

Green Lease Leaders

REFERENCE GUIDE FOR **TENANTS**



Developed by:



Contents

2	Introduction	23	Credit 5: Implement Tenant Energy-Management Best Practices
4	Common Questions	27	Credit 6: Purchase On-site Renewables if Offered by Landlord and Competitively Priced
6	Overview of Requirements	29	Credit 7: Accept Cost Recovery Clause for Energy Efficiency Upgrades Benefiting Tenant
8	Prerequisite 1: Provide Sustainability Contact	31	Credit 8: Include Requests for Energy Information in Site Selection Questionnaire
10	Prerequisite 2: Require Minimum Energy Efficiency Fit-out	32	Credit 9: Commit to Actively Contributing to a Whole Building Performance Reduction Goal in Carbon or Energy Use Intensity (EUI) Units
12	Prerequisite 3: Integrate Environmental and Social Performance Impact Goals in Leasing (Platinum)	39	Credit 10: Establish Social Impact Goals for Health, Resilience, Diversity, and Climate
14	Credit 1: Track Tenant Space Energy Use		
17	Credit 2: Track Tenant Space Water Use		
19	Credit 3: Request Whole-Building ENERGY STAR Score from Landlord Annually		
21	Credit 4: Ensure Transaction Management Team Receives Energy Training		

DISCLAIMER

This document was prepared as an account of work sponsored by the United States Government. While this document is believed to contain correct information, neither the United States Government nor any agency thereof, nor The Regents of the University of California, nor any of their employees, makes any warranty, express or implied, or assumes any legal responsibility for the accuracy, completeness, or usefulness of any information, apparatus, product, or process disclosed, or represents that its use would not infringe privately owned rights. Reference herein to any specific commercial product, process, or service by its trade name, trademark, manufacturer, or otherwise, does not necessarily constitute or imply its endorsement, recommendation, or favoring by the United States Government or any agency thereof, or The Regents of the University of California. The views and opinions of authors expressed herein do not necessarily state or reflect those of the United States Government or any agency thereof or The Regents of the University of California

INTRODUCTION

Buildings generate nearly 40% of annual global greenhouse gas emissions.¹ 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.²

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) 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 standards for what constitutes a green lease. It includes three levels: Silver, Gold and Platinum. Silver recognizes companies that have drafted a green lease; Gold recognizes companies that have executed a green lease and Platinum

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

recognizes companies striving for 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 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 tenants on how to achieve recognition as a Green Lease Leader.

Common Questions

What is a portfolio?

A portfolio is the group of buildings or leased spaces to which the participant's green leasing practices apply. Tenant participants should strive to define the portfolio as all of their 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. Examples include a regional portfolio or all buildings within an investment fund. Green Lease Leader portfolios which do not include the participant's entire leased portfolio will be considered on a case-by-case basis.

I have many leases that will not come up for renewal for years. Can my organization still be recognized as a Green Lease Leader?

Yes. Participants are not required to renegotiate existing leases to meet their new green leasing policies before the renewal date. Revised policies and lease language should be the "going in" offer in lease negotiations in new leases and lease renewals as they occur.

What if I'm not able to get every green leasing clause my organization has committed to into every lease I sign?

That's OK. It is understood that some green lease requests may be denied or changed during the lease negotiation process. However, starting lease negotiations with these requests ensures that both parties will at least discuss the intent of green leasing clauses. Many Green Lease Leaders have found that energy- and water-related clauses and requests are easily negotiated into the final lease.

For Gold level recognition, does my organization have to meet all prerequisites and credits in a single executed lease?

Yes. While it is not required that every executed lease to contain each prerequisite and credit pursued, applicants must provide at least one lease that shows all elements were executed.

For Platinum level recognition, does my organization have to meet Prerequisite 4 in one lease?

No, during this first year this level will be in the beta stage which means platinum applicants have the option to submit documentation for meeting each requirement in any combination below:

- Executed lease
- Corporate guidelines
- Procurement policies
- Other relevant documentation

How do I apply for recognition?

The online application can be found at www.greenleaseleaders.com/apply

Overview of Requirements

Green Lease Leaders recognizes three levels of achievement—Silver, Gold, and Platinum. The Silver level recognizes the establishment of foundational policies and business practices that encourage reduced energy and water consumption in leased spaces, while the Gold level builds on Silver level achievements, and recognizes execution of green leases and energy-efficient tenant fit-outs, and Platinum exemplifies achievements by both landlord and tenant to integrate environmental and social priorities into the lease. Meeting the requirements for either level implies portfolio-wide implementation, i.e. the entire portfolio of leased spaces must be covered under the documentation provided to satisfy each prerequisite or credit. (See “Common Questions” 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.*

To achieve Silver level recognition, tenants must establish a standard lease or corporate guidelines³ that meet the following prerequisites.

