D	FD	CO
Phase Summary Reports:				0%			
PERFORMANCE MANAGEMENT				PD*	D	FD	CO
+ P.0. Performance Management Information				Read the Guideline			
+ P.1. Design and construction process				Read the Guideline			
- P.2. Operations process				Read the Guideline			
P2A. Develop and implement an SB 2030 Energy Efficiency Operations Manual	Design/Const. Commiss. Leader	(Unassigned)	Required				
P2B. Conduct at least one Post Occupancy Evaluation	Facility Operations Manager	(Unassigned)	Required				
P2C. Reserve 0.25% of Construction Cost for Meeting SB 2030 Energy Standard During Operations	Agency Contact	Claire Winters	Pursued				
SITE AND WATER				PD*	D	FD	CO
+ S.0. Site and Water Strategies				Read the Guideline			



VIEWING GUIDELINE ASSIGNMENTS

REVIEWING ASSIGNED INPUTS

3. Review associated Tracking Tool inputs.



GUIDELINES TRACKING TOOL

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Predesign

Agency Contact (Becky Alexander)

PD D FD CO

P.2 Operations process

P2C. Reserve 0.25% of Construction Cost for Meeting SB 2030 Energy Standard During Operations

Optional

[Read The Guideline](#)

Fields in yellow are editable. Fields in blue are calculated. Fields in gray are not applicable or disabled at this phase. Compliance check looks for adequate set-aside funds and for affirmative (yes) response when applicable. .

P2C11. Project Budget.....

0



P2C21. Project budget set aside for SB 2030 compliance in operation.....

P2C31. SB 2030 Compliance Set aside as percentage of total construction cost.....

NaN %



P2C41. Do contract documents include language on use of set aside funds?.....

Unselected ▾



Check for Compliance

Cancel

SITE AND WATER

S.O. Site and Water Strategies

PD* D FD CO

[Read the Guideline](#)



VIEWING INPUT ASSIGNMENTS



GUIDELINE DOCUMENTATION



GUIDELINES TRACKING TOOL

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OCCUPANCY

This project is not defined for occupancy. [Click here to set an occupancy date](#)

FILTER

Expand the grid to display:
My Action Items

LEGEND

- Action Item
- Completed
- Variance
- Not applicable
- Current Phase
- Required
- Actual Phase



B3 Guidelines Sample Project

123 Fake Street, Minneapolis , MN 55406

[General](#) [Team](#) [Roles](#) [Actions](#) [Schedule](#) [Notes](#) [Admin](#)



You have 1 open action item(s)

**Predesign Phase
In Process**

Guideline	Responsible Role	Person	Action	PD*	D	FD	CO
Phase Summary Reports:				0%			
PERFORMANCE MANAGEMENT				PD*	D	FD	CO
+ P.0. Performance Management Information							
+ P.1. Design and construction process							
- P.2. Operations process							
P2A. Develop and implement an SB 2030 Energy Efficiency Operations Manual	Design/Const. Commiss. Leader	(Unassigned)	Required				
P2B. Conduct at least one Post Occupancy Evaluation	Facility Operations Manager	(Unassigned)	Required				
P2C. Reserve 0.25% of Construction Cost for Meeting SB 2030 Energy Standard During Operations	Agency Contact	Claire Winters	Pursue				
SITE AND WATER						FD	CO
+ S.0. Site and Water Strategies							



IDENTIFYING GUIDELINES WITH INPUTS



GUIDELINES TRACKING TOOL

Welcome **Claire Winters**
Sign Out

Home Projects Rep

OCCUPANCY

This project is not defined for occupancy. Click here to set an occupancy date

FILTER

Expand the grid to display:

My Action Items

LEGEND

- ! Action Item
- ✓ Completed
- V Variance
- Not applicable
- Current Phase
- Required
- * Actual Phase

