BranchPattern

# So Many LEED:

**A Case Study of the Existing Building v5 O+M Beta (Re)certification for BranchPattern Omaha**
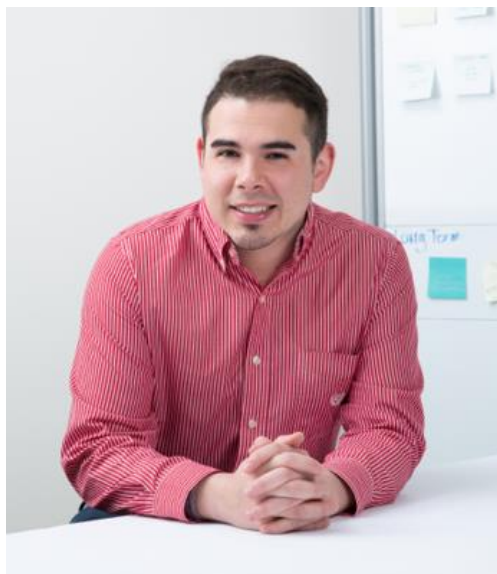
October 3, 2024

# Introductions

**Sam Blanchard**

Associate

**Andres Rodriguez-Burns**

LEED AP BD+C, WELL AP

Senior Associate

**Sarah Gudeman**

PE, BCxP, CPHC, WELL AP, LEED Fellow, CEM

Principal

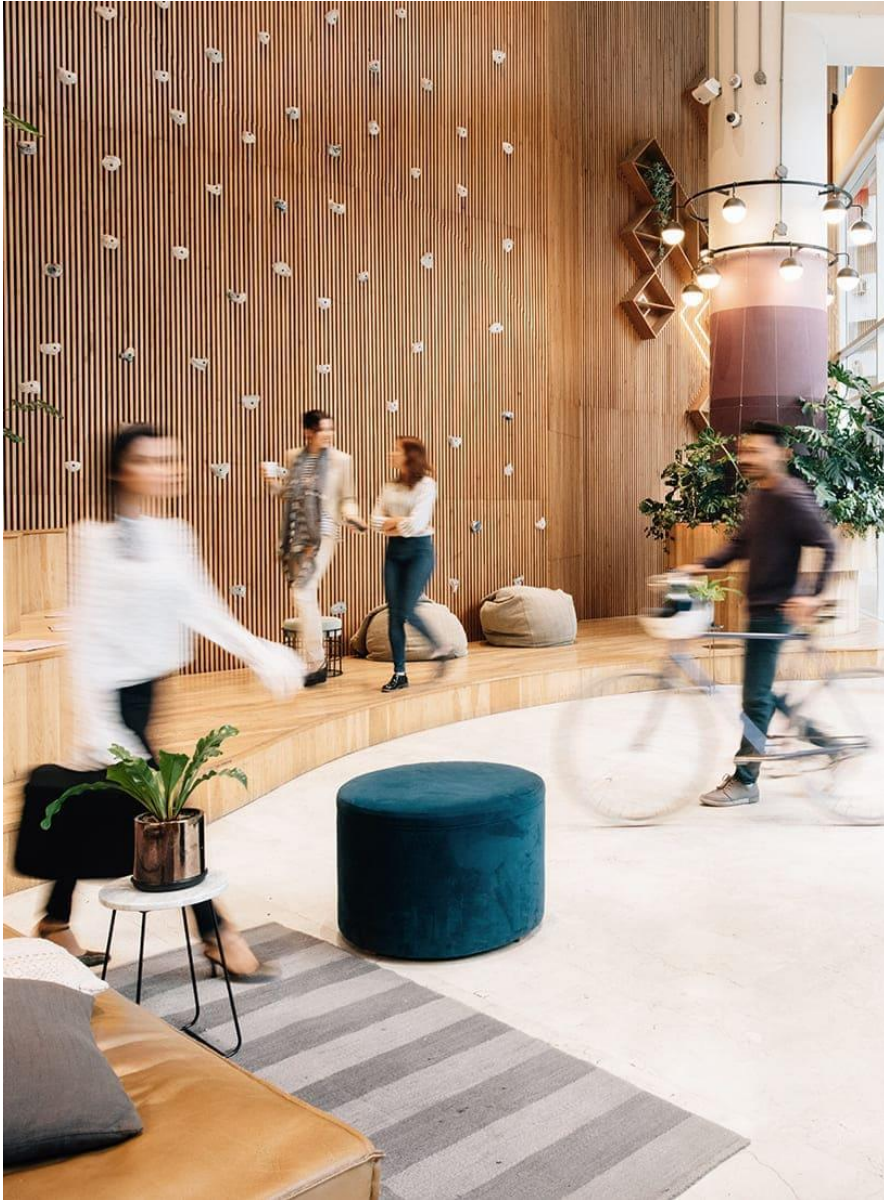Photo: https://www.kaiterra.com/indoor-air-quality-monitoring-office

# Agenda

## 1. NAVIGATE

Navigate the twists and turns of LEEDv5 O+M Beta recertification, learning from our successes and our face-palm moments (reflecting on how much of our LEED v2009 certification remained relevant).

## 2. DISCOVER

Discover the strategies and improvements that have led to operational resiliency, including leaking windows in torrential downpour and the addition of EV charging infrastructure (in the same day!)

## 3. EXPLORE

Explore the journey towards net zero energy and carbon, including the installation of a new solar array and a partnership with the Arbor Day Foundation.

## 4. LEARN

Learn how to apply the lessons from this case study to your own organization's sustainability and operational resiliency goals.

# Our Story

Our name is inspired by the **natural environment** that surrounds us.

Branch patterns are the building blocks of natural systems. Humanity is innately drawn to these **elegant and efficient fractals**.

This deep connection is represented throughout mankind's history of science, art, engineering and architecture.

Looking closely, we see that the buildings and infrastructure we help create are full of **fractals and branching patterns**.

