



# LEED 2009 for Existing Buildings: Operations and Maintenance

## IO CREDIT 3: DOCUMENTING SUSTAINABLE BUILDING COST IMPACTS

All fields and uploads are required unless otherwise noted.

This static sample form has been modified for offline access. All sections of the form are visible. Sample forms are for reference only.

Performance period start:

Performance period end:

The project team has documented the following:

- ☐ Overall operating costs of the project building for the previous five years (or length of building occupancy, whichever is shorter).
- ☐ Changes in overall operating costs for the project building over the performance period.
- ☐ The project building operating cost as well as financial impacts of all aspects of LEED for Existing Buildings: Operations & Maintenance implementation on an ongoing basis.

Gross square footage of the project building(s):  sf

Project site area:  sf

Project site area:  acres

### HISTORICAL BUILDING EXPENSES PRIOR TO PERFORMANCE PERIOD

The tables below list a series of facility expense account categories related to sustainable operations (e.g., cleaning, repair/maintenance, etc). The expense account categories do not include all expenses that might be included in a more comprehensive analysis of all facility operating costs (eg., taxes, insurance, security). Projects who wish to include those costs may enter them as a summary line item under "Additional operating expenses" in Table IOc3-5.

The tables below include expense sub-accounts for guidance purposes. Custom expense sub-accounts may be added which better reflect internal accounting procedures.

If you only know the total expense amounts within each account category, enter this value under "Unsegregated" for each applicable year under each account category. "Total Expenses" for each category equals any unsegregated category expenses plus any itemized sub-account expenses.

Dates entered in the tables below may be based on calendar or fiscal year.

Indicate each of the five years of historical data reported in Tables IOc3-1 to IOc3-5 below (i.e. "2008", or Jun-2008 to June-2009). If the building has been in operation for less than five years before the start of the performance period, then enter N/A for the years where historical data is not available.

Historical Year 1:

Historical Year 2:

Historical Year 3:

Historical Year 4:

Historical Year 5:

**Table IOc3-1.** Cleaning Expenses - Historical, Prior to Performance Period

<b>Cleaning Expenses (\$ in Gross Actual Figures)</b>						<b>Average</b>
<i>Unsegregated</i>						
Custodial services						
Window washing						
Other specialized contracts						
Supplies/Materials						
Miscellaneous						
Trash removal/recycling						
Total						

**Table IOc3-2.** Repair/Maintenance Expenses - Historical, Prior to Performance Period

<b>Repair/Maint. Expenses (\$ in Gross Actual Figures)</b>						<b>Average</b>
<i>Unsegregated</i>						
Payroll, taxes, fringes						
Elevator						
HVAC						
Boiler room						
Electrical						
Equipment repair/maint.						
Building maintenance						
Building engineering						
Roof repair						
Parking lot						
Miscellaneous						
Total						

**Table IOc3-3.** Utility Expenses - Historical, Prior to Performance Period

<b>Utility Expenses (\$ in Gross Actual Figures)</b>						<b>Average</b>
<i>Unsegregated</i>						
Electricity – HVAC						
Electricity						
Gas						
Fuel oil						
Steam						
Chilled water						
Water/Sewer						
Total						

**Table IOc3-4.** Roads/Grounds Expenses - Historical, Prior to Performance Period

<b>Roads/Grounds Expenses (\$ in Gross Actual Figures)</b>						<b>Average</b>
<i>Unsegregated</i>						
Landscaping						
General parking						
Snow removal						
Pest control						
Total						

**Table IOc3-5. Total Operating Expenses - Historical Prior to Performance Period**

						Average
Total sustainable operating expenses (\$) <sup>1</sup>						
Additional operating expenses (\$)						
Total operating expenses (\$)						

<sup>1</sup> Only includes operating expenses linked to sustainable operations practices

## PERFORMANCE PERIOD BUILDING EXPENSES

The tables below list a series of facility expense account categories related to sustainable operations. The expense account categories do not include all expenses that might be included in a more comprehensive analysis of all facility operating costs (e.g., taxes, insurance, security). Projects who wish to include those costs may enter them as a summary line item under "Additional Operating Expenses" in Table IOc3-10.

Facility expense sub-accounts are for guidance purposes. Custom sub-accounts may be added which better reflect internal accounting procedures. If you only know the total expense amounts within each Facility Expense Account Category, enter expenses under the unsegregated expense rows for each applicable year under each account category. "Total Expenses" for each category should equal all unsegregated expenses plus any itemized sub-account expenses.

Data for the tables below should be calculated on an annual basis. Where the LEED-EB: O&M Performance Period was less than a year, extrapolate costs based on trends visible in historic data or as otherwise determined. Most projects will complete only one of the five columns for annual data, unless the performance period was longer than one year. The maximum number of columns to be filled out is two for an initial LEED-EB certification, and five for a LEED-EB recertification

Dates entered in the tables below may be based on calendar or fiscal year.

Indicate each year of the performance period in Tables IOc3-6 to IOc3-10 below (i.e. "2008", or Jun-2008 to June-2009). If the performance period is less than five years long (as will be the case for all projects except LEED-EB recertifications), enter N/A for the years where performance period data is not available.

