



CHPS Verified Program User Guide

Version 2.0

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For projects in California (non-HPI projects), Colorado, Hawaii, Massachusetts, Texas and Virginia

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1. Introduction

The CHPS Verified Program was created in March of 2007 to provide 3rd-party review and verification of compliance with the CHPS Criteria high performance school rating system. In the CHPS Verified Program, accountability rests on the design team, school district, CHPS, and a 3rd-party reviewer to ensure that the high performance features are implemented as intended.

Participation in the CHPS Verified Program will ensure that the school project has the required high performance features to realize the benefits associated with a high performance school, such as increased health, productivity, and student performance, and energy savings and decreased operating costs.

2. Project Eligibility

The CHPS Verified Program includes the following project types:

- New Schools
- New Buildings on Existing Campuses
- Major Renovations/Modernizations
- Prefabricated Classrooms (modular manufacturers should visit <http://www.chps.net/prefab> for more information; school and districts that have purchased a CHPS Prefab can use this guide to attain CHPS Verified recognition for their classroom/building)

Each of these project types are defined in the state-specific CHPS Criteria along with their respective prerequisite requirements and point thresholds.

CHPS offers two recognition programs, CHPS Verified and CHPS Designed. For Recognition Program Availability by state, see the table here: <http://www.chps.net/recognition>.

3. Program Tools & Resources

The CHPS Verified Program will help project teams manage the design and documentation process and provide tools for project oversight, plan review, and resources. Each registered project will receive:

Project Website

A project website will be established for each registered project. The project website will be used for all electronic submittal of supporting documentation, project tracking (e.g. to-do lists, milestones, reminders), and coordination and communication amongst the project team and CHPS staff. The project will be reviewed online, so no paper submittals are necessary.

Project Scorecard (except for Hawaii-CHPS)

The CHPS project scorecard is an extensive series of linked Excel worksheets (credit and prerequisite templates) that is used to track progress on CHPS prerequisites and credits, and is used to assign

responsibility amongst team members. The worksheets have been set up to allow for all necessary calculations to be performed within them. Some submittal requirements may be listed on the scorecard, however refer to the state-specific Criteria for detailed documentation and submittal requirements. The project scorecard will be uploaded to the project website.

Project Plan Sheets (Hawaii-CHPS projects only)

The CHPS plan sheets contain the HI-CHPS Scorecard along with other tools for showing compliance with various Hawaii specific prerequisites and credits and is included with the construction documents to aid in construction compliance. Plan sheet templates will be uploaded to the project website.

CHPS Criteria Interpretations (CCIs)

CHPS Verified includes up to three CHPS Criteria Interpretations (CCIs) on any of its prerequisites or credits per project. Design teams may request these CCIs to clarify a prerequisite or credit, understand how it might apply to their project, or seek guidance on an unusual approach to a prerequisite or credit. CHPS technical experts will review the request and reply to you within 20 business days (in most cases a reply will be given within 10 business days). CCI results are posted on the [Credit Interpretation Library](#) for any CHPS users to view. Additional CCIs can be completed for a fee of \$250 each. CHPS staff will be available to answer non-CCI questions for projects as well.

CHPS 3rd-Party Review

Each project will have the construction documents (plans and specs), scorecard, and supporting documentation reviewed by an independent CHPS-approved 3rd-Party Reviewer.

Recognition

For each project that meets the requirements of the CHPS Verified Program, the school will receive a custom-made CHPS Verified plaque, and the entire project team will receive a personal letter, signed by the Executive Director of CHPS. CHPS Verified projects will be recognized as a CHPS Verified School on the CHPS website and other related materials. CHPS also offers a guide "Plan Your Own CHPS Verified Ceremony," which contains ideas and helpful tools for planning a successful celebration of your CHPS Verified recognition.

4. Project Phases, Requirements & Review Timelines

The CHPS Verified Program has several project phases, requirements, and review timelines.

