



## **Guide to Envision Verification for Applicants**

This guidance document contains important information for applicants (users) of the Envision® sustainable infrastructure framework, including current policies, procedures, submission tips, and pricing.

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## 1.0 INTRODUCTION

Congratulations on your decision to pursue Envision verification for your infrastructure project!

You are on your way to increasing the value and sustainability of your project. This guide is intended to lead you through the process of submitting your project for review and formal recognition from the Institute for Sustainable Infrastructure (ISI).

This guide identifies the program requirements and guidelines put in place by ISI for the purpose of administering the Envision verification program. Applicants must adhere to the requirements and guidance contained within this guide and attached appendices.

Also, throughout this document, applicants are referred to various policies. All referenced policies can be found in the ISI Policies document. The guidance and policies set forth by ISI are applicable to all applicants seeking to verify infrastructure projects under the Envision framework, regardless of type and size of infrastructure project.

This document is intended for project teams pursuing Envision verification and should be used in conjunction with the official Envision Guidance Manual and ISI Policies, as updated from time-to-time, available on the ISI website: [www.sustainableinfrastructure.org](http://www.sustainableinfrastructure.org).

While this document is primarily intended for projects pursuing verification under Envision v3, this document contains relevant guidance and information for projects pursuing Envision verification under Envision v2. Particularly relevant sections and any notable differences for projects pursuing verification under verification under Envision v2 can be found in a table in *Appendix F*.

### 1.1 THE ENVISION FRAMEWORK

There are six components that comprise the Envision framework. Throughout this document, references will be made to each of the following:

**1. Envision Guidance Manual:** The written framework.

The Envision Guidance Manual is the foundational component of the Envision framework. It contains 64 sustainability indicators, called credits, that cover the full dimensions of infrastructure sustainability. Each credit in the Envision framework includes an intent statement and metric, levels of achievement ranging from *Improved* to *Restorative*, a description of the credit, ways to improve performance, evaluation criteria and documentation guidance, and related Envision credits. Credits are organized into five categories and 14 subcategories by subject matter:

- **Quality of Life:** Wellbeing, Mobility, Community
- **Leadership:** Collaboration, Planning, Economy

- **Resource Allocation:** Materials, Energy, Water
- **Natural World:** Siting, Conservation, Ecology
- **Climate and Resilience:** Emissions, Resilience

**2. Envision Pre-Assessment Checklist:** An early-phase high-level pre-assessment.

The Envision Pre-Assessment Checklist is an Excel-based tool structured as a series of yes/no questions based on the criteria found in the Envision Guidance Manual. It can be helpful early in the project planning phase when specific performance data necessary for an in-depth assessment is still unknown. It is also an educational tool designed to help Envision users become familiar with the sustainability aspects of infrastructure planning, design, and construction. The Pre-Assessment Checklist can be used to quickly compare project alternatives before key project decisions have been finalized.

**3. Envision Online Scoresheet:** The detailed online assessment tool and calculator.

The Envision Online Scoresheet is a digital version of the Envision Guidance Manual that Envision account holders may access on the ISI website. The Envision Online Scoresheet is used to conduct more in-depth sustainability project assessments and is used to register and submit a project for verification.

**4. Envision Sustainability Professional Credential (ENV SP):** Professional training in Envision use.

An ENV SP is an individual who has completed ISI's training program on the use of Envision. The training program is offered online through the ISI website or in-person by an ISI-approved trainer. In order for a project to submit for Envision verification, at least one ENV SP must be on the project team (refer to *Policy 3.5.1*).

**5. Envision Verification:** Independent third-party project review process.

While many project teams use Envision as a self-assessment tool, ISI also offers a project verification program. Verification is an independent third-party peer-review process to confirm a project meets Envision evaluation criteria. Pursuing verification helps project teams calibrate their self-assessments.

**6. Envision Awards:** Recognition for qualifying verified projects.

Projects that complete the verification process and achieve sufficient points earn an Envision award. Award levels are based on the percentage of applicable points achieved.

## 1.2 USING ENVISION

Envision can and should be used throughout the entire life cycle of a project. The earlier Envision is applied, the greater the value it can deliver. Using Envision early in the planning and design phase can help project teams:

- Determine the right project to pursue;
- Establish sustainability goals, targets and objectives for the project; and
- Determine how best to design the project to meet the sustainability goals and the needs of the host and affected communities.

