

## CHPS Criteria Addendum #2019-OM-01

Published 4/5/2019, Revised 11/2019 (HI-CHPS only)

Category: Operations & Metrics

Addendum Type: Revision

Criteria Edition: US-CHPS 2014 v1.1, CA-CHPS 2014 v1.02, NE-CHPS v3.x, HI-CHPS 2012, TX-CHPS 2015 v2.0

**Description:** The CHPS Operations Report Card is an online tool that is undergoing an update and is not anticipated to be available for use until late in 2019. Additionally for all states except Hawaii, the Performance Review recognition option is on hold for evaluation, affecting the ability of schools to document their usage of the ORC. This Addendum provides revised requirements for the Performance Benchmarking/Performance Operations prerequisite and credit to be used in the interim.

### Applicable Prerequisites/Credits:

Edition	Criterion Number and Name
US-CHPS 2014 v1.1	
CA-CHPS 2014 v1.02	OM 3.0 Performance Benchmarking
NE-CHPS v3.x	OM 4.1 High Performance Operations
TX-CHPS v2.0	
HI-CHPS 2012 11/2019: superseded by HI-CHPS v1.1	<del>OM.P1 District High Performance Operations</del> <del>OM.C2 Enhanced High Performance Operations</del>

### Revisions:

#### US-CHPS 2014 v1.1 (2016 update)

#### **OM 3.0 - Performance Benchmarking Implementation, p 236**

Option 1 (the ORC) is removed. Options 2 (Portfolio Manager) and 3 (energy model) are renumbered to 1 and 2.

#### **Documentation Requirements, p 237**

The text is changed as follows:

##### *Design Review*

If using ~~option 2~~ Option 1, submit a copy of the initial facility report with the preliminary ENERGY STAR Score from EE 1.0-1.1.

##### *Construction Review*

~~Indicate which Option was used.~~

For all options, submit a letter from the District identifying which benchmarking program will be used and commit to tracking energy performance after 1-2 years or perform recommissioning after 2-5 years.

~~Option 1 Provide proof of registration of school to conduct the ORC.~~

Option 32 Submit the letter as noted above and certify a model was done according to the guidelines contained in Energy Prerequisite EE 1.0.

*Performance Review*

~~Option 1 Complete the ORC program by receiving scores for the school.”~~

**OM 4.1 – High Performance Operations  
Requirement, p 238**

The text is changed as follows:

~~“OM 4.1.1 CHPS Operations Report Card. Receive a point for every two modules of the CHPS Operations Report Card conducted under OM 3.0 for which the school receives a high performance score of at least 70 points (except energy efficiency which is already required under OM 3.0). Within the window for final commissioning, set a baseline for benchmarking of additional building performance metrics beyond energy usage. For every two metrics, receive one point. Choose from IAQ, water use, GHG emissions, waste generation, noise, lighting, and temperature/humidity. No specific baseline number is required. The baseline should be set with a combination of building measurements and occupant feedback, as applicable.”~~

**Implementation, p 239**

The text is changed as follows:

~~“Possible benchmarking tools include Portfolio Manager, EPA’s IAQ checklists or mobile app, and the CHPS Waste Survey. Occupant surveys are also appropriate. Other third party tools may be used with prior approval. Complete the required steps of the ORC program, including data gathering through facilities measurements and occupant surveys. After entering all the requested information, the school is provided with a Report Card. This summary document provides the school with the numeric score it has achieved in each category, along with brief comments about why that is the case. In addition to the Report Card, the school receives a customized list of suggested improvements based on their site information. While a particular score is not required to earn 1 point under OM 3.0, 2 points are offered for a passing score under OM 4.1.1.”~~

**Documentation Requirements, p 240**

Added to Construction Review:

“OM 4.1.1

Identify metrics selected and tools used. Provide copy of output or screenshot showing results.”

Performance Review is removed.

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**CA-CHPS 2014 v1.02 (2016 update)**

**OM 3.0 - Performance Benchmarking  
Implementation, p 239**

The options are reduced from 3 to 2 and reference to the ORC is removed.

**Documentation Requirements, p 240**

Changed as above under US-CHPS.

#### **OM 4.1 – High Performance Operations, beginning on p 241**

Changed as above under US-CHPS.

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#### **NE-CHPS v3.1 and 3.2**

#### **OM 3.0 - Performance Benchmarking, beginning on p 43**

Changed as above in US-CHPS.

#### **OM 4.1 – High Performance Operations, beginning on p 47**

Changed as above under US-CHPS.

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#### **TX-CHPS 2015 v2.0**

#### **OM 3.0 – Performance Benchmarking, beginning on p 258**

Changed as above in US-CHPS.

#### **OM 4.1 – High Performance Operations, beginning on p 261**

Changed as above in US-CHPS except that 1 point is awarded for each metric instead of every 2 metrics.

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#### **HI-CHPS 2012 – Superseded by HI-CHPS 2012 v1.1**

#### **OM.P1 – District High Performance Operations Requirement, p 210**

Text is changed as follows:

~~“OM.P1.1 Within 18 months of occupancy the owner must benchmark the project’s performance under the CHPS Operations Report Card (ORC) by conducting the following:~~

- ~~• Update the data in [Portfolio Manager](#), as used in EE.P1, to monitor energy and water use. GHG emissions can also be tracked;~~
- ~~• Use EPA’s [IAQ Walkthrough Checklist](#) or [School IAQ Assessment mobile app](#) from the Tools for Schools program;~~
- ~~• Conduct an occupant survey of teachers and staff using CHPS’ survey or equivalent;~~
- ~~• Conduct a waste audit using the CHPS waste audit worksheet; and~~
- ~~• Optionally, use any available third party tools to monitor acoustics, lighting, and temperature/humidity.”~~

#### **Verification, p 210**

The requirement to submit ORC scores is removed. The following text is added:

“Submit the following:

- Statement of Energy Design Intent (SEDI) from Portfolio Manager to cover energy, water, and GHG emissions;
- Proof of completion of the IAQ Walkthrough or IAQ app;

- ~~Copy of compiled results of the occupant survey (can be a graphical summary);~~
- ~~Proof of completion of the CHPS Waste Audit;~~
- ~~Proof of use of other tools, if applicable.”~~

**OM.C2 – Enhanced High Performance Operations  
Requirement, p 215**

~~OM.C2.1 – The requirement to receive an ORC score of at least 70 is replaced with a requirement to maintain or improve the building’s ENERGY STAR score established under EE.P1.~~

**Verification, p 216**

~~Submission of the ORC scores is replaced with submission of the SEDI report from Portfolio Manager, which is covered in OM.P1.~~