Project Registration Phase

a. Timing

The project team should register the project with CHPS as soon as possible. It is preferred that the project is registered during pre-design, however, as long as the project is registered prior to construction, it will be accepted. For late registration, contact CHPS directly to see if a project can still be considered for the CHPS Verified Program.

b. Requirements

Project registration is required. To register a project, complete the CHPS Verified Project Registration Form and pay the registration fee online at <http://www.chps.net/verified-registration>. The project team also has an option to request an invoice and pay the registration fee by check.

c. Actions

Once project registration and payment is complete, you will receive a confirmation and receipt. CHPS will create a project website and upload the state-specific CHPS Verified Scorecard and Documentation Templates. The member of the project team that registered the project will be set up as the initial user, allowing access to download, complete, and repost the CHPS Verified Scorecard Worksheets I.-III. (blue registration tabs) to the website. These worksheets identify the essential members of the project team and help CHPS to continue to build the project website. Each project team member will be given individual access to the project website and CHPS Verified Scorecard and Documentation Templates. Prior to Design Review, the project team can utilize this site to communicate with CHPS about the project and the process.

CCIs must be requested through <http://www.chps.net/cqi> not through the project website. For more about CCIs, see page 4 of this guide.

Design Review Phase

a. Timing

The Project Team Leader should allow ample time for this phase prior to construction. Though project schedules and timing may vary, eight weeks is the minimum recommended timeframe for the Design Review phase. CHPS makes every effort to complete projects within this timeframe, but it assumes the timely submission of complete project information. The project team must receive CHPS Design Review approval prior to construction.

b. Requirements

When a project is ready for Design Review, the project team must upload all required documentation to the project website. Based on the project size and number of points the project is pursuing, CHPS will assess the CHPS Verified Review Fee and notify the project team. The review fee can be paid online at www.chps.net/creditcardpayment or the project team can request an invoice.

Review Types:

CHPS is piloting a "Consolidated Review" as a means of reducing the time needed to complete the design and construction review phases. Projects that are chosen to participate in this pilot will bypass the CHPS completeness screening. Documentation will be accessed immediately by the 3rd-Party Reviewer, and the project team will interact directly with the reviewer during the review phases. The CHPS submittal screening is eliminated from this review process. Projects that are chosen to participate will be notified before the review begins.

c. Actions

The CHPS Verified Program Scorecard and Documentation Templates must be completed and uploaded to project website along with any supporting documents and submittals. Supporting documents should be compiled in a single PDF document, bookmarked by credit and assembled in the order of the scorecard. A complete set of construction drawings (including CHPS Plan Sheets for HI-CHPS) and project specifications must be uploaded to the project website as well. No paper submittals, construction drawings or specifications will be accepted.

Once submittals are completely uploaded and Review Fee has been paid, the project team must notify CHPS, through the project website, that the project is ready for Design Review.

Within 20 business days of notification, CHPS will screen the submittals for completeness prior to 3rd-Party Design Review. If CHPS determines that there is not adequate information for the 3rd-Party Reviewer to approve a prerequisite or credit, the project teams will have 20 business days to respond to all incomplete prerequisites and credits (this may include requests for clarification, additional documentation, pictures, or a question of accuracy of the documentation submitted). If the project team does not respond at all to items on the list within 20 business days, the project team will lose the prerequisite or points associated with that information. If the project team resubmits the prerequisites and credits within 20 business days, CHPS will have 10 business days to review the resubmitted material. If the project team does not respond at all to items on the list within 10 business days, the project team will lose the prerequisite or points associated with that information. If the project team resubmits the prerequisites and credits within 10 business days, CHPS will have additional 10 business days to review the resubmitted material. The project will not be recommended for 3rd-Party Review until all necessary information for each prerequisite or credit claimed has been properly documented. There are several types of possible submittal requirements for prerequisites and credits:

- Templates (T): Complete the credit template (excel worksheet)
- Attachment (A): Submit an attachment in PDF format that provides the required documentation
- Construction Document (CD): Cite on the template where in the project drawings or spec book reviewers may confirm compliance with the credit
- Plan Sheets (PS): Included in CD's for HI-CHPS projects only
- Construction Audit Requirement (CA): See the Construction Review Section

A 3rd-Party Review of all documents and submittals will take place. CHPS will post the complete review results to the project website.

There are four scenarios that *may* be a part of the Design Review Phase.

- **Project team response for 3rd-Party Design Review**
If the 3rd-Party Reviewer determines that there is not adequate information to approve a prerequisite or credit, this will be detailed in the review results. Project teams will have 20 business days to respond to all incomplete prerequisites and credits. If the project team does not respond at all to items on the list within 20 business days, the project team will lose the prerequisite or points associated with that information. If the loss in points or prerequisites places the project below the minimum required threshold for that project, the project will

become inactive and the review will stop. The project review may be reactivated for a \$500 fee if the correct information is provided that brings the point total above the minimum required. All communications during the design review phase are through on the project.

