B3 GUIDELINES PROJECT ROLE:

Team Member

AGENDA

- 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/

WHO IS A TEAM MEMBER?

















RESPONSIBILITIES OF TEAM MEMBERS

Team Members have three primary responsibilities:

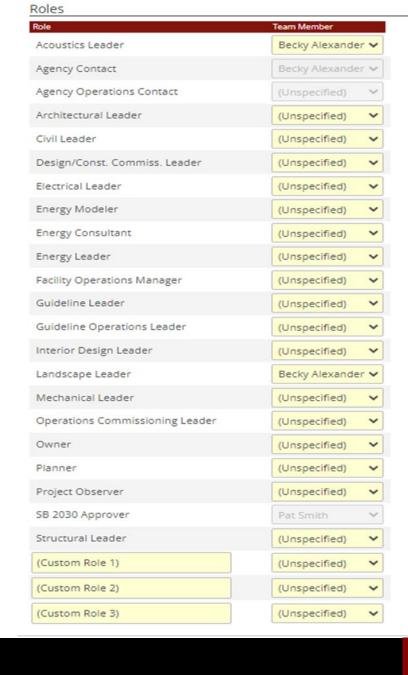
- 1. Understanding their Specific Role and Responsibilities
- 2. Completing Guideline Documentation
- 3. Appropriately Requesting Variances

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/



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



■ Welcome Claire Winters
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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.

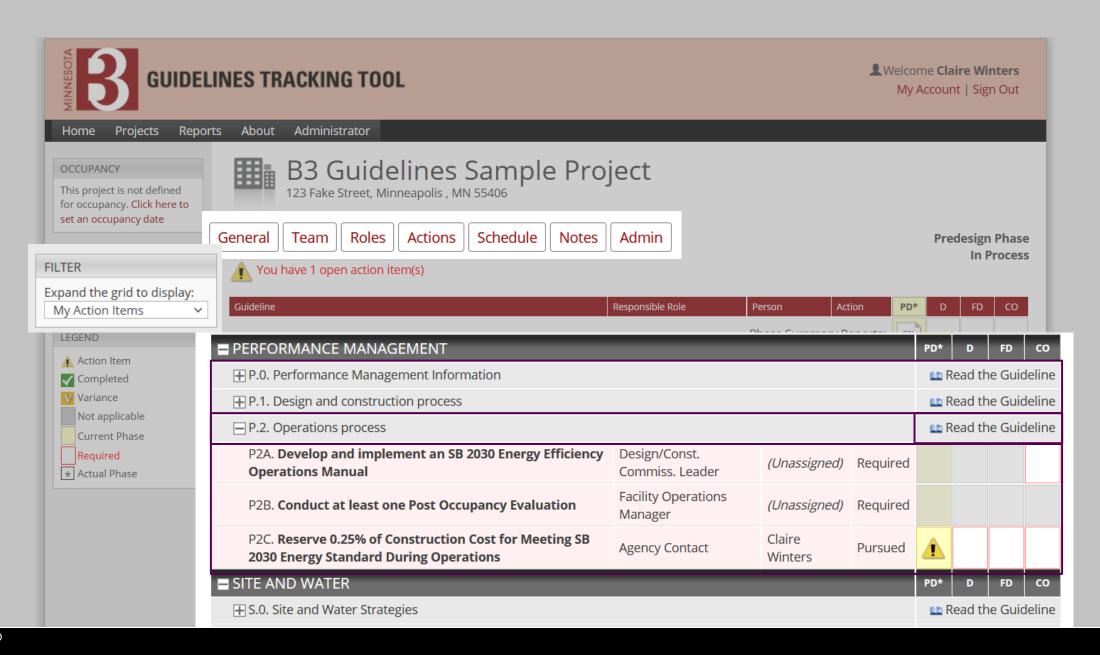
What would you like to do?