# LEED V5

A market ready rating system that will drive the built environment toward a near zero carbon future that is equitable, resilient, and promotes the wise, safe utilization of all resources.

# LEED v5 DEVELOPMENT TIMELINE

Current Phase

**September 2023**
LEED for Operations and Maintenance (O+M) draft released at Greenbuild

**April 2024**
First public comment period opens

**Early 2025**
Rating system opens for registration

| Public comment period(s) | Rating system refinement | Ballot and member ratification |
|---|---|---|

**Entirety of 2024**
LEED O+M beta
LEED for Building Design and Construction (BD+C) and Interior Design and Construction (ID+C) will proceed without a beta

IMPACT AREAS

ECOLOGICAL CONSERVATION & RESTORATION

QUALITY OF LIFE

DECARBONIZATION

USGBC

# Continuity across the building lifecycle

**Initial development**

**Existing buildings for ongoing assessment of performance and guidance towards improvement where needed**

**Annual impact reporting**

**Ongoing certification**

# Operations and Maintenance

Position every building on a path to improved performance while maintaining the pursuit of market transformation and leadership.

How we get there:

- Provide education and leadership in a critical time.

- Establish a roadmap of actionable and transformational criteria, and a plan for improvement over time.

- Achieve certification through measurable building performance.

- Reward existing buildings that start down the path toward decarbonization by creating strategic long-term plans and taking immediate steps.

# LEED v5 Operations + Maintenance: Existing Buildings

| Integrative Process, Planning & Assessments | | 4 |
|---|---|---|
| Prereq | Operations Assessment: Climate Action, Quality of Life and Ecological Conservation and Restoration | Required |
| Credit | Operational Planning and Response for Resilience | 2 |
| Credit | Equity within Operations and Maintenance Staff | 2 |

| Location and Transportation | | 10 |
|---|---|---|
| Credit | Sustainable Transportation Performance | 10 |

| Sustainable Sites | | 4 |
|---|---|---|
| Credit | Rainwater Management | 2 |
| Credit | Heat Island Reduction | 1 |
| Credit | Light Pollution and Bird Collision Reduction | 1 |

| Water Efficiency | | 14 |
|---|---|---|
| Prereq | Water Metering & Reporting | Required |
| Credit | Water Performance | 14 |

| Energy and Atmosphere | | 37 |
|---|---|---|
| Prereq | Energy, Carbon & Operations Foundations | Required |
| Credit | Decarbonization and Efficiency Plans | 5 |
| Credit | GHG Emissions Reduction | 12 |
| Credit | Refrigerant Impact Reduction | 2 |
| Credit | Grid Interactive | 4 |
| Credit | Energy Performance and Commissioning | 14 |

| Materials and Resources | | 11 |
|---|---|---|
| Credit | Waste Performance | 9 |
| Credit | Embodied Carbon of Interior Materials During Renovations | 2 |

| Indoor Environmental Quality | | 20 |
|---|---|---|
| Prereq | Verification of Ventilation and Filtration | Required |
| Prereq | No Smoking | Required |
| Credit | Indoor Air Quality Performance | 12 |
| Credit | Occupant Satisfaction Survey | 3 |
| Credit | Green Cleaning | 3 |
| Credit | Integrated Pest Management | 2 |

| Project Priorities & Innovation | | 10 |
|---|---|---|
| Credit | Project Priorities | 10 |

| Total | | Possible Points: | 110 |
|---|---|---|---|

# LEED v5 Operations + Maintenance: Existing Buildings

BETA

## Integrative Process, Planning & Assessments — 2

| | |
|---|---|
| Prereq | Operations Assessment: Climate Action, Quality of Life and Ecological Conservation and Restoration |
| Credit | Operational Planning and Response for Resilience |
| Credit | Equity within Operations and Maintenance Staff |

## Location and Transportation — 14

| | |
|---|---|
| Credit | Sustainable Transportation Performance |

## Sustainable Sites — 4

| | |
|---|---|
| Credit | Rainwater Management |
| Credit | Heat Island Reduction |
| Credit | Light Pollution and Bird Collision Reduction |

## Water Efficiency — 15

| | |
|---|---|
| Prereq | Water Metering & Reporting |
| Credit | Water Performance |

## Energy and Atmosphere — 35

| | |
|---|---|
| Prereq | Energy, Carbon & Operations Foundations |
| Credit | Decarbonization and Efficiency Plans |
| Credit | GHG Emissions Reduction |
| Credit | Refrigerant Impact Reduction |
| Credit | Grid Interactive |
| Credit | Energy Performance and Commissioning |

## Materials and Resources — 9

| | |
|---|---|
| Credit | Waste Performance |
| Credit | Embodied Carbon of Interior Materials During Renovations |

## Indoor Environmental Quality — 21

| | |
|---|---|
| Prereq | Verification of Ventilation and Filtration |
| Prereq | No Smoking |
| Credit | Indoor Air Quality Performance |
| Credit | Occupant Satisfaction Survey |
| Credit | Green Cleaning |
| Credit | Integrated Pest Management |

