User Guide to Verification

CHPS Verified™ CHPS Verified Leader™ CHPS Designed™

COLLABORATIVE FOR HIGH PERFORMANCE SCHOOLS®

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Welcome to the CHPS Verification Programs

Thank you for considering CHPS for your next school project!

The Collaborative for High Performance Schools (CHPS) is a national 501(c)(3) organization dedicated to advancing the cause of healthy, high performance school buildings. We have over 20 years of experience in this field, which has shown us that children learn better in schools with good lighting, clean air, and comfortable classrooms. That is why CHPS works with schools, design and building professionals, product manufacturers, and researchers to ensure that every child has the best possible learning environment with the smallest impact on the planet.

CHPS helps facilitate and inspire change in the design, construction, and operation of schools to:
- Protect student, educator, and staff health and wellness.
- Conserve energy, water, and other natural resources.
- Lower operating costs of school facilities.
- Reduce waste, pollution, and environmental degradation.
- Promote educational activities and curriculum that support environmental sustainability and positive community environmental stewardship.

Introduction

The CHPS verification programs offer PK-14 schools two options for earning recognition for their achievements in the construction or major renovation of classroom or non-classroom buildings.
- The CHPS Verified™ program provides a pathway to recognition through rigorous documentation of a school's design, construction, and operation. The Verified program involves a complete review of high performance documentation for the design and construction phases, and optionally for the performance phase. The purpose of the Verified approach is to ensure that owners, design teams, and construction professionals are all acting on the requirements of the CHPS criteria guidelines. Some state funding authorities offer incentives to achieve CHPS Verified. Under CHPS Verified, there are two verification levels, dependent on the number of points achieved:
    - Verified
    - Verified Leader
- The CHPS Designed™ program provides a pathway to recognition through a combination of self-certification by the design team and a narrative review by CHPS. The Designed program involves submission of a scorecard with narrative explanations of how the project complies with the criteria and does not require any documentation. The purpose of the Designed approach is to offer experienced design teams or schools and school districts with limited resources

an economical yet credible form of recognition. CHPS Designed has only one verification level.

Applicability of CHPS Criteria

The CHPS Criteria are applicable to all 50 states and the District of Columbia. Twelve states, thus far, have adopted state or region-specific versions of the CHPS Criteria, which include California, New York, the Northeast States (Massachusetts, Rhode Island, New Hampshire, Connecticut, Vermont, Maine, and New York), Texas, Virginia, Washington, and Hawaii. If your state has not adopted a custom edition, US-CHPS Criteria applies to your area. Ask us for more details and we will make sure you have the appropriate version.

Eligibility

CHPS Verified and CHPS Designed are available to public, private, and charter schools. Colleges and universities are also eligible. Contact us to find out more.

Eligible project types include:
- New Schools on New Sites/Campuses
- New Buildings on Existing Sites/Campuses
- Major Renovations/Modernizations & Additions
- Non-Classroom Buildings in any of the above categories
- Pre-Fabricated Structures in any of the above categories (modular manufacturers should visit https://chps.net/chps-prefab for more information)

Fees and Payment Deadlines

CHPS Designed

CHPS Designed has a single fee payable at the time of registration. The CHPS Designed fee as of publication is $900 for members and $1250 for non-members. For current CHPS Designed fees, go to https://chps.net/chps-designed.

CHPS Verified

CHPS Verified fees include registration and two or more review fees. For current CHPS Verified fees, visit https://chps.net/chps-verified, scroll down to the CHPS Verified Fees and Deadlines section and click the "Show more" button to open the information. Fees are divided into three payments: Registration, Design Review, and Construction Review. Additional payments may be applicable as indicated on the web page.

Deadlines are important to note as they must be honored in order to maintain active status of a project. Review fees must be paid in full in order for the review to commence. All fees need to be received by CHPS staff by the deadlines outlined or the project may be marked inactive and may trigger a $500 fee for reactivation.

- **Registration Fee:** Paid at time of project registration, 60 days after invoicing maximum.
- **Design Review Fee:** Paid at time of submission of documents for review, 30 days after invoicing maximum.
- **Construction Review Fee:** Paid at time of submission of documents for review, 30 days after invoicing maximum.

Criteria Editions and Deadlines for Use

Criteria editions are either open for registration (effective), closed for registration but open for verification (closed), or closed for both registration and verification (sunset). A complete table of all dates is available at https://chps.net/recognition-programs.

Registration for an edition opens on the effective date and closes on the closed date. As we update our criteria, we phase out the former editions by allowing for a short concurrency period where teams can register under either edition.

The sunset date is the date at which CHPS no longer provides review services for a given Criteria edition. That means all reviews and verification determinations must be complete by that date. Sunset dates are established when an updated edition becomes effective, based on the number of registered projects in the process and other factors. If a project will not be complete for verification by the sunset date, notify CHPS immediately so we can work out an arrangement.

Dates change when updated editions become available. Check the link above for the most current information.

All other editions are closed for registration at this time. Verification continues on some earlier editions.

What's Included in the Programs?

CHPS strives to make the verification process as simple and welcoming as possible. Our program fees entitle each project team to a dedicated project site, an Excel Scorecard or Workbook, free guidance throughout the process, up to two free Criteria Interpretations (CHPS Verified only), and a straightforward review process. Schools achieving verification receive a recognition letter and one free plaque.

Project Management Website

CHPS manages all projects through a third party project management service called Basecamp.com. All CHPS Verified and CHPS Designed submissions and results are handled online. No paper submittals are accepted. Once a project is registered and the fee paid, the project lead will be invited to join the project's Basecamp site. Each project site is private and accessible only to CHPS staff, the reviewers, and project team members. The project lead can easily add members to the site using the links providing on the site.

Scorecard and/or Workbook

Both programs utilize an Excel scorecard for recording and tracking points and notes; the CHPS Verified program also utilizes a set of Excel worksheets, known as the Verified Workbook, for documenting prerequisites and credits needed to achieve CHPS Verified status. The Workbook consists of the Scorecard and:

- Documentation worksheets for each criteria category
- Calculation sheets for specific criteria points (e.g. Materials Worksheet)

The scorecards allow you to assign responsibility for documenting different prerequisites and credits to project team members, and they can be used to track progress toward compliance during CHPS high performance design integration and construction meetings.

Q&A and Criteria Interpretations

CHPS is here to help! When general or technical questions arise regarding how a project conforms to criteria, we offer multiple options for finding an answer. CHPS staff and reviewers are available to answer questions and provide guidance through the discussion feature of Basecamp. Minor questions are handled informally and are generally answered quickly.

Additionally, we have a CHPS Project Forum on Basecamp that connects people across teams and projects. Every project lead will be added to the Project Forum and can post questions for their peers to answer. It's a great place to get ideas and support from other teams. Project leads can add others from their teams to the Forum as well.

CHPS Criteria Interpretations (CCIs)

For significant questions requiring interpretation or clarification, CHPS offers Criteria Interpretations handled by our National Technical Committee. A project team may request a CCI in order to clarify a prerequisite or credit, to establish alternative pathways to meeting the criteria, or to seek guidance on an unusual approach to a prerequisite or credit.

Each registered CHPS Verified project team is entitled to two free CHPS Criteria Interpretations (CCIs). Note: Free CCIs are not included in the CHPS Designed program. CHPS Designed teams or teams that have not yet registered a project may request CCIs at a rate of $200 each for members and $250 each for non-members.

To request a CCI, go to the CHPS website: https://chps.net/request-cci and fill out the online form. CHPS technical experts will review the request and reply to you within 20 business days. CCI results are posted on the Criteria Interpretation Library for all CHPS users to view. Additional CCIs can be requested for a fee; each additional CCI costs $250 for non-members and $200 for CHPS members.

Project Review

Both programs contain two primary phases of project review: Design Review (submitted toward the end of construction documents) and Construction Review (submitted within 90 days of substantial completion). Note: A third review phase, Performance Review, is no longer active.

- In CHPS Designed, each project's scorecard and narrative will be reviewed by a CHPS reviewer. The reviewer will communicate with the project team when questions arise and will provide the team with written comments and review results.
- In CHPS Verified, each project's Workbook, construction documents (plans and specs), and other supporting documentation is reviewed by a CHPS coordinator and third party reviewer. The reviewer will communicate with the project team when questions arise and will provide the team with written comments and

review results. Reviews are not initiated until the applicable review fees are received. Please see fee schedules listed previously.

Recognition

CHPS provides a free custom-designed plaque to every school that earns verification. Additionally, the superintendent or school director will also receive a formal verification letter. For the benefit of the entire project team, a copy of the letter will be posted to Basecamp.

Additional plaques may be purchased by the school or design team directly from the vendor. Simply notify CHPS, and a staff member will connect the school or team with the vendor.