Using Envision early in the planning and design phase can also save time for applicants during verification. The following sections provide a high-level overview of how to use Envision at each stage of the project life cycle.

**Planning:** In the planning phase of the project, Envision can be used to assess community values, engage stakeholders, and build consensus around the best project solution. It guides decisions when defining a project scope, prioritizing a list of projects, and comparing project alternatives.

Envision tools to support project planning: Envision Guidance Manual, Envision Pre-Assessment Checklist.

**Design:** In the design phase of a project, Envision guides a thorough evaluation of the design and aids identification of additional improvements toward more sustainable development. The credit levels of achievement benchmark the relative impact and encourage expanding the project goals toward higher levels of sustainability. Integrating the Envision assessment into the design process allows for sustainable-minded decision making throughout the project.

Envision tools to support project planning: Envision Guidance Manual, Envision Pre-Assessment Checklist, Envision Online Scoresheet, Envision Sustainability Professional Credential, Envision Verification.

**Construction:** The construction phase of a project allows for creativity and innovation in how the design is achieved. Envision can be used to guide decisions in this phase for continuity between the sustainable intent in design and actual project delivery. During this phase, sustainable achievement is measured and documented. The impact of the credits on the construction process can also be measured.

Envision tools to support project construction: Envision Guidance Manual, Envision Online Scoresheet, Envision Sustainability Professional Credential, Envision Verification.

**Operations and Maintenance:** During operations and maintenance, it is important to measure sustainable performance. The Envision framework provides key sustainable performance indicators that can be monitored over the project life. In this way, Envision supports evaluation of sustainable impacts across project life-cycles.

Envision tools to support project operations and maintenance: Envision Guidance Manual, Envision Sustainability Professional Credential, Envision Verification.

**Communication and Education:** The Envision framework provides an organized system for educating stakeholders and garnering support. The transparent nature of the framework demonstrates the relationship to the triple bottom line. Advertising sustainable project achievements and awards is further supported by this transparency.

Envision tools to support sustainable infrastructure communication and education: Envision Sustainability Professional Credential, Envision Verification, Envision Awards.

### 1.3 BENEFITS OF ENVISION AND VERIFICATION

Using Envision can benefit projects in many ways, including:

- Long-term viability through increased resiliency and preparedness;
- Lower costs through management and stakeholder collaboration;
- Reduced negative impacts on the community and environment;
- Potential to save owners money over time through efficiency;
- Credibility of a third-party rating system; and
- Increased public confidence and involvement in decision-making.

Envision users, including owners, planners, designers, engineers, architects, contractors, and others have found value in attaining third-party verification. They indicate that pursuing Envision verification provides many benefits, including:

- Instils community confidence that the project addresses their needs and concerns;
- Instils rate-payer or tax-payer confidence that their money is being spent in their best interest;
- Demonstrates that the sustainable achievements of the project are recognized and considered noteworthy by an independent internationally recognized system;
- Motivates the project team to collaborate to achieve better outcomes;
- Provides an objective measure of sustainable performance;
- Draws attention to the good work being undertaken;
- Emphasizes the importance of tracking performance, collecting documentation, and following a sound methodology from project inception through construction and operations; and
- Provides a quality control/quality assurance measure to confirm project assessments are accurately completed by the appropriate agency, department, or municipality.

## 1.4 DETERMINING ELIGIBILITY FOR VERIFICATION

Envision is a holistic sustainability framework for all types and sizes of physical infrastructure. This includes, but is not limited to: airports, bridges, dams, landfills, levees, parks, power generating stations, pipelines, railways, streetcars, stormwater management systems, water treatment plants, and other components that make up civil works. While initially developed for use in the United States and Canada, the Envision framework is being successfully adapted and applied around the world.

Envision is not designed to evaluate human-occupied, interior conditioned buildings as stand-alone projects, but can be used in conjunction with building rating systems. Envision is also not designed to evaluate non-physical infrastructure such as policies, programs, or master plans, though some of the documentation requirements for Envision credits include policies, descriptions of programs, and information contained in master plans.

