

# Green Lease Leaders



## REFERENCE GUIDE FOR **LANDLORDS**

Developed by:



## Contents

2	<b>Introduction</b>	26	<b>Credit 6:</b> Implement Landlord Energy Management Best Practices
4	<b>Common Terms &amp; Definitions</b>	29	<b>Credit 7:</b> Require Tenants to Purchase Renewables if Offered by Landlord and Competitively Priced
5	<b>Overview of Requirements</b>	31	<b>Credit 8:</b> Require Minimum Efficiency Fit-out for Tenants
9	<b>Prerequisite 1:</b> Provide Sustainability Contact and/or Information	33	<b>Credit 9:</b> Establish a Tenant/Resident Energy Efficiency Engagement and Training Plan
11	<b>Prerequisite 2a:</b> Implement Cost Recovery Clause for Energy Efficiency Upgrades Benefiting Tenant	35	<b>Credit 10:</b> Energy Transparency
13	<b>Prerequisite 2b:</b> Multifamily - Implement Energy Efficiency Improvements During Unit Turns	37	<b>Credit 11:</b> Establish a Whole Building Performance Reduction Goal in Carbon or Energy Use Intensity (EUI) units
16	<b>Credit 1:</b> Track Energy Use	41	<b>Credit 12:</b> Establish Social Impact Goals for Health, Wellness, Diversity and Inclusion
18	<b>Credit 2:</b> Track Water Use	46	<b>Credit 13:</b> Establish Impact Goals for Building Resilience and Climate Risk
20	<b>Credit 3:</b> Disclose Energy Performance to Tenant/Resident Annually		
22	<b>Credit 4:</b> Disclose Water Performance to Tenant/Resident Annually		
24	<b>Credit 5:</b> Ensure Brokers or Leasing Agent(s) Receive Energy Training		

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## INTRODUCTION

Buildings generate nearly 40% of annual global greenhouse gas emissions.<sup>1</sup> Significant reductions in emissions can be achieved through the adoption of energy efficiency and renewable energy, however, in leased spaces, conventional leasing practices often hinder both landlords and tenants from investing in these projects. Green leasing practices (also called “energy-aligned” or “high-performance” leases) allow tenants and landlords to collaborate and save energy, reduce costs, and achieve organizational sustainability goals.<sup>2</sup>

Green leasing can produce not only financial and sustainability gains, but also achieve a fundamental shift in what buildings can achieve for occupants and for communities. Increasingly, the main stakeholders of the real estate industry are pushing for a more equitable and sustainable future. Institutional investors are moving funds towards financial assets with higher scores in Environmental, Social and Governance (ESG) performance. The biggest corporate real estate occupiers are committed to ambitious carbon neutrality goals that impact their leased and owned buildings. Governments are establishing more regulations to reduce their carbon footprints by 2030. Additionally, decarbonizing buildings by 2050 has the potential to create millions of new good-paying jobs (one estimate suggests as many as 25 million peak new jobs by 2030<sup>3</sup>) for energy managers, facilities managers, mechanical engineers, controls manufacturers, and more, creating a new generation of building stewards to ensure that our buildings use energy resources wisely over time.

Green Lease Leaders was created by the Institute for Market Transformation (IMT) and the U.S. Department of Energy’s (DOE) Better Buildings Alliance to recognize landlords and tenants who have implemented energy efficiency in a portfolio of leased spaces. The Green Lease Leader program sets the global standards for what constitutes a green lease. It includes three levels: Silver, Gold and Platinum. Silver recognizes companies that incorporated green leasing into their standard lease form; Gold recognizes companies that have executed a green lease and Platinum recognizes companies who are integrating building performance with inclusive, equitable outcomes as well as financial and sustainability improvements. Achieving Platinum recognition is an acknowledgment that both landlord and tenant have committed to reducing

1. Source: **“2018 Global Status Report.”** Global Alliance for Buildings and Construction. 2018
2. Source: **Feierman, “What’s in a Green Lease?”** Institute for Market Transformation. 2015
3. Source: **Griffith, Saul and Sam Calisch. “Mobilizing for a zero carbon America: Jobs, jobs, jobs, and more jobs.”** Rewiring America, July 2020

negative building- related environmental impact, lowering energy consumption, improving occupant health, positively contributing to the local economy, and complying with local law.

This document provides guidance to landlords on how to comply with and implement green leasing standards and achieve recognition as a Green Lease Leader for their efforts.

## Common Terms & Definitions

The list of terms below is used throughout this reference guide. To see the Green Lease Leaders Frequently Asked Questions, [please visit our website](#).

### **Corporate Policy**

A corporate policy is a company approved statement about company standard values and/or procedures. A corporate policy must be shared internally within the company or externally and have gone through a chain of approvals in order to be accepted as documentation for a Green Lease Leaders application. Examples of acceptable corporate policies include a company Environmental Social Governance policy, annual sustainability report, or standard procedure documents.

### **Energy Performance Score**

This score or rating can provide insight into a building's energy efficiency performance and compare a building's energy efficiency against similar buildings. For example, ENERGY STAR is a common U.S. energy performance score. Green Lease Leaders will also accept other similar energy performance scores in the application process.

### **Fund**

A fund is a group of buildings within an investment mechanism to which the same investment policies and green leasing practices apply. Green Lease Leaders applicants are able to apply for fund level recognition or portfolio level recognition. See definition of "Portfolio" below.

### **Portfolio**

A portfolio is a group of buildings or leased spaces to which the participant's green leasing practices apply. Participants should strive to define the portfolio as all owned buildings or leased spaces. However, since this broad definition is not always feasible, participants may choose to define their Green Lease Leader portfolio as a subset of their portfolio, such as an investment fund. See definition of "Fund" above.

### **Standard Lease Form**

A standard lease form is your base lease language or starting point for going into any leasing transaction. A standard lease form is nonbinding. For your Green Lease Leaders application, please provide the full standard lease form and highlight the language relevant to the prerequisites and credits that you're applying for.

### **Submetering**

Utility submetering is a system that measures the utility consumption of each tenant within a multi-tenant building.

## Overview of Requirements

Green Lease Leaders recognizes three levels of achievement—Silver, Gold, and Platinum. Meeting the requirements for each level implies reasonable portfolio-wide implementation to satisfy each prerequisite or credit. (See “Common Terms & Definitions” for definition of portfolio.)

*The prerequisites and credits pursued to qualify for recognition do not need to appear in 100 percent of the final executed leases, but the intention is that they will be in most cases.*

- **Silver** level recognizes the establishment of foundational policies and business practices (e.g. a standard lease form that incorporates green lease language) that encourage reduced energy and water consumption in leased spaces.
- **Gold** level builds on Silver level achievements, and recognizes execution of green leases and utility-efficient tenant fit-outs.
- **Platinum** exemplifies achievements by both landlord and tenant to integrate environmental and social priorities and best practices into the lease and organization-wide practices.

### Prerequisites

For **all recognition levels**, landlords must establish there is a standard lease form or corporate policy that meet two of the three prerequisites. Depending on your property type, please address either Prerequisite 2a **OR** Prerequisite 2b.

1. Provide sustainability contact and/or information
- 2a. Implement cost recovery clause for energy efficiency upgrades benefiting tenant
- 2b. Multifamily - Implement energy efficiency improvements during unit turns

### Credits

Organizations must also address at least 5 of the following best practices in a standard lease form, corporate policies, or other documentation. **At minimum, 3 credits must use the standard lease form (and executed lease, if applicable) as supporting evidence.**

- **Silver** recognition - landlords must provide evidence of at least 2 prerequisites and 5 credits within a **standard lease form** and other verifying documentation.
- **Gold** recognition - landlords must provide evidence of at least 2 prerequisites and 5 credits within a **standard lease form AND one executed lease** and other verifying documentation.
- **Platinum** recognition - landlords must provide evidence of at least 2 prerequisites, credit 10, credit 11, credit 12, credit 13, and 3 additional

credits of your choosing within a **standard lease form AND one executed lease** and other verifying documentation.