P2C Reserve 0.25% of Construction Cost for Meeting SB 2030 Energy Standard During Operations — Mozilla Firefox

https://trackingtool.b3mn.org/SubGuidelinePhaseForm?ProjectID=1890&SubGuidelineID=P2C&PhaseID=301

Predesign

Agency Contact (Claire Winters)

PD D FD CO

P.2 Operations process

P2C. Reserve 0.25% of Construction Cost for Meeting SB 2030 Energy Standard During Operations

Optional

[Read The Guideline](#)

Fields in yellow are editable. Fields in blue are calculated. Fields in gray are not applicable or disabled at this phase. Compliance check looks for adequate set-aside funds and for affirmative (yes) response when applicable.

P2C11. Project Budget

\$1,250,000



P2C21. Project budget set aside for SB 2030 compliance in operation

3500

P2C31. SB 2030 Compliance Set aside as percentage of total construction cost

0 %



P2C41. Do contract documents include language on use of set aside funds?

Unselected



[Notes](#)

P2C. Reserve 0.25% of Construction Cost for Meeting SB 2030 Energy Standard During Operations

Agency Contact

Claire Winters

Pursued



SITE AND WATER

PD*

D

FD

CO

S.O. Site and Water Strategies

[Read the Guideline](#)

Design Phase
In Process

FD CO

FD CO

Guideline

Guideline

Guideline

Guideline

Guideline

Guideline

Guideline

Guideline

Guideline

Guideline

Guideline

Guideline

Guideline

Guideline

Guideline



GUIDELINE DOCUMENTATION: ENTERING INPUTS

OCCUPANCY








This project is not defined for occupancy. [Click here to set an occupancy date](#)

FILTER

Expand the grid to display:

My Action Items

LEGEND

-  Action Item
-  Completed
-  Variance
-  Not applicable
-  Current Phase
-  Required
-  Actual Phase

Predesign

Agency Contact (Claire Winters)

PD	D	FD	CO
----	---	----	----

P.2 Operations process

P2C. Reserve 0.25% of Construction Cost for Meeting SB 2030 Energy Standard During Operations

Optional

 [Read The Guideline](#)

Fields in yellow are editable. Fields in blue are calculated. Fields in gray are not applicable or disabled at this phase. Compliance check looks for adequate set-aside funds and for affirmative (yes) response when applicable. .

P2C11. Project Budget

\$1,250,000

P2C21. Project budget set aside for SB 2030 compliance in operation

3500

P2C31. SB 2030 Compliance Set aside as percentage of total construction cost

0 %

P2C41. Do contract documents include language on use of set aside funds?

Unselected v

6

 Notes

Check for Compliance

Cancel

P.2 Operations process

P2C. Reserve 0.25% of Construction Cost for Meeting SB 2030 Energy Standard During Operations

Optional

 [Read The Guideline](#)

Fields in yellow are editable. Fields in blue are calculated. Fields in gray are not applicable or disabled at this phase. Compliance check looks for adequate set-aside funds and for affirmative (yes) response when applicable. .

P2C11. Project Budget

\$1,250,000

P2C21. Project budget set aside for SB 2030 compliance in operation

3500

P2C31. SB 2030 Compliance Set aside as percentage of total construction cost

0.28 %

P2C41. Do contract documents include language on use of set aside funds?

Unselected v

1. Save, but not sign off, by unchecking the box and clicking “Save and Close”.
2. Sign off on the guideline by clicking “Save & Close”.

 **Compliant**

Save & Close

Cancel

☒ I agree that the above information is correct and complete. Signed by Claire Winters on 9/15/2021 11:53 AM

⊕ S.O. Site and Water Strategies

 Read the Guideline

This project is not defined for occupancy. [Click here to set an occupancy date](#)

FILTER

Expand the grid to display:

My Action Items

LEGEND

 Action Item

✓ Completed

V Variance

	Not applicable
--	----------------

Current Phase

☐ Required

- * Actual Phase


P2C Reserve 0.25% of Construction Cost for Meeting SB 2030 Energy Standard During Operations - Google Chrome

trackingtool.b3mn.org/SubGuidelinePhaseForm?ProjectID=1890&SubGuidelineID=P2C&PhaseID=301

P.2 Operations process

P2C. Reserve 0.25% of Construction Cost for Meeting SB 2030 Energy Standard During Operations

 COMPLETE

 [Read The Guideline](#)

☒ Warning. This guideline has already been signed off. Click the checkbox to enable editing.