Performance Period Year 1:

Performance Period Year 2:

Performance Period Year 3:

Performance Period Year 4:

Performance Period Year 5:

**Table IOc3-6. Cleaning Expenses - Performance Period**

Cleaning Expenses (\$ in Gross Actual Figures)						Average
Unsegregated						
Custodial services						

Window washing						
Other specialized contracts						
Supplies/Materials						
Miscellaneous						
Trash removal/recycling						
Total						

**Table IOc3-7. Repair/Maintenance Expenses - Performance Period**

<b>Repair/Maint. Expenses (\$ in Gross Actual Figures)</b>						<b>Average</b>
<i>Unsegregated</i>						
Payroll, taxes, fringes						
HVAC						
Elevator						
Boiler Room						
Electrical						
Equipment repair/maint.						
Building maintenance						
Building engineering						
Roof repair						
Parking lot						
Miscellaneous						
Total						

**Table IOc3-8. Utility Expenses - Performance Period**

<b>Utility Expenses (\$ in Gross Actual Figures)</b>						<b>Average</b>
<i>Unsegregated</i>						
Electricity – HVAC						
Electricity						
Gas						
Fuel Oil						

Steam						
Chilled Water						
Water/Sewer						
Total						

**Table IOc3-9. Roads/Grounds Expenses - Performance Period**

<b>Roads/Grounds Expenses (\$ in Gross Actual Figures)</b>						<b>Average</b>
<i>Unsegregated</i>						
Landscaping						
General parking						
Snow removal						
Pest control						
Total						

**Table IOc3-10. Total Operating Expenses - Performance Period**

						<b>Average</b>
Total sustainable operating expenses (\$) <sup>1</sup>						
Additional operating expenses (\$)						
Total operating expenses (\$)						

<sup>1</sup> Only includes operating expenses linked to sustainable operations practices

# COMPARISON OF EXPENSES AND COSTS

**Table IOc3-11.** Comparison of Historical and Performance Period Expenses

Facility Expense Account Categories	Average Annual Operating Costs				Comparison	
	Historically (\$/Account)	Historically (\$/sf)	Performance Period (\$/Account)	Performance Period (\$/sf)	\$ / Square Foot	%
Cleaning						
Repair/Maintenance						
Utilities						
Roads/Grounds						
Total operating expenses						

**Table IOc3-12.** Increase in Value through Reduced Operating Costs Relative to Historic Average

Historic average annual operating cost/sf (\$)	
Annual average operating cost/sf for performance period calculated on an annual basis (\$)	
Annual operating cost savings/sf (\$)	
Floor area of LEED-EB: O&M building (sf)	
Total annual operating cost savings for performance period relative to historic baseline year (\$)	
Increased value of building as a result of reduction in operating costs (\$) <sup>1</sup>	

<sup>1</sup> Real estate is often priced at 8 to 10 times net operating income. For the purposes of this credit, annual operating cost reductions are multiplied by 10 to calculate the increased value of the building.

**Table IOc3-13.** Implementation Costs through Simple Payback Analysis

Significant Sustainability Actions <sup>1</sup>	Date of Implementation	Associated LEED-EB Prerequisites and/or Credits, if any	Total Gross Costs of Implementation (\$)	Incremental Costs of Implementation (\$)	Annual Net Operating Savings (\$)	Simple Payback on Incremental Cost (Years)
Total						

<sup>1</sup> Staff time related to LEED-EB: O&M should not be included in the Implementation Costs Through Simple Payback Analysis table above; incremental staff time costs are reflected in the Certification Process Costs table.

**Table IOc3-14.** Certification Process Costs

Description of certification process costs	Hours	Costs (\$)
LEED registration fee		
LEED certification fee(s)		
Internal staff time spent on the LEED process <sup>1</sup>		
Internal staff		
Consultants		
Total		

<sup>1</sup> Estimate internal staff costs by multiplying internal staff hours times the blended salary rate per hour of staff.

**Table IOc3-15.** Summary of Quantified Costs, Benefits and Payback

Total incremental costs of implementation (\$)	
Total LEED-EB: O&M certification process costs (\$)	
Total LEED-EB: O&M building project incremental operating costs (\$)	
Total annual net savings (\$)	
Simple payback of total LEED-EB: O&M building incremental operating costs (yrs)	
Floor area of LEED-EB building (sf)	
Total LEED-EB: O&M building project incremental operating costs per square foot (\$/sf)	
Total annual net savings per square foot (\$/sf)	
Life cycle net present value (\$)	
Life cycle net present value per square foot (\$/sf)	

## ADDITIONAL DETAILS

☐ Special circumstances preclude documentation of credit compliance with the submittal requirements outlined in this form.

SPECIAL CIRCUMSTANCES

Describe the circumstances limiting the project team's ability to provide the submittals required in this form. Be sure to reference what additional documentation has been provided, if any. Non-standard documentation will be considered upon its merits.

**Upload IOc3-SC.** Provide any additional documentation that supports the claim to special circumstances. (Optional)

☐ The project team is using an alternative compliance approach in lieu of standard submittal paths.

ALTERNATIVE COMPLIANCE PATH

Describe the alternative compliance path used by the project team. Include justification that this path meets the credit intent and requirements. Be sure to reference what additional documentation has been provided, if any. Non-standard documentation will be considered upon its merits.

**Upload IOc3-ACP.** Provide any additional documents that support the alternative compliance path approach. (Optional)

SUMMARY

IO Credit 3: Documenting Sustainable Building Cost Impact Points  
Documented: