

Appendix B

(Resolution No.)

**“Project Green Build:
Optimizing the Building Development Review and Inspection Process to
Encourage High Performance Building Practices”**

BACKGROUND

In 2001, the Portland City Council created the Green Building¹ program (brand name: G/Rated) housed in the Office of Sustainable Development (OSD) and adopted a Green Building Policy to mandate and promote building design, construction, and operation that minimizes the detrimental impacts of the built environment on the public good. As the link between greenhouse gas emissions, poor indoor air quality, water and energy shortages and price increases grows more apparent, the City has responded with an aggressive strategy to reduce the environmental and human health impacts of development.

A major thrust of the City's Green Building program is to "promote the voluntary adoption of green building practices in the private sector". Areas of focus have included the creation of the Green Investment Fund, a small innovation grant program; implementing a comprehensive technical assistance and training program; and creating inter-bureau partnerships to integrate green building services in other City business areas- stormwater, water conservation, and affordable housing. As a result of this integrated approach, Portland now boasts the most LEED registered buildings in the country and an increasingly becoming known as a national leader in green building services and product manufacturing.

While Portland has been successful in working with the development community to embrace and implement green building practices, market transformation continues at a slow pace. Many developers remain unfamiliar with nascent green building technologies and practices, others do not understand the value of it, and some are wary of integrating new strategies that may challenge zoning or building codes. A key task to mainstreaming green building practices remains: streamlining green building into the development review and inspection process. The City's Bureau of Development Services (BDS) issues and manages all building and planning code permits for building and site improvements in Portland. BDS is a key partner and provides significant leverage in moving green building market transformation forward. As the agency responsible for ensuring building health and safety, BDS is well positioned to provide leadership and creativity in promoting best practices that go beyond the building and zoning code minimums.

To address this issue, in 2004 OSD and BDS partnered on an initiative, Project Green Build, to identify strategic areas and tactics within the development review process to promote and facilitate the review of green building projects. A project team made up of various City staff involved in development review was formed and a scope of work developed. OSD convened two meetings with this group to increase OSD's familiarity with the development review process and identify strategic areas where green building could be integrated. In addition, OSD conducted two job shadows with BDS staff, one with a field inspector and another with a plans examiner. From this preliminary research, a series of strategies were identified to encourage and facilitate green building within the development review process. They include:

- Provide BDS Process Management for LEED² registered buildings; and
- Identify building and zoning code improvements to facilitate green building; and
- Identify green building training needs of City development review and field staff; and
- Identify strategies to market the City's green building services at the Development Services Center.

In researching opportunities with BDS to promote green building, the partner team realized the importance of a strategy of inter-bureau partnership and business delivery that aligns with Mayor Potter's vision of increased integration and improved customer service.

¹ Green buildings are distinguished by water and energy efficiency, high indoor air quality, daylighting, locally-sourced materials, renewable energy production, minimized or positive site impacts and increased worker productivity among other characteristics.

² "Green building" is often used in reference to, or interchangeably with, the U.S. Green Building Council's Leadership in Energy and Environmental Design (LEED) green building rating system. LEED is becoming the most widely used tool in the U.S. to help design and evaluate the environmental performance of a building.

RECOMMENDATIONS

BDS and OSD identified the following strategies as the most effective in cultivating interest in green building by BDS customers and enhancing green building receptiveness at the Development Services Center. Project Green Build uses a multi-faceted and customer-oriented approach by integrating green building promotional and educational efforts into several areas of the current development review framework. This maximizes customer exposure to green building in a manner that acknowledges their receptivity at any given stage of the development review process- a distinguishing characteristic of Project Green Build. For example, a pro-active promotional approach may be more appropriate during the customer's early project planning when design can be more readily influenced, whereas a passive-informational strategy might be more effective later in the development process to influence later projects. This, in turn, requires staff competency at strategic areas in BDS that accommodates and promotes customer demand for green building. Through the design, implementation and evaluation of these efforts, OSD and BDS will establish the requisite inter-bureau infrastructure to integrate green building services at the Development Services Center.

Project Green Build – KEY ELEMENTS

I. Improve Green Building Development Review

Permit and plan review and building inspection are critical interaction points between the City and developer/builder/architect/engineer. How are building permits processed? What role does the building inspector play in interpreting zoning and building codes? What opportunities exist to facilitate review of green buildings within BDS's and the partner's organizational frameworks?

A. Process Management for LEED Registered Buildings

Strategy: Provide Process Management for LEED Silver or above registered buildings through BDS.

Action: Applicant will notify BDS of their intent to be a "LEED Silver registered or above" project." Projects must sign a letter of intent and provide a copy of LEED Silver or above registration and preliminary LEED scorecard to qualify to participate.

Rationale: Through LEED certification, the City is encouraging developers to design and build using high-quality development practices. Such practices characterize green building and help reduce impacts to Portland's infrastructure and environmental quality over time. LEED provides a rigorous, third-party certification for buildings that achieve excellence in site connectivity, transit orientation, stormwater management, erosion control, energy and water conservation, materials conservation, indoor air quality, and commissioning.

Partner roles and responsibilities:

- **BDS:** Provide technical assistance to potential LEED-registered projects through BDS Process Management protocols. Develop marketing materials and add content to BDS website promoting the service.
- **OSD:** Develop registration documentation and penalty schedule to ensure compliance with the LEED certification process. Develop marketing materials and add content to BDS website promoting the service. Staff participate in relevant pre-application meetings.

Evaluation: Track number of LEED Silver or above registered projects that receive process management and success rate in earning targeted level of LEED certification. Implement customer survey to gauge customer service, permit speed, and number of code conflicts addressed.

Timeline: May 2005

B. Green Building Technical Assistance at BDS Permit Night and limited office hours at the Development Services Center

Strategy: Provide green building expertise at BDS Permit Night and on a limited offices hours and/or appointment basis at the Development Services Center to facilitate “one-stop shopping for information and permits.”

Actions: Create a green building technical assistance table at the Development Services Center staffed by OSD every Thursday through December 2005 and during limited daytime hours and/or on an appointment basis. Respond to questions about green building and distribute materials.

Rationale: BDS Permit Nights are attended mostly by homeowners and small business owners about to embark on a project. This provides a great opportunity to reach project owners during early project design phasing. Projects are typically conceptual at this point and design decisions are more easily influenced. This is also a unique opportunity for BDS planners, inspectors and OSD staff to interact while responding to “real world” questions about green building as it relates to codes, practices, and applications.

Partner roles and responsibilities:

- **OSD:** Provide technical staff to assist homeowners and small business owners, bring G/Rated handout materials, track number and nature of inquiries, and track accompanying BDS staff members’ time. Set up limited office hours, allow for appointments or walk-up customers, at the Development Services Center during daytime hours.
- **BDS:** Provide staff support to OSD technical staff. Add permanent language to “Permit Night” area on website, “Permit Night” brochure (online and hard copy), and one-time announcement in *Plans Examiner* newsletter describing the “G/Rated green building table” every Thursday at Permit Night. Encourage customers to also meet with OSD technical staff as part of their permitting inquiries.

Evaluation: Create and utilize tracking sheets to record the number and nature of inquiries at permit night.

Timeline: May 2005

C. Green Building Technical Assistance at Pre-Application Conferences

Strategy: Provide green building expertise in pre-application conferences.

Actions: Establish inter-bureau communication infrastructure whereby OSD is automatically notified of LEED projects entering process management and related pre-application meetings. For non-process management projects, implement a check box on the pre-application meeting request form to request presence of an OSD staff member and/or G/Rated materials.

Rationale: Feedback from BDS staff consistently indicates that the pre-application conferences are a good venue for OSD to be present when requested because projects are still impressionable. There is currently no system in place to provide green building expertise and or materials to these impressionable projects and to make these projects aware of the G/Rated program *before* requesting a meeting.

Partner roles and responsibilities:

- **OSD/BDS:** Identify means by which to inform OSD of LEED process management projects. Determine manageable and effective threshold for non-LEED process management projects that can request OSD presence. Determine language to be added to pre-app request form and communication protocol to schedule meetings.
- **OSD:** Provide technical staff on-call to attend all LEED pre-application conferences and when green building expertise is otherwise requested via the revised pre-application form. Assemble package of

materials specifically tailored for pre-application meeting. Develop system for tracking projects and providing on-going technical assistance to projects that warrant additional service.

- **BDS:** Add language to current request form, distribute materials, create marketing materials, and add language to website.

Evaluation: Track the number of LEED and non-LEED requests for OSD technical assistance and materials. Track follow-up by project owners to help determine impact of assistance at pre-application conference. Value will be determined by quantity of requests and project follow through in implementing green building measures.

Timeline: June-July 2005

II. Identify Building and Zoning Code Improvements

Green building practices often go beyond code in the areas of energy and water efficiency, stormwater management, and construction and demolition waste, among others. What zoning and building codes, development review processes, and structural barriers inhibit the application of green building practices? What opportunities exist to improve these areas to encourage a wider range of green building strategies?

A. Code review retreat

Strategy: Design and participate in a facilitated retreat with relevant public and private stakeholders to identify code-related barriers to, and opportunities for, green building.

Actions: A preliminary meeting with David Eisenberg (Director, Development Center for Appropriate Technology; Chair of USGBC Greening the Codes Committee, and LEED Board Member), Anne Hill (Bureau of Development Services), and OSD took place in April, 2005 to plan a two-day “Greening the Codes” retreat. David facilitated a similar effort for the City of Chicago and will lead a session in Portland. Remaining action items include additional planning meetings to solidify explicit retreat objectives, its subsequent design and identifying key retreat participants.

