



GreenCheck Process Overview

Introduction

The GreenCheck process is a framework used by the U.S. Environmental Protection Agency (EPA) to track facility repair and improvement, major renovation, and new construction projects at facilities owned or leased by EPA for compliance with applicable sustainability requirements and policies. Applicable regulations include, but are not limited to: the Energy Policy Act (EPAAct) of 2005, the Guiding Principles for Federal Leadership in High Performance and Sustainable Buildings, Executive Order (EO) 13423, EO 13514, and the Energy Independence and Security Act of 2007 (EISA). The GreenCheck Form consolidates federal requirements and EPA policies into a user-friendly checklist. With the assistance of GreenCheck Staff, EPA Project Leads (PLs) from the Sustainable Facilities Practices Branch (SFPB); Architecture, Engineering, and Asset Management Branch (AEAMB); Security Management Division (SMD); and Facilities Operations Branch (FOB) are required to complete a GreenCheck Form for each applicable construction or renovation project. Individual Regions or Program Offices should also use the GreenCheck process for major construction or renovation projects.

Applicability

The GreenCheck process is required for any new construction, major renovation, equipment replacement, or repair and improvement projects at facilities occupied by EPA and entirely or partly financed by AEAMB, SFPB, or SMD. Individual Regions and Program Offices should complete GreenCheck reviews for projects which are financed within their own organizations.

Roles and Responsibilities

Project Leads:

The PL is the Engineer, Architect, or Real Estate Specialist who serves as the primary contact for the project. It is the responsibility of the PL to ensure that his or her projects undergo GreenCheck evaluations, and that the applicable requirements identified in the GreenCheck Form are incorporated into the appropriate phase(s) of the project: planning, design, construction, commissioning, and/or occupancy. PLs maintain copies of completed GreenCheck Forms in the project file, in hard copy form, and in the Facilities Management System (FMS) database.

AEAMB and SFPB Branch Chiefs:

The AEAMB and SFPB Branch Chiefs provide an oversight role for the GreenCheck program. The AEAMB and SFPB Branch Chiefs sign off on all completed GreenCheck Forms. They assist in identifying projects that require GreenCheck evaluations and assigning PLs to the projects. The Branch Chiefs, along with GreenCheck Staff, also identify potential changes to the GreenCheck Form resulting from shifts in legislative or policy requirements.

GreenCheck Coordinator:

The GreenCheck Coordinator oversees the facilitation and tracking of all projects through the GreenCheck process. The Coordinator assists GreenCheck Staff in updating the GreenCheck Project Spreadsheet with new projects based on the Buildings and Facilities (B&F) Operating Plan, SFPB Operating Plan, and upcoming lease expirations. For projects not under the purview of AEAMB or SFPB, the Coordinator will facilitate GreenCheck discussions between parties.

GreenCheck Staff:

GreenCheck Staff are responsible for assisting PLs through the GreenCheck process and meet with PLs as necessary to accurately complete GreenCheck Forms. GreenCheck Staff review information recorded for each project for quality assurance, accuracy, and completeness. They provide PLs with GreenCheck Summary



Reports detailing applicable requirements, and follow up with PLs to confirm that applicable requirements resulting from the GreenCheck Form are incorporated into each project.

GreenCheck Staff update the GreenCheck Project Spreadsheet throughout the GreenCheck process. At the end of each fiscal year, they provide a final GreenCheck Project Spreadsheet and hard copy documentation of all active projects, as well as GreenCheck Forms completed during the fiscal year. GreenCheck Staff, along with the Branch Chiefs, identify potential changes to the GreenCheck Form resulting from shifts in legislative or policy requirements and provide revisions to the GreenCheck Form.

GreenCheck Process

GreenCheck documents are considered living documents until the associated projects reach completion. GreenCheck Forms may be subject to change, revisions, or updates as projects progress, due to changes in project scope, updates to GreenCheck requirements, or project timeline.

Annual Project Identification
At the beginning of each fiscal year, the GreenCheck Coordinator and Staff create an initial GreenCheck Project Spreadsheet for the fiscal year using the draft B&F and SFPB Operating Plans and any upcoming leasing actions. The GreenCheck Staff begins initial GreenCheck actions for lease expirations approximately 12 months in advance of each lease expiration date (or sooner, if directed by the AEAMB and SFPB Branch Chiefs). The GreenCheck Project Spreadsheet serves as the master list of projects and the repository for the GreenCheck status for each project.
AEAMB identifies PLs for B&F and lease initiation and renewal projects, while SFPB identifies PLs for additional sustainability projects.
Emergency requests, security projects, and new space requests (once approved by the associated Branch Chief) are added to the GreenCheck Project Spreadsheet by the GreenCheck Coordinator, who coordinates with each PL and GreenCheck Staff to complete the GreenCheck Form. The GreenCheck Coordinator works with SMD and the Safety, Health, and Environmental Management Division (SHEMD), as needed. GreenCheck Staff maintain an updated GreenCheck Project Spreadsheet, including changes to each project’s GreenCheck status.
Initial GreenCheck Evaluation
When a GreenCheck review is initiated for an applicable project, the PL and GreenCheck Staff discuss the project scope and enter basic project information into Section I of the GreenCheck Form.
On major or complex projects, a kickoff meeting may be scheduled to discuss the project parameters and GreenCheck requirements. Local facility managers may also be involved in the GreenCheck process, at the preference of the PL and Branch Chiefs. Complex multi-year or multi-phased projects may require multiple GreenCheck reviews. GreenCheck Staff coordinate with PLs and AEAMB and SFPB Branch Chiefs to ensure that the entirety of the project is reviewed.
Scenario 1: If the project is below the GreenCheck thresholds: ¹
The PL and GreenCheck Staff complete Section I of the GreenCheck Form, which includes basic project information and questions regarding GreenCheck thresholds. Should the project not exceed GreenCheck thresholds, no additional sections are required. The PL signs and dates the completed Form.

