
Gary Shlifer M.S., LEED AP BD+C, O+M, Homes

Sustainable Design Consulting Professional
LEED Certification Project Management
Performance Green Building – Sustainable Design Consulting & Education

<http://www.GreenBuildingFl.com>

954-557-3516

**Sustainable Design
LEED for Homes Certification Project Management
Integrative Process Consulting**

April 26, 2016

Proposal - Contract

Prepared for:

Client

Omniconrete International
Michael Ellis
1723 Business Center Lane
Kissimmee, FL 34758-1801
407-777-4791 Ext 403
Michael.ellis@omnicrete.com
www.Omniconrete.org

Project:

Single Family Residence
1347 Congo Court
Kissimmee, Florida 34759

Introduction

Thank you for the opportunity to provide performance green building, sustainability, and LEED® Certification Consulting Services.

This proposal outlines services and scope of work to be provided to the 'Client' using The US Green Building Council's® LEED for Homes® 2008 v3 Rating System.

I understand the project to consist of 1 single family detached residence consisting of approximately 2500 s.f of conditioned space, with 3 bedrooms and a 2 vehicle garage. The developer's wish is that the home be netzero energy and to achieve LEED for Homes 2008 v3 Platinum certification.

DEFINITIONS – SUSTAINABILITY PARADIGMS

In order to achieve established goals for cost, sustainability, and LEED Third-Party certification the owner – stakeholders must adopt and engage in the following core paradigms.

The Integrative Process

The Integrative Process approach can be a fundamental shift in the mindset of project teams. In most cases, team members must step out of their traditional silos and jump into unfamiliar processes such as 'systems thinking' and nonhierarchical leadership.

The Integrative Process supports creating sustainable high-performance, cost-effective project outcomes. It begins with a thorough analysis of the interrelationships among systems early in the project.

The Integrative Process brings stakeholder, design, construction, and operations/maintenance groups together to assess the current project standing and brainstorm solutions, strategies, methods, and procedure to create a higher performing, sustainable building. The Integrative Process should be applied from project inception and will continue through occupancy and operations/maintenance. Teams using the Integrative Process will identify opportunities to achieve synergies across disciplines and building systems.

Integrative Process includes an intensive, face-to-face collaborative process, often consisting of half, full and multiday charrettes. The charrette process contributes significantly to improving and streamlining the developing and implementing strategies that improve overall design, while managing costs.

Consulting fees are often completely offset through the adoption of the Integrative Process', systems selection, materials choices, and streamlining.

The Triple Bottom Line

Sustainability is based on the 'Triple Bottom Line' paradigm. It is an approach to solution evaluation in a way that recognizes a necessary balance between three interests: human, environmental, and economic well-being. For example, lowest-cost bidding does not support Triple Bottom Line purchasing. Purchasing policies that allow for evaluation of a product/process against cost, labor considerations and environmental impact in equal importance support Triple Bottom Line. An integrative process applied to purchasing would likely result in policy and bid documents that more robustly support sustainable outcomes.

The criteria, measures, and requirements found in the LEED rating systems embody the Triple Bottom Line.

Scope of Services - Brief

Thank you for the opportunity to be considered for your project team. As an independent consultant I wish to offer the following services.

1. LEED Certification Project Management: Guidance and Oversight of the complete LEED Certification and Performance Green Building Goal Implementation Process.

- Consult with owner, design and construction disciplines towards achieving prerequisite and established credit requirements and associated documentation.
- Facilitate the integrative process as outlined below.
- Execute LEED for Homes registration.
- Provide assistance and support to marketing activities related to sustainability and LEED certification.
- Assemble and create the required LEED for Homes Homeowner Manual.
- Coordinate and oversee required LEED Provider, Green Rater, and Energy Rater services and inspections.
- Coordinate and oversee indoor air quality (IAQ) inspections as required.
- Guide and assist design-construction disciplines towards providing required documentation on the LEED Online (LEED v4 only) or Comprehensive Excel LEED for Homes Project Workbook and Checklist platform.
- Develop and maintain task responsibility matrix.
- Develop and maintain the Comprehensive Excel LEED for Homes Project Checklist Workbook platform or LEED Online platform. Including scorecard tally reporting.
- Draft periodic Reports/Evaluations informing the owner and teams as to the status of the certification process, measures undertaken, tasks required and by whom, checklist point tally and related information.
- Act as the Owner's representative to the LEED for Homes Provider / Green Building Certification Institute (GBCI), Green Rater and Energy Rater.
- Provide pre-construction contractor requirements, IAQ, documentation, education meetings.
- Site visits as required.
- Provide applicable materials and other calculators. (General Contractor)

- Evaluate pursuit of LEED for Homes v3 2008 and v4 to determine appropriate rating system for the project.