1. Provide sustainability contact to landlords
2. Require minimum energy efficiency standards for fit-outs

Credits

Organizations must also address at least 5 of the following best practices in a standard lease, policies, or corporate guidelines:

1. Track tenant space energy use
2. Track tenant space water use
3. Request whole-building ENERGY STAR score from landlord annually
4. Ensure transaction management team receives energy training
5. Implement tenant energy management best practices
6. Purchase on-site renewables if offered by landlord and competitively priced
7. Accept cost recovery for efficiency upgrades benefiting tenant
8. Include requests for energy information in Site Selection Questionnaire
9. Commit to actively contributing to a whole building performance reduction goal in carbon or Energy Use Intensity (EUI)
10. Establish social impact goals for health, resiliency, diversity, and climate

To achieve Gold recognition, tenants must show implementation of at least two prerequisites and at least five credits listed above by providing an executed lease and other verifying documentation. Gold level recipients are eligible to be featured in a case study.

3. Corporate guidelines are statements of standard practice that applies to your entire GLL portfolio. They can be in multiple documents, and can be incorporated into existing documents.

To achieve Platinum recognition, tenants must meet Gold level requirements, AND demonstrate adoption of credits 9 and 10 in a lease, policy, procurement, or corporate guidelines. Platinum level recipients are also eligible to be featured in a case study.

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

Intent

Requirements

Silver level

Gold level

Platinum Level (if different from Gold requirements)

Documentation

Silver level

Gold level

Platinum Level (if different from Gold requirements)

Resources

The motivation behind each prerequisite or credit is described in the “Intent.” The “Requirement” describes how to satisfy each credit or prerequisite, while the “Documentation” section establishes the documentation needed to confirm achievement of the prerequisite or credit 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 the credit such as templates, example lease clauses, and calculators.

Provide Sustainability Contact

Intent

Ensure that landlords will be able to easily communicate with the correct person within the tenant organization regarding energy efficiency, retrofits, billing issues, etc.

Requirements

Silver level:

- Include a clause in the standard lease or establish corporate guidelines noting the landlord sustainability/energy contact(s).

Gold level:

- Meet the Silver level requirement AND
- Execute at least one lease stipulating sustainability contact(s) to the landlord.

Documentation

Silver level:

- Standard lease or corporate guidelines requiring a sustainable/energy contact be identified.

Gold level:

- Silver level documentation AND
- At least one executed lease including a sustainability contact AND
- Estimated percentage of total square footage meeting this prerequisite.

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 for 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:

Require Minimum Energy Efficiency Fit-out

Intent

Ensure that key systems installed or modified as part of fit-out (e.g. lighting, supplemental cooling, etc.) enable lower energy costs and greater visibility to energy use for the tenant during the lease term.

Requirements

Silver level:

- Require leased space fit-outs to meet the **Environmental Protection Agency's (EPA) ENERGY STAR Tenant Space criteria** listed below, or other criteria equally or more stringent:
 1. Estimate tenant space energy use with **EPA's Target Finder Calculator**⁴ or equivalent
 2. Meter tenant energy use
 3. Light efficiently (use **ENERGY STAR For Tenant Spaces: Lighting Analysis** to determine the target lighting energy unit intensity)
 4. Install efficient equipment
 5. Share meter data with landlord on annual basis

Gold level:

- Meet the Silver level requirements AND
- Execute at least one lease requiring the fit-out to meet the ENERGY STAR Tenant Space requirements or equivalent.

4. The Tenant Space estimation tool is developed for the purpose of benchmarking against the historical energy use and validating against design goals.

Documentation

Silver level:

- Standard lease or corporate guidelines requiring leased space fit-outs to meet EPA's ENERGY STAR Tenant Space criteria or equivalent

Gold level:

- Silver level documentation AND
- At least one executed lease and/or work letter highlighting the requirements of this prerequisite.

OR

- Proof of ENERGY STAR Tenant Space recognition for at least one leased space
- Estimated percentage of building square footage meeting this prerequisite.

Resources

1. **IMT Green Lease Language Examples (see section "Fit-Out and Building Requirements")**
Sample lease language listing tenant fit-out requirements.
2. **Retail Green Lease Primer (item 4 Leased Premises, page 1)**
Lease provisions, modifications, and costs & benefits to achieve an energy-efficient fit-out.
3. **Making Efficiency Work for You (see "Green Tenant Build out," page 8)**
Sample lease language to achieve an energy-efficient fit-out.
4. **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.⁵

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

Integrate Environmental and Social Performance and Impact Goals in Leasing (Platinum)

Intent

This evolution of the Green Lease Leaders program and its recommended leasing practices seeks to better address the full spectrum of environmental, social, and governance (ESG) concerns and opportunities in real estate. IMT's **BuildUp 2030 Framework for the Transformation of Real Estate** provides guidelines on how this might be addressed in real estate more broadly, while the addition of a Platinum tier within Green Lease Leader recognition seeks to specifically address leasing practices and greater ESG impact. This work is ongoing and the Green Lease Leaders program will monitor and evaluate industry feedback and participation in these endeavors.