- **3rd-Party Review of re-submitted credits and prerequisites**

If the project team resubmits the prerequisites and credits within 20 business days, the 3rd-Party Reviewer will have 10 business days to review the resubmitted material. If the 3rd-Party Reviewer determines that there is not adequate information to approve a prerequisite or credit, this will be detailed in the review results. Project teams will have 10 business days to respond to all incomplete prerequisites and credits. If the project team does not respond at all to items on the list within 10 business days, the project team will lose the prerequisite or points associated with that information. If the project team resubmits the prerequisites and credits within 10 business days, the 3rd-Party Reviewer will have additional 10 business days to review the resubmitted material. The 3rd-Party Reviewer will return the final review results.

- **Project team appeals period for Design Review**

If the project team wishes to appeal the final review results, they have 20 business days to complete the appeals process. See the "Appeals Process" section below for more information.

- **CHPS Technical Committee appeals period for Design Review**

If the project team submits for an appeal, the CHPS National Technical Committee and/or CHPS state-specific Partner Advisory Committee has 20 business days to respond.

Construction Review Phase

a. Timing

The Construction Review must take place within 90 days of substantial completion of the project. Also see the graphic "Figure 1: CHPS Verified Program Phases" on page 10.

b. Requirements

The CHPS Verified Program Scorecard and Documentation Templates must be updated and/or completed for credits with Construction Review requirements only. Not all prerequisites and credits have Construction Review requirements. All supporting documents and submittals must be uploaded to the project website.

c. Actions

The CHPS Verified Program Scorecard and Documentation Templates must be updated, completed, and uploaded to project website along with any supporting documents and submittals. Supporting documents should be compiled in a single PDF document, bookmarked by credit and assembled in the order of the scorecard. Once submittals are completely uploaded, project team must notify CHPS, through the project website, that the project is ready for Construction Review. CHPS will notify the project team which prerequisites or credits claimed will be audited. Some prerequisites and credits will be audited for additional material.

During the Construction Review the project team will be asked to provide materials for audit requirements for 25% of the credits that have Construction Review audit requirements. The project team does not need to provide the additional documentation or submittals unless they are informed that a credit will be audited.

The project team will have 20 business days to produce the requested audit information. In most cases, the audit information requested is a picture or proof of purchase (see state-specific Criteria for when a picture may need to be taken during construction). The project team must notify CHPS, through the project website, when all audit requirements are uploaded. If the project team is unable to supply the audit information for a prerequisite or credit claimed, that prerequisite or points associated with the credit claimed will be lost and an additional credit or prerequisite with audit requirements will be chosen. If the project team is unable to supply the audit information for this additional prerequisite or credit, all prerequisites or credits with audit requirements will be reviewed.

Within 20 business days of notification, CHPS will screen the submittals for completeness prior to 3rd-Party Construction Review. If CHPS determines that there is not adequate information for the 3rd-Party Reviewer to approve a prerequisite or credit, the project teams will have 20 business days to respond to all incomplete prerequisites and credits (this may include requests for clarification, additional documentation, pictures, or a question of accuracy of the documentation submitted). If the project team does not respond at all to items on the list within 20 business days, the project team will lose the prerequisite or points associated with that information. If the project team resubmits the prerequisites and credits within 20 business days, CHPS will have 10 business days to review the resubmitted material. If the project team does not respond at all to items on the list within 10 business days, the project team will lose the prerequisite or points associated with that information. If the project team resubmits the prerequisites and credits within 10 business days, CHPS will have additional 10 business days to review the resubmitted material. The project will not be recommended for 3rd-Party Review until all necessary information for each prerequisite or credit claimed has been properly documented. During the 3rd-Party Construction Review, the project team cannot change or add documentation, unless requested by CHPS or 3rd-Party Reviewer.

If the project has met the prerequisites and minimum point threshold, once the review is completed CHPS will notify the project team that the project has been approved to be a "CHPS Verified" project. CHPS will also notify the project team if any credits/points were ultimately denied (for more information on appealing the loss of prerequisites or credits, see the section labeled "Appeals Process"). After the Construction Review, if no appeals are received within 20 business days, the project will be recognized as a CHPS Verified project. The Project Team Leader can also inform CHPS that they accept the Construction Review results and do not intend to appeal through project website in order to receive immediate recognition.