¹GreenCheck has four project thresholds: (1) Total project cost over \$85,000; (2) more than 5,000 gross square feet for EPA-owned facilities or rentable square feet for leased facilities affected; (3) impervious site area increase of over 5,000 GSF, and/or (4) new construction/ major renovation that requires a General Services Administration (GSA) prospectus and/or a total project cost of greater than \$2.5 million.



The AEAMB and SFPB Branch Chiefs review the completed GreenCheck Form and initial approval.
GreenCheck Staff provide the signed, completed GreenCheck Form to the PL, who maintains the form in the project file, along with any other required environmental documentation, such as the National Environmental Policy Act (NEPA) Review Form. The PL attaches the GreenCheck Form to the FMS project file.
GreenCheck Staff update the GreenCheck Project Spreadsheet with information provided by the PL. During Quarterly GreenCheck Meetings, the AEAMB and SFPB Branch Chiefs, GreenCheck Coordinator, and GreenCheck Staff review GreenChecks completed in the previous quarter.

Scenario 2: If the project is above the GreenCheck thresholds:

The PL and GreenCheck Staff discuss the project parameters and complete Section I of the GreenCheck Form. If the project exceeds one or more GreenCheck thresholds, all additional sections must be addressed.
The PL and GreenCheck Staff complete all required questions in Section II of the GreenCheck Form. The PL and GreenCheck Staff determine applicable GreenCheck Form sections based on the mandatory questions at the beginning of each of Sections III – VIII. After determining applicability for a section, all questions in the section are completed.
The AEAMB and SFPB Branch Chiefs review the completed GreenCheck Form and initial approval.
GreenCheck Staff provide the signed, completed GreenCheck Form to the PL, who maintains the form in the project file alongside any other required environmental documentation, such as the NEPA Review Form. The PL attaches the GreenCheck Form to the FMS project file.
GreenCheck Staff provide the PL with a GreenCheck Summary Report (GSR), which highlights all applicable requirements for the project.
The PL periodically informs GreenCheck Staff of project status. The PL and GreenCheck Staff work to ensure all project GreenCheck requirements are completed. As GreenCheck requirements are met, the GSR is updated to indicate completion and the phase(s) in which the requirement was met. GreenCheck Staff provide the PL with revised GSRs on an ad hoc basis.
The GreenCheck Form is revised and updated as needed throughout the project lifecycle.
GreenCheck Staff update the GreenCheck Project Spreadsheet as necessary with information provided by the PL. During Quarterly GreenCheck Meetings, the AEAMB and SFPB Branch Chiefs, the GreenCheck Coordinator, and GreenCheck Staff review GreenChecks completed in the previous quarter.

GreenCheck Form Revisions

<p>As the project progresses, the PL or GreenCheck Staff may update the GreenCheck Form on an ad hoc basis. Each time substantial changes are made to the GreenCheck Form:</p> <ol style="list-style-type: none"> 1. GreenCheck Staff may make changes to the GreenCheck Form in coordination with the PL, as outstanding items on the GreenCheck Form are resolved. If requested by the PL, GreenCheck Staff review project design or construction documents to ensure compliance with applicable GreenCheck requirements. 2. After the GreenCheck Form is updated, the PL or GreenCheck Staff resubmit it to the AEAMB and SFPB Branch Chiefs for subsequent review and approval. 3. GreenCheck Staff return a hard copy to the PL, who maintains the updated GreenCheck Form in the project file in FMS. 4. GreenCheck Staff update the GSR as necessary and provide the PL with the updated version. 5. GreenCheck Staff update the GreenCheck Project Spreadsheet accordingly. <p>This updating process is repeated as necessary until the project is completed.</p>



Quarterly GreenCheck Meetings

The AEAMB and SFPB Branch Chiefs, GreenCheck Coordinator, and GreenCheck Staff meet on a quarterly basis. The GreenCheck Coordinator and Staff are responsible for scheduling these meetings. Meeting objectives include:

1. Reviewing the GreenCheck Project Spreadsheet to ensure that:
 - a. GreenCheck Forms for all applicable projects have been completed.
 - b. All active and anticipated projects are accounted for.
 - c. Any follow-up items are identified and resolved.
2. Identifying additional sustainability policies and regulations that are applicable to the GreenCheck process.
3. Discussing GreenCheck evaluations conducted in the previous quarter.

Acronyms

AEAMB – Architecture, Engineering, and Asset Management Branch
B&F – Buildings and Facilities
EISA – Energy Independence and Security Act of 2007
EO – Executive Order
EPA – Environmental Protection Agency
EPAct – Energy Policy Act of 2005
FMS – Facilities Management System database
FOB – Facilities Operations Branch
GSA – General Services Administration
GSR – GreenCheck Summary Report
NEPA – National Environmental Policy Act
PL – Project Lead
SFPB – Sustainable Facilities Practices Branch
SHEMD – Safety, Health, and Environmental Management Division
SMD – Security Management Division