2. Integrative Process Facilitation

- Facilitate -2- full day design charrettes. 1. Design/LEED Kick-off 2. Measure Design – Construction Development.
- Coordinate Integrative cross-discipline face-to-face, videoconference meetings.
- Maintain cross-discipline integrative communication through certification.

3. Performance Green Building Consulting

- Provide information, guidance, toward development of measures contributing to the design, construction, and operation of the aforementioned residence.
- Provide recommendation for sourcing products, materials, systems, and methods.
- Provide recommendation for sourcing outside disciplines and vendors as requested within capabilities.

4. Sustainability – LEED Education

- Provide necessary LEED for Homes education to disciplines for achieving established sustainability requirements.

Printing This Document Sustainably

- Please consider viewing this document via computer or device before printing.
- When printing ensure 'double sided' print option is selected and please consider selecting 'draft' or 'fast' mode on your printer to reduce toner and energy use.
- This font (Century Gothic) has been specifically selected because it has been determined to use up to 30% less ink than other similar fonts, and less toner means less energy. Other fonts to consider are EcoFont and RymanEco.

Statement of Understanding:

In order to facilitate sustainability and overall first-costs the owner and project team members must engage in the Integrative process as defined above, and outlined in the LEED for Homes Rating System: Integrated Project Planning

- LEED IDp1.1: Preliminary Rating,
- LEED IDc1.2: Integrated Project Team
- LEED IDc1.4: Design Charrette (1 full Day Charrette) and 1 additional charrette.
- Maintain an open collaborative communication between all project team members.

Design Charrette: No later than the design development phase, recommended during schematic, conduct at least one full-day integrated design workshop with the project team defined in ID 1.2. Use the workshop to integrate green strategies across all aspects of the building design, drawing on the expertise of all participants.

Integrated Project Team: Assemble and involve a project team to meet the three criteria below:

1. Include team members, in addition to the builder and Verification Team, whose capabilities include at least three of the following skill sets:

- Architecture or residential building design
- MEP - HVAC engineering
- Performance testing
- Civil engineering, landscape architecture

2. Actively involve all team members referenced above in at least three of the following phases of the home design and construction process:

- Schematic and design development
- Energy and envelope systems analysis or design
- Specifications
- Construction

3. Conduct meetings with the project team at least monthly to review project status, introduce new team members to project goals, discuss challenges formulate solutions, review responsibilities and identify next steps.³

Change Orders: Design Change Orders Post-Construction Documents: Changes in design after construction documents completion may incur additional consulting fees.

Scope Narrative

Through the Integrative Process, the Green Building Consultant (GBC): Gary Shlifer MS, LEED AP BD+C, O+M, Homes and will guide and educate you and your team throughout the Performance Green Building and LEED certification process. The process helps transform approaches to design, construction, maintenance, operations and management. The US Green Building Council knowledge base and the LEED for Homes rating system is the vital tool and roadmap to dramatically enhance strategies to improve performance, sustainability, durability, disaster preparedness, indoor air quality, value and salability.

The GBC leads and facilitates high-level collaboration between stakeholders and the design and construction teams to improve design, reduce costs, and speed completion. Design charrettes are facilitated to foster rapid decision-making and streamlined implementation of strategies towards achieving certification while elevating sustainability and return on investment.

The GBC will be at your side from throughout the process and beyond. Strategies and measures will be constantly evaluated for refinement while improving how the LEED process can best serve the 'Owner's Program and Requirements'.

Mr. Shlifer introduces methods, systems, materials, products and vendors further contributing to strategy development and strategy implementation that often completely offsets the Mr. Shlifer's fees.

With a keen understanding of regional characteristics and more than 20 years of Green Building experience the GBC streamlines the LEED Certification process. From educating every design and construction professional, gathering USGBC/GBCI submittals, and construction oversight to authoring periodic project reports and the required homeowner's training manual.

The GBC manages the LEED submittal process and assists team members in identifying and fulfilling their required submittal tasks. This also includes authoring credit templates; credit Interpretations, Innovation in Design/Exemplary Performance and Indoor Air Quality Management narratives.