Requirements

Platinum level:

- Gold level requirements AND
- Credit 1 Track Tenant Space Energy Use.

Credits

Organizations must also address at total of three prerequisites, seven credits, including Credits 1, 9 and 10, in a standard lease, policies, procurement or corporate or equivalent documentation outlining how both landlord and tenant will work to achieve the stated goals.

- **Prerequisites** 1, 2, and 3
- **Credit 1.** Track Tenant Space Energy Use
- **Credit 9.** Commit to actively contributing to a whole building performance reduction goal in Carbon or Energy Use Intensity (EUI) units
- **Credit 10.** Establish Social Impact Goals for Health, Resilience, Diversity, and Climate
- **Four additional credits** of your choosing

Documentation

- Executed lease, procurement policy, corporate guidelines or other relevant documentation meeting the requirements of this prerequisite.

- Estimated percentage of total square footage meeting this prerequisite across the portfolio.

Resources

High level resources which seek to inform why environmental and social issues should be addressed in leased spaces.

- **BuildUp 2030 Framework for the Transformation of Real Estate:**
A report evaluating how business leaders—real estate owners, operators, tenants, and investors—can lead the creation of an economically robust, more socially just, and sustainable future.

Track Tenant Space 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 evaluate the effectiveness of energy improvements.

Requirements

Silver level:

- Establish corporate guidelines that energy use in leased spaces is to be recorded at least monthly.

Gold level:

- Meet Silver level requirement AND
- Record energy use monthly for each leased space in the portfolio.

Documentation

Silver level:

- Corporate guidelines that require energy use in leased spaces to be recorded at least monthly.

Gold level:

- Silver level documentation AND
- Documentation showing energy use is actively tracked across the portfolio. Acceptable documentation includes:
 - Spreadsheet of properties and monthly energy usage
 - Screenshot of ENERGY STAR Portfolio Manager account showing energy tracking
- Estimated percentage of total square footage tracked across portfolio.

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. **Retail Green Leasing (see #2 Benchmark Energy Use on pg. 2)**
Strategies and justifications that tenants can use to monitor energy usage.
3. **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.
4. **Energy Efficiency Lease Guidance (see section 1.1)**
Steps and points of negotiation when implementing policy for benchmarking water and energy usage.
5. **Efficiency Toolkit (see page 20 Measure & Maintain Progress)**
Strategy outlining how benchmarking energy data and audits inform the types of upgrades and retrofits a landlord or tenant can take to address energy inefficiencies.
6. **Making Efficiency Work For You**
A guide for empowering landlords and tenants to collaborate on saving energy and resources.

Example Corporate Guideline

We are committed to reduce our carbon footprint by reducing the energy consumption at our facilities. We shall track energy consumption data at all the leased Premises 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 targets.*

Example Lease Clause

The Landlord and the Tenant will share the Environmental Performance Data they hold relating to the Premises and/or the Building. This Environmental Performance Data will be shared on a regular basis [but not less frequently than monthly/quarterly/annually] with each other, with the Managing Agent and with any third party who the Landlord and the Tenant agree needs to receive such data. Save where they are under a statutory obligation of disclosure, the Landlord and the Tenant will keep confidential the Environmental Performance Data shared under this clause, and will only use such data for the purposes of:

- 1. Monitoring and improving the Environmental Performance of the Premises and/or the Building and/or*
- 2. Measuring the Environmental Performance of the Premises and/or the Building against any agreed targets. The Landlord will procure that the Managing Agent is placed under a similar obligation to that set out in clause [] to keep any shared data confidential and to use it only for the purposes listed in that clause.*

Where the Landlord or Tenant discloses any shared data to a third party, they will procure that third party is placed under a similar obligation to that set out in clause [insert page number of clauses outside of the lease document] to keep any shared data confidential and to use it only for the purposes listed in that clause.”

Track Tenant Space Water Use

Intent

Tracking water use across the portfolio enables both tenants and landlords to understand consumption patterns and identify water-saving opportunities. Furthermore, tracking water over time allows tenants to see the effects of water-saving measures on both water and energy consumption.

Requirements

Silver level:

- Establish corporate guideline requiring water use in leased spaces to be recorded at least quarterly.

Gold level:

- Meet the requirement of Silver level AND
- Record water use quarterly for each leased space in the portfolio.

Documentation

Silver level:

- Corporate guidelines requiring water use in leased spaces to be recorded at least quarterly

Gold level:

- Silver level documentation AND
- Documentation showing water use is actively tracked across the portfolio. Acceptable documentation includes:
 - Spreadsheet of properties and at least quarterly water usage
 - Screenshot of ENERGY STAR Portfolio Manager account showing water tracking
- Estimated percentage of total square footage tracked across portfolio.