How to Get Started

Visit the CHPS Criteria webpage: https://chps.net/chps-criteria to download a copy of the current CHPS Criteria for your state or region. If you are unsure which CHPS Criteria applies to your project, please let us know and we will be happy to help you.

Register Your Project Online

To access the online registration form, you must have a CHPS User Account and be logged in. To create a new account, go to https://chps.net/new-login-account. New accounts are approved automatically, so there is no wait.

Once you're logged in, go to https://chps.net/project-application-form and complete the form.

A design team member, CHPS consultant, or school representative may register a project. Before doing so, check to see if any of these members of your team have a CHPS membership, which allows you to benefit from the discount offered on new project registration. See: https://chps.net/member-directory.

The registration form will ask for basic contact details for both the school and design team, and information about the project, including project type, size, location, grades served, etc. The application also requires an *NCES Number*. See the box for information.

> The National Center for Education Statistics (NCES) is a federal organization that collects and analyzes school statistics across the nation. NCES assigns a unique number to every school and district, either private or public.
>
> For new schools that have not yet been assigned an individual NCES Number or if you can't find your number, please use the District (or Governing Body) Number.
>
> Public School Search:
> http://nces.ed.gov/ccd/schoolsearch
> Public District Search:
> http://nces.ed.gov/ccd/districtsearch/
> Private School Search:
> http://nces.ed.gov/surveys/pss/privateschoolsearch/

Once you have submitted your registration form your project will be reviewed and approved by CHPS staff. You will then receive a confirmation email with a credit card

payment link or a basic invoice to pay by check. After that, a CHPS staff member will send you a welcome email with additional information, including a formal invoice, if requested.

We encourage project teams to register new projects with CHPS as early in the process as possible. One advantage of registering a project during pre-design is gaining access to free criteria interpretations to ensure your project will successfully meet the criteria standards.

As long as the project is registered prior to construction, however, it will be accepted. For registration beyond the design phase, please contact CHPS directly to make a plan for review.

Project Website and Scorecard/Workbook Access

As mentioned previously, once project registration and payment is completed, you will be assigned a Basecamp.com project site. For more information on Basecamp and how to use it, please see "Using Basecamp" below.

Once the project's Basecamp site is created, CHPS will post a link where you can download the CHPS Designed Scorecard or CHPS Verified Workbook that corresponds with the criteria version for your project.

When you visit Basecamp for the first time, you will see a welcome message introducing you to the CHPS team and providing additional helpful instructions and information.

Now you are ready to begin!

The Verification Process

Although there are variations of the CHPS verification process depending on circumstances of each project, the following sections are based on a standard process where projects are on a normal timeline and do not have a complex scope of work. For more information on different project and review types, see the "Types of Reviews" section later in this document.

In both CHPS Verified and CHPS Designed, there are two review phases: Design Review and Construction Review. Both phases follow the same steps and timelines, shown here. Days are counted in business days.

CHPS review times vary depending on number of school projects under review. Four to eight weeks is the usual timeframe for the Design Review phase. CHPS makes every effort to complete projects within this timeframe; however, the timing depends on a combined effort between CHPS and the project team to keep the review on track.