Rationale: Through customer-oriented programs such as Process Management, BDS has made significant strides in improving its services and reputation in the development community. However, persistent code issues coupled with structural and procedural barriers stemming from the various layers of regulation (multi-bureau review, zoning and building code conflicts, state regulation) can inhibit innovation and cause developers to seek only to meet the minimum building code. Gathering all of the relevant stakeholders at the same table with guidance from a green building codes expert will provide a venue to identify specific code, structural, and procedural barriers to green building and create a platform for continued work in this area.

Partner roles and responsibilities:

- **OSD/BDS:** Continue to collaboratively plan and design the code retreat with David Eisenberg. Perform post-retreat evaluation and determine next steps.
- **OSD:** Compile a list of private-sector development professionals knowledgeable and experienced in green building-related development review and code conflicts.
- **BDS:** Compile a list of relevant local and state code officials and staff to attend and participate in the retreat.

Timeline: June-July 2005

III. Implement Green Building Training

Each customer interaction is an opportunity to share green building best practices. In which BDS service areas could heightened green building competency be the most effective in promoting and enabling private-sector green building? What types and levels of competency are needed in these areas?

A. Survey and train

Strategy: Survey relevant BDS staff to identify strategic service areas to increase green building competency. Work collaboratively to identify what type of green building knowledge would be most effective in promoting and/or enabling private green building per service area. Train relevant staff.

Actions: Administer survey to learn the nature of customer interaction in relevant BDS service areas and gather staff input on the most effective strategies to promote and enable green building in those areas. Collaboratively determine strategic BDS service areas in which to build green building competency and subsequent training needs. Identify specific staff to be trained, source of training, and implement.

Partner role and responsibilities:

- **OSD/BDS:** Define survey audience at BDS. Determine survey questions.
- **OSD:** Draft survey for BDS approval, deliver survey and synthesize results. Schedule meeting with BDS project liaison to evaluate results, identify staff to be trained, and evaluate quality of training. Identify training source and schedule training.
- **BDS:** Approve survey, participate in follow up meetings, direct relevant staff to be trained.

Evaluation: Administer a post-implementation survey to BDS customers involved in green building projects to assess how well BDS green building competency accommodated their needs. Also, administer a random survey of non-green building projects to gauge effectiveness of specific promotional efforts.

Timeline: July-August 2005

IV. Implement BDS Green Building Marketing Strategy

The Development Services Center is an important place to educate customers about the benefits of green buildings. What point of purchase materials, fact sheets, internet tools, etc. can be developed for the DSC, inspectors, and the internet that reinforces the City's commitment to green building? What green building incentives can be showcased at different access in the development review process?

A. Promote BDS's Green Building Services on OSD and BDS Websites

Strategy: Promote green building services and City leadership on BDS and G/Rated websites.

Actions: Add content and appropriate links to relevant areas on each bureau's website to promote BDS's green building services and reinforce the connection between development permitting and OSD's G/Rated program..

Rationale: Project Green Build is a cross bureau partnership and implementation strategy. Website communications should reflect the connectivity between G/Rated and BDS, adding beneficial exposure for both bureaus.

Partner roles and responsibilities:

- **OSD/BDS:** Identify relevant areas on each website for linkage. Work with webmasters to incorporate links.

Evaluation: Track individual web visits to relevant areas of BDS and G/Rated websites using an automated tracking tool.

Timeline: July 2005

B. Integrate Green Building into Plans Examiner Newsletter

Strategy: Integrated “Green Corner” short article in Plans Examiner Newsletter

Actions: Work with publisher to designate a small portion of newsletter for a one-paragraph green building news brief or article. Set up a regular schedule whereby G/Rated can submit the article for review by designated BDS staff and then be sent on to the production team.

Rationale: Developing an ongoing series of stories on green building best practices, case studies, and news to add exposure and continue integration between OSD and BDS. This provides a particularly good venue to discuss green building-related code issues and new products.

Partner roles and responsibilities:

- **OSD/BDS:** Develop editorial content for on-going green building stories for Plans Examiner.
- **OSD:** Write short article on green building as established by BDS. Establish system with Plans Examiner production staff to submit articles.
- **BDS:** Copy edit and produce Plans Examiner

Evaluation: Provide an informal survey of readers at the beginning and after one year of their interest in green building practices and level of implementation of such practices.

Timeline: May-June 2005

TIMELINE

October 2004

- *Establish Advisory Group.* Obtain bureaus approval of participation – outline workplan and define roles and responsibilities

November 2004 – March 2005

- *Research Phase.* Analyze development review process of current green building projects, conduct zoning and building codes scan of green building strategies, research facilitated permitting options, identify training needs of BDS staff through survey and interviews.

April 2005

- *Draft Options Study & Recommendations.* Synthesize data and information into an options report that details the feasibility of various short-term and long-term strategies to promote and facilitate green building. Present to Advisory Committee for comments.
- *Final Options Study & Recommendations.* Present study to bureau directors and City Council staff.
- *Present findings and recommendations to City Council for Approval*

May – December 2005

- *Program implementation and evaluation*