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. **IMT: Green Lease Language Examples (See section “Water Consumption”)**
Sample lease language for a tracking water consumption clause.

Example Corporate Guidelines

We are committed reduce our water consumption. Therefore, we shall track water usage data at all the leased Premises on a quarterly basis. Water usage data will be recorded on a quarterly basis 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.*

Request Whole-Building ENERGY STAR Score from Landlord Annually

Intent

An ENERGY STAR score is a 1-100 score describing the energy performance of a whole building as compared to other similar buildings. The score is an indicator of overall building energy performance and operation. Visibility to the score allows tenants to better understand their energy performance in the context of the whole building and to make more informed decisions when selecting a new space to lease.

Requirements

Silver level:

- Establish a corporate guideline or establish a clause in standard lease requiring that whole-building ENERGY STAR scores be requested annually from landlords holding the leases for your organization's portfolio.

Gold level:

- Meet Silver level requirement AND
- Execute at least one lease requiring landlords to provide whole-building ENERGY STAR score to the tenant at least annually.

Documentation

Silver level:

- Corporate guidelines or standard lease requiring that whole-building ENERGY STAR scores be requested annually from landlords holding the leases for your organization's portfolio.

Gold level:

- Silver level documentation AND
- Executed lease meeting the requirements of this credit AND
- Documentation showing ENERGY STAR score requests to landlords (e.g. copy of standard email request sent to landlords and tracking document showing when requests were sent) AND
- Estimated percentage of total square footage meeting this credit across portfolio.

Resources

1. **IMT Green Lease Language Examples (see section “Data Sharing/Disclosure”)**
Sample lease language for tenant energy disclosure.
2. **Retail Green Lease Primer (see item #9 “Utility Data Sharing” on pg. 2)**
Lease provisions, modifications, and costs & benefits to implement energy data sharing lease clause.
3. **Retail Green Leasing (see “Utility Data Sharing” on pg. 4)**
Strategies, justifications, and sample lease language to share energy data.
4. **Template Energy Disclosure Tracker**
Template to track annual ENERGY STAR score provided by the landlord.
5. **Making Efficiency Work For You (see page 9)**
Sample lease language for utility data sharing.

Example Corporate Guideline

We shall request annual ENERGY STAR score from the landlord(s). If an ENERGY STAR score is not available, we shall request the landlord to provide reports for the amount of electricity, natural gas and fuel oil (where applicable) consumed at the building broken down by utility type, energy unit usage (e.g., kWh, therms or ccf, gallons), cost per month for each energy source for the duration of the Lease and the Energy Use Intensity (EUI measured in kBtu/SF/YR).

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.⁶

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

Ensure Transaction Management Team Receives Energy Training

Intent

Maintaining a transaction management team with sustainability training facilitates negotiation and execution of energy-aligned lease contracts.

Requirements

Silver level:

- Establish corporate guidelines requiring each member of the transaction management team to complete at least one hour of training covering the fundamentals of energy efficiency and energy benchmarking in commercial buildings. Acceptable training includes the following:
 - Current LEED Green Associate or LEED Accredited Professional status
 - Completion of **“The Business Case for High Performance Buildings”** training, developed with support from the U.S. Department of Energy
 - Other training such as internally developed energy or sustainability trainings considered on a case-by-case basis.

Gold level:

- Meet Silver level requirement AND
- Record name, date, length, and source of training completed by each member of transaction management team.

Documentation

Silver level:

- Corporate guidelines requiring transaction management team receive energy training.

Gold level:

- Silver level documentation AND
- Documentation of training completed by transaction management team (e.g. transaction management team names, title of training, date completed, and expiration date if applicable).

Resources

1. **The Business Case for High-Performance Buildings**
Free 2-hour online training developed by the Institute for Market Transformation with support from DOE.
2. **LEED Credential Exam Preparation Trainings**
Trainings to prepare individuals to sit for LEED credentialing exams (LEED GA, LEAD BD+C, LEED O+M, etc.).
3. **Template Transaction Management Team Energy Training Tracker**
Template to track training completed by transaction management team members.
4. **Building Innovation Hub: Tenant Broker Playbook**
Guidance for brokers to help tenants understand the long-term implications of their leasing decisions, including how efficiency, health, and safety measures can affect everything from operating costs to worker productivity to ESG reporting.
5. **Efficiency Toolkit (see page 11 for Use high-performance clauses)**
Learn about six (6) strategies that will help you gain buy-in and ensure efficiency is incorporated in decision making and investments made by landlord and tenant.

Example Corporate Guideline

All transaction management team members shall complete at least one hour of sustainability training covering the fundamentals of energy efficiency in commercial buildings.