1. Track energy use
2. Track water use
3. Disclose energy performance to tenant/resident annually
4. Disclose water performance to tenant/resident annually
5. Ensure brokers or leasing agent(s) receive energy training
6. Implement landlord energy management best practices
7. Require tenants to purchase renewables if offered by landlord and competitively priced
8. Require minimum efficiency fit-out for tenants
9. Establish a tenant/resident energy efficiency engagement and training plan
10. Energy transparency
11. Establish a whole building performance reduction goal in carbon or energy use intensity (EUI) units
12. Establish social impact goals for health, wellness, diversity and inclusion
13. Establish impact goals for building resilience and climate risk

**Table 1. Prerequisites & Credits**

**NOTE: A minimum of 3 credits must use a lease as evidence**

	Silver	Gold	Platinum
Prerequisite 1: Provide sustainability contact and/or information	Required	Required	Required
Prerequisite 2a: Implement cost recovery clause for energy efficiency upgrades benefiting tenant	Required for <b>non-multifamily</b>	Required for <b>non-multifamily</b>	Required for <b>non-multifamily</b>
Prerequisite 2b: Multifamily - Implement energy efficiency improvements during unit turns	Required for <b>multifamily applicants only</b>	Required for <b>multifamily applicants only</b>	Required for <b>multifamily applicants only</b>
Credit 1: Track energy use	Option	Option	Option
Credit 2: Track water use	Option	Option	Option
Credit 3: Disclose energy performance to tenant/resident annually	Option	Option	Option
Credit 4: Disclose water performance to tenant/resident annually	Option	Option	Option
Credit 5: Ensure brokers or leasing agent(s) receive energy training	Option	Option	Option
Credit 6: Implement landlord energy management best practices	Option	Option	Option
Credit 7: Require tenants to purchase renewables if offered by landlord and competitively priced	Option	Option	Option
Credit 8: Require minimum efficiency fit-out for tenants	Option	Option	Option
Credit 9: Establish a tenant/resident energy efficiency engagement and training plan	Option	Option	Option
Credit 10: Energy transparency	Option	Option	Required
Credit 11: Establish a whole building performance reduction goal in carbon or energy use intensity (EUI) units	Option	Option	Required
Credit 12: Establish social impact goals for health, wellness, diversity and inclusion	Option	Option	Required
Credit 13: Establish impact goals for building resilience and climate risk	Option	Option	Required



Each prerequisite and credit is described in more detail in this reference guide in the following manner:

### Intent

### Silver Requirements

### Gold & Platinum Requirements

### Resources

The motivation behind each prerequisite or credit is described in the “Intent.” The “Silver Requirements” and “Gold & Platinum Requirements” describes how to satisfy each credit or prerequisite at the Silver, Gold, or Platinum level. ***Confidential information may be redacted from any documentation submitted.*** The “Resources” section provides practical information to assist participants in achieving credits such as templates, example lease clauses, and calculators.

## Provide Sustainability Contact and/or Information

### Intent

Ensure that tenants/residents can learn about and participate in sustainability initiatives and can easily communicate with the correct person within the landlord organization if there is a need to discuss energy or water efficiency, retrofits, etc.

### Silver Requirements

- Provide evidence of a clause or statement noting the landlord sustainability contact(s) and/or where information can be found on the landlord's sustainability program in **one of the following**:
  - Standard lease form OR
  - Corporate policy OR
  - Welcome packet OR
  - Online resource
- NOTE: The landlord sustainability contact can be a general email address as long as it is monitored for inquiries from tenants/residents. If providing an online resource as supporting evidence, you must demonstrate how you are sharing the online resource with the tenant/resident. For example, the link to the online resource may be included in a standard welcome email to your tenants/residents.

### Gold & Platinum Level Requirements

- Provide Silver requirements AND
- Provide evidence that the sustainability contact and/or sustainability information is accessible to tenants in an **executed lease** and/or reference to where sustainability information can be accessed by tenant

### Resources

1. **Retail Green Leasing (see "5. Share Contact information," page 2)**  
Explains the benefits of sharing sustainability and energy contact information.

## Example Lease Clause

*Landlord and tenant shall provide a point of contact to discuss issues related to sustainability and energy. Issues include, but not limited to retrofit projects, billing issues, energy efficiency upgrades, and data access.*

*Tenant sustainability contact:*

*Email:*

*Phone:*

*Landlord sustainability contact:*

*Email:*

*Phone:*

## Implement Cost Recovery Clause for Energy Efficiency Upgrades Benefiting Tenant

### Intent

Within typical lease structures, landlords incur capital expenses while making energy retrofits to their buildings, and tenants often receive the monetary benefits attributed to the decrease in energy consumption. This leaves landlords with little incentive to make such energy-efficient improvements. To address this, landlords can adopt a cost recovery clause to amortize and recoup capital costs for energy-efficient improvements made to the building and common areas while tenants reap the significant long-term savings that efficiency delivers.

### Silver Requirements

- Provide evidence of a cost recovery clause allowing the landlord to amortize and recover capital costs from tenants for energy efficiency improvements made to the building which benefit tenants in a **standard lease form**.

### Gold & Platinum Requirements

- Provide Silver requirements AND
- Provide evidence of a cost recovery clause allowing the landlord to amortize and recover capital costs from tenants for energy efficiency improvements made to the building which benefit tenants in an **executed lease**.

## Resources

1. **IMT: Green Lease Language Examples (see section “Pass-through Clauses: Operating Expenses vs. Capital Expenses”)**  
Sample lease language for a cost recovery clause that eliminates the split-incentive issue.
2. **Retail Green Lease Primer (see item #5 “Capital Improvement Costs” on pg.1)**  
Lease provisions, modifications, and costs & benefits to overcoming the split-incentive barrier.
3. **Retail Green Leasing (see “Capital Improvement Costs: Cost Recovery” on pg. 3)**  
Sample lease language for a cost recovery clause that eliminates the split-incentive issue.

## Example Lease Provision

*Landlord may include the costs of certain capital improvements [intended to] [that] improve energy efficiency in operating expenses of tenant space. The amount passed through by Landlord to Tenant in any one year shall not exceed the prorated capital cost of that improvement over the expected life cycle term of that improvement [and shall not exceed in any year the amount of operating expenses actually saved by that improvement]. Interest/the cost of capital can be included.<sup>4</sup>*

4. Source: “**Retail Green Leasing**,” Institute for Market Transformation

## Multifamily - Implement Energy Efficiency Improvements During Unit Turns

### Intent

Unlike commercial leases, residential lease agreements cannot include cost recovery clauses allowing amortization and recovery costs from residents due to short lease term. However, the landlord can implement efficiency upgrades when units are vacant between residents. Resident turnover in multifamily buildings provides an opportunity to improve efficiency in apartment units through cost-effective measures that reduce resident consumption. Improvements directly benefit the resident upon move-in such as reduced utility bills and indirectly benefit the landlord from decreased maintenance calls, a reduction in whole building energy and water use, and improved affordability for residents.

### Silver Requirements

- Provide evidence of **corporate policy or checklists** used to implement utility-efficient unit turns which include **at least 8 out of 11 items** from the list below.
  1. **Interior air sealing:** Identify areas in an apartment unit that typically cause air leaks such as around the perimeters of windows. Establish a plan to check and repair these leaks every time a unit turns over. This action can reduce the burden on HVAC units and reduce utility bills.
  2. **Air conditioning units:** Perform basic inspection of air conditioning units to identify leaks around the unit, clean or replace the filters as necessary, and clean or replace air handler filters if present.
  3. **Ventilation:** Establish a plan to check the condition of equipment. Clean bath and kitchen exhaust fans to improve airflow.
  4. **Programmable thermostats:** Install programmable thermostats in resident units that facilitate precise control of HVAC temperature setpoints based on weekday and weekend occupancy schedules. Provide your maintenance staff and residents with guidance on how to efficiently program the thermostats.
  5. **Domestic hot water:** Evaluate hot water heater insulation. If R-value of the current insulation is less than 24, add insulation to achieve an R-value of 24 or greater.
  6. **Lighting:** Install LEDs in all light fixtures and replace older fixtures if needed. LEDs last longer than traditional lamps, significantly reduce kWh, do not give off heat and can contribute to increased comfort for residents.