There are four scenarios that *may* be a part of the Construction Review Phase:

- **Project team response for 3rd-Party Construction Review:**
If the 3rd-Party Reviewer determines that there is not adequate information to approve a prerequisite or credit, this will be detailed in the review results. Projects will have 20 business days to respond to all incomplete prerequisites and credits. If the project team does not

respond at all to items on the list within 20 business days, the project team will lose the prerequisite or points associated with that information. If the loss in points or prerequisites places the project below the minimum required threshold for that project, the project will become inactive and the review will stop. The project review may be reactivated for a \$500 fee if the correct information is provided that brings the point total above the minimum required. All communications during the construction review phase are done on the project website and between CHPS and the project team only.

- **3rd-party review of re-submitted credits and prerequisites**

If the project team resubmits the prerequisites and credits within 20 business days, the 3rd-Party Reviewer will have 10 business days to review the resubmitted material. If the 3rd-Party Reviewer determines that there is not adequate information to approve a prerequisite or credit, this will be detailed in the review results. Project teams will have 10 business days to respond to all incomplete prerequisites and credits. If the project team does not respond at all to items on the list within 10 business days, the project team will lose the prerequisite or points associated with that information. If the project team resubmits the prerequisites and credits within 10 business days, the 3rd-Party Reviewer will have additional 10 business days to review the resubmitted material. The 3rd-Party Reviewer will return the final review results.

- **Project team appeals period for Construction Review**

If the project team wishes to appeal the final review, they have 20 business days to complete the appeals process. See the section called "Appeals Process" for more information.

- **CHPS Technical Committee appeals period for Construction Review**

If the project team submits for an appeal the CHPS Technical Committee has 20 business days to respond.

Performance Review Phase (Hawaii-CHPS projects only)

a. Timing

The Performance Review occurs between 12-18 months of occupancy.

b. Requirements

When a project is ready for Performance Review, the project team must upload all required documentation to the project website.

c. Actions

The project team must upload supporting documents and submittals. Supporting documents should be compiled in a single PDF document, bookmarked and assembled in the order of the scorecard. Once submittals are completely uploaded, project team must notify CHPS, through the project website, that the project is ready for Performance Review.