Implement Tenant Energy-Management Best Practices

Intent

By implementing energy management best practices for the spaces, equipment and systems they control, tenants can reduce their energy waste.

Requirements

Silver level:

- Establish corporate guidelines requiring at least five of the following energy management best practices to be implemented in the leased 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. Maintaining high indoor air quality can increase occupant comfort and reduce building-related illnesses.
 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 occupants to turn off or unplug lights, electronics, and appliances when not in use and/or provide advanced powerstrips at employee workstations.
 8. **Ongoing maintenance:** Obtain regular (quarterly or annual) inspections of HVAC equipment, exhaust fans, etc. if controlled by tenant.
 9. **Energy audit:** Conduct tenant space energy audit at least annually.

10. **Retrocommissioning:** Conduct retro-commissioning 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:** To the extent managed by tenant, monitor supplemental air-conditioning units and refrigerators for leaks.
14. **Central plant:** Continuous optimization of chilled and hot water temperatures/flows.
15. **Data center server rooms:** Optimize air management.
16. **Data center server rooms:** Optimize environmental controls (increase temperature and humidity ranges).
17. **Supplemental cooling:** Optimize operational settings for CRAC units or other supplemental cooling in server rooms or other high-load spaces.
18. **Data center IT load:** Increase server utilization via virtualization.
19. **Other:** Please specify additional energy management practices if not listed above. Eligibility is subject to review.

Gold level:

- Meet the Silver level requirement AND
- Documentation verifying that energy management best practices are implemented in leased spaces

Documentation

Silver level:

- Corporate guidelines requiring at least five of the energy management best practices listed above to be implemented in leased spaces.

Gold level:

- Silver level documentation AND
- Documentation verifying that energy management best practices are implemented in leased spaces AND
- Estimated percentage of total square feet meeting this credit across portfolio.

Resources

1. **Efficiency Toolkit (see page 10)**
Create sustainable operations incorporating two strategies: physical building standards and employee-driven operations.
2. **Building Innovation Hub: Commercial Tenant Playbook**
Use this playbook to prioritize building performance that can provide positive long-term returns on your finances and improve worker productivity.
3. **Making Efficiency Work For You (see “Energy Management” on pgs. 10-11)**
Sample lease language and operation recommendations to demonstrate how tenants can incorporate energy management best practices to lower energy usage.
4. **Energy Efficiency Lease Guidance (see” Section 1.3 - 15 & Appendix A)**
Steps and points of negotiation for implementing energy management best practices.
5. **Template Tenant Energy Management Best Practices Tracker**
Template to track energy management best practices.

Example Corporate Guideline

We are committed to the following energy management practices in our leased spaces:

- 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 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 for HVAC equipment that we control.*
- 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.*

Purchase On-site Renewables if Offered by Landlord and Competitively Priced

Intent

Some building owners are installing on-site renewables to guard against future energy price fluctuations and draw tenants who value building sustainability features. By agreeing to purchase on-site renewables if provided by landlord and priced competitively, tenants can lock in a fixed and known energy cost for the future, contribute to corporate renewable energy purchasing goals, and benefit from a more resilient distributed power source.

Requirements

Silver level:

- Establish a corporate guideline or include a clause in the standard lease requiring the purchase of on-site renewables if provided by the landlord and priced competitively.

Gold level:

- Meet Silver level requirement AND
- Execute at least one lease containing the commitment to purchase on-site renewables if provided by the landlord and priced competitively.

Documentation

Silver level:

- Standard lease meeting the requirements of this credit.

Gold level:

- Silver level documentation AND
- At least one executed lease containing the requirements of this credit AND
- Estimated percentage of total square feet meeting this credit across portfolio.

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. **Promoting Solar PV on Leased Buildings Guide**
DOE resource highlighting benefits, barriers, and strategies for installing solar PV on leased buildings.
3. **Regency Centers Landlord-Retailer Power Purchase Agreement Case Study**
Case study demonstrating the process and insight to successfully implement landlord-tenant PPA for a retailer space
4. **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.

Example Corporate Guideline

We are committed to support renewable resources. We shall purchase renewable energy from landlords if it is provided on-site and offered at a rate that is at or below the rate offered by local utilities.

Example Lease Clause

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. Customer agrees that Provider shall be entitled at any time or from time to time to acquire all of part of the electrical power for the Licensed Area from sources with low and/or zero greenhouse emissions. Additionally, to the extent that Customer pays or reimburses Provider for utility costs in addition to the payment of Base License Fees, Customer acknowledges and agrees that, for the purpose of determining the utility costs payable by Customer, Provider’s actual costs of renewable energy certificates, carbon offsets of other environmental sustainability credits shall be included to the same extent that the utility provider’s costs are included in such determination.