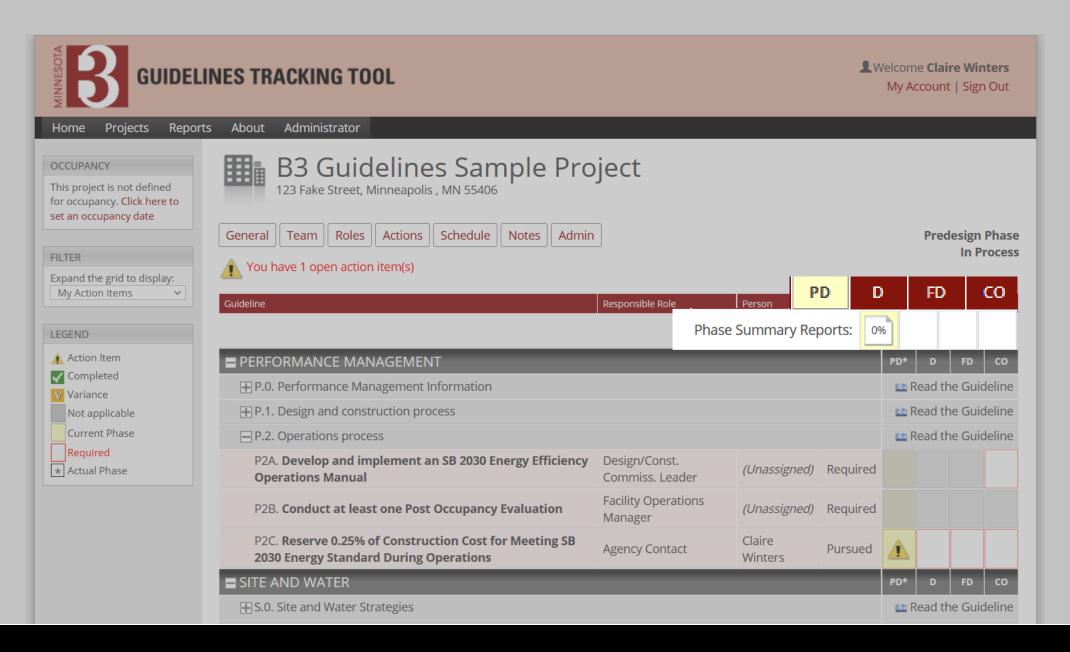
■ Project Dashboard

▲ You have 1 open action item(s)

■ Project Editor (Team members, roles, etc.)
■ Current Phase Report (PD)

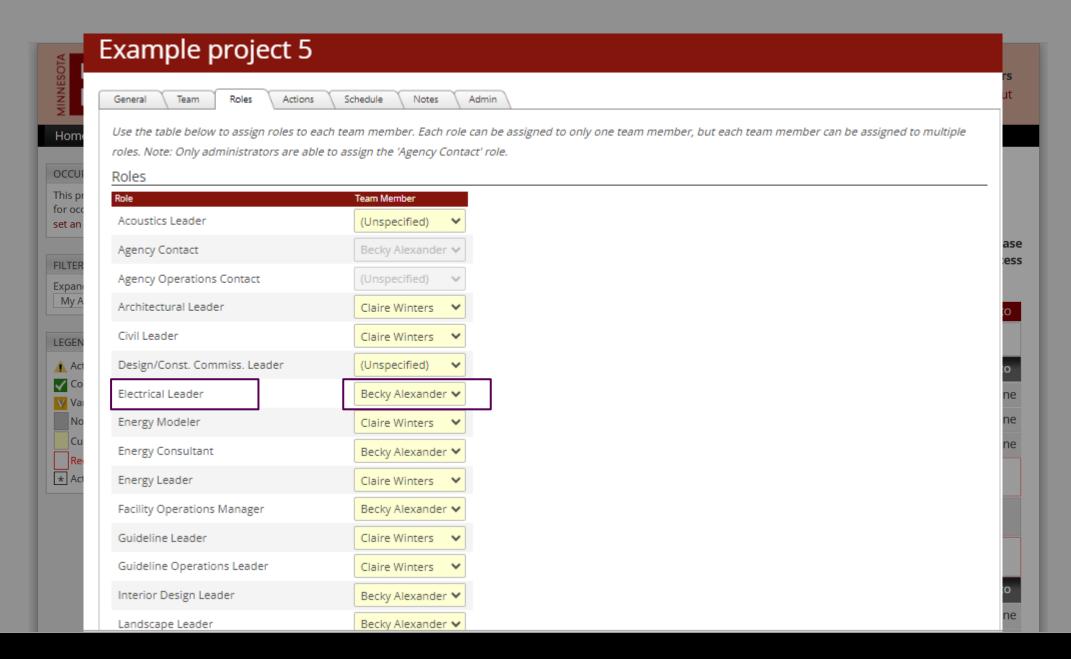
Note: This list details projects for which you are member of. Your user account has elevated rights. Click here to view all projects in the Project Manager.