## Project Priorities & Innovation — 10

| | |
|---|---|
| Credit | Project Priorities |

**Total** — Possible Points: 110

USGBC

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|---|---|---|

USGBC

# Welcome to BranchPattern's Omaha Office!
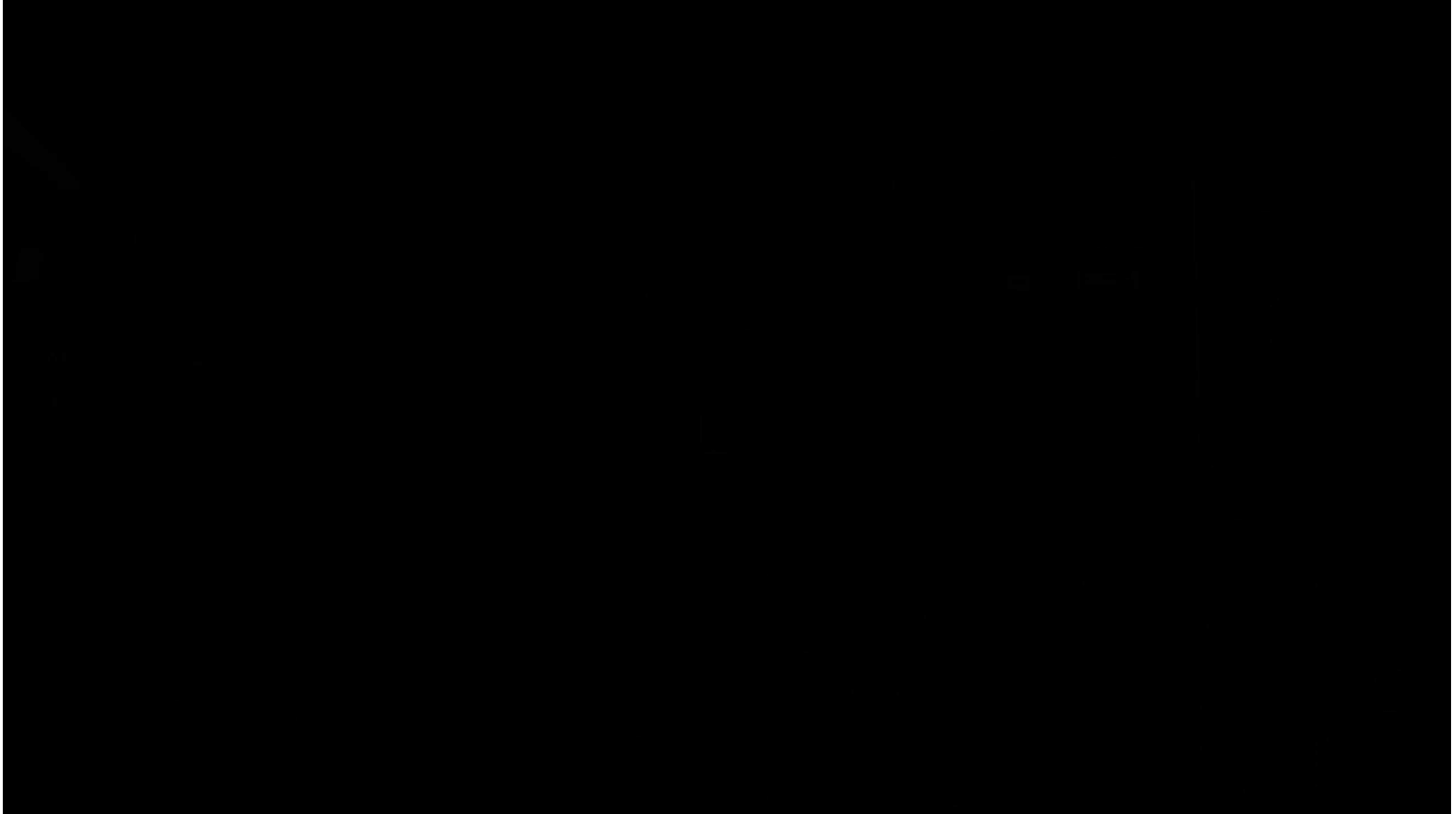


Video credits: Will Randby, BranchPattern

Photo: BranchPattern Inc.


Photo: BranchPattern Inc.

## History

- Designed by founder and CEO Ravi Maniktala

- Located in urban west Omaha neighborhood

- Built in Fall 2008

## Ethos

- Sustainability in everything we do

- Community connectivity

- Occupant-centric

- Resilience

Photos: BranchPattern Inc.

# First LEED Platinum Certification
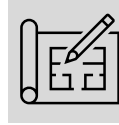
### Systems Design

High Performance HVAC

Enclosure Strategies

Renewable Energy

### Ecology

Site Impact Reductions

Internal and External Impacts

### Occupant Amenities

Transportation Options

Space Types

Biophilic Principals

### Outcomes

Long Term Impact

Gaps for O&M recertification

# ENERGY STAR

- Continuous ENERGY STAR Certifications since 2010

- Score of 90+ consistently



Photos: BranchPattern Inc.

Photo: BranchPattern Inc.

# First Fitwel Project in Nebraska

## Policy Development

- Materials, emphasis on circular economy
- Catering, emphasis on local and sustainable food
- IAQ Policy
- Cleaning Protocol

## Other Crosswalks

- Daylight
- Indoor Air Quality
- Views of Nature
- Indoor bicycle storage
- Showers with lockers

# Social Justice Label for BranchPattern since 2018

## Just.

**Organization Name:** BranchPattern, Inc.
**Organization Type:** Service Provider
**Headquarters:** Overland Park, Kansas
**Satellite Facilities:** 6
**Number of Employees:** 82

### Social Justice and Equity Indicators:

**Diversity**
- Non-Discrimination
- Gender Diversity
- Ethnic Diversity

**Equity**
- Full Time Employment
- Pay-Scale Equity
- Union Friendly
- Living Wage
- Gender Pay Equity
- Family Friendly

**Safety**
- Occupational Safety
- Hazardous Chemicals

**Worker Benefit**
- Worker Happiness
- Employee Benefit
- Continuing Education

**Local Benefit**
- Local Control
- Local Sourcing

**Stewardship**
- Responsible Investing
- Community Volunteering
- Positive Products
- Charitable Giving
- Animal Welfare
- Transparency

THE SOCIAL JUSTICE LABEL
BPI-001          EXP. 12/15/2020

INTERNATIONAL LIVING FUTURE INSTITUTE™ justorganizations.com

**Submitted 2018 Data**

## Just.

**Organization Name:** BranchPattern, Inc.
**Organization Type:** Engineering
**Headquarters:** Overland Park, Kansas
**Number of Employees:** 83

### Social Justice Indicators:

**Diversity & Inclusion**
- Gender Diversity
- Ethnic Diversity
- Inclusion
- Engagement

**Equity**
- Full-Time Employment
- Pay-Scale Equity
- Freedom of Association
- Living Wage
- Gender Pay Equity

**Employee Health**
- Physical Health
- Well-Being

**Employee Benefits**
- Health Care
- Retirement Provision
- Family/Medical Leave
- Training/Education

**Stewardship**
- Local Communities
- Volunteering
- Animal Welfare
- Charitable Giving
- Positive Products

**Purchasing & Supply Chain**
- Equitable Purchasing
- Supply Chain

THE SOCIAL JUSTICE LABEL 2.0
BPI-002          EXP. 03/01/2023

INTERNATIONAL LIVING FUTURE INSTITUTE™

**Submitted 2020 Data**

## Just.

**Organization Name:** BranchPattern, Inc.
**Organization Type:** Consulting
**Headquarters:** Kansas City, Missouri
**Number of Employees:** 110

### Social Justice Indicators:

**Diversity & Inclusion**
- Gender Diversity
- Ethnic Diversity
- Inclusion
- Engagement

**Equity**
- Full-Time Employment
- Pay-Scale Equity
- Freedom of Association
- Living Wage
- Gender Pay Equity

**Employee Health**
- Physical Health
- Well-Being

**Employee Benefits**
- Health Care
- Retirement Provision
- Family/Medical Leave
- Training/Education

**Stewardship**
- Local Communities
- Volunteering
- Animal Welfare
- Charitable Giving
- Positive Products

**Purchasing & Supply Chain**
- Equitable Purchasing
- Supply Chain

THE SOCIAL JUSTICE LABEL 2.0
BPI-003          EXP. 04/01/2025

INTERNATIONAL LIVING FUTURE INSTITUTE™

**Submitted 2022 Data**

# Crosswalk Overview

| | LEEDv5 O+M | Just | Fitwel | EnergyStar | LEED v2009 NC |
|---|---|---|---|---|---|
| **IP** | Equity Within Operations and Maintenance Staff, Option 2 | Employee Engagement Policy | | | |
| | Operational Planning and Response for Resilience | CDC Workplace Health Model Step 2 | 12.1. Emergency Equipment Database, 12.3 Certified First Responders, 12.4 Emergency Address Notification | | |
| **LT** | Sustainable Transportation Performance, Option 3 | | 1.1 Walkability, 1.4 Proximity to Transit, 2.3 Bicycle Parking, 2.4 Active commuter showers, 2.6 Efficiency Parking | | SSc4 Alternative Transportation |
| | Transportation Policy | | 2.2 Commuter Survey | | |
| **SS** | Site Management Policy | | 3.1 Outdoor Space Amenities | | |
| | Heat Island Reduction | | | | SSc7 Heat Island Effect |
| | Light Pollution Reduction | | 3.8 Outdoor Lighting | | SSc8 Light Pollution Reduction |
| **WE** | Water Performance | | | | WE ALL CREDITS |
| **EA** | Energy and Carbon Policy Management | | | | |
| | Refrigerant Policy and Maintenance Practices | | | | EA Enhanced Refrigerant Management |
| | Minimum Energy Performance | | | Energy Use | EAp2 Minimum Energy Performance |
| | GHG Emissions Reduction | | | GHG Reporting | EA On-site Renewable Energy, Green Power |
| | Energy Performance and Commissioning | | | Energy Use | EA Optimize Energy Performance |
| **MR** | Materials Management Policy | Supply Chain Social & Environmental Responsibility | 6.4 Green Purchasing Policy | | |
| | Waste Performance, Option 2,3 | | | | MRc1: Storage & Collection of Recyclables |
| **EQ** | Occupant Needs Assessment | Physical Health, Workplace Safety & Health Assessment | 4.3 Main Entrance Pedestrian Route, 4.5 Publicly Accessible Use, 4.6 Advertise nearby amenities, 8.5 Quiet Room. 8.7 Multipurpose room | | |
| | Green Cleaning Policy | | | | |
| | Verification of Ventilation and Filtration | | | Ventilation for acceptable AQ | EQp1 Minimum IAQ Performance |
| | Environmental Tobacco Smoke Control | | 3.9 Smoke Free Outdoor Spaces, 4.1 Smoke-Free Signage | | EQp2 Environmental Tobacco Smoke (ETS) Control |
| | IAQ Policy | | 6.3 IAQ Policy | | |
| | Indoor Air Quality Performance | | 4.7 Entryway Systems | Ventilation for acceptable AQ | EQc1 Outdoor Air Delivery Monitoring, EQc2: Increased Ventilation, EQc5: Indoor Chemical & Pollutant Source Control |
| | Occupant Satisfaction Survey | | 7.1 Natural Daylight, 7.3 Operable Shading | Thermal Environmental conditions, Adequate Illumination | EQc6 Controllability of Systems. EQc7: Thermal Comfort, EQc8: Daylight and view |
| | Integrated Pest Management | | 3.7 Integrated Pest Management | | EQc Integrated Pest Management |

**slido**

Please download and install the Slido app on all computers you use

# Does your organization compile an ESG report?

ⓘ Start presenting to display the poll results on this slide.

# slido

**Which of the following emissions does your organization disclose as part of its ESG reporting? (Select all that apply)**

ⓘ Start presenting to display the poll results on this slide.

# slido

**What's helped most as you've tried to tackle internal data tracking / certifications / ESG initiatives?**

ⓘ Start presenting to display the poll results on this slide.