Fee and Schedule

Fees

<p>Performance Green Building Consulting</p> <p>Integrative Process Facilitation</p> <p>LEED Certification Project Management</p> <p>LEED for Homes Consulting</p> <p>(Earning 1 LEED point)</p>	<p>Total</p> <p>Consulting, Project Management Fee:</p> <p>\$10,800.</p>
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Schedule

Retainer/Design	50%
Drywall Install	20%
GBCI Documentation Submittal	25%
Notice of Certification	5%

- Payment due 7 days upon invoice. - Invoiced within 7 days of phase **start** - Pricing

Additional Required and Optional Costs:

Required	
*LEED for Homes Registration per Dwelling	\$150.
*US Green Building Council/ Green Building Certification Institute (USGBC/GBCI) per Dwelling	\$225.
*LEED for Homes Provider	TBD Estimated Cost for all services including IAQ Credits
*LEED for Homes – Green Rater	
*HERS Energy Rater: HERS Preliminary-Mid and Final Inspections (Depending on pursued LEED Credits)	
Optional	
LEED IAQ Duct tightness – Local Exhaust Inspections	TBD
Additional Certifications to be Considered Added to this Proposal for Nominal Costs	
Energy Star for Homes Certification	
Fortified for Safer Living Certification	
Energy Star Indoor AirPlus Certification	
Florida Green Building Coalition Certification	
Florida Yards and Neighborhoods Certification	

* USGBC Member Rate: Required for LEED for Homes Certification – Additional 3rd Party Fees



Concrete Single-Family Home Certification Proposal



Disclaimer:

This Proposal/Contract of Services does not represent a guarantee of LEED Certification nor the attainment of a LEED certification level. A multitude of factors go into achieving third-party certification. Gary Shlifer will use due diligence to assist in achieving certification and the highest level of certification as prescribed by the owner. However, it is ultimately the Green Building Certification Institute and/or the Certifying Body that determine acceptance of individual credit points that contribute to LEED certification.

Signatures

<p>Gary Shlifer MS, LEED AP BD+C, O+M, Homes Sarasota and Hollywood, Florida 954-557-3516 380 North Shore Road, Unit 7 Longboat Key, Florida 34228</p>	<p>Client: Michael Ellis 1723 Business Center Lane Kissimmee, FL 34758-1801 407-777-4791 Ext 403 Michael.ellis@omnicrete.com www.Omnicrete.org</p>
<p>Date: April 26, 2016</p>	<p>Date:</p>
	

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Definitions

- **Sustainability**
The integration of economic, social and environmental spheres to: “meet the needs of the present without compromising the ability of future generations to meet their own needs.” The capacity to endure. The potential for long-term maintenance of wellbeing, which in turn depends on the wellbeing of the natural world and the responsible use of natural resources.
- <http://en.wikipedia.org/wiki/Sustainability> -
- **Performance Green Building**
The design, construction and implementation of strategies, methods and philosophies towards the creation, renovation and operation of performance, sustainable, economically viable built environments. Practices mindful of lifecycle, use of energy, consumption of resources, waste management, durability, disaster preparedness and social equity and well-being.
- **GBCI: Green Building Certification Institute**
A subsidiary of The US Green Building Council responsible for the certification of buildings and the accreditation of professionals and part of LEED 2009 evolution.
- **Green Building Consultant**
Individuals with expertise and knowledge of design and construction methods, practices, strategies, and systems improving and maximizing built environment performance and sustainability.
- **LEED for Homes Provider**
LEED homes are rated by LEED for Homes Providers – local organizations selected by USGBC based on demonstrated experience and expertise in supporting builders in the construction of high-performance, sustainable homes in their market. Applicable to LEED for Homes Only.
- **Green Rater**
An individual skilled and certified in assessing and verifying elements of a project pursuing LEED for Homes certification. Providing preliminary evaluation and rating, Pre-drywall Inspection, and Final Verification services.
- **Energy Rater**
A certified individual designated to assess energy performance of a residential building and pursuing LEED for Homes Certification. Using the HERS Index system developed by RESNET, Energy Star and the Environmental Protection Agency. They may also perform elective 3rd Party Verification and inspections. Applicable to LEED for Homes Only.

About the Green Building Consultant: Resume

GARY SHLIFER M.S., LEED AP BD+C, O+M, Homes

Sustainability - Performance Green Building

LEED Consultant and Project Manager

www.GreenBuildingFL.com Gary@GreenBuildingFL.com 954-557-3516

Twenty Year Experienced Sustainability Professional, Performance Green Building Consultant and LEED Project Manager leading the successful development and implementation of programs, strategies, measures, systems and methods towards creating deep-green, sustainable built new and existing built environments.

- **Proficient in the LEED, Enterprise Green Communities, Florida Green Building Coalition Certification process** for new and existing buildings and for neighborhood development that includes LEED CS, CI, HC, ND, EBOM, Homes and Schools. Experience includes involvement in more than 30 LEED projects.
- **Passionate sustainability advocate** with the skills, experience and abilities to cultivate initiatives, best practices and programs to support goals towards social equity, policy and performance built vertical and horizontal environments.