Accept Cost Recovery Clause for Energy Efficiency Upgrades Benefiting Tenant

Intent

When landlords incur capital expenses while making energy retrofits to their buildings, tenants receive the monetary benefits attributed to the decrease in energy consumption, creating a split-incentive problem. This leaves landlords with little incentive to make such energy efficiency improvements. To address this problem, tenants can commit to accept a cost recovery clause allowing landlords to amortize and recover capital costs for energy efficiency improvements made to the building and common areas.

Requirements

Silver level:

- Establish corporate guidelines or include a clause in the standard lease that accepts a cost recovery clause allowing the landlord to amortize and recover capital costs from tenants for energy efficiency improvements made to the building and common areas which benefit the tenant.

Gold level:

- Meet Silver level requirement AND
- Execute at least one lease containing the cost recovery clause.

Documentation

Silver level:

- Standard lease or corporate guidelines meeting the requirements of this credit.

Gold level:

- Silver level documentation AND
- At least one executed lease containing the requirements of this credit AND
- Estimated percentage total square feet meeting this credit across portfolio.

Resources

1. **IMT Green Lease Language Examples (see page 4)**
Sample lease language for cost recovery clause that eliminates the split incentive
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 problem.
4. **GSA Green Lease Policies and Procedures**
Library of sample lease languages adopted by U.S. federal government.

Example Lease Clause or Corporate Guideline

We are committed to support 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

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.⁷

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

Include Requests for Energy Information in Site Selection Questionnaire

Intent

Tenants can quickly assess the energy performance/sustainability of a landlord's building by administering a site selection questionnaire. This will help to ensure the performance of the building meets the sustainability requirements of the tenant.

Requirement

Silver level:

- Update Site Selection Questionnaire to request the following information from potential landlords:
 - Base building energy performance
 - Confirmation if landlord is recognized under Green Lease Leaders program or other sustainable building certification

Gold level:

- Meet Silver level requirement AND
- Administer Site Selection Questionnaire to potential landlords.

Documentation

Silver level:

- Standard Site Selection Questionnaire including requirements of this credit.

Gold level:

- Silver level documentation AND
- At least one completed questionnaire AND
- Estimated percentage total square feet meeting this credit across portfolio.

Resources

1. **Green Leasing Questionnaire**
Template language for energy information in Site Selection Questionnaire.

Commit to Actively Contributing to 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 strategies that reduce whole building carbon emissions and comply with more stringent regulations and reputational requirements.

Requirements

Silver level:

- Establish corporate guidelines or include a clause in the standard lease committing to actively contributing to 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
- Develop 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.
- Both shall include landlord and tenant responsibility towards meeting the goal.

Gold level:

- Silver level documentation AND
- At least one executed lease containing the requirements of this credit.

Platinum level:

- Gold level documentation and/or
- Documentation verifying that the performance goal and action plan are implemented.

NOTE: Platinum requirements include completing Credit 9 and Credit 10.

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.

1. 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.
2. 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.

Action Plan to Meet Performance Goal

The Action Plan includes at least four of the five criteria listed below:

1. Continuous 24/7 whole building energy monitoring and reporting energy consumption.
2. Calculation of the energy consumption goal and energy consumption limits for the building and tenant spaces.
 - a. Energy Use Intensity tracks how energy is consumed (e.g. plug loads, HVAC, lighting).
 - b. Carbon Intensity Units limit the type of fuel source used by the building. This includes tenant space heating and cooling, plug loads, and lighting.
 - Building fuel source and use calculation for heating the building, and cooling tenant space
 - Prorate heating based on tenant footprint
 - Prorate cooling based on % of electricity tenant used from whole building data
3. Inclusion of tenant systems in the recommissioning for the whole-building.
4. Implement tenant fit-outs and operations which improve tenant energy consumption and the ability to continuously monitor energy performance.. The following guidelines optimize tenant energy consumption and integrate with building systems to meet whole-building performance goals without limiting tenants' aesthetic design.

At a minimum, implement a plug load management plan and energy efficiency procurement practices:

- a. **Plug load management.** These strategies include:
 - **Aggregate plug and process loads (PPL) to dedicated electrical panels.** This step allows the building's control systems to turn off PPLs during non business hours. This additional step can easily submeter plug loads, analyze energy-use patterns, and provide feedback to tenants during monthly landlord-tenant check-ins.
 - **Control plug loads from switches.** Per **ASHRAE 90.1**, install switches, vacancy sensors, or timed disconnects to control 50% of receptacles as, including outlets at workstations and in common areas.
 - For projects that cannot integrate advanced controls, require all plug loads to use advanced power strips.
 - b. **Develop a tenant procurement best practices.** Upgrade all equipment to low-energy or ENERGY STAR-certified equipment. All tenant equipment must be energy-efficient or have an upgrade plan to replace old equipment with ENERGY STAR-certified equipment at end of life.
 - c. **Implement a recognized standard.** Standards such as **Urban Land Institute's Tenant Energy Optimization Process (TEOP)** which provides complementary processes to achieve deep energy savings in tenant spaces.
5. Implement a mitigation plan outlining the landlord-tenant relationship, continuous review of energy performance goals, and requirements through ongoing communications. This may be the most important step to ensuring landlords and tenants continuously review energy performance goals. Implement the following:
- Schedule monthly meetings with landlord to review building and tenant energy consumption. Request capital improvement plans and recommissioning timelines to review how the building is continuously improving energy performance.
 - Review building performance with the landlord and discuss if this is on track to meet the performance goal.
 - Address unexpected capital improvement costs, request detailed accounting of expenses and impact to tenants.
 - Request regular emails, newsletters, or announcements highlighting building performance and relevant efficiency best practices.
 - During monthly meetings evaluate and investigate root cause for either party's energy consumption outside of the energy consumption limit. Proactively work together to develop a plan to address energy performance.