7. **Leak prevention:** Check pipes and fixtures to check and fix leaks. This maintenance can help to avoid eroded pipes, mitigate costly damage and reduce the possibility of unusually high utility costs caused by leaks.
8. **High-efficiency water fixtures:** Install high-efficiency, low-flow faucet aerators and shower heads (i.e., those that have attained the EPA's WaterSense designation).
9. **Maintenance:** Inspect toilets for leaks and repair or replace flappers. Check faucets and showerheads for repair as needed and install aerators where feasible.
10. **Fixture placement:** Establish a plan to replace all water fixtures (faucets, shower heads, toilets, etc.) with high efficiency fixtures like WaterSense labeled products at the end of their use life.
11. **ENERGY STAR appliances:** Establish a plan to replace all appliances (refrigerator, washing machines, dishwashers, etc.) to ENERGY STAR appliances at the end of their use life.

### Gold & Platinum Requirements

- Provide Silver requirements AND
- Provide evidence of implemented resident unit turnover efficiency checklist such as **one of the following:**
  - Copy of email sent to property manager sharing guidance OR
  - Completed unit checklist and findings.

## Resources

1. **Standards of Affordable Housing for the Future EZ Retrofit Tool**  
EZ Retrofit is a free, do-it-yourself Excel-based audit tool that gives multifamily property owners and managers an easy way to identify cost-effective energy and water efficiency upgrades.
2. **Valuing Energy Efficiency in Multifamily Housing: An approach to cut energy and water bill while increasing property value**  
An approach to cut energy and water bills while increasing property value.



## Track Energy Use

### Intent

Tracking energy use across the portfolio is the first step towards managing energy performance and reducing waste. As we often say in the energy efficiency world, “you can’t manage what you don’t measure” and doing so allows landlords to manage consumption over time and to evaluate the effectiveness of energy improvements in areas often under their control. **The purpose of this credit is tied to the landlord collecting whole building energy data whenever feasible. At a minimum, landlord should be tracking common area energy data and/or collecting energy data from tenants in triple-net lease situations.**

### Silver Requirements

- Provide evidence that monthly energy use is tracked as a standard practice within **one of the following**:
  - Standard lease form OR
  - Corporate policy

### Gold & Platinum Requirements

- Provide Silver requirements AND
- Provide evidence that energy use is tracked monthly for each building in the portfolio. Acceptable documentation includes:
  - Spreadsheet of properties and monthly energy usage OR
  - Screenshot of ENERGY STAR Portfolio Manager account, or other energy data tracking software, showing ongoing energy tracking.

## Resources

1. **ENERGY STAR Portfolio Manager**  
Free online tool from the U.S. EPA which allows building owners and tenants to track energy, water, and waste across their portfolios.
2. **Working Together for Sustainability: The RMI-BOMA Guide for Landlords and Tenants (see “Process” on pgs. 2-3)**  
Insights to overcome the “split-incentive” barrier in green leasing and process to implement energy tracking.

## Example Corporate Policy Language

*We are committed to reduce our carbon footprint by reducing the energy consumption at our facilities. We shall track energy consumption data of the common areas in all our properties on a monthly basis. This energy consumption data will be recorded monthly via ENERGY STAR Portfolio Manager or other tracking tools. Data will be used for the purposes of:*

1. *Monitoring and improving the energy performance of the Premise and/or*
2. *Measuring the energy performance of the Premises against any agreed*

*We are committed to tracking the data for spaces we control and collaborating with the tenant to obtain as much whole building data as feasible. We will benchmark this information and provide tenants with performance information, such as the ENERGY STAR® score where applicable.*

## Track Water Use

### Intent

Tracking water use across the portfolio enables both tenants and landlords to understand consumption patterns, identify water-saving opportunities, and evaluate the effects of water-saving measures. **The purpose of this credit is tied to the landlord collecting whole building water data. At a minimum, landlord should be tracking common area water data and/or collecting water data from tenants in triple-net lease situations.**

### Silver Requirements

- Provide evidence that quarterly water use tracking is a standard practice across the portfolio within **one of the following**:
  - Standard lease form OR
  - Corporate policy

### Gold & Platinum Requirements

- Provide Silver requirements AND
- Provide evidence that water use is recorded at least quarterly for each building in the portfolio. Acceptable documentation includes:
  - Spreadsheet of properties and at least quarterly water usage OR
  - Screenshot of ENERGY STAR Portfolio Manager account, or other water data tracking software, showing ongoing water tracking.

### Resources

1. **ENERGY STAR Portfolio Manager**  
Free online tool from the U.S. EPA which allows building owners and tenants to track energy, water, and waste across their portfolios.

### Example Corporate Policy Language

*We are committed to reduce our water consumption. We shall track water usage of the common areas at all our properties on a quarterly basis. This water usage data will be recorded quarterly via ENERGY STAR Portfolio Manager or other tracking tools. Data will be used for the purposes of:*

1. *Monitoring and reducing the water usage of the Premise and/or*
2. *Measuring the water usage of the Premises against any agreed targets.*

*We are committed to tracking the data for spaces we control and collaborating with the tenant to obtain as much whole building data as feasible. We will benchmark this information and provide tenants with performance information, such as a total building water consumption metric.*

## Disclose Energy Performance to Tenant/ Resident Annually

### Intent

Energy performance visibility allows tenants/residents to better understand their own energy performance in the context of the whole building, increase transparency, and establish more communication between landlord and tenant/resident.

- U.S. based applicants: An ENERGY STAR score is a 1–100 score describing the energy performance of the whole building as compared to other similar buildings. The score is an indicator of overall building energy performance and operations. A high ENERGY STAR score translates to a more efficient Power Usage Effectiveness metric.
- International applicants: For regions without ENERGY STAR, similar energy rating disclosures will be accepted for this credit.
- Triple net leases: To fulfill this credit, you can demonstrate collection of energy data from the tenant, benchmarking, and sharing the ENERGY STAR Score, or aggregated energy performance information, back with tenants so they understand their efficiency level.

### Silver Requirements

- Provide evidence that whole-building ENERGY STAR scores or similar energy rating are disclosed annually to tenants/residents or upon request through **one of the following**:
  - Standard lease form OR
  - Corporate policy

### Gold & Platinum Requirements

- Provide Silver requirements AND
- Provide evidence that whole-building ENERGY STAR scores or similar energy rating is disclosed annually or upon request to tenants/residents within an **executed lease** AND
- Provide evidence that ENERGY STAR scores or similar energy rating is provided to tenant/resident such as a **copy of an email disclosing this information to the tenant/resident**.

## Resources

1. **Retail Green Lease Primer (see item #9 “Utility Data Sharing” on pg. 2)**  
Lease provisions, modifications, and costs & benefits to implement energy data sharing.
2. **Retail Green Leasing (see “Utility Data Sharing” on pg. 4)**  
Strategies, justifications, and sample lease language that tenants can adopt to share energy data.
3. **Template Energy Disclosure Tracker**  
Template to track annual ENERGY STAR scores provided by tenants
4. **ENERGY STAR Score Lookup Table for Data Center**  
See page 8, Figure 5 of this ENERGY STAR technical reference for an energy efficiency conversion table for ENERGY STAR scores.

## Example Corporate Policy Language

*We are committed to energy data transparency and support our tenants to be more sustainable, therefore we will disclose whole-building ENERGY STAR scores annually to tenants upon request.*

## Example Lease Provision

*Landlord shall provide tenant with the building’s ENERGY STAR score annually. To the extent Tenant obtains electricity independently of the building, Tenant shall give Landlord access to Tenant’s data on energy use for inclusion in Landlord’s annual reports, ENERGY STAR annual rating and similar purposes.<sup>5</sup>*

5. Source: “**High performance lease criteria and sample lease language**” created by The High Performance Leasing Task Group of GSA’s Green Building Advisory Committee

## Disclose Water Performance to Tenant/ Resident Annually

### Intent

Water performance visibility, such as a water use intensity metric or an EPA Water Score for Multifamily, allows tenants/residents to better understand their own water performance in the context of the whole building, increase transparency, and establish more communication between landlord and tenant/resident.