# Certification Systems as Reporting Frameworks

| | JUST | Fitwel | LEED |
|---|---|---|---|
| **ENVIRON-MENTAL** | | | LEED O+M's core focus on energy, water, and material efficiency directly aligns with the **environmental** metrics in ESG, particularly for climate risk and resource management. |
| **SOCIAL** | JUST's focus on equity, diversity, and fair labor practices aligns with the **social** component in ESG reporting. | Fitwel's focus on health and well-being aligns strongly with the **social** aspects of ESG, especially in enhancing workplace productivity, reducing absenteeism, and promoting a healthy lifestyle. | The credits on indoor environmental quality, occupant well-being, and community engagement align with **social** ESG goals, particularly in health and safety. |
| **GOVERNANCE** | Transparency and accountability in reporting workforce diversity and pay structures also fall under **governance**. | | LEED's transparent certification process and ongoing building performance evaluations feed into **governance** aspects, emphasizing accountability and sustainability reporting. |

| JUST | Fitwel | LEED |
|------|--------|------|
| **ENVIRON-MENTAL** | | |
| | • Green Purchasing Policy<br>• IAQ Policy<br>• Integrated Pest Management Plan<br>• Supply Chain Social & Environmental Responsibility | • Energy and Climate Policy<br>• Materials Management Policy<br>• Refrigerant Policy & Maintenance Practices<br>• Site Management Plan<br>• Sustainable Transportation Policy<br>• Water Management Policy |
| **SOCIAL** | | |
| • Employee Engagement Policy<br>• Ethnic & Racial Diversity Policy<br>• Family-Friendly Policy<br>• Gender Diversity Policy<br>• Gender Pay Scale Equity Policy<br>• Inclusion Policy<br>• Medical Leave Policy<br>• Physical Health Policy<br>• Well-Being Program<br>• Workplace Safety & Health Assessment | • Cleaning Protocols<br>• Meetings & Events Catering Policy<br>• Office Commuter Survey Results<br>• Tobacco-Free Policy | • Emergency Preparedness Plan<br>• Green Cleaning Policy<br>• Occupant Needs Assessment Policy<br>• Smoke & Tobacco-Free Workplace Policy<br>• Social Equity Checklist |
| **GOVERNANCE** | | |
| • Animal Welfare Policy<br>• Charitable Giving Policy<br>• Community Engagement Narrative<br>• Fair & Equitable Procurement Activities<br>• Freedom of Association Narrative<br>• Full-Time Employment Policy<br>• Living Wage Policy<br>• Local Control<br>• Pay Scale Equity Polity<br>• Positive Products & Services Policy<br>• Retirement Provision Policy<br>• Supply Chain Social & Environmental Responsibility<br>• Supply Chain Social & Environmental Responsibility<br>• Training & Education Policy<br>• Volunteer Time Off Policy | • Fair & Equitable Procurement Activities<br>• Positive Products Policy<br>• Supply Chain Social & Environmental Responsibility | • Site Management Policy<br>• Sustainable Purchasing Policy<br>• Repair/Reuse Policy |

# LEED O+M v5 Beta Program

## Internal Goals

- Strengthen knowledge of O&M

- Develop understanding of v5 criteria

- Become experts in the new LEEDOnline Platform

- Put ourselves in the shoes of our clients

" **The overarching goal of LEED v5 is to guide new and existing buildings towards achieving near-zero carbon emissions operationally by 2050, supported by a decarbonized grid.**
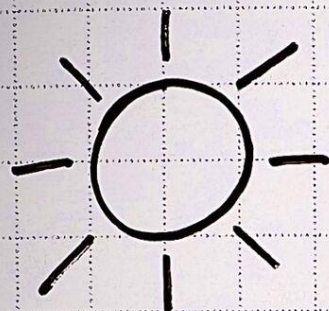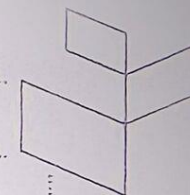
# Operational Resiliency

## Addressing Resiliency

- Emphasis on climate resilience

- Impact of building resources
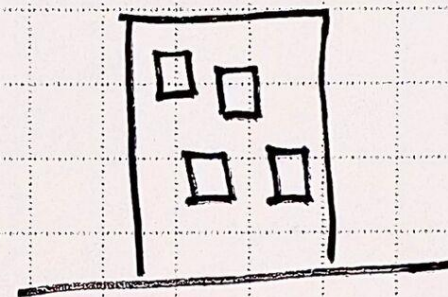
- Greenhouse gas emission focus

- Policy adaptation

# TACKLING EMISSIONS IN CRE:

## 1. RESPONSIBLE DESIGN
Embodied carbon
Passive strategies
Electrification
Efficient systems
Renewable energy

## 2. OPERATIONAL EFFICIENCY
Energy + refrigerant monitoring
Grid integration
Continuous commissioning
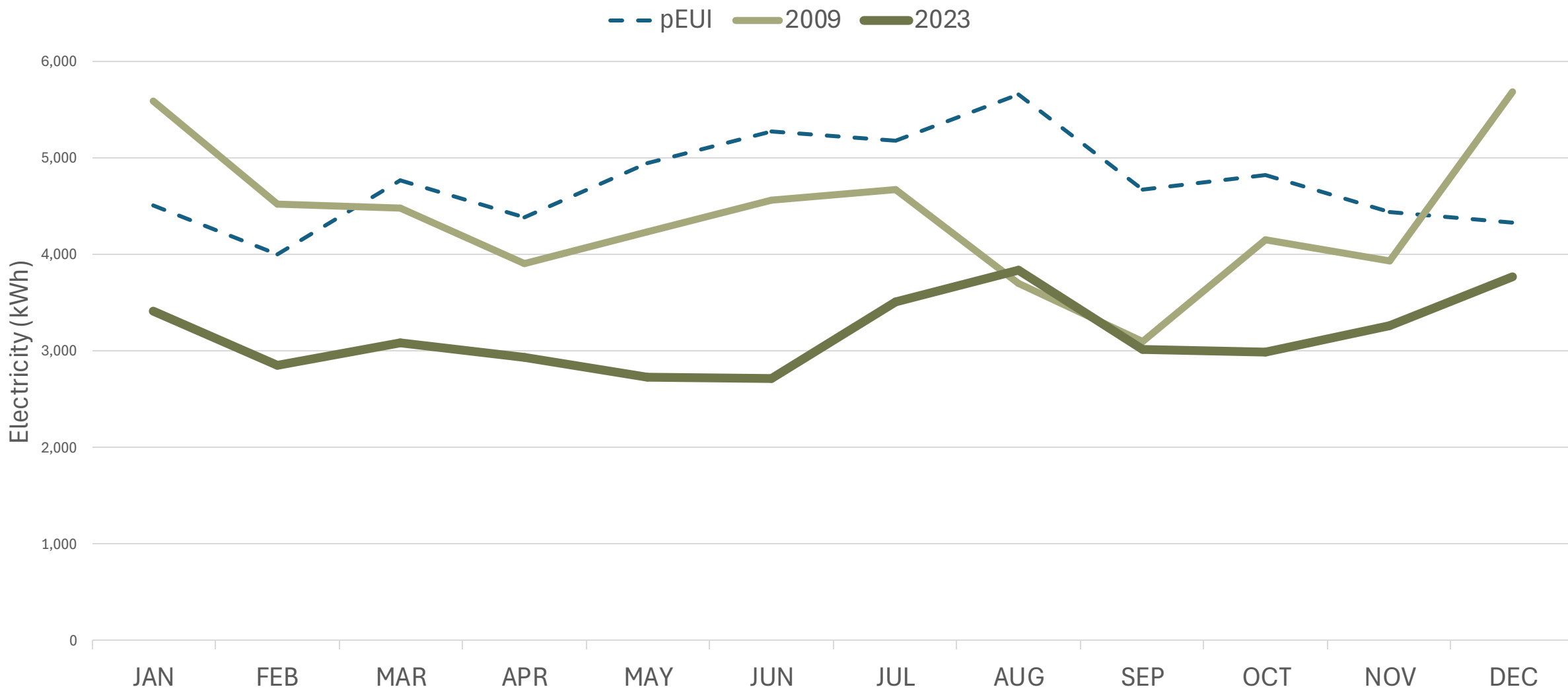Auditing
Supply chain
Health + Wellness
Offsets

