10 TIPS FOR COMPLETING AN INITIAL ENVISION CERTIFICATION ASSESSMENT

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The Envision Sustainable Infrastructure Rating System ("Envision") was developed by the Institute of Sustainable Infrastructure (ISI)

QUICK READ

1. **Use Additional Tools**

   -ISI Scoresheet & Guidance Manual:

   http://sustainableinfrastructure.org

   -Pinewoods Assessment Sheet:

   www.pinewoodsengineering.com/envision

2. **Plan For 4-6 hrs. min.**

3. **Read the Credit Interpretations Document:**

   http://sustainableinfrastructure.org/training-material/credit-interpretations

4. **"Not -Achieved" is More Conservative than "Not-Applicable".**

5. **Do a Quick Risk Assessment**

6. **List Acronyms and Jargon**

7. **Do Background Research**

8. **Use Updated Fees**

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9. **Research Other Projects**

10. **Inform Clients of Their Roles & Requirements**

WHY DO AN ENVISION ASSESSMENT?

The purpose of conducting an initial assessment early in the project design phase is to determine whether pursuing Envision Certification should be incorporated into the project goals. An Envision Assessment evaluates and rates the project's benefits to the community, environment, and economy. It also identifies pertinent factors in the decision-making process such as: feasibility, associated costs, applicable requirements, and probability of success. Involving all potential stakeholders in an assessment highlights the responsibilities of each party, the appropriate resources that must be allocated and the establishment of design standards. A unified, collaborative and informed approach amongst stakeholders is essential for Envision success and an initial assessment will identify the degree to which these factors are met.

Pinewoods Engineering, PC recently participated in an Envision Assessment to determine if pursuing Envision certification was an achievable and desired goal for a proposed civil infrastructure project. The following list is ten lessons learned from this process:

1. Consider Using Additional Tools

We found the Envision Scoresheet provided by ISI was too vague and broad to be used as a stand-alone tool. The Scoresheet is an excel file that guides users through the assessment process with yes or no response questions. More often than not, you will find yourself wishing you had more context in meaning of the question (or the option of answering "it depends"). It's also frustrating that this worksheet doesn't tabulate the results (even viewing the results in a bit complicated to understand) and it does not correlate the result to a project certification level. We found it necessary to follow along in The Envision Guidance Manual as we completed each credit assessment. The Manual provides detailed credit descriptions, requirements, and documentation which helps answer many of the context questions. Both the Envision Scoresheet and Envision Guidance Manual can be found here after creating a free log-in account.

For our project, we were surprised to find that the results of the ISI Scoresheet were high; (meaning we qualified for the highest level of certification), despite not achieving a majority of the credits. Using a more detailed Envision Assessment Spreadsheet we created which calculated the actual points of applicable credits based on the level of achievement anticipated we arrived at what we believe to be a much more accurate estimate of the probable project certification. A link to access our Envision Assessment Spreadsheet is http://www.pinewoodsengineering.com/goodies.html

2. Give Yourself Lots of Time (and probably 2 meetings)

This process was intensive and time-consuming. Our team met ahead of time for a pre-assessment before doing it again with the stakeholders. On average, we found the process to take about 4-6 hrs. The initial meeting helped us identify areas we would need to further research and develop questions for the stakeholders.

3. Read the Credit Interpretations Document

We found that thoroughly familiarizing ourselves with ISI's Credit Interpretations document was imperative. This document may be found here. It provided crucial information for assessing credit applicability.

4. When in Doubt, Opt for "Not-Achieved" over "Not-Applicable".

According to the ISI credit interpretation document, back-up documentation supporting the conclusion of "not-applicable" must be supplied for all such designated credits. When in doubt that there is sufficient evidence, it's more conservative to select "Not Achieved". This is because certification is based on the percentage of *applicable* credits.

5. Conduct a Risk Assessment

Some credits had a disproportionally high level of points applied for achievement as compared with others, making them more "high risk" assumptions. We re-reviewed our completed assessment for a little risk-analysis that evaluated the impacts of falling short in key credit areas. This allowed us to give our client; best, probable and worst case scenarios.

6. Know Envision Acronyms and Jargon.

A number of acronyms, references, and industry specific jargon is used in the assessment and credit manual. The acronyms are defined at least once in the Guidance Manual but not on all pages in which they are used. I found it helpful to make a list of acronyms and industry jargon and their associated meanings.

7. Do Background Research of Available Resources and Information

There is quite a bit of available resources and information for particular credits which make them seem less daunting. For example, there are many websites that provide product life-cycle assessments. Ditto for climate change resources. It helps to know what is available as a starting point.

8. Use Updated Envision Fees

The certification verification fees have recently been increased for the first time since the program inception. ISI has produced a nice Envision summary brochure with (outdated) fees access it here. Updated fees are included in the box to the right. Unlike LEED, fees are not dependent on the level of certification pursued.

UPDATED ENVISION CERTIFICATION FEES:
(FROM THE JANUARY 2017 ISI NEWSLETTER)

Project Size (in $M)	Registration Fee	Verification Fees Non-Member	Member
< 5	$1,000	$11,000	$9,000
5 – 25	$1,000	$17,000	$14,000
25 – 100	$1,000	$25,000	$21,000
100 – 250	$1,000	$34,000	$28,000
250 – 500	$1,000	$42,000	$35,000

9. Be Informed of Other Envision Certified Projects

Naturally our team wanted to know what other projects in our area had achieved Envision Certification to get an idea of how we compared. Unfortunately, there were no projects in our area. A list of certified projects and a map of their location can be found here.

10. Inform All Stakeholders (Especially Owners) of Their Roles & Responsibilities

For success, all stakeholders need to be actively involved and put substantial time and effort into the process. We found it imperative to make sure the owner understood how much would be required of them both to obtain certification and afterwards. Certification results in long-term obligations by the owner including: policies, funding allocation, committees, etc. We provided the owner with a list of all the documentation and tasks they would need to do for this.

ABOUT THE AUTHOR

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