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┌─────────────────────────┐   Submission does not pass   ┌─────────────────────────┐
│    1ˢᵗ Pass Review      │─────────────────────────────▶│   1ˢᵗ Pass Response: a) │
│    20 DAYS (4 weeks)    │                              │   Proceed as is; b)     │
└─────────────────────────┘                              │   Submit revisions; or c)│
            │                                            │   Withdraw              │
    Submission passes                                    │   20 DAYS (4 weeks)     │
            ▼                                            └─────────────────────────┘
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│    10 DAYS              │
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│  of Result              │───────────────────────▶│  for fee; b) Withdraw;  │
└─────────────────────────┘                        │  or c) Appeal for fee   │
            │                                       │  10 DAYS                │
    Submission passes                               └─────────────────────────┘
            ▼
┌─────────────────────────┐
│   Continuation to       │
│  Construction Review    │
│         OR              │
│     Recognition         │
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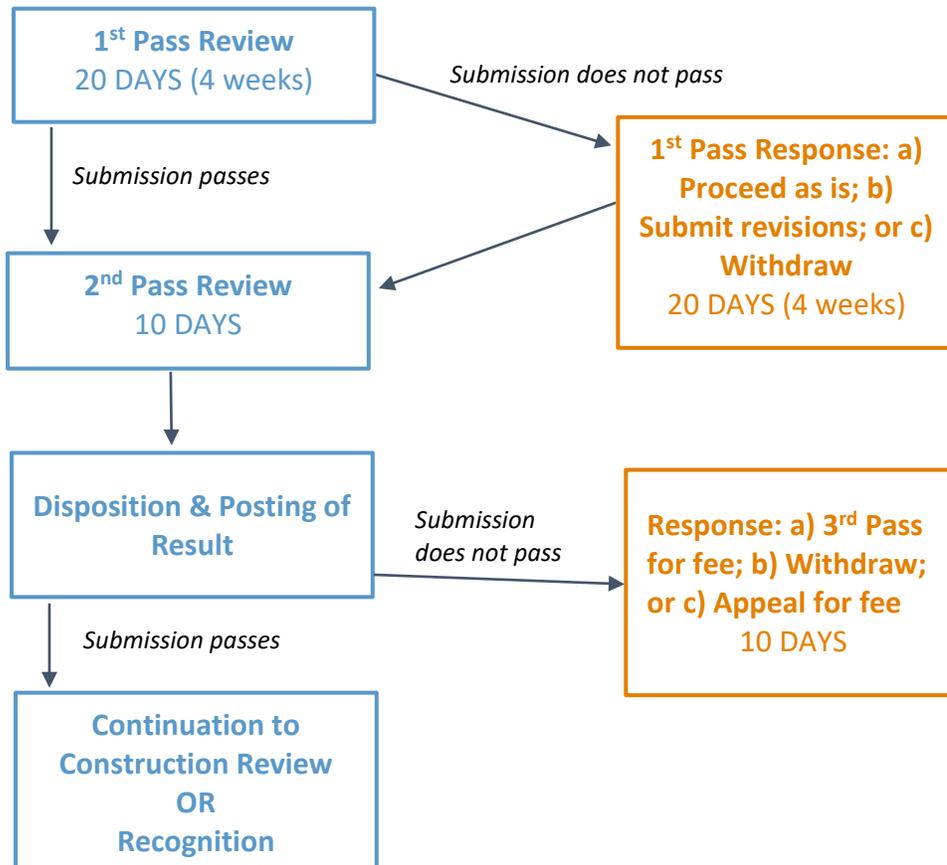
How to Submit for Review

Submission includes 3-4 simple steps. Everything is posted to Basecamp:

1. Post a short project description in the Discussion section;
2. Upload to the applicable CHPS Designed Scorecard or CHPS Verified Workbook with all required documentation; and
3. Post a quick message to CHPS informing us you are ready for review. This message establishes your place in the queue and starts the review clock. Note that CHPS has one queue for both programs.
4. For CHPS Designed projects, additionally upload your site and building layout drawings to Basecamp. This information is not part of documentation; it is used to better understand the project.

When to Submit

Design Review

Submissions should be uploaded toward the end of the construction documents phase. While projects may submit for review after 100% of the CDs are completed, it may be beneficial to receive feedback from CHPS earlier in order to make corrections. This applies especially to projects that are new to the CHPS Criteria or to the process.

Construction Review

Submissions should be uploaded within 90 days of substantial completion or occupancy. **All Construction Review submissions must be uploaded no later than two years after substantial completion or issuance of the occupancy permit.** If your submission is delayed or you decide to withdraw, please notify us.

Getting Ready to Submit

CHPS Designed

The entire submission is contained in the CHPS Designed Scorecard. All supporting narratives must be entered into the Annotation cells as indicated. The annotations should be descriptive about *how* you attained compliance for a prerequisite or credit. Cutting and pasting the requirements or simply entering "yes" or "compliant" is not accepted. Calculations should be included in the annotations where appropriate.

The objective is to be succinct while demonstrating that you comply. Entries should be thorough and should not refer the reviewer to documentation. The contents of design and construction materials (such as drawings and specifications) should be described in the annotations. In rare cases, a reviewer may ask for documentation for a specific prerequisite or credit in order to clarify an annotation. Again, this is rare.

CHPS Verified

Complete the Workbook as indicated in the Instructions on each sheet. The Scorecard is set up to total your points for you, allowing you to double check that you reach the threshold. Newer Workbooks (from early 2019 forward) have features that automatically check worksheet points as well to make sure you complete every necessary item.

All supporting documentation must be compiled into one zip file or PDF for *each* category of the criteria. That means seven zip files or PDFs total, one each for Integration (II), Indoor Environmental Quality (EQ), Energy (EE), Water (WE), Site (SS), Materials & Waste (MW), and Operations (OM). Within each section, it is essential to bookmark and clearly label each prerequisite and credit. Unmarked or unlabeled documentation will be returned to the project team for correcting.