# Journey Towards Net Zero

# Journey Towards Net Zero



Legend: pEUI (dashed), 2009, 2023

Y-axis: Electricity (kWh) — 0, 1,000, 2,000, 3,000, 4,000, 5,000, 6,000

X-axis: JAN, FEB, MAR, APR, MAY, JUN, JUL, AUG, SEP, OCT, NOV, DEC

# Journey Towards Net Zero
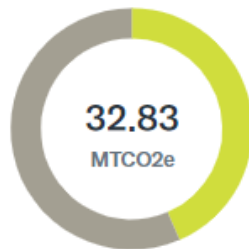
## MROW Emission Rates

| CO₂ | SO₂ | NOₓ |
|---|---|---|
| $CO_2$ | $SO_2$ | $NO_X$ |
| **936.5** | **0.907** | **0.758** |
| (lbs/MWh) | (lbs/MWh) | (lbs/MWh) |



Generation

Coal accounts for 38.0 % of the fuel mix for MROW

National    MROW

- Gas (8.3 %)
- Coal (38 %)
- Nuclear (8.1 %)
- Hydro (3.9 %)
- Wind (39.8 %)
- Biomass (0.7 %)
- Solar (1 %)
- Oil (0.1 %)
- Geothermal (0 %)
- Other Fossil Fuel (0.1 %)
- Other Unknown Fuel (0.1 %)

https://www.epa.gov/egrid/power-profiler#/MROW
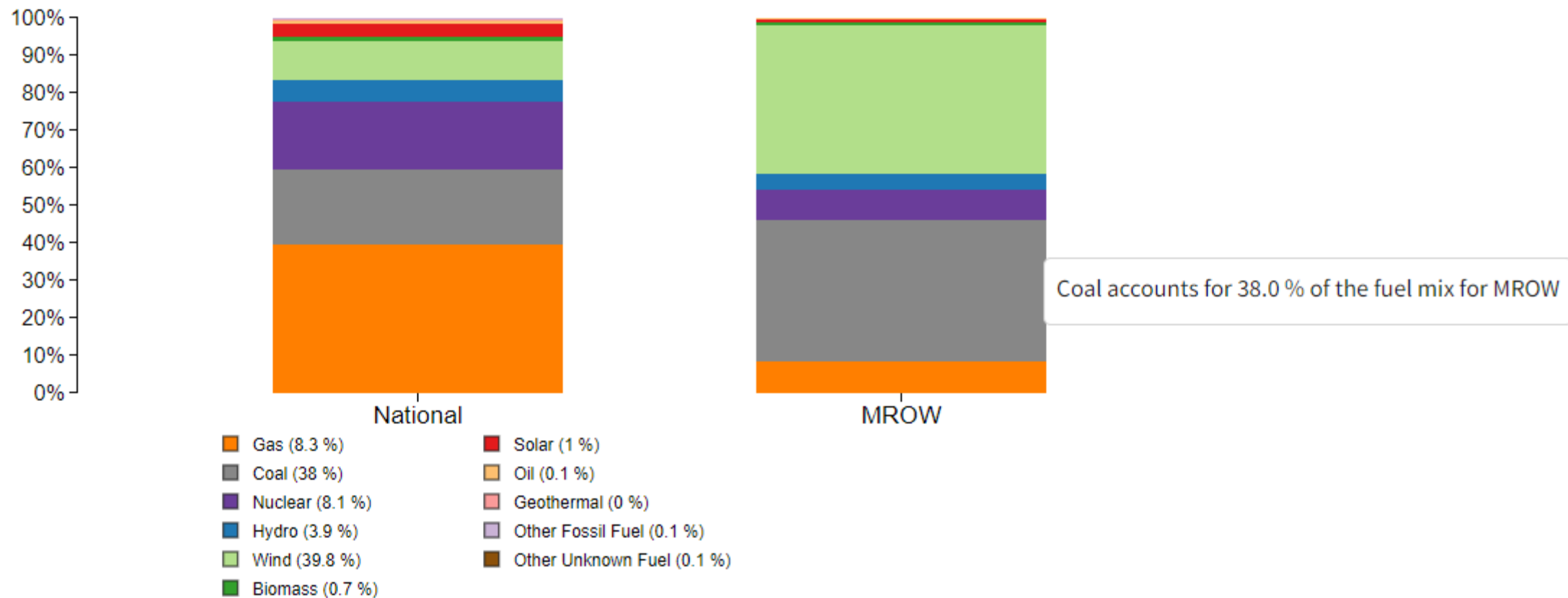
| LEED O+M: Existing Buildings (v5 - BETA) | LEED O+M: Existing Buildings (v5 – PC1) | LEED O+M: Existing Buildings (v5 – PC2) |
|---|---|---|
| • **PRE: Energy & Carbon Policy Management**<br>• **PRE: Refrigerant Policy and Maintenance Practices**<br>• **PRE: Minimum Energy Performance** | **PRE: Energy, Carbon and Operations Foundations** | • **PRE: Carbon Projection from Energy Use**<br>• **PRE: Energy Monitoring and Reporting**<br>• **PRE: Fundamental Refrigerant Management**<br>• **PRE: Minimum Energy Performance** |
| Decarbonization and Efficiency Plans | *same* | *same* |
| Energy Performance and Commissioning | *same* | Enhanced Commissioning |
| GHG Emissions Reduction | *same* | Greenhouse Gas Emissions Reduction Performance |
| Grid Harmonization | Grid Interactive | • Peak Load Management<br>• Peak Load Reduction Performance |
| Refrigerant Impact Reduction | *same* | Enhanced Refrigerant Management Performance |
| | | Optimized Energy Performance |