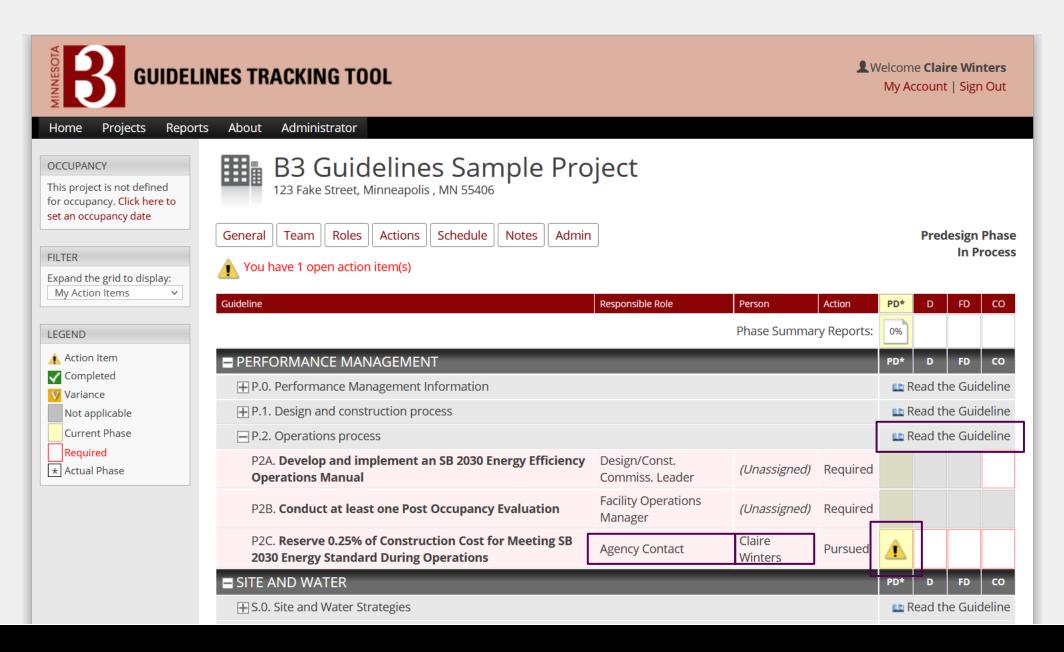
UNDERSTANDING ASSIGNED ROLES AND RESPONSIBILITIES

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



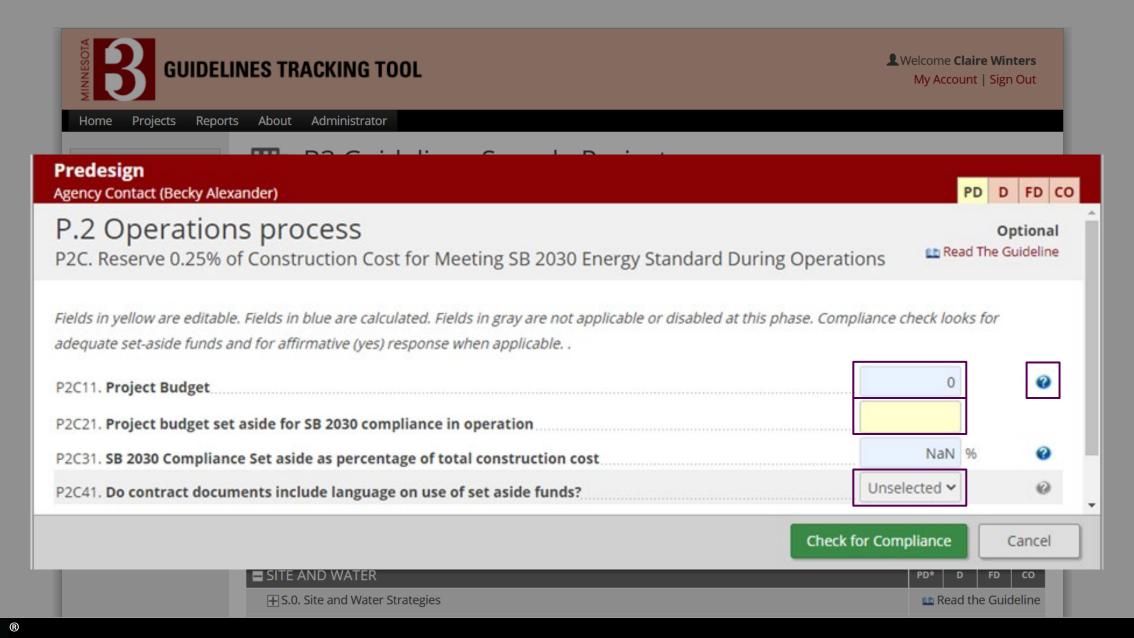
REVIEWING ASSIGNED GUIDELINES

- 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.