Please use the following guidelines to determine your project's eligibility to submit for Envision verification:

- The submission is for physical infrastructure (see above).
- There is at least one Envision Sustainability Professional (ENV SP) on the submitting project team (*Policy 3.5.1*).
- The project is at or after 95% design completion, meaning all major design decisions have been made. Projects can and should use Envision from the earliest planning stages. However, projects will not have sufficient documentation to complete an Envision verification submission until 95% design completion.<sup>1</sup>
- The project has been fully operational for less than three years.<sup>2</sup>

Refer to *Policy 3.2.1* and *Policy 3.2.2* for ISI's policies on project eligibility. If you wish to apply for Envision verification but are uncertain about the eligibility of your project, please contact ISI before registering.

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<sup>1</sup> Project teams may indicate their intention to pursue verification by registering their project at any point in the project timeline. Projects may choose to submit for verification after 95% design completion or after 95% construction completion according to the verification pathways described in *Section 2.1*.

<sup>2</sup> Projects that have been operational for more than three (3) years are not eligible for verification unless special permission has been granted by ISI. This is because the documentation required for verification is typically more difficult to retrieve once the project has been operational for a longer period of time.



## 2.0 ENVISION VERIFICATION

The following sections provide more detail on the Envision v3 verification process, including an overview of the steps involved, and then a closer look at each one in more detail.

### 2.1 OVERVIEW

The purpose of Envision is to foster the dramatic and necessary improvement in the sustainable performance and resiliency of physical infrastructure by helping owners, planners, engineers, communities, contractors, and other infrastructure stakeholders to implement more cost-effective, resource-efficient and adaptable long-term infrastructure investments. Recognition is an important component of increasing awareness and initiating this systemic change. To this end, ISI offers an Envision verification and awards program for recognizing sustainable project achievements.

Under Envision v3, projects may choose to pursue one of two verification pathways (see *Figure 1*):

- Pathway A: Design + Post-Construction
- Pathway B: Post-Construction

In Pathway A: Design + Post-Construction the project team conducts the primary verification and earns the Envision award after the design phase (at or after 95% design completion). Projects are then required to complete an additional post-construction review to maintain their Envision award. The purpose of the post-construction review is to validate that commitments made during the design review were carried through during construction.

In Pathway B: Post-Construction the project conducts the verification after the construction phase (at or after 95% construction completion). No further steps are required.



**Figure 1: Envision v3 Verification Pathways**

Verification Pathway A: Design + Post-Construction		
Step	Description	Section Reference
1	<p><b>Create Envision Online Scoresheet and Conduct Self-Assessment:</b> In your Envision account, create an Envision Online Scoresheet by providing a few basic details about your project. You can then conduct a self-assessment of your project using the Envision framework.</p>	<i>Sections 2.2.1 and 2.2.2</i>
2	<p><b>Register Project:</b> Register your infrastructure project through the ISI website by providing additional details about your project, requesting an invoice for the project registration fee, and submitting payment.</p>	<i>Section 2.2.3</i>
3	<p><b>Start Verification:</b> Once the self-assessment phase is complete, submit the project for independent, third-party verification.</p>	<i>Section 2.2.4</i>
4	<p><b>Design Review:</b> Your assessment and submission are reviewed and validated. The review process is iterative in nature; projects teams have an opportunity to respond to verifier comments and provide additional documentation.</p>	<i>Section 2.2.5</i>
5	<p><b>Envision Award:</b> Projects that earn sufficient points in the Envision framework receive an Envision award.</p>	<i>Section 2.2.7</i>
6	<p><b>Post-Construction Review:</b> Your assessment and submission are confirmed by the verifier after construction is complete. The purpose is to validate that commitments made during the design review were carried through during construction. A post-construction review is required maintain the Envision award.</p>	<i>Section 2.2.6</i>
7	<p><b>Project Complete:</b> The project verification process concludes once the final score is returned to the project team.</p>	N/A