RETIRED CARBON

*Certificate*

1,463 METRIC TONS OF CARBON DIOXIDE
HAVE BEEN OFFSET AND RETIRED
ON BEHALF OF

# BRANCHPATTERN

BY PROTECTING AND RESTORING TREES
IN THE MISSISSIPPI ALLUVIAL VALLEY

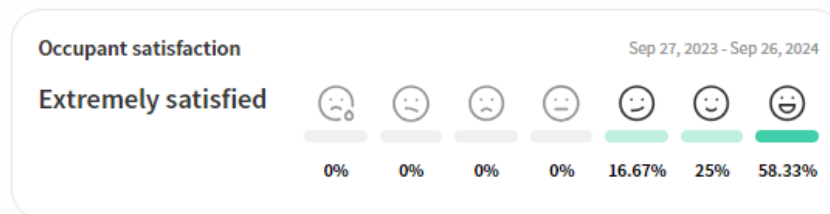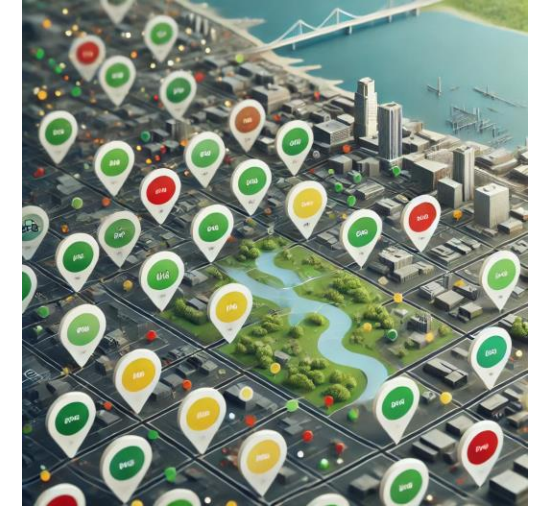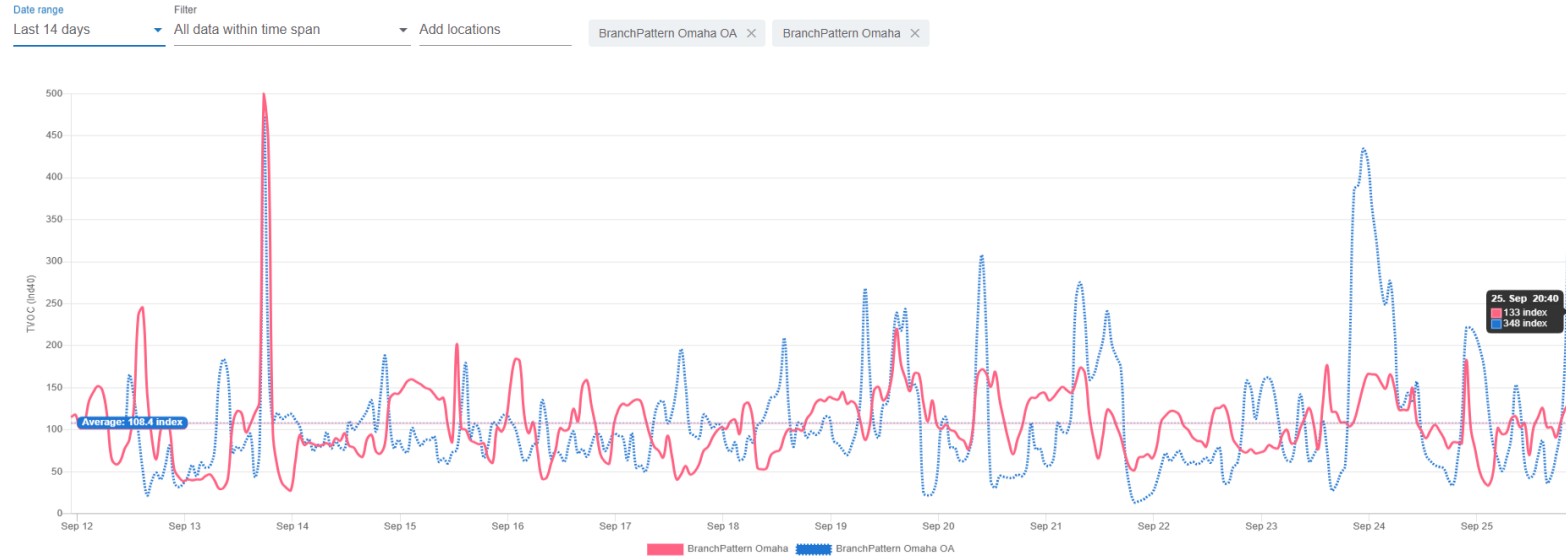Serial Numbers