Documentation

- An executed lease, addendum, or slip sheet stating building performance reduction target, or equivalent documentation outlining how both landlord and tenant will work to achieve the stated performance goal
- Action plan outlining how the building and tenants will meet their performance goal
- Estimated percentage of total square footage meeting this credit across portfolio

Resources

1. **National Renewable Energy Laboratory’s how-to guide on properly installing an APS in an office setting**
A tear sheet describing Advanced Power Strips and how to manage plug loads based on equipment type.
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**
This performance-based template lease offers provisions to create an equitable agreement between landlord and tenant by 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**
This is 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**
This library of resources and solutions provides information about decarbonization and the steps to implementing a successful decarbonization strategy.

Example Clauses for Meeting Performance Goals

Operating Expense: *“Operating Expense” includes the “costs to comply with laws and governmental requirements of general applicability to the building... the purpose of which is to cause a reduction in greenhouse gas emissions or energy use intensity” and “the costs to comply with building performance*

standards,” including the costs of recommissioning and implementation of resulting recommendations. **(IMT Performance-based lease provisions 2021)**

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)**

Building Performance Data Sharing: “Landlord shall provide Tenant with an annual energy use summary indicating the energy consumed in any Building Common Areas (total and kilowatt hours/square foot) and the energy consumed in the Building as a whole (total and kilowatt hours/square foot) the previous year. Landlord shall also provide Tenant the Building’s ENERGY STAR score” **(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)**

Systems Commissioning: The Lessor shall incorporate commissioning requirements to verify that the installation and performance of energy consuming systems meet the Government’s project requirements. These systems include, at a minimum, heating, ventilating, air conditioning and refrigeration (HVAC&R) systems and associated controls, lighting controls, and domestic hot water systems. The commissioning shall cover work associated with TIs or alterations. In instances involving minimal improvements, recommissioning is required to ensure that the systems are operating properly. In the event the Government exercises a renewal option, recommissioning is required within 60 days after the exercising of the option.

a. *The Lessor shall submit a written commissioning plan prior to completion of Design Intent Documents (DIDs). In instances involving minimal improvements not requiring DIDs, the plan is due within 60 days prior to Space acceptance. The plan shall include:*

- *A schedule of systems commissioning (revised as needed during all construction phases of the project, with such revisions provided to the LCO immediately); and*

- A description of how commissioning requirements will be met and confirmed (**GSA global lease template**)

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**)

Example Lease Provision

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.⁵

Establish Social Impact Goals for Health, Resilience, Diversity, and Climate

Intent

Communities are calling for a just transition to a regenerative economy. To ensure that building owners and operators play a role in addressing systemic injustice in communities as we move forward, this initiative highlights opportunities for real estate to address health, climate, and social priorities, including:

- Protecting the planet through improved materials manufacturing and reduced carbon emissions
- Providing healthy and safe shelter to all
- Providing fair employment for all
- Increasing access and service to marginalized communities—most often low income communities and communities of color—that have previously been penalized by systemic racism
- Using real estate ownership to build local communities and community wealth
- Supporting a just transition to a renewable energy future

Requirements

Silver level:

- Establish corporate guidelines, checklists, or procurement policies requiring at least two of the following social impact priorities.

Gold and Platinum Level Requirements:

- Meet the Silver level requirements AND
- Provide documentation verifying the social impact goals are implemented in a building or across a portfolio.

1. **Health**

Provide a healthy and safe working environment for all occupants. To meet this credit, implement an indoor air quality monitoring and management program that meets the latest ASHRAE 62.1 or exceeds industry best practices outlined in green building certifications schemes such as:

- b. LEED
- c. Fitwel

- d. WELL
- e. RESET
- f. Or equivalent

2. **Diversity & Economic Inclusion: Business Relationships**

In leased spaces companies and/or organizations make decisions every day about the products it uses to design and operate tenant spaces, and those decisions can be infused with criteria around diversifying business relationships, both internally and externally, to boost racial diversity and expand power and economic inclusion across a community. Diversity efforts in the supply chain promotes innovation, resiliency, competitive pricing, better quality products, and generates reputational benefits.