Leadership Strengths and Management Competencies

Skillful Sustainability Leader:

Keen knowledge of diverse sustainability measures, strategies, programs and systems with a focus on forging consensus and building commitment. Motivating others to exceed performance expectations while leading by example with highest level of integrity. Keen knowledge of environmentally preferable products, materials and systems.

Accomplished Integrative Process Facilitator:

Skilled in facilitating the 'integrative process', and the stakeholder, multi-disciplinary, cross departmental, rapid consensus decision making charrette. Expert, creative systems thinking enabled to distinguish vast interconnectedness to enhance superlative design and creating the balance between economic, environmental human prosperity.

Education

Nova Southeastern University • Ft. Lauderdale, FL – **Master's of Science**- Systems Theory, Cybernetics

Temple University • Philadelphia, PA – **Bachelor's of Arts** – Communications

Accreditations

LEED Accredited Professional Specialties for:

- Green Building Design and Construction (BD+C)
 - Existing Buildings: Operations and Maintenance (O+M)
 - Residential Green Building Design and Construction - Homes
- Omniconrete Single Family Residence – LEED Certification Proposal

Professional Experience & Achievements

Performance Green Building – LEED - Sustainability Project Manager

HLMS Sustainability Solutions

Sarasota, Florida – Cleveland, OH July 2014 - Present

Contracted Consultant and Project Manager to architects, engineers, stakeholders, developers and building managers for performance green building, LEED (NC, CS, Healthcare, Schools, CI, ND, Homes) and Enterprise Green Communities certification with respect to the design, construction, operations and maintenance of performance built environments. Integrative process facilitation, project administration, education, and oversight of LEED Online submittal portal.

Project Manager and Consultant - Projects include: Cleveland Clinic Cancer Building (LEED HC), Central Choice Cedar Extension (LEED ND, NC & Enterprise Green Communities), Uptown II Apartments (LEED NC Silver Certified), The City of Cleveland – City Hall, Public Auditorium and West Side Market (LEED EBOM)

Performance Green Building – LEED - Sustainability Consultant & Project Manager

Sarasota, Florida December 2013 - Present

Consulting to architects, engineers, building owners, stakeholders, developers, municipalities, higher education and residential for sustainability, performance green building and LEED certification with respect to the design, construction, operations and maintenance of new and existing buildings. Integrative process facilitation. Support, leadership and policy authoring for v3/v4 LEED for Existing Buildings Operations and Maintenance certification. Sustainability, performance green building presenter and speaking professional.

Chief Sustainability Professional – Green Building Professional A-E Firm – Guernsey: Architects, Engineers, Consultants Oklahoma City, OK. April 2010–September 2013

Guernsey is the largest employee owned architectural and engineering firm in Oklahoma servicing the federal government, regional municipalities, higher education, commercial and residential development companies. The 150 employee company provides architecture, interior design, landscape architecture, mechanical-electrical-plumbing-civil engineering, fire protection engineering, commissioning, master planning, RFP authoring and sustainable design services.

Responsibilities included leading both internal and client sustainability initiatives, measures, education and management of LEED certification of client new construction and major renovations projects. Established and lead the internal ‘Sustainability Green

Team' to collaboratively implement measures and programs for the company owned building.

Additionally lead and oversaw the LEED for Existing Buildings: Operations and Maintenance strategy development and implementation of measures in the pursuit of certification. This included sustainable business policies, practices, upgrade of systems, integrating new systems, and use materials and resources. Attended to and managed multiple buildings and clients simultaneously.

Strategic Accomplishments

- *Recognized the need to align sustainability approaches and strategies to strengthen senior management, architects, engineers, landscape architects, interior designers and planners skill performance in competitive climate.*
 - *Established, facilitated implementation of programs for comprehensive recycling, green cleaning, energy optimization, improved indoor environmental quality.*
 - *Educated staff and coordinated alignment of practices between disciplines to enhance successfully met LEED intent and requirements. Result ... Successfully achieved credits toward LEED certification and sustainability for all relevant proposals. Introduced new, innovative design concepts and strategies to disciplines to integrate.*
- *Initiated organizational analysis of corporate responsibility practices with a focus on aligning policy and systems, lifecycle costing and corporate culture. Established benchmarks for optimization of energy, waste, and water.*
 - *Reviewed all company practices and policies and developed a course of action to transform operations to align with sustainability goals and policies.*