Please note that although documentation requirements are identified in documentation worksheets, the requirements in the CHPS Criteria documents are more complete and should be referenced for each prerequisite and credit. Failure to do so may mean having

to go back to project team members for additional documentation or even having a prerequisite or credit denied by CHPS.

Documents Typically Submitted	
For Design Review	For Construction Review
• Completed Verified Workbook • Full Construction Documentation • Drawing & Specifications • Compiled single PDF or zip file for EACH category	• Updated Verified Workbook • Compiled single PDF or zip file for EACH category

Review Phases: Design Review and Construction Review

In both programs, Design Review and Construction Review phases follow similar steps. Note that for CHPS Verified projects, a review will not commence until the applicable fee has been received by CHPS.

After the team submits their package for review, as described above in Submitting for Review, the following process occurs:

Step 1: First Pass

1st Pass Review

The CHPS reviewer will review the submission to 1) verify the threshold number of points has been claimed, and 2) evaluate the submission for compliance with the CHPS Criteria. The reviewer will post the results with detailed requests for additional information if needed.

1st Pass Response

If the reviewer requests new or revised information, the project team may respond with a revised submission, may choose to proceed with the submission as is if the threshold has been met, or withdraw if the threshold has not been met. If the team proceeds as is, the 1st Pass results become the Final Disposition of Review for that phase.

> Quick Tip:
> When uploading files to Basecamp, change the date at the beginning of the file name with every edit and title them clearly. This will make it easier to find files once the site becomes populated with multiple documents.

Step 2: 2nd Pass

2nd Pass Review

The CHPS reviewer evaluates any new or revised information. As in the 1st Pass, the reviewer will post the results.

2nd Pass Response	The team may submit minor revisions if requested. If ready for Final Disposition, the team may 1) accept the results and proceed as is, withdraw, or request a 3rd pass review (for additional fee, see below); or 2) dispute the results and file an appeal. The review results become the Final Disposition of Review unless the team files an appeal.

> Special Note:
> If your project team needs an extension, please inform CHPS in advance. If a response is not heard within the given timeframe, a project may require an activation fee to resume the review process.

Final Disposition of Review

Design Review

The scorecard with the final review results will be posted to the project website. If, after the project team has been provided adequate time to submit revisions, the project is still not able to meet the CHPS Criteria point threshold (see CHPS Criteria document for the thresholds), then the project will not move on to Construction Review. The project team may withdraw the project, request a 3rd pass opportunity, or file an appeal. See below for information on appeals and 3rd passes. However, if all design prerequisites and the point threshold are met, then the project is approved to move on to the Construction Review phase.

Construction Review

A scorecard with the final review results will be posted to the project website. If the project has met the prerequisites and minimum point threshold, then CHPS will notify the project team as to whether the project has been approved for verification. CHPS will also notify the project team if any credits/points were ultimately denied. See Appeals Process below for next steps in that case.

After the Construction Review (if no appeals are received within 20 business days) the project will either be recognized under CHPS Verified or CHPS Designed, as applicable, or be closed from further review. A member from the project team must inform CHPS that they accept the Construction Review results in order to receive immediate recognition.

Third Pass Review – Additional Phase

Third passes are uncommon. Most project teams are able to complete the process in two reviews per phase. Third pass review is for project teams that are not able to pass the review under the standard process but do not dispute the reviewer's results. An example is when the project team demonstrates the intention to meet all prerequisites

and thresholds but needs to improve the quality of its documentation. A third pass is *not* an appeal (see below). The third pass fee is $100 members/$150 non-members per prerequisite/credit that needs to be re-submitted. Teams seeking a third pass are strongly advised to work closely with the reviewer and follow the reviewer's instructions in preparing the revisions. ***There are no fourth passes.***

The team should inform CHPS of the intention to submit for a third pass as soon as possible. The project will be assumed withdrawn and closed after 20 business days, if no appeal is filed.

Appeals Process

If the project team disagrees with the CHPS Reviewer's final results and wishes to appeal, the team has 20 business days to submit a request for appeal. The cost of an appeal is $500/credit for CHPS members and $800/credit for non-members. Appeals may be requested by posting a message on the project's Basecamp site. The request must include:
1. The number and name of the prerequisite and/or credit being sought;
2. The number of points being sought;
3. The reason for the request, including a detailed explanation of why the submitted documentation should meet compliance; and
4. The name and contact information for a point person on the project team.