To meet this criteria, establish corporate guidelines to improve diversity and inclusion, and establish a procurement policy that incorporates at least two of the following options:

- **Supplier Scorecard:** Score suppliers on their environmental policies, social and governance, including labor practices, human rights, diversity and inclusion, sustainable procurement, and ethical business practices.
- **Supplier Diversity and Inclusion:** Set and track 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.
- **Competitive and Knowledgeable Suppliers:** Provide mentoring or access to grants providing the skills and financial access needed for minority-owned businesses to compete with larger resourced vendors (suppliers).
- **Community Supplier Diversity and Apprenticeship:** Offer training and mentoring to community members, or local hiring pool, providing skills so they can enter the clean energy industry.
- **Accountability:** Establish a system to measure progress towards improved racial and economic inclusion through supply chain procurement.
- **Racial Equity:** Reduce racial profiling and de-escalation by incorporating policies and training to reduce racial bias.

3. **Diversity & Economic Inclusion: Internal Business Practices**

Companies and/or organizations have begun to evaluate and implement policies addressing inequalities from within. Some of these practices can cross over to include other companies and/ or organizations in leased spaces, by evaluating how both parties can contribute to reaching racial equity goals.

To meet this criteria, applicants must provide evidence of incorporating practices:

- Incorporating high road contracting practices that address safe working conditions, fair livable wages, and encourage continuous training.
- Providing racial profiling and de-escalation training to avoid creating unsafe conditions for employees and customers.
- Implementing diversity and economic inclusion examples not listed which seek to improve internal business practices will be considered for this criteria.

4. **Scope 3 Emission Reduction and Embodied Carbon**

The construction industry has the second largest global supply chain carbon footprint of any industry in the world.⁸ By infusing criteria to reduce scope 3 emissions, companies can have more than 10 times the positive impact on supply chain emissions, creating a ripple of positive action through their value chains.⁹

To meet this credit, applicants must show a commitment to reducing scope 3 emissions resulting from buildings not owned or controlled by the reporting organization, but that indirectly impact your value chain.

Each commitment is established by the company as a:

- **Organization-wide target:** Align teams across organizations to achieve the stated target.
- **Identifies a project-level target:** Set a target that is specific to a building or tenant space, and which contributes to the organization-wide emission reduction goals.
- **Sets a material-level target:** Ensure that the reductions opportunities are followed through the value chain.

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.
 - 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
 - Example policies include procurement guidelines, building material use guidelines

8. Source: Burchart, Jones, Fredeau, M., Hadfield, M, Herhold, P, O'Brien, C, Pieper, C, and Weise, D., "**Supply Chains as a Game-Changer in the Fight Against Climate Change.**" BCG, January 26, 2021.

9. Source: "**Transparency to Transformation: A Chain Reaction.**" CDP, 2020.

Documentation

Silver level

- Establish corporate guidelines, corporate policies or checklist outlining steps for implementing social impact priorities within an organization.
- Establish procurement policies or guidelines incorporating social impact priorities with external partners or through contractual agreements with external stakeholders.

Gold and Platinum level:

- Silver level documentation AND
- Documentation verifying that the social impact goals are implemented
- Estimated percentage of total square feet meeting this credit across 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 & Economic Inclusion: Business Relationships

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. **CBRE Supplier Partner Program and Quality Supplier Development Program**

In this program, a CBRE executive sponsor mentors and manages “top-to-top” relationships with prospective clients with the company. The supplier is trained in developing technologies and program management.

Guides

10. **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.

11. **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.

12. **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.

13. **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.

14. **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)

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

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

Diversity & Economic Inclusion: Internal Business Practices

Industry Examples

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

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

17. **The Racial Bias in Retail**

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

Guides

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.

18. **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.

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

(training videos available only to members)

20. **Open to All's Inclusive Retail Business toolkit**
(training videos available only to members)
21. **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.
22. **Just Capital Corporate**
Racial Equity Tracker a tool to help companies take meaningful steps to advance racial equity.
23. **Corporate Racial Equity Alliance Advancing Frontline Employees of Color**
Innovating for Competitive Advantage in America's Frontline Workforce.
24. **International Living Future Institute Level 2.0: Setting a corporate goal**
"Workforce should be racially representative of the place the organization is located, to a matching percent value. The organization's senior leadership is at least 80% of the representative racial percentage of the town in which the organization is located."

Scope 3 Emission Reduction and Embodied Carbon

25. **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).
26. **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.
27. **TRU GBCI.org: REDESIGN. RETHINK. REDUCE. REUSE. GO BEYOND RECYCLING**
Fact sheet on TRU defining how companies can design material to reduce waste.
28. **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 resources includes case studies and steps to reduce embodied carbon.