- **Multifamily:** An EPA 1-100 water score for multifamily properties describing the water performance of the whole building with 20 or more units. The score is an indicator of overall building water performance and operations.
- **Other property types:** Non-multifamily applicants can qualify for this credit if similar water performance scores or metrics, such as a water use intensity, are communicated to tenants.

### Silver Requirements

- Provide evidence that whole-building water performance scores are disclosed annually to tenants/residents or upon request within **one of the following:**
  - Standard lease form OR
  - Corporate policy

### Gold & Platinum Requirements

- Provide Silver requirements AND
- Provide evidence that whole-building water performance scores are disclosed annually to tenants/residents or upon request within an **executed lease** AND
- Provide documentation showing EPA 1-100 water scores, or similar water performance scores, are provided upon request to the tenant/resident such as a **copy of an email disclosing this information to the tenant/resident.**

## Resources

### 1. **EPA 1-100 Water Score for Multifamily Properties.**

Consistent with the approach to the 1 – 100 ENERGY STAR score, you can now generate an EPA 1 – 100 water score to see how your multifamily property’s water consumption measures up against similar properties nationwide.

## Example Corporate Policy Language

*We are committed to water data transparency and support our tenants to be more sustainable, therefore we will disclose whole-building ENERGY STAR water scores annually to tenants upon request.*

## Example Lease Provision

*Landlord shall provide tenant with the building’s ENERGY STAR water score annually. To the extent Tenant obtains water independently of the building, Tenant shall give Landlord access to Tenant’s data on water use for inclusion in Landlord’s annual reports, ENERGY STAR water score annual rating and similar purposes.*



## Ensure Brokers or Leasing Agent(s) Receive Energy Training

### Intent

Maintaining a team of brokers or leasing agents with sustainability training facilitates negotiations and execution of energy-aligned lease contracts. The intent of this credit is to ensure that parties involved in the lease negotiation process are knowledgeable about the value of green lease clauses. This is also applicable to outsourced brokers and leasing agents.

### Silver Requirements

- Provide evidence of requirements for any person responsible for managing leasing transactions between landlord and tenant (i.e. leasing agents or brokers) to complete at least one training course covering the benefits of energy efficient buildings and energy benchmarking in commercial buildings, and/or the benefit of green leasing within a **standard lease form OR corporate policy**. Acceptable training includes the following:
  - Current LEED Green Associate or LEED Accredited Professional status
  - Completion of one of the following trainings:
    - **“The Business Case for High Performance Buildings”** OR
    - **“Rethinking Leasing: Spotlight on the 2019 Green Lease Leaders”** OR
    - **“A Conversation with Green Lease Leaders”**
  - Other dedicated training that informs on 1) the value of ENERGY STAR ratings or similar energy performance disclosure, 2) energy and water efficiency, 3) green leasing, 4) efficient build outs, and 5) effective tenant and landlord engagement. These trainings should be a minimum of 30 minutes and will be considered on a case-by-case basis.

### Gold & Platinum Requirements

- Provide Silver requirements AND
- Provide a **record** of each broker’s name, date of training, length of training, source of training completed, and expiration date if applicable.

## Resources

1. **The Business Case for High-Performance Buildings**  
Online training from the Institute for Market Transformation with support from the U.S. Department of Energy that shows how leading property owners incorporate energy efficiency and broader sustainability elements into their operational and investment decisions.
2. **Rethinking Leasing: Spotlight on the 2019 Green Lease Leaders**  
This online video highlights examples of how Green Lease Leaders effectively implement green leases to support collaborative landlord tenant relationships.
3. **A Conversation with Green Lease Leaders**  
This webinar with 2021 Green Lease Leaders demonstrates how green leasing can offer a competitive advantage across sectors.
4. **LEED Credential Exam Preparation Trainings**  
Trainings to prepare individuals to sit for LEED credentialing exams (LEED GA, LEAD BD+C, LEED O+M, etc.).
5. **Template Broker Energy Training Tracker**  
Template to track training completed by brokers.
6. **Green Leasing in DC (see “How do you motivate key stakeholders?”)**  
Guide to green leasing and building the business case for implementing green leasing in real estate.

## Example Corporate Policy Language

*All brokers employed by or supporting the organization shall complete at least one hour of sustainability training covering the fundamentals of energy efficiency in commercial buildings.*

## Implement Landlord Energy Management Best Practices

### Intent

By implementing energy management best practices across all controlled spaces, landlords can reduce the energy waste and operating costs.

### Silver Requirements

- Provide evidence within a **standard lease form OR corporate policy** that **at least 5 of the following 14** energy management best practices are implemented in the portfolio:
  1. **Restricted HVAC hours:** Restrict HVAC hours to the tenants' business hours, with a reasonable amount of extra time to allow the space to reach temperature set point. HVAC operation after hours available upon request.
  2. **Space heaters:** Prohibit use of space heaters.
  3. **Daytime cleaning:** Schedule janitorial work to occur during regular business hours to reduce time that building HVAC and lighting equipment are utilized.
  4. **Air filters:** To the extent managed by tenant, clean and replace air filters as often as recommended by manufacturers. Timely filter replacement can reduce HVAC equipment loads and energy use.
  5. **Thermostat set-back/set-up:** Use programmable thermostats or other means to lower heating set point and increase cooling set point during unoccupied periods.
  6. **Lighting controls:** Install lighting controls such as occupancy sensors, daylight harvesting, or timers in all non-regularly occupied spaces, including break rooms, storage rooms, and bathrooms.
  7. **Plug load management:** Train common area and back-of-house occupants to turn off or unplug lights, electronics, and appliances when not in use and/or provide advanced powerstrips.
  8. **Ongoing maintenance:** Obtain regular (quarterly or annual) inspections of controlled HVAC equipment, exhaust fans, etc.
  9. **Energy audit:** Conduct base building and common area energy audits at least annually.
  10. **Recommissioning:** Conduct base building recommissioning periodically, in order to optimize energy consuming systems/equipment.

11. **Walk-in refrigerators:** Inspect walk-in refrigerators for leaks. Install strip curtains and automatic door closures.
12. **Vending machines:** Prohibit vending machines or place on timers.
13. **Refrigerant leaks:** Monitor base building HVAC systems and refrigerators for leaks.
14. **Other:** Please specify additional energy management practices implemented if not listed above. Eligibility is subject to review. **A substitution checklist of practices for an industrial portfolio is the ENERGY STAR Warehouse Best Practices Checklist.**

## Gold & Platinum Requirements

- Provide Silver requirements AND
- Provide documentation verifying that energy management best practices are implemented in base building and common area spaces across the portfolio such as a **preventative maintenance tracker.**

## Resources

1. **Making Efficiency Work For You (see “Energy Management” on pgs. 10-11)**  
Sample lease language and operation recommendations to demonstrate how landlords can incorporate energy management best practices to lower energy usage.
2. **Building Innovation Hub: Operations and Maintenance Guide**  
Outlines the critical role operations and maintenance play in increasing energy efficiency and adding value for landlords and their portfolios.
3. **Data Center Master List of Energy Efficiency Actions**  
The Lawrence Berkeley National Laboratory created a Master List of best practice recommendations (actions) to increase energy efficiency in data centers. Designed for data center owners, operators, and qualified assessors, this document provides actionable guidance to both prioritize and implement energy saving measures in data centers.
4. **Warehouse Best Practices Checklist**  
ENERGY STAR created this checklist for warehouse properties to identify low-cost operations and maintenance practices to reduce energy use.