Noteworthy Projects Managed

- *Camp Lejeune – Devil Dog Battalion Aid Station - Jacksonville, NC LEED Gold Certified*
- *Camp Lejeune - Applied Field Training Center – Jacksonville, NC LEED Silver Certified*
- *Windsor Locks Readiness Center- Pursuing LEED Silver Certification – Hartford, CT*
- *Sugar Grove Fire and Police Centers - Pursuing LEED Silver Certification - Sugar Grove, WV*
- *Starship 6050 – LEED Silver Equivalent (USACE Self Certified) - Ft. Sill, OK*

Key Areas of Accountability:

- *Manage, facilitate, support LEED certification for new construction projects.*

- Internal corporate responsibility initiatives and efforts that benefited company and employees.
- Education of employees and disciplines on performance green building, sustainability and LEED.
- Established and facilitated the internal ‘Sustainability Green Team Committee’
- Organizing, facilitation and leading Sustainability Committee.
- Initiated and oversaw implementation of LEED EBOM v3 requirements including policies for purchasing, waste streams, and alterations, and measures for green cleaning, energy optimization, and indoor air quality.
- Directed and managed the production of video content for marketing and promotion related to projects, firm architectural, BIM showreel and external education.

Oklahoma State University • Oklahoma City, OK Feb 2011 – April 2013

Instructor – LEED Accreditation Workshops

Created and implemented a series of workshops with a grant from the Oklahoma Department of Commerce in partnership with Oklahoma State University to expand regional expertise. Series designed to increase quantity of LEED Green Associate (LEED GA) and LEED Accredited Professional for Building Design and Construction (LEED AP BD+C) accredited professionals.

Strategic Accomplishments

- ***Created successful curriculum to prepare industry professionals for rigorous GBCI accreditation exams.***
 - *Action ... Led intensive high level workshops which prepared future professionals for strict compliance examination through 24 16-hour workshops.*
 - *Result ... Prepared and educated over 300 professionals to assist a growing market in need of performance green building expertise.*

Green Building Florida • Hollywood Beach, FL 2005 - 2010

As principal of the firm that provided consulting services to commercial, higher education, K-12, and residential clients. Services included charrette and integrative process facilitation, sourcing of products, materials and systems, LEED and Florida Green Building Certification stewardship, sustainability education, and on-site inspections.

Florida Green Building Coalition Certifying Agent for multiple residential projects. Introduced the City of Hollywood to Local Green Government Certification process.

Noteworthy LEED-FGBC Certified Projects

- *St. Stephen’s Episcopal Day School- Miami, FL LEED for Schools Gold Certified*
- *Bay Harbor Residence – Miami, FL LEED for Homes Silver, Florida Green Building Coalition Gold, Energy Star Certifications*

- *2020 Alton Road – Net Zero Residence - Miami Beach, FL LEED for Homes Platinum Certification*

Community Leadership Experience

- **U.S. Green Building Council (USGBC) OK Chapter –Vice Chair - 2011-2013**

Serving in chapter leadership position as mentor, educator, manager and sustainability advocate for NGO, Government, Profit and non-Profit companies and organizations. Involved in ongoing chapter events, activities, advocacy, education, and programs. Shared management of board and executive committee monthly and annual meetings and events. Supported annual 'Spring Forum' expo and conference with 500 average attendees coming from the public and private sectors.

- **Green Building Certification Institute (GBCI) –Content Expert – 2011 & 2009**

Served Prometric Exam Provider and GBCI by offering expertise from the field in drafting and reviewing of (items) questions to be integrated into LEED Accreditation Exams.

• **USGBC South Florida Chapter – Residential Green Building Advocate (RGA) - 2009–2010**

Served as mentor, educator, advocate for Broward branch and chapter with respect to LEED for homes and all potential residential green building rating systems for new and existing residential built environments. Served as expert educator for the LEED for Homes rating system and Florida Green Building Coalition Green Home rating system.

• **City of Hollywood Green Team Advisory Board – Vice Chair - 2007–2008**

Served by advising the City of Hollywood on potential sustainable and green programs, strategies and measures for implementation. Introduced the city to the Florida Green Building Coalition's 'Local Green Government' Certification and process. FGBC Local Green Government Bronze Certification was achieved July 2012.

• **Synergy Housing Development Corp - Delray Beach, FL 1993–2000**

Founder and core investor of the first in Florida 38 home sustainable performance green residential community. Project moved from concept through zoning approval and successfully sold to builder/developer.

Awards

Environmental Leadership Award • Miami Chapter of the American Institute of Architects 2008

Project Awards

2020 Alton Road – LEED Platinum – Net Zero Residence – USGBC South Florida Chapter - Residential Project of the Year 2013

St. Stephen's Episcopal Day School – LEED Gold – USGBC South Florida Chapter – K-12 Project of the Year 2012

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