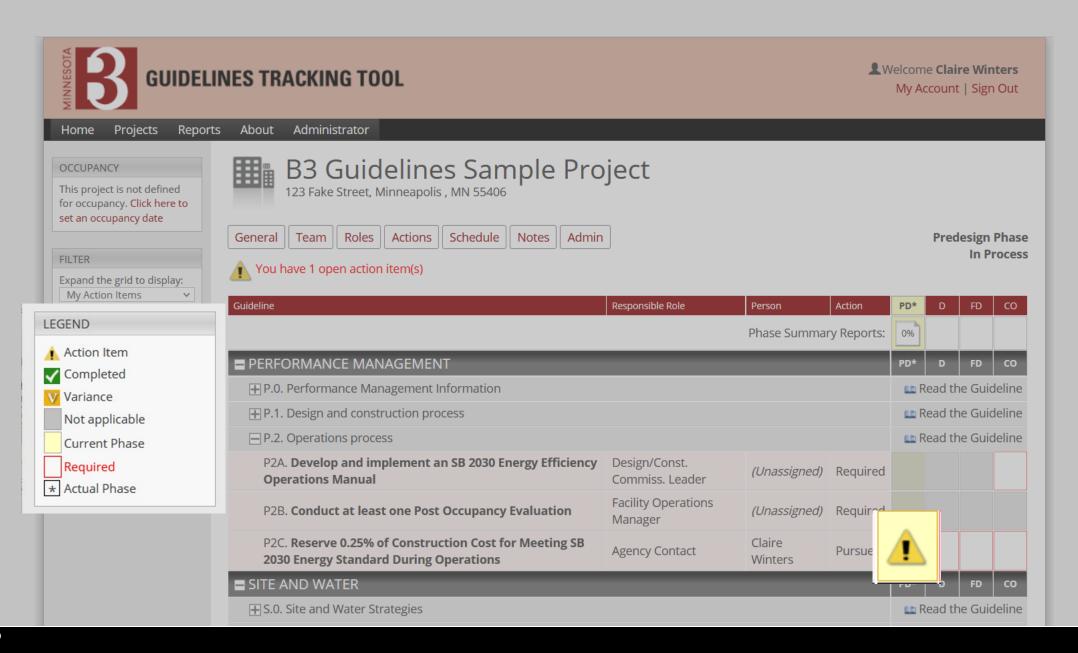


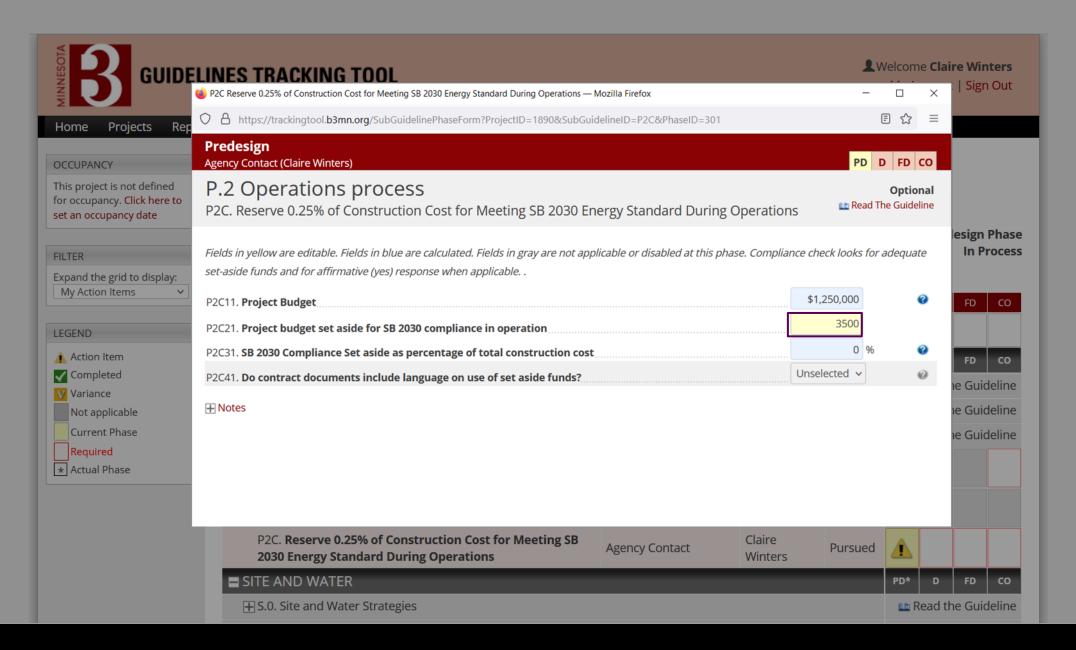
REVIEWING ASSIGNED INPUTS