## Example Corporate Policy Language

*We are committed to the following energy management practices in our base building systems and common areas:*

- 1. Restrict HVAC operating time to our business hours with ample warm-up/cool-down time to reach temperature set point*
- 2. Prohibit use of personal space heaters*
- 3. Schedule common area building cleaning to occur during daytime hours, allowing non-emergency lighting to be turned off at night*
- 4. Clean and replace air filter as recommended by the manufacturer to ensure equipment efficiency and maintain good air quality, for HVAC equipment that we control*
- 5. Adopt temperature reset practices during unoccupied periods to avoid unnecessary cooling/heating*
- 6. Install occupancy sensors in all non-regularly occupied spaces such as break rooms, storage room, bathrooms*
- 7. Administering trainings or other strategies to turn off lights and appliances when not in use*
- 8. Conduct regular HVAC equipment maintenance to ensure proper operation*
- 9. Conduct energy audits periodically to identify any energy conservation measures*
- 10. Conduct retro-commissioning periodically, in order to optimize energy consuming systems/equipment*
- 11. Inspect walk-in refrigerator door gaskets for leaks and install strip curtains and automatic door closures (if applicable)*
- 12. Prohibit use of vending machines to reduce energy usage*
- 13. Monitor supplemental air conditioning units and refrigeration for leaks*

## Require Tenants to Purchase Renewables if Offered by Landlord and Competitively Priced

### Intent

Some building owners are installing on-site renewables or offering off site renewable energy to guard against future energy price fluctuations and draw tenants who value building sustainability features. Requiring tenants to purchase competitively priced renewable power, or other forms of green power procurement if offered, helps to ensure the success of this innovative energy approach.

### Silver Requirements

- Provide evidence of requirement for tenants to purchase renewable energy if provided by the landlord and priced competitively **within one of the following:**
  - Standard lease form OR
  - Corporate policy

### Gold & Platinum Requirements

- Provide Silver requirements AND
- Provide evidence of tenant commitment to purchase renewable energy if provided by the landlord and priced competitively within an **executed lease.**

### Resources

1. **IMT Green Lease Language Examples (see section “Purchase of On-Site Renewables”)**  
Sample lease language for financing, installation and operation clauses that allow both parties to invest in renewables.
2. **Green Lease Leaders: Using the Lease to Drive Innovation and Clean Energy**  
Leading sustainability professionals share their organization’s best practices that every real estate or sustainability practitioner should consider when leasing property.
3. **Promoting Solar PV on Leased Buildings Guide**  
DOE resource highlighting benefits, barriers to, and strategies for installing solar PV on leased buildings.
4. **Retail Green Leasing (see “Rooftop Access and Control: Solar Panels” on pg. 5)**

Sample Green Lease language requiring tenants to purchase energy from on-site renewable energy from the landlord.

5. **Regency Centers Landlord-Retailer Power Purchase Agreement Case Study**

Case study demonstrating the process and providing insight to successfully implement landlord-tenant PPA for a retailer space.

**Example Corporate Policy Language**

*We are committed to supporting renewable resources. We shall provide our tenants the option to purchase renewable energy for leased spaces and offer it at a rate that is at or below the rate offered by local utilities.*

**Example Lease Provision**

*Tenants shall purchase energy from on-site renewables as provided by the landlord via a Power Purchase Agreement (PPA). Landlord shall install, own, and maintain the on-site generation and sell power directly to the Tenants at a fixed rate that is at or below electricity rate offered by local utilities.*

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*Where building infrastructure is replaced with a more sustainable solution, and this will reduce energy consumption for Tenants, the Landlord should propose capital investment cost recovery equivalent to 80% of the predicted energy savings from which the Tenants should benefit, over the remaining lease term. Once cost is recovered, the operating cost benefits should accrue directly to Tenants.*

## Require Minimum Efficiency Fit-out for Tenants

### Intent

Requiring minimum energy, water, and waste efficiency and health standards for tenant fit-outs can significantly reduce whole-building utility use over the life of the lease, unleashing lower utility bills for tenants, lower operating costs for landlords, and improved indoor air quality for building occupants.

### Silver Requirements

- Provide evidence of **6 out of 10** of the requirements below or efficient leased space fit-out recognition such as ENERGY STAR® Tenant Space within a **standard lease form OR corporate policy**:
  1. Estimate tenant space energy use
  2. Meter/submeter tenant energy use
  3. Use efficient lighting strategies such as daylighting and occupancy sensors
  4. Install ENERGY STAR certified appliances and equipment
  5. Install WaterSense/high efficiency plumbing fixtures as applicable
  6. Use only low/no VOC paints, finishes and adhesives
  7. Reuse office furniture and materials as feasible
  8. Include recycling within construction waste management plan as feasible
  9. Establish recycling stations with clear instructions
  10. Ensure indoor air quality procedures are in place during any renovations so that other buildings occupants are protected

### Gold & Platinum Requirements

- Provide Silver level requirements AND
- Provide evidence of efficient fit-out requirements within an **executed lease**.  
Note: Evidence of meeting ENERGY STAR Tenant Space requirements within an executed lease is also acceptable.



## Resources

1. **ENERGY STAR Tenant Space: Eligibility and Criteria**  
Details of eligibility and criteria to earn ENERGY STAR Tenant Space recognition and meet the Green Lease Leaders energy-efficient fit-out requirement.
2. **Solar United Neighbors: Community Solar in Maryland**  
Community solar projects allow a subscriber (individual, business, non-profit, or municipality) to purchase or lease a share of off-site solar generation and have that electricity credited on their monthly electric bill, just as if the panels were on their own roof. Maryland launched a pilot community solar program in the spring of 2017. This report highlights the program's successes to date and discusses the obstacles that remain.
3. **IMT Green Lease Language Examples (see section "Fit-Out and Building Requirements")**  
Sample lease language listing tenant fit-out requirements.
4. **Retail Green Lease Primer (item 4 Leased Premises, page 1)**  
Lease provisions, modifications, and costs and benefits to achieve an energy-efficient fit-out.
5. **Making Efficiency Works for You (see "Green Tenant Build out," page 8)**  
Sample lease language to achieve an energy-efficient fit-out.
6. **Retail Green Leasing (see "Leased Premises Standards: Efficient Buildouts," page 3)**  
Sample lease language to achieve an energy-efficient fit-out.

## Example Lease Clause

*Any and all Tenant Improvement Work and/or Alterations will be performed in accordance with Landlord sustainability practices that the Tenant has accepted as part of the lease agreement, namely the leased space fit-out must meet Environmental Protection Agency's ENERGY STAR Tenant Space criteria.<sup>6</sup>*

6. Source: "**Retail Green Leasing**," Institute for Market Transformation

## Establish a Tenant/Resident Energy Efficiency Engagement and Training Plan

### Intent

Establish a process for informing tenants/residents about efforts underway to optimize building performance and improve occupant comfort. Provide education and training opportunities to encourage their participation in operating their space with efficiency in mind and to significantly conserve resources.

### Silver Requirements

- Provide evidence describing how landlord will engage tenants on efficiency opportunities within **one of the following**:
  - Standard lease form OR
  - Corporate policy

### Gold & Platinum Requirements

- Provide Silver requirements AND
- Provide evidence of how landlord will engage tenants on efficiency opportunities within an **executed lease** AND
- Provide documentation showing how tenant engagement is executed. Acceptable documentation includes:
  - Copy of email sent to tenants on an efficiency program OR
  - Tenant/resident welcome packet OR
  - Section of tenant/resident portal OR
  - Tenant/resident newsletter

### Examples of Engagement May Include

- Sharing energy efficiency and sustainability goals and initiatives with tenants/residents in newsletters, on property websites, and/or during leasing discussions.
- Providing tenants/residents with energy saving tips.
- Hosting tenant/resident events to raise awareness around energy efficiency best practices.

