

SUSTAINABLE ENERGY REQUIREMENTS FOR ADVANCE PLANNING PHASE

1. The following Advance Planning deliverables shall be included to comply with the Performance Standards for Sustainable, Energy-Efficient Public Buildings as identified in GS 143 – 135.35 through .40 (Article 8C).

Program: Provide a program that defines the Owner's space utilization and needs requirements. Provide space allocations of the program needs, showing relationship of gross and net square footage outlined in the program including space provided for building systems. Provide a summary of 'required' and 'optional' building areas and features with cost opinions provided for each. Recommend specific features and areas for inclusion in the project scope, within the project funds available.

Project Narrative: Provide building and site analysis and recommendations by the design team. Include the following deliverables:

- a. Daylighting Feasibility Report
- b. Evaluation of the building geometry for daylighting
- c. Zoning and Site Utilities availability and adequacy
- d. Identify building systems and features to be reviewed for the Life Cycle Cost Analysis and explain the rationale of choices identified
- e. Identify and review potential energy conservation strategies
- f. Identify code requirements and required enhancements related to existing buildings

Budget Narrative: Provide a budget and scope reconciliation narrative that reconciles the Owner's OC-25 budget constraints with energy efficient strategies and requirements.

Net Savings Required: Effective October 1, 2013, the sustainable energy requirements will apply to a major facility construction project or major facility renovation project only if their application will result in an anticipated net savings for the first 10 years post-construction in accordance with GS 143-135.37(a1).

2. Based on this reviewed and approved Advance Planning submission, the Owner, in consultation with the design team, will reconcile project scope and funding.
3. If Net Savings Required (from Requirement 1) is not anticipated, the selection of a Commissioning Authority will not be required and the use of the "Sustainable Energy Supplement to the State of North Carolina Standard Form of Agreement between Owner and Designer" (Article 15-1) will not be required.
4. At the conclusion of the Advance Planning phase, the Owner shall begin the process of selecting a Commissioning Authority but the participation of the Commissioning Authority is not required until after the completion of the Schematic Design phase.
5. The **Standard Form of Agreement Between Owner and Designer** that includes the required "Sustainable Energy Supplement to the State of North Carolina Standard Form of Agreement between Owner and Designer" (Article 15-1) shall be executed at the completion of the Advance Planning phase.
6. A **Letter Agreement** between the selected Commissioning Authority and the Owner shall be executed after the completion of the Schematic Design phase. The Commissioning Authority participation will begin with review of the Schematic Design documents.