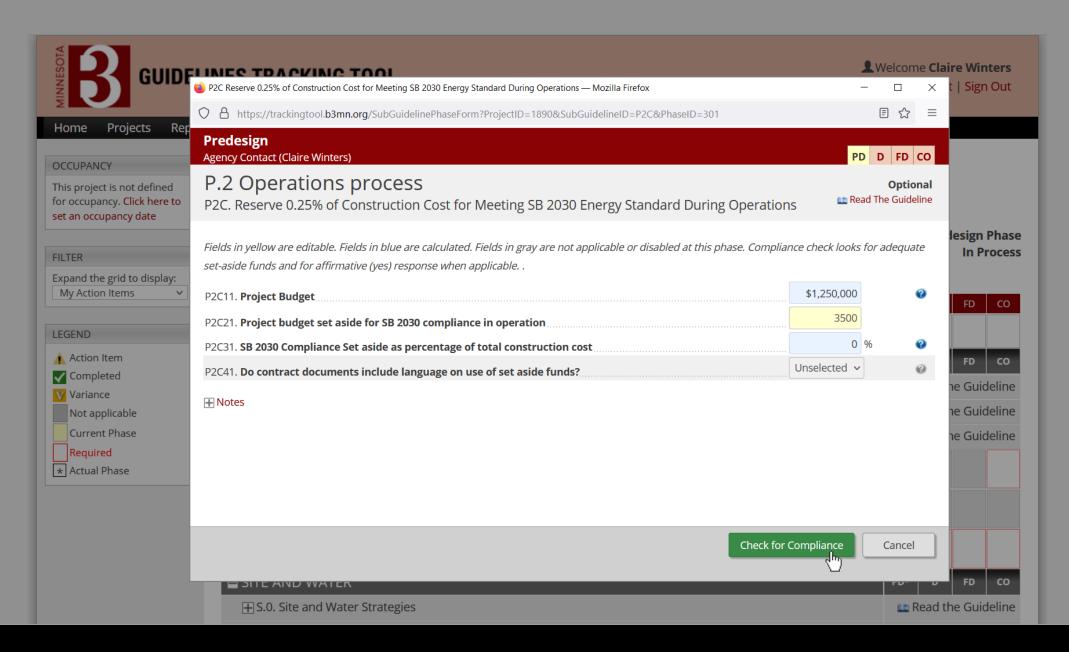
3. Review associated Tracking Tool inputs.