## Resources

1. **Green Lease Leaders: Using the Lease to Galvanize Landlord-Tenant Engagement and Higher Performing Buildings**  
Learn from Green Lease Leaders that are using strategies to increase tenant engagement that unlocks greener, higher-performing buildings and spaces that go above and beyond the critical goal of reducing energy consumption.
2. **Landlord-Tenant Partnership Efficiency Toolkit (see the “Engage Occupants” section)**  
Changing the status quo is never easy but this section will help guide you through proven tactics to incentivizing energy efficient and sustainable behavior.
3. **ENERGY STAR At Home Tips**  
ENERGY STAR provides tips on how to save energy inside and outside the home.
4. **ENERGY STAR 8 Great Strategies to Engage Tenants**  
Proven strategies to engage employees and tenants in saving energy.

## Energy Transparency

### Intent

The goal of this credit is to encourage energy data transparency and collaboration between the landlord and tenant. Landlords who have control of utility data should provide tenants the ability to understand their actual usage through submetering. Tenants who control the utility data should share the data with their landlords so that landlords understand the whole building's energy consumption. Data transparency between landlord and tenant is critical to meeting ESG goals of both parties, while meeting additional landlord requirements such as building performance regulations and annual investor reporting.

- Multifamily: Eligibility for this credit includes working with your local utility to access whole building data.
- Platinum applicants: This credit is **REQUIRED** to achieve Platinum recognition.

### Silver Requirements

- Provide evidence within **standard lease form OR corporate policy** of the applicable required data sharing of leased spaces based on your lease structure:
  - **If landlord has control of the tenant space utility data:** Please provide evidence the tenant is required/able to submeter.
  - **If landlord does NOT have control of tenant space utility data** (e.g., triple-net leases): Please provide evidence of tenant data sharing requirement.
  - **Multifamily:** For landlords working with their local utilities to access whole building data, provide documentation that demonstrates a process is in place to receive whole building data from the utility. This can include a screenshot of an email from the utility.

### Gold & Platinum Requirements

- Provide Silver requirements AND
- Provide evidence of the applicable required energy data transparency effort implementation in your leased spaces within **one of the following:**
  - Executed lease OR
  - For landlords working with their local utilities to access whole building data, demonstrate tracking of the whole building data provided from the utility. This can include a screenshot of a utility tracking portal or spreadsheet.

## Resources

1. **IMT Green Lease Language Examples (see sections “Data Sharing/Disclosure” and “Submetering”)**  
Sample lease language for tenant energy disclosure and to implement a submetering clause.
2. **Retail Green Lease Primer (see item #8 and #9 on pg. 2)**  
Lease provisions, modifications, and costs and benefits to submeter leased spaces.
3. **Retail Green Leasing (see “Utility Metering & Operating Expense: Submetering” on pg 3 and “Utility Data Sharing” on pg 4)**  
Sample lease language to implement a submetering clause.
4. **Local Laws of the City of New York (see “Article 311: Installation of Electrical Sub-meters in Tenant Spaces” on pg. 4)**  
Lease language to implement submetering in tenant spaces.
5. **Making Efficiency Work for You (see “Building Utility Data Sharing” on pg. 9)**  
Sample lease language for tenant energy disclosure.

## Example Lease Clauses

*Landlord will install an electric submeter to service the lease premises to measure the consumption of electricity in the lease premises, and Landlord will charge Tenant and Tenant will pay as an additional charge hereunder such amounts as are invoiced by Landlord for Tenant’s electricity usage as measured by such submeter, without markup by Landlord, and Landlord will make appropriate adjustments to the electricity charges included in Operating Expenses so that Tenant’s proportionate share of operating expense increase will not include such amounts with are separately invoiced and paid by Tenant.<sup>7</sup>*

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*Tenant shall be required to submit on a(n) [monthly, quarterly, annual] basis to Landlord energy and water consumption data, including total usage and total charges as they appear on Tenant’s electric, gas, water, and other utility bills, in a format deemed reasonably acceptable by Landlord.*

*The Landlord participates in an energy benchmarking program with the United States Environmental Protection Agency (EPA) called ENERGY STAR Portfolio Manager®. This program helps the Landlord improve the energy efficiency of the Building. To this end, Landlord may request Tenant to provide monthly electricity data for the Leased Premise from the utility company.<sup>8</sup>*

7. Source: **“Retail Green Leasing,”** Institute for Market Transformation

8. Source: **“Making Efficiency Work for You,”** Institute for Market Transformation and Council of Smaller Enterprises

## Establish a Whole Building Performance Reduction Goal in Carbon or Energy Use Intensity (EUI) units

### Intent

Real estate in the U.S. and around the world is experiencing an astronomical disruption due to stakeholder demands such as climate change policies. This will reshape the future of buildings, how they are built, operated and occupied for the foreseeable future. To meet this requirement, building owners and tenants need to prioritize **building-level** strategies that reduce whole building carbon emissions, and comply with more stringent regulations and reputational requirements.

- Platinum applicants: This credit is **REQUIRED** to achieve Platinum recognition

### Silver Requirements

- Provide evidence of a building performance goal that reduces a building's carbon or site energy use intensity (EUI) to meet a target goal by a target year (examples: committing to **Science Based Target Initiative (SBTI)**/ net zero by 2050/ **Better Climate Challenge**, or an energy reduction goal to comply with jurisdictional building performance standard mandates) and include landlord and tenant responsibility towards meeting the goal within:
  - Standard lease form OR
  - Corporate policy AND
- Provide an **action plan** outlining the landlord-tenant responsibilities to meet the building performance goal. This step is essential to providing a transparent process for achieving building performance goals.

### Gold Requirements

- Provide Silver requirements AND
- Provide the building carbon or site EUI performance clause within an **executed lease**.

### Platinum Requirements

- Provide Gold requirements AND
- Provide **documentation** verifying that the performance goal and action plan are implemented.

## Building Performance Goal

The directive is to identify and set a building performance goal that requires the entire building's energy consumption and/or carbon emissions to be evaluated. With tenants **consuming upwards of 80%** of the energy in a leased building, it is critical to integrate tenant energy-reduction strategies to improve whole-building energy performance.

- To make an accurate calculation, the landlord should evaluate all energy consumed (including plug loads, lighting, and heating and cooling loads), and set an energy consumption limit for base building, common area, and tenant spaces.
- The building goal does not need to be public to earn Platinum recognition, but it should be stated within a lease and/or in a corporate policy or other form of communication that is shared with tenants. Tenant agrees to implement solutions that contribute to building's carbon reduction goal.

## Provide an Action Plan to Meet Performance Goal

A building specific action plan to meet a performance goal should include the following components (in whole or in part):

- The stated performance goal for the building
- Energy efficiency
  - An energy audit/recommissioning report of energy conservation measures
  - A capital plan and timeline to complete the recommended measures
  - Plan related to incorporating efficiency into tenant fit outs and as applicable
  - A plan for calculating, setting consumption limits, and monitoring tenant energy usage
- Electrification
  - Identifying and timeline for replacing any equipment over time that uses fossil fuels
- Renewable energy
  - Review of renewable opportunities
  - Plan for integrating renewables either on site or off-site, such as green power procurement
  - Includes plan for tenant engagement
  - Ongoing monitoring of progress to goal

## Resources

1. **National Renewable Energy Laboratory's how-to guide on properly installing an APS in an office setting**
2. **Getting Started with Performance-Based Leasing**  
This document is part of a toolkit providing commercial building owners and their tenants with a high-level introduction to the growing trend of building performance-focused legislation; the impacts of such policies on traditional leasing structures; and the new concept of performance-based leasing.
3. **Performance-Based Lease Template**  
A performance-based template lease with provisions to create an equitable agreement between landlord and tenant clearly defining a building's performance goal and how both parties will meet this goal.
4. **Summary of Model Performance-Based Lease Provisions**  
This document provides a high-level look at key provisions in IMT's model performance-based lease template.
5. **Department of Energy Better Climate Challenge**  
A voluntary, market-based platform for organizations to set ambitious, portfolio-wide, operational GHG emissions reduction goals and showcase how they are taking steps to address climate change.
6. **Department of Energy Better Buildings Decarbonization Resource Hub**  
A library of resources and solutions to learn more about decarbonization and the steps to implementing a successful decarbonization strategy.