Fields in yellow are editable. Fields in blue are calculated. Fields in gray are not applicable or disabled at this phase. Compliance check looks for adequate set-aside funds and for affirmative (yes) response when applicable. .

P2C11. Project Budget

\$6,434,000

P2C21. Project budget set aside for SB 2030 compliance in operation

20000


P2C31. **SB 2030 Compliance Set aside as percentage of total construction cost**

0.3108 %

P2C41. Do contract documents include language on use of set aside funds?

Yes

 Notes

 **Compliant**

Check for Compliance

Cancel

☒ I agree that the above information is correct and complete. Signed by Claire Winters on 10/21/2021 1:53 PM

⊕ S.O. Site and Water Strategies

 Read the Guideline

MINNESOTA

3

GUIDELINES TRACKING TOOL

Welcome Claire Winters

Sign Out

Home

Projects

Re

OCCUPANCY

This project is not defined for occupancy. [Click here to set an occupancy date](#)

FILTER

Expand the grid to display:

My Action Items

LEGEND

⚠ Action Item

✅ Completed

⚠ Variance

⚠ Not applicable

🟢 Current Phase

🔴 Required

★ Actual Phase

P2C Reserve 0.25% of Construction Cost for Meeting SB 2030 Energy Standard During Operations — Mozilla Firefox

https://trackingtool.b3mn.org/SubGuidelinePhaseForm?ProjectID=1890&SubGuidelineID=P2C&PhaseID=301

Predesign

Agency Contact (Claire Winters)

PD D FD CO

P.2 Operations process

P2C. Reserve 0.25% of Construction Cost for Meeting SB 2030 Energy Standard During Operations

Optional

[Read The Guideline](#)

Not compliant. Compliance check looks for adequate set-aside funds and for affirmative (yes) response when applicable. [Read the guideline for additional instructions.](#)

Fields in yellow are editable. Fields in blue are calculated. Fields in gray are not applicable or disabled at this phase. Compliance check looks for adequate set-aside funds and for affirmative (yes) response when applicable. .

P2C11. Project Budget

\$1,250,000

?

P2C21. Project budget set aside for SB 2030 compliance in operation

500

?

P2C31. SB 2030 Compliance Set aside as percentage of total construction cost

0.04 %

?

P2C41. Do contract documents include language on use of set aside funds?

Unselected

?

1. Click “Save & Close,” and manage the noncompliant inputs later.

2. Apply for a Variance or Noncompliant designation.

🔴 Not Compliant

Save & Close

Cancel

You may refine your entries above, Save & Close this window for later editing, [or Apply For a Variance/Not Compliant >>](#)

design Phase In Process

FD CO

FD CO

he Guideline

he Guideline

he Guideline

FD CO

FD CO

[Read the Guideline](#)

S.O. Site and Water Strategies

MINNESOTA

3

GUIDELINES TRACKING TOOL

Welcome Becky Alexander

Sign Out

HomeProjectsRe

Design

Architectural Leader

PD

D

FD

CO

OCCUPANCY

This project is not defined for occupancy. Click here to set an occupancy date

FILTER

Expand the grid to display:

All Action Items

LEGEND

Action Item

Completed

Variance

Not applicable

Current Phase

Required

Actual Phase

P0D Building information - Google Chrome

trackingtool.b3mn.org/SubGuidelinePhaseForm?ProjectID=1890&SubGuidelineID=P0D&PhaseID=302

P.0 Performance Management Information

P0D. Building information

REQUIRED

Read The Guideline

☒ Warning. This guideline is later than the current phase. Click the checkbox to enable editing.