Once CHPS receives a request for an appeal, a staff member will upload an invoice for the total appeals amount to the project's Basecamp site with instruction for payment. Payments for appeals may be paid by check or credit card.

Once CHPS has received payment, the CHPS Technical Committee will review the appeal and will respond within 20 business days.

After Verification

This is the best part!

Once the project has been verified, CHPS offers a helpful "Plan Your Own CHPS Recognition Ceremony" document with information on planning an event, suggested press release language, and photo ideas. CHPS staff, board members, and/or region-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.

Additional Information

Types of Reviews

Type	Applies To	Review Process
Standard	most projects	outlined above
Combined	project registered late in process and/or other extenuating circumstances	design and construction review are completed together under process outlined above
Expedited	projects seeking expedited reviews	review completed in half the time, additional fee applies
Multi-phase	multi-phase projects with multiple submissions and/or scopes, e.g. combined new construction and renovation	must contact CHPS to create a review plan, additional fees may apply

Using Basecamp

Basecamp.com is an intuitive project management website. CHPS staff can be of some assistance in helping project team members learn how to use it, but CHPS does not own or manage Basecamp.com. Thorough help and tutorials are available directly through Basecamp.

Once CHPS receives a registration payment, the individual who registered the project will receive a Basecamp invitation via email. Once you have access, you can add your project team members to Basecamp by clicking "Invite More People" in the right corner of the project page. All you need is their email address to send the invitation. Contact CHPS if you are having issues accessing or setting up your account.

Please read the "Welcome to your Project Website!" post when you log in to your project site for more information on working with us through Basecamp. It is the first message posted on your newly created project page.

We encourage you and your team to utilize this site for all project questions, notifications, and document uploads. It helps the project to stay organized, provides a history of the CHPS project communications, and stores documentation.

Status Levels of Projects
Active

All registered projects are active by default unless CHPS hears otherwise. If a project is not able to meet a deadline, please inform CHPS immediately. Active projects may be placed on hold under extenuating circumstances with no consequence to the registration.

Active projects will remain on Basecamp through the review process; upon completion, projects are marked complete and remain on Basecamp for a short time to allow project team members to download the award letter and other documents or discussions. After that, complete projects are archived and are no longer accessible to the project team.

As noted above, maintaining active status requires prompt payment of all fees. Non-payment will result in a project being marked inactive.

Withdrawn

Projects may be withdrawn by the project team from further consideration at any time in the process. Projects that are withdrawn are not eligible for refunds. Withdrawn projects will remain on Basecamp for a short period to allow team members to download any materials and then will be removed.

Inactive

In order to effectively manage the queue of projects, CHPS from time to time reviews all registrations for inactivity. CHPS will mark projects inactive that are delinquent in payments or have had no activity for 24 months or more without notification to CHPS. CHPS will make every effort to contact project teams prior to marking a project inactive. CHPS will post a message on the project's Basecamp site when it has been marked inactive.

Archived/Closed

Projects are archived in Basecamp and made inaccessible to the project team upon completion or due to lengthy inactivity or expiration. Projects that have been archived for 6 months or more will be downloaded from Basecamp. CHPS retains records of all projects in perpetuity.

In its discretion, CHPS may archive projects that have been marked inactive and remained so for 6 months or more. Again, CHPS will make every effort to contact the project team to learn the project's status. Once a project has been archived, it must be reactivated before it can continue through the review process. There is a $500 reactivation fee. Project teams that wish to reactivate the project should send a written request to CHPS staff via info@chps.net and make arrangements to pay the $500 fee.

> Important Note:
> A project can only be reactivated prior to the sunset date of the edition under which it registered.

Unless an arrangement has been made with CHPS, projects that do not complete the verification process prior to the criteria sunset date will be marked expired and removed from Basecamp. Project fees paid to CHPS up to that point will not be valid for reviews. Expired projects must be re-registered as new projects in order to be

reactivated. Applicable fees will be those in place at the time of the new registration—CHPS cannot honor former fees.

> Note:
> If the CHPS Criteria has been updated since the project expired and the former edition has sunset, the project pursuing new registration will need to conform to the most up-to-date version of the CHPS Criteria.

More Questions - Contact CHPS

CHPS is dedicated to advancing the cause of high performance schools and we are eager to work with you through our CHPS Verified process. After reading this guide if you still have remaining questions, please contact us. We are happy to answer your questions.

Contact us: (415) 957-9888 | info@chps.net