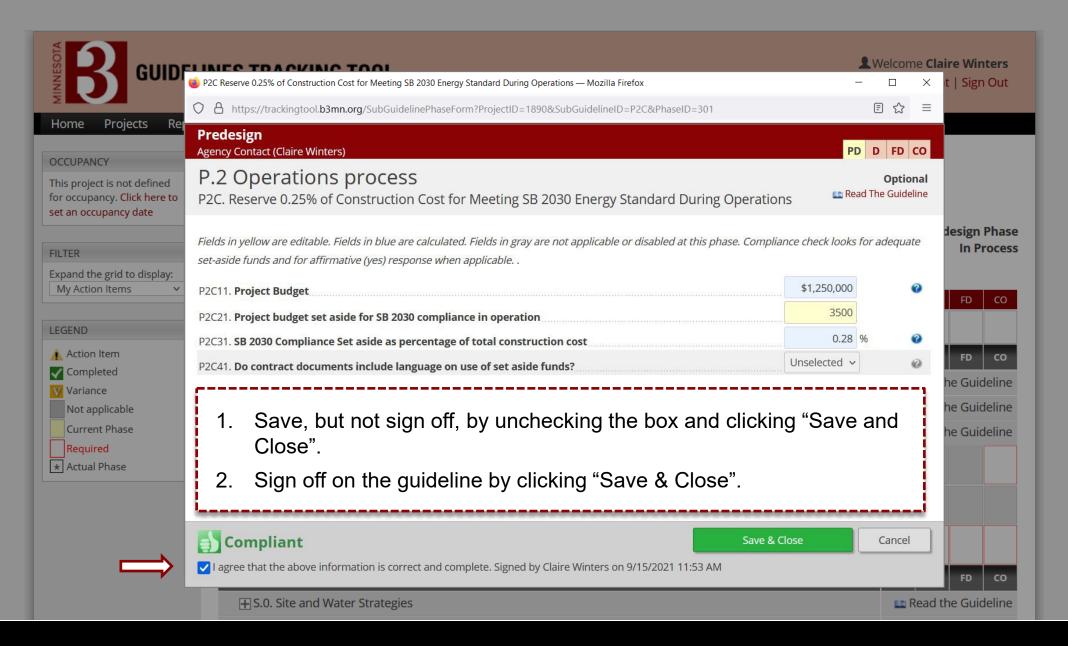


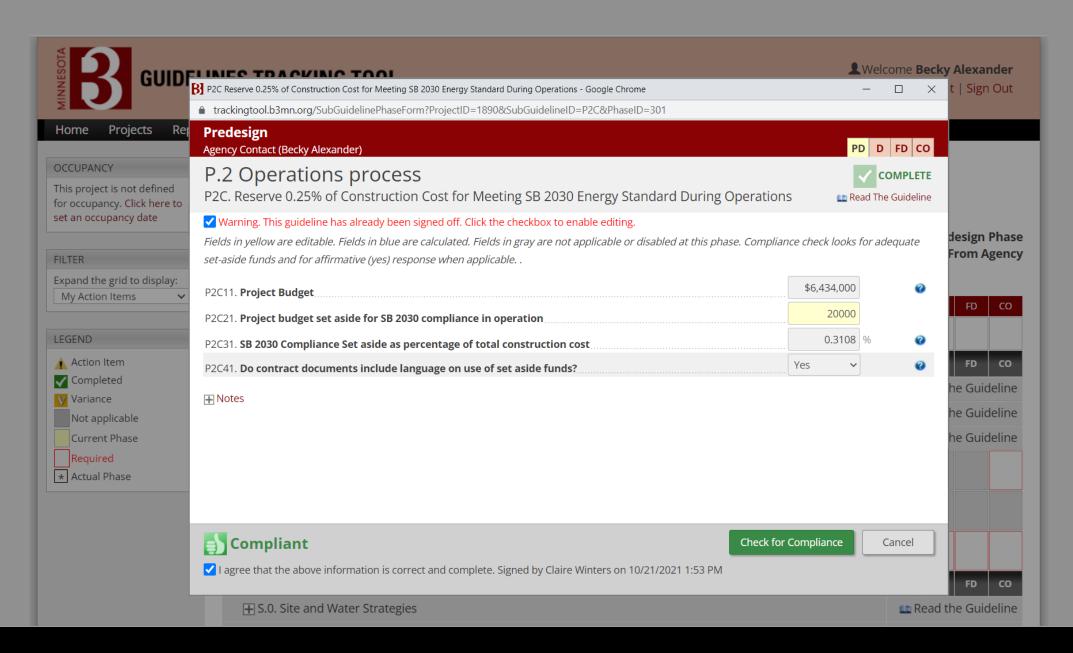
GUIDELINE DOCUMENTATION

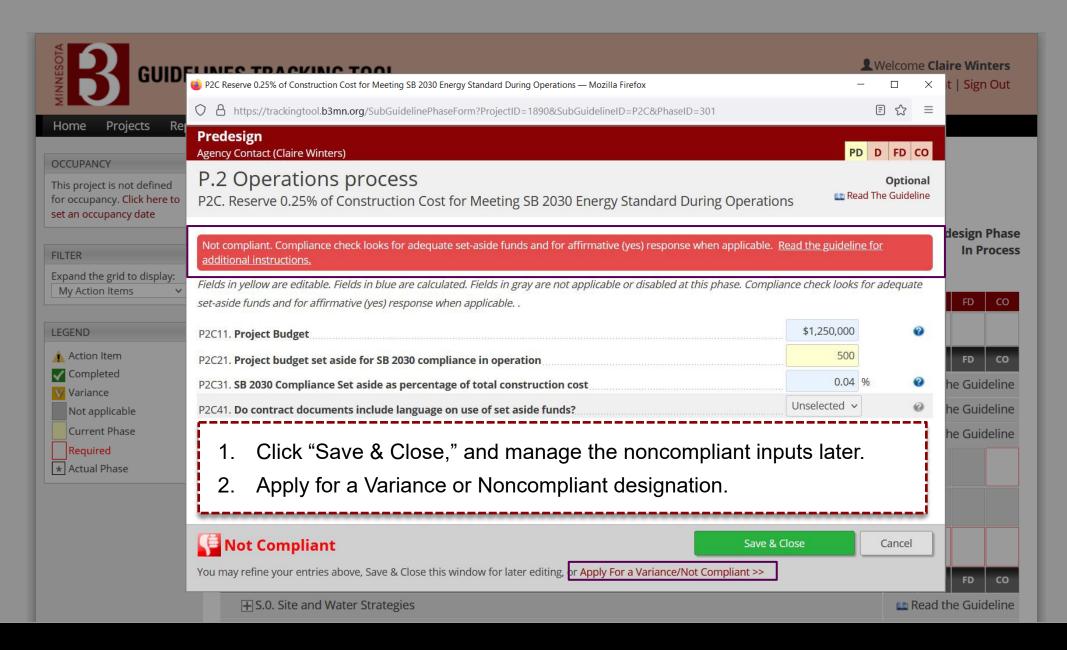


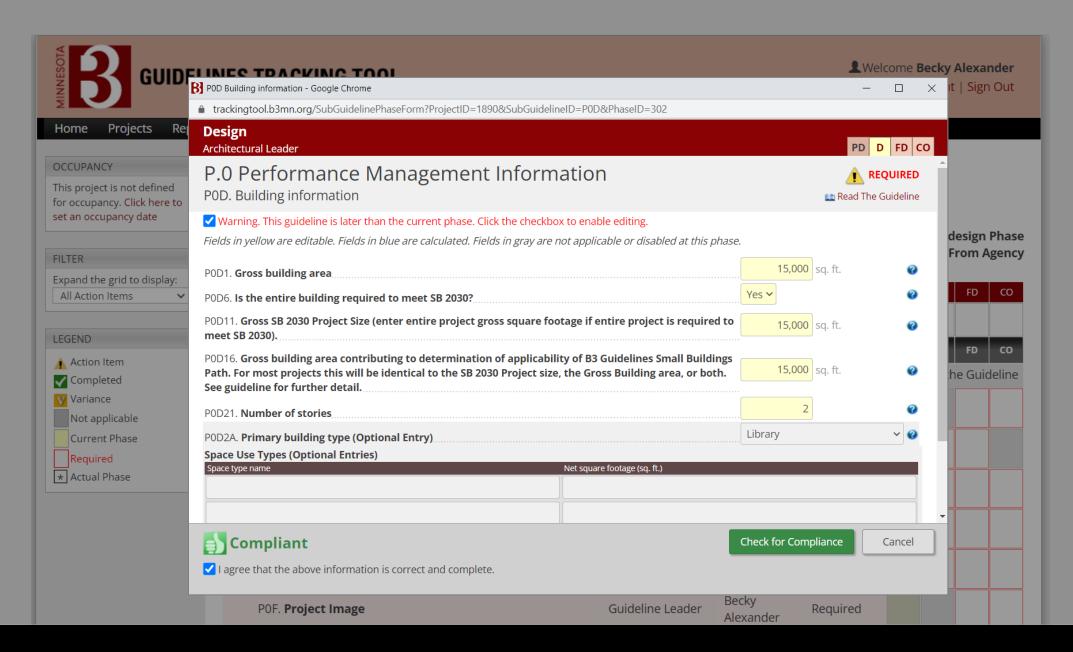


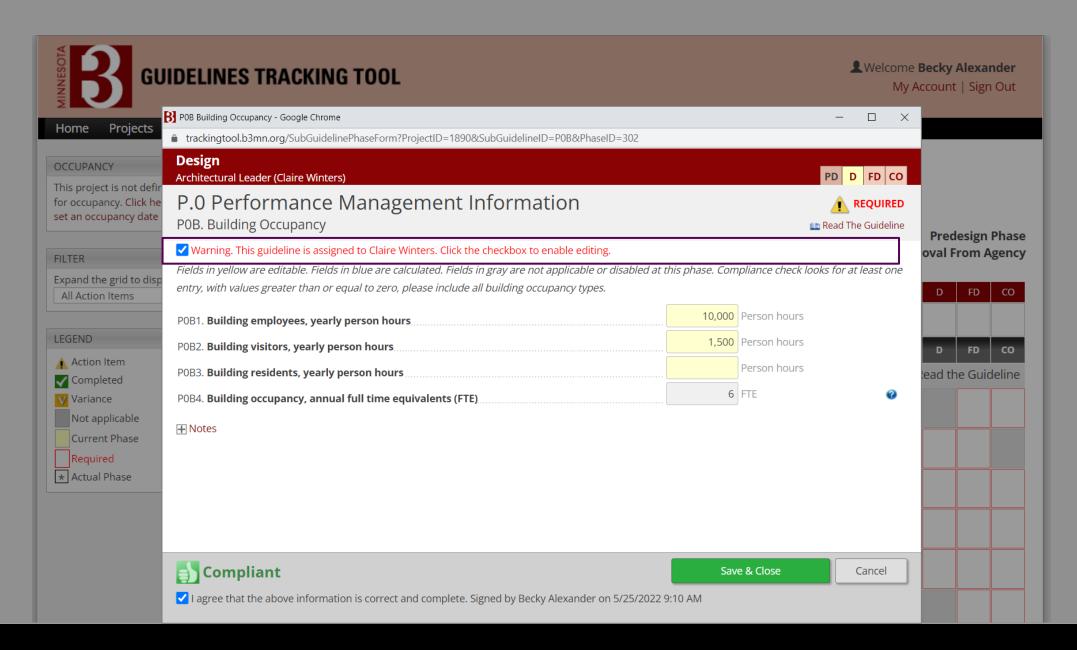












VARIANCE AND NON-COMPLIANCE GUIDANCE

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 <u>not</u> 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.



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:

- . 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%."



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

- 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

Administrators:
guidelines@b3mn.org