## Example Clauses for Meeting Performance Goals

**Local Law Compliance:** *“The Tenant, at its expense, shall comply with Landlord’s Building Performance Goal. The Tenant shall also comply with any federal, state, or local laws applicable to the reduction of greenhouse gases or the use of sustainable materials, to the extent such laws are applicable to Tenant.” (IMT Performance-based lease provisions 2021)*

**Recommissioning:** *“Prior to the recommissioning set forth in [x section], every [x] calendar years, Landlord will work with a Tenant point of contact to issue a survey to all occupants of the Premises to evaluate thermal comfort, functionality, transportation methods, health and productivity, and Tenant operations, including the type of equipment used, lighting systems, plug load management, and hours of operations. Survey results will be used to inform recommissioning and to improve the functionality and comfort of the Premises. Surveys shall be coordinated through the designated Tenant point of contact and shall not occur more than once per calendar year. Interviews may be used to supplement the surveys, pending approval from the Tenant point of contact.” (IMT Performance-based lease provisions 2021)*

**Zone Control:** *“Provide individual thermostat control for office Space with*



control areas not to exceed 1,500 ANSI/BOMA Office Space (ABOA) SF. Interior spaces must be separately zoned. Specialty occupancies (conference rooms, kitchens, etc.) must have active controls capable of sensing Space use and modulating HVAC system in response to Space demand. Areas that routinely have extended hours of operation shall be environmentally controlled through dedicated heating and air conditioning equipment. Special purpose areas (such as photocopy centers, large conference rooms, computer rooms, etc.) with an internal cooling load in excess of 5 tons shall be independently controlled. Provide concealed package air conditioning equipment to meet localized spot cooling of tenant special equipment. Portable space heaters are prohibited. (Source: **GSA Request for Lease Proposal template**)

**Landlord-Tenant Communication Plan:** *“To promote Sustainable Use and Sustainable Management, the Landlord shall organize a meeting to take place monthly/quarterly (“Sustainability Dialogue”) in which the following shall be decided on: a) The recording and analysis of suggestions by the Tenant [tenants] concerning the Sustainable Use and/ or Sustainable Management of the Leased Property and the discussion of suitable measures; b) The preparation of manuals and/or guidelines on Sustainable Use and/or Sustainable Management; c) If manuals and/ or guidelines on Sustainable Use and/or on Sustainable Management exist, how their content and discussions as to any revision are to be communicated; d) The implementation of further means of optimizing Sustainable Use and/or Sustainable Management. [e) The coordination of the means for the Parties jointly to market the sustainability standards that have been achieved at the Leased Property including aspects of Sustainable Use and/ or Sustainable Management to third parties.] The representatives of the Landlord, any property and/or facility management company and third parties involved in the management of the Leased Property shall participate in the Sustainability Dialogue. On the part of the Tenant [the Sustainability Officer/at least one employee] shall participate in the Sustainability Dialogue. The Sustainability Dialogue should take place [every quarter/every half year/as required but at least [ ] with a view to promoting Sustainable Use and Sustainable Management. The Sustainability Dialogue may also take place within the framework of [other discussions/a meeting of the advertising association of the Leased Property] as an independent discussion point. (DLA Piper. German Market Toolkit. 2015)*

## Establish Social Impact Goals for Health, Wellness, Diversity and Inclusion

### Intent

Communities are calling for a just transition to a regenerative economy. Provide a healthy, safe and equitable working environment for all occupants by utilizing expertise, technology, and innovation to manage the day-to-day performance of buildings and tenant spaces.

- Platinum applicants: This credit is **REQUIRED** to achieve Platinum recognition.

### Silver Requirements

- Provide evidence of **standard lease form, corporate policy, checklists, or procurement policies** which include **at least 6 out of 12 items** from the list below.
  1. **Green building certification** achievement, such as achieving one or more of the following:
    - A. LEED
    - B. Green Globes
    - C. BREEAM
    - D. WELL Building Standard
    - E. WELL Equity Rating
    - F. Fitwel
    - G. Living Building Challenge
    - H. SEAM
    - I. Passive House
    - J. Other global green building standard not listed above that addresses health & wellness and/or equity
  2. **Indoor Air Quality** management plan including regular monitoring and testing
  3. **Green cleaning policy** to reduce building occupant potential exposure to chemicals or other contaminants that can adversely affect human health
  4. **Active building design** that encourages walking, bicycling, recreation, social connection, and connection to nature
  5. **Vendor prioritization** of vendors/contractors with high-road contracting practices that address safe working conditions, fair livable

wages, and encourage continuous training

6. **A supplier scorecard** that ranks suppliers on their environmental, social and governance practices, including labor practices, human rights, diversity and inclusion, and ethical business practices
7. **Supplier diversity goal** including setting and tracking a goal to increase spending with diverse suppliers, for example, minority-owned, women-owned, LGBTQ, and veteran-owned companies and date by which the goal will be achieved
8. **Supplier apprenticeship program** that includes mentorship or access to grants providing the skills and financial access needed for minority-owned businesses to compete with larger resourced vendors/suppliers
9. **Community supplier diversity and apprenticeship program** that offers training and mentoring to community members, or local hiring pool, providing skills so they can enter the clean energy industry
10. **Racial equity** policies and training that combat racial bias, such as non-retaliation policies, bystander intervention training, and cultural competency courses
11. **Diversity training** to educate employee and building tenants on racial profiling and de-escalation training to avoid creating unsafe conditions for employees and customers
12. **Other** health, wellness, or diversity and inclusion examples not listed will be considered on a case by case basis

### Gold & Platinum Requirements

- Provide Silver requirements AND
- Provide **documentation** verifying the social impact goals for health, wellness, diversity and inclusion are tracked and implemented in a building and across a portfolio.

## Resources

### Health

1. **Building Performance Standard Module: Ventilation and Indoor Air Quality**  
This document is part of a series of creative, impactful policy toolkits consisting of policy briefs and deployment modules designed for jurisdictions but can be adapted by building owners to address complex social and environmental problems related to the built environment.
2. **U.S. Green Building Council Green Building Certification**  
LEED V4.1 Guide  
A rating system for the design, construction and operations of high-performance green buildings.
3. **Fitwel Certification System**  
Fitwel Resource  
Resources provide you with the information needed to advance health and wellbeing in your buildings and communities.
4. **International WELL Building Institute Health and Safety**  
The WELL Health-Safety Rating for Facility Operations and Management helps buildings and organizations address the health, safety and well-being of their most valuable asset-people.
5. **RESET Building Standard**  
A data quality standard explicitly designed for continuous monitoring sensors in the built environment.

### Diversity & Inclusion

#### Industry Examples

6. **Apple Supplier Mentorship Program**  
The Apple mentorship program selected companies to participate in customized training, and have access to Apple experts and an alumni community. Following the three-month virtual program, the companies will be considered for opportunities to act as suppliers to Apple as it works to become carbon neutral for its supply chain and products by 2030.
7. **Brandywine Schuylkill Yards Social Impact Case Study**  
This case study demonstrates how a developer can positively contribute to local economic opportunity in West Philadelphia. Their efforts included investing in more inclusive procurement, job training and technical assistance programs. (pg. 26).
8. **CBRE Procurement Process, Purchasing Company Pledge and Policy**  
CBRE created a free registration portal for any diverse supplier to register their interest in working with CBRE. CBRE also pledged to spend \$1 Billion

with diverse suppliers in 2021 and to grow this spending to \$3 Billion by 2025.

9. **Columbia Property Trust Supplier Diversity Program**

In this program, Columbia Property Trust attracts and retains diverse suppliers through engagement, outreach, assistance and an internal process that assesses insurance limits, contract requirements, and access to opportunities.

10. **UPS Company Policy on Unconscious Bias Training**

95% of UPS' management employees have undergone unconscious bias training to strive toward a more inclusive environment.