Recognition Phase

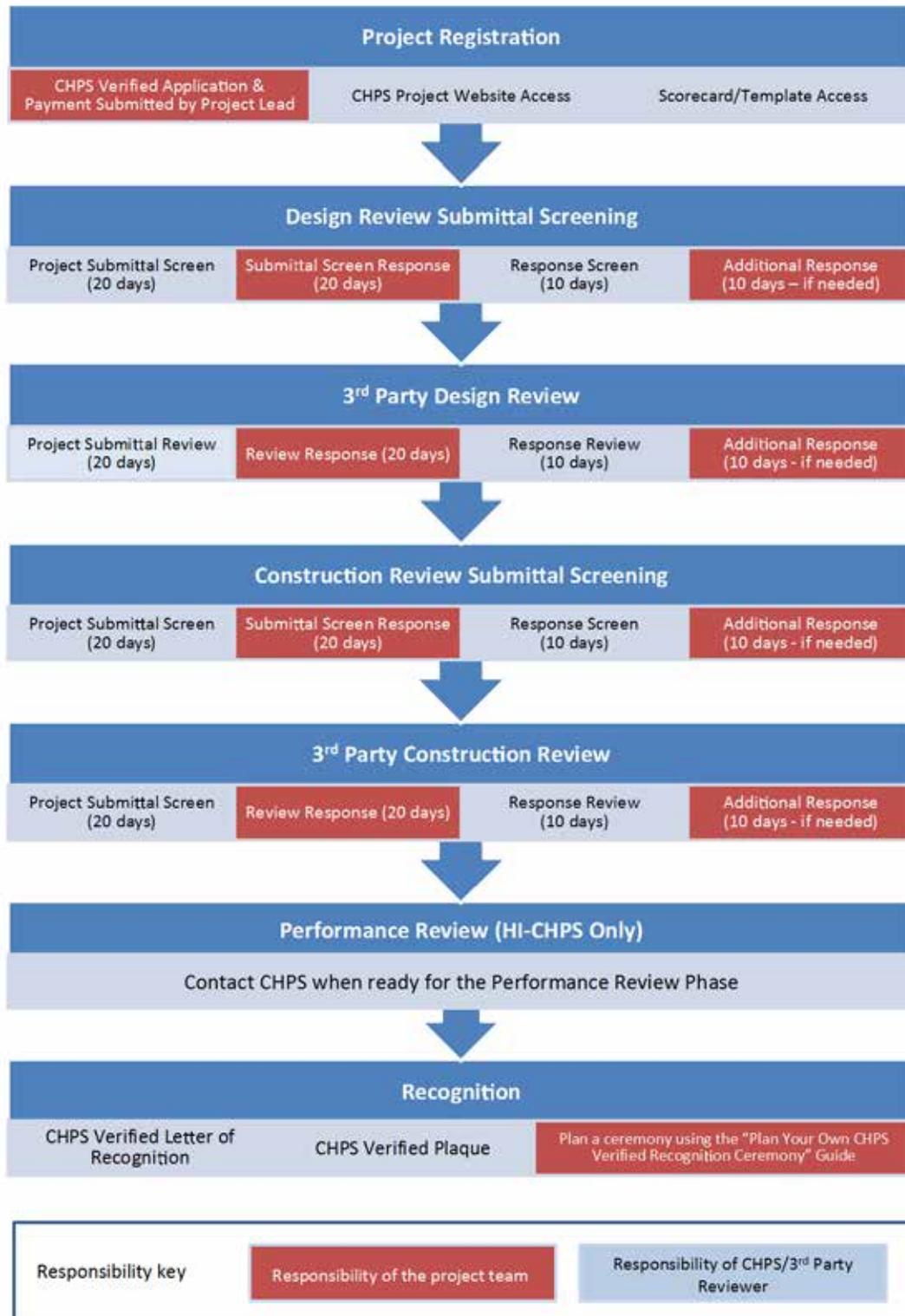
a. Timing

Once the project has been approved, after the Construction Review (after the Performance Review for HI-CHPS), it will be recognized as a CHPS Verified School.

b. Actions

Projects will receive a signed CHPS Verified letter and a CHPS Verified Plaque. CHPS will list the project on its website. CHPS staff, board members, and/or state-specific Partner Advisory Committee members may participate in recognition ceremonies, as well as use the project in case studies based on project and availability. CHPS may also provide quotes for media use as desired.

5. CHPS VERIFIED DESIGN



5. Post-Project

a. Claiming Additional Points

If the project team decides that it would like to claim additional points after the Design Review has been completed, the project will be charged a fee of \$200 for the Design and Construction Review of each credit. Project teams may add credits until they have been notified by CHPS that their Construction Review is complete.

b. Appeals Process

After the Design or Construction Review, the project team has 20 business days to appeal a decision made by CHPS regarding a denied prerequisite or credit if they feel they have sufficient grounds for appeal. The appeal fee is \$500 per prerequisite or credit being appealed. A review will occur within 20 business days of receipt of the appeal by the CHPS Technical Committee and/or state-specific CHPS Partner Advisory Committee. The project team should submit a detailed narrative explaining why they believe the determination of the review was inaccurate and how they feel the project meets the intent of the prerequisite or credit. They may also provide additional documentation to support their argument. The narrative should not exceed 3 pages and the additional supporting documentation should not exceed 10 pages. All decisions made by CHPS are final and there are no refunds.

6. CHPS Verified Program Fees

CHPS Verified Program fees represent any fees that may be charged through participation in the program. The fee structure in place at the time of project registration will be the fee structure to which the project is subject. No refunds will be offered once payment is made.

CHPS Verified projects must be registered as soon as possible (preferably during pre-design). For the most up-to-date registration fee schedule, please refer to <http://www.chps.net/verifiedfees>.

CHPS Members receive a significant discount for their clients on the CHPS Verified project registration fee. For more information on becoming a CHPS Member, visit <http://www.chps.net/membership>.

The CHPS Verified Review Fee will be assessed prior to the Design Review based on the square footage of the project and the number of points the project team is pursuing. For the most up-to-date review fee schedule, please refer to <http://www.chps.net/verifiedfees>.

The first three CHPS Criteria Interpretations (CCIs) for a registered project are free. Each additional CCI is \$250. For non-registered projects, CCIs are \$250 each. To request a CCI, visit <http://www.chps.net/ci>.

After the Construction Review, a school district or project team may appeal the decision made by the 3rd-Party Reviewer or CHPS for a fee of \$500 per prerequisite or credit appealed.