ACR-US-114-2019-1071-280294 to 281756

RETIRED FORESTRY CARBON CREDITS

Presented by

**Arbor Day Foundation®**

January 5, 2024

Date

# Nerds for Continuous Air Quality Monitoring
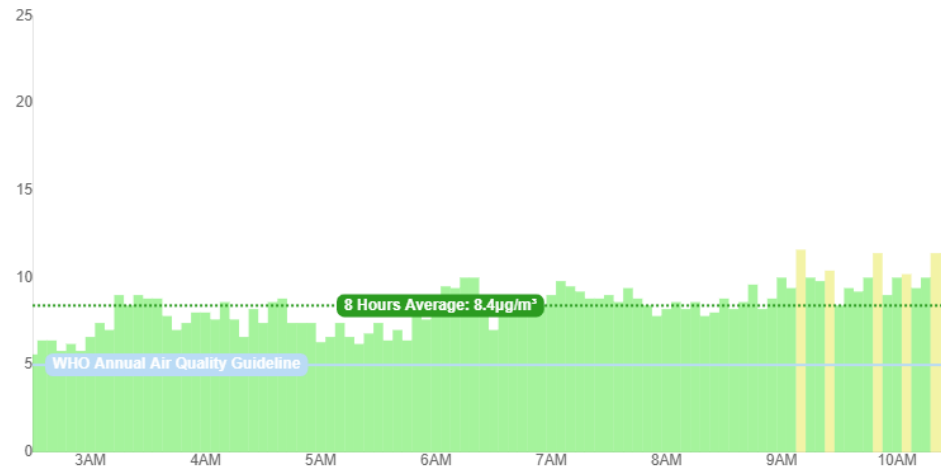
## Emphasis on IAQ

- O+M incentives good IAQ in significant and challenging ways

- There is not just ONE air!

- Continuous monitoring supplemented with on-site lab-based testing
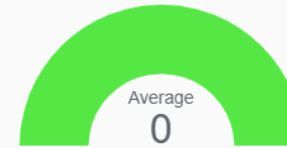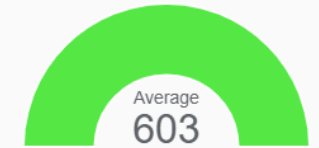


| Occupant satisfaction | | | | | Sep 27, 2023 - Sep 26, 2024 | |
|---|---|---|---|---|---|---|
| Extremely satisfied | | | | | | |
| 0% | 0% | 0% | 0% | 16.67% | 25% | 58.33% |

# Purchasing & Material Management Procedures

Adjustments to internal processes

Old and new strategies

Looking at ways to improve follow-through

How much is up to us?

# Stakeholders

**Significant differences in interactions between O+M and BD+C.**
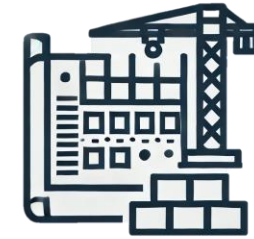
**v5 encourages neighbor and jurisdictional interactions.**

## LEED v5 O+M

1. Owner
2. All building occupants
3. Cleaning service provider
4. Refrigerant maintenance provider
5. Controls contractor
6. Landscaping crew
7. Solar Installers
8. Window retrofit crew
9. Drone operator
10. Building maintenance staff

## LEED BD+C

1. Owner
2. Architect
3. Design team
4. Contractors

# GBCI Online / The HUB

Properties vs Projects

LEED calculators

Data input strategies and challenges

https://www.gbcionline.com

# Properties



OVERVIEW   ENERGY   WATER   WASTE   TRANSPORTATION   HUMAN EXPERIENCE   EMISSIONS

LEED point breakdown ⓘ

**59**/100

10 points are awarded to projects that have previously been LEED certified

**25**/33
Energy
Improvement score
**76**/100

**12**/15
Water
Improvement score
**80**/100

**0**/8
Waste
Improvement score
**0**/100

**13**/14
Transportation
Improvement score
**90**/100

**9**/20
Human Experience
Improvement score
**30**/100

What do these graphics mean in the context of certification?

# Project

## LEED v5 O+M: Existing Buildings  <span style="color:blue">Submitted for review</span>

**Initiate payment**

5000000067 ⧉

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✓ **Registration**                                                          May 13, 2024  ⌃

**Registration details** ✎

| **BranchPattern Omaha LEED v5 O&M** | **LEED v5 O+M: Existing Buildings** | **5976 sqft** | **Office: Administrative/Professional** | **Public** | **Yes** |
|---|---|---|---|---|---|
| Project name | Rating system | Gross floor area | Space type | Project privacy | Previously LEED certified |

**Documents**

LEED Certification Agreement ⬇   **Signed by owner**

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✓ **Support documents**  ⌃

| Decarbonization Tool Blank_01292024_rev.xlsx ⬇ | Decarbonization Tool Sample Office Building_01292024.xlsx ⬇ | LEED Social Equity Checklist O+M_beta.docx ⬇ |
|---|---|---|
| LEED v5 scorecard for beta participants_credit categories_pathways.xlsx ⬇ | v5_Green Cleaning Calculator_v02_BETA.xlsm ⬇ | v5_Rainfall Events Calculator_v01_BETA.xlsm ⬇ |

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⋯ **Prerequisites & Credits**  ⌄

### Certification Comparison

Very few large scale design changes

Need for O&M certification for originally certified BD+C buildings

### Ongoing Operations

Large emphasis on ongoing maintenance and logging needs

Occupant involvement in sustainable practices

Delegating roles as a challenge

### Policy Development

Discuss new policies for LEED and company

Discuss internal goal discussions that align with international climate goals and target dates

### Takeaways

Unlike any other certification our firm has received

Important for organizational changes in operations