11. **The Racial Bias in Retail**

Sephora commissioned the first of its kind research study on the state of racial bias in retail today.

12. **Taza Development Indigenous Hub**

The Taza development is a 1,200 acre mixed use property that provides the opportunity for Tsuut'ina citizens to work, live and flourish near their families and extended Native community while strengthening the Tsuut'ina Nation's economic stability.

Guides

13. **Building Innovation Hub Contractor Selection Criteria Checklist**

This document provides recommendations when reviewing bids and for RFPs and RFQs as part of the contractor selection criteria.

14. **Building Innovation Hub Vendor High-Road Contracting**

This guide incorporates business standards of productivity and efficiency, environmental sustainability, livable wages, and shared prosperity and inclusion.

15. **National Multifamily Housing Council NMHC Industry Framework for Racial Equity and Economic Inclusion**

This action guide helps companies expand economic inclusion by hiring and partnering with minority-owned companies and those with racially diverse leadership.

16. **Solar United Neighbors: Community Solar in Maryland**

Community solar projects allow a subscriber (individual, business, non-profit, or municipality) to purchase or lease a share of off-site solar generation and have that electricity credited on their monthly electric bill, just as if the panels were on their own roof. Maryland launched a pilot community solar program in the spring of 2017. This report highlights the program's successes to date and discusses the obstacles that remain.

17. **Emerald Cities Collaborative Inclusive Procurement**

This report sets forth recommendations for strengthening the field of practices by detailing the rationale for inclusive practices, supported by

historical and current equitable development policies, trends, challenges and best practices. pg. 30

18. **Diversity Wins: How Inclusion Matters**

Research from McKinsey explores the business case and relationship between diversity and financial outperformance strengthens over time.

19. **Duke Realty Corporation Real Estate Mentorship and Scholarship Program**

Duke Realty created ProjeT REAP, a real estate diverse apprentice program dedicated to diverse professionals with a desire to enter the real estate industry. The DREAM scholarship, also established by Duke, housed in Roosevelt University in Chicago to advance women and minorities in the real estate industry.

20. **Open to All**

Join Open to All and gain access to free resources guiding corporate policies on racial equity. Open to All is a program that unites national leaders in business, civic engagement, and the nonprofit sector to support the shared American values of fairness and equality. In addition to the 500,000 business members, Open to All includes more than 200 nonprofit members spanning civil rights and racial justice organizations; LGBTQ equality organizations; health and disability organizations; faith organizations; and more. Open to All members are committed to building awareness and understanding about the importance of nondiscrimination—and to defend the bedrock principle that when businesses open their doors to the public, they should be Open to All.

21. **Open to All's Business Resource Toolkit**

(training videos available only to members)

22. **International Living Future Institute**

Company Policy - The JUST Program is a voluntary disclosure tool for all organizations, providing guidance to follow as organizations seek to integrate and disclose social justice action

23. **Just Capital Corporate**

Racial Equity Tracker a tool to help companies take meaningful steps to advance racial equity.

25. **Corporate Racial Equity Alliance Advancing Frontline Employees of Color**

Innovating for Competitive Advantage in America's Frontline Workforce.

26. **WELL Equity Rating**

"The WELL Equity Rating gives organizations an actionable framework to improve access to health and well-being, celebrate diversity, prioritize inclusivity and promote sensitivity while addressing disparities in populations that have been traditionally marginalized and underrepresented."

## Establish Impact Goals for Building Resilience and Climate Risk

### Intent

As climate related events continue to increase in frequency and intensity, buildings have the opportunity to provide lifesaving services for the communities to help support community survival and resiliency during emergencies impacted, called “passive survivability.” By adhering to organization-wide carbon emissions reduction goals, organizations have the opportunity to minimize their contribution to global climate change and climate related events.

- Platinum applicants: This credit is **REQUIRED** to achieve Platinum recognition.

### Silver Requirements

- Provide evidence of **standard lease form, corporate policy, or checklists, or procurement policies** which include **at least 6 out of 12 resilience strategies/practices** from the list below:
  1. **TCFD alignment** (Task Force on Climate-Related Financial Disclosures)
  2. **Company-wide Science-Based Target and/or Net Zero goal** to reduce carbon emissions
  3. **Organization-wide Scope 3 emissions** reduction target
  4. **Company-wide Zero Waste goal**
  5. **Embodied carbon reduction goal** and reduction plan. This may include a project-level target or a material-level target
  6. **Conduct climate risk assessments** and developing subsequent climate risk mitigation plans
  7. **Achieve RELi certification** by assessing and implementing a plan to provide life-saving service in the event of extended loss of power, heat, or water
  8. **Incorporate adaptive design into your buildings** for flooding, sea rise, storm surge and extreme weather events and plan systems for 500 years floods. (See ReLi v2, Hazard Adaption & Mitigation, Action 1.2 and 4.2 respectively)
  9. **Provide space for essential resources** during a state of emergency or other disruptive event which support the community’s needs. Examples of essential resources may include shelter, water, food, heating/cooling, power, and medical services, such as vaccinations

10. **Provide reliable power sources** (i.e. microgrids, backup generators, or battery storage) to allow for shelter-in-place for the local community in the event of a climate emergency
11. **Track embodied carbon** for the organization
12. **Other:** Climate risk and resiliency strategies/practices examples which seek to improve business practices will be considered for this criterion.

## Gold & Platinum Requirements

- Provide Silver requirements AND
- Provide **documentation** verifying the building resilience and climate risk goals are tracked and implemented in a building and across a portfolio.

## Example Commitment

1. Commitment to meet a **Zero Waste** goal AND a policy outlining how the goal will be met by the building operator and occupants AND your process for tracking that progress
  - Example policies include procurement guidelines, vendor selection criteria, reporting requirements
2. Commitment to net-zero embodied carbon AND a policy outlining how the goal will be met by the building operator and occupants AND your process for tracking that progress
  - Example policies include procurement guidelines, building material use guidelines

## Resources

### Resiliency

#### Industry Examples

1. **Green Lease Leaders: Retailers Leverage Tenant-Landlord Communication During Pandemic**  
Case study demonstrating how retailers leverage tenant-landlord communication during a pandemic (2021)

#### Guides

2. **U.S. Department of Energy Better Buildings Resilience Resource**  
Resources to help organizations across different sectors take steps to build resilience and increase their ability to bounce back from natural disasters and other stressors



3. **U.S. Climate Resilience Toolkit**  
Resources to help organizations across different sectors take steps to build resilience and increase their ability to bounce back from natural disasters and other stressors
4. **Heitman and Urban Land Institute case study**  
Climate Risk and Real Estate Investment Decision-Making guide for investors and investor managers to explore new approaches to find better tools and common standards to help the industry get better at pricing climate risk in the future
5. **IFMA Resilient Building Systems article**  
Questions for Developing Resilience Criteria
6. **2020 Enterprise Green Communities credit 4.7**  
Recommendations for providing access to potable water during an emergency

### **Scope 3 Emission Reduction and Embodied Carbon**

7. **Greenhouse Gas Protocol: Corporate Value Chain Accounting and Reporting Standard**  
A document providing requirements and guidance for companies and other organizations to prepare and publicly report a GHG emissions inventory that includes indirect emissions resulting from value chain activities (i.e., scope 3 emissions).
8. **Carbon Leadership Forum: CLF Embodied Carbon Toolkit for Building Owners**  
A library of resources to support action by owners to reduce carbon emissions in buildings.
9. **Embodied Carbon in Construction Calculator Tool (EC3)**  
A free tool that allows benchmarking, assessment, and reductions in embodied carbon, focused on the upfront supply chain emissions of construction materials.
10. **TRU GBCI.org: REDESIGN. RETHINK. REDUCE. REUSE. GO BEYOND RECYCLING**  
Fact sheet on TRU defining how companies can design material to reduce waste.
11. **Americas ULI: Embodied Carbon in Building Materials for Real Estate**  
Provide guidance for building owners to make the business case for a low carbon materials future. This resource includes case studies and steps to reduce embodied carbon.