Fields in yellow are editable. Fields in blue are calculated. Fields in gray are not applicable or disabled at this phase.

P0D1. Gross building area

15,000

sq. ft.

?

P0D6. Is the entire building required to meet SB 2030?

Yes

?

P0D11. Gross SB 2030 Project Size (enter entire project gross square footage if entire project is required to meet SB 2030).

15,000

sq. ft.

?

P0D16. Gross building area contributing to determination of applicability of B3 Guidelines Small Buildings Path. For most projects this will be identical to the SB 2030 Project size, the Gross Building area, or both. See guideline for further detail.

15,000

sq. ft.

?

P0D21. Number of stories

2

?

P0D2A. Primary building type (Optional Entry)

Library

?

Space Use Types (Optional Entries)

Space type name	Net square footage (sq. ft.)

Compliant

Check for Compliance

Cancel

☒ I agree that the above information is correct and complete.

P0F. Project Image

Guideline Leader

Becky Alexander

Required



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OCCUPANCY

This project is not defined for occupancy. Click here to set an occupancy date

FILTER

Expand the grid to display
[All Action Items](#)

LEGEND

- Action Item
- Completed
- Variance
- Not applicable
- Current Phase
- Required
- Actual Phase

P0B Building Occupancy - Google Chrome

trackingtool.b3mn.org/SubGuidelinePhaseForm?ProjectID=1890&SubGuidelineID=P0B&PhaseID=302

Design

Architectural Leader (Claire Winters)

PD D FD CO

P.0 Performance Management Information

P0B. Building Occupancy

REQUIRED

[Read The Guideline](#)

☒ **Warning.** This guideline is assigned to Claire Winters. Click the checkbox to enable editing.

Fields in yellow are editable. Fields in blue are calculated. Fields in gray are not applicable or disabled at this phase. Compliance check looks for at least one entry, with values greater than or equal to zero, please include all building occupancy types.

P0B1. Building employees, yearly person hours 10,000 Person hours

P0B2. Building visitors, yearly person hours 1,500 Person hours

P0B3. Building residents, yearly person hours Person hours

P0B4. Building occupancy, annual full time equivalents (FTE) 6 FTE

Notes

Compliant

Save & Close

Cancel

☒ I agree that the above information is correct and complete. Signed by Becky Alexander on 5/25/2022 9:10 AM

Predesign Phase
Approval From Agency

D	FD	CO
D	FD	CO

[Read the Guideline](#)



GUIDELINE DOCUMENTATION: COMPLETING OTHER ASSIGNMENTS



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.

MINNESOTA B3 GUIDELINES COMPLIANCE		
Design Submission Status	✓	Complete – the B3 Guidelines design and construction documentation for this project is complete
Design Compliance	✗	Not Compliant – this project does not comply with the following B3 design and construction guidelines: <ul style="list-style-type: none">• M3B - Divert 75% construction and demolition waste from landfill• M3C - Reduce and recycle waste generated during building operation
Operations Submission Status	✗	Overdue – the B3 Guidelines operations documentation for this project is more than 90 days overdue
Operations Compliance	?	Undetermined – this project has not yet completed a full year of B3 Guidelines operations documentation

VARIANCE REQUEST PROCESS

Variance requests are processed within the B3 Guidelines Tracking Tool:

-  The project team submits a variance request
-  The variance request is reviewed by the project's Guideline Leader, the B3 Guidelines Administrators, and the Agency Contact
-  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. Team Member roles
2. Team Member responsibilities
 1. Understanding their Specific Role(s) and Responsibilities
 2. Completing Guideline Documentation
 3. Understanding and Appropriately Requesting Variances

**Visit our website:
B3mn.org**

**Contact the B3 Guidelines
Administrators:
guidelines@b3mn.org**