**Table 1: Steps in Verification Pathway A: Design + Post-Construction**

Verification Pathway B: Post-Construction		
Step	Description	Section Reference
1	<p><b>Create Envision Online Scoresheet and Conduct Self-Assessment:</b> In your Envision account, create an Envision Online Scoresheet by providing a few basic details about your project. You can then conduct a self-assessment of your project using the Envision framework.</p>	<i>Sections 2.2.1 and 2.2.2</i>
2	<p><b>Register Project:</b> Register your infrastructure project through the ISI website by providing additional details about your project, requesting an invoice for the project registration fee, and submitting payment.</p>	<i>Section 2.2.3</i>
3	<p><b>Start Verification:</b> Once the self-assessment phase is complete, submit the project for independent, third-party verification.</p>	<i>Section 2.2.4</i>
4	<p><b>Post-Construction Review:</b> Your assessment and submission are reviewed and validated. The review process is iterative in nature; projects teams have an opportunity to respond to verifier comments and provide additional documentation.</p>	<i>Section 2.2.6</i>
5	<p><b>Envision Award:</b> Projects that earn sufficient points in the Envision framework receive an Envision award.</p>	<i>Section 2.2.7</i>
6	<p><b>Project Complete:</b> The project verification process concludes once the final score is returned to the project team.</p>	N/A

**Table 2: Steps in Verification Pathway B: Post-Construction**

## 2.2 VERIFICATION PROCESS STEPS

This section provides greater detail on the steps to prepare a project for Envision verification. Important tools, including the Envision Guidance Manual, Envision Online Scoresheet, and Envision Pre-Assessment Checklist can be accessed or downloaded from your account. If you do not already have an Envision account with ISI, you can create one by visiting ISI's website ([www.sustainableinfrastructure.org](http://www.sustainableinfrastructure.org)).

### 2.2.1 Create Envision Online Scoresheet

***Create an Envision Online Scoresheet project file by logging into your Envision account, clicking "Create Project", and providing basic information about your project.***

When initially creating a new Envision Online Scoresheet you are required to provide some basic information about your project, such as its name and location. Refer to *Appendix A* for the information that you will be required to input online when you create your Envision Online Scoresheet.

The ISI website will automatically assign the individual creating the scoresheet as the project leader. Throughout the verification process only the project leader will have access to controls such as managing individuals associated with the scoresheet (i.e. the project team), registering the project, or submitting for verification. At any time, the project leader can assign another member of the project team as the project leader. There can only be one project leader for a project. Refer to *Policies 3.5.2 and 3.7.7*.

### 2.2.2 Conduct Self-Assessment

***Conduct a self-assessment of your project by selecting levels of achievement for the credits you wish to pursue.***

Once your Envision Online Scoresheet is created, you can begin to assess your project against the Envision evaluation criteria. Begin by determining the credits you wish to pursue and at what level of achievement. Be sure to consider the types of documents that will be needed to support the level of achievement selected. As you select levels of achievement for credits, the scoresheet will automatically calculate your Envision score. Often, project teams will create more than one scoresheet for a project to compare alternatives and test different scoring scenarios.

Project leaders have the ability to add individuals to a scoresheet as part of the project team to assist in conducting the assessment. Project leaders also have the ability to limit editing controls to certain members of the project team.

### 2.2.3 Register Project

**Register your infrastructure project by providing additional details about your project, requesting an invoice, and submitting payment.**

Only the project leader can register a project. Registration is an important step in the Envision verification process as it signals your intent to pursue Envision verification. Before you register your project, it is important to ensure your project is eligible for Envision verification (refer to *Policies 3.2.1 and 3.2.2*).

You may register your project at any time in the process from early planning to shortly before submitting for verification (refer to *Policy 3.3.3*)

There are many benefits to registering your project:

- **Welcome Letter.** After registering your project, the project leader and lead ENV SP will receive a welcome letter from ISI including important directions and next steps for preparing the verification submission.
- **Dedicated ISI Project Manager.** Registered projects are assigned an ISI project manager who acts as the main point of contact for the project team. The project manager can address questions related to the verification process, use of the online tools, and/or specific credit-related questions.
- **Pre-Verification Credit Review.** Registered projects may submit up to two credits to ISI for a pre-verification review. This optional service, at no additional charge, is especially useful to project teams who are submitting for verification for the first time. In their review ISI staff provide guidance on the structure and content of the submission but do not make decisions on levels of achievement.
- **Early Recognition on the ISI website.** As an optional form of early recognition, registered projects may be listed on the ISI website. In order for your project to be listed as “registered”, a complete street address or Google Map coordinates for the project is required. Only a location marker and the name of the project as it was registered will appear on the ISI website project awards map. The award level being sought is not listed on the website.
- **Continuity of Envision Versions.** Registered projects are not subject to future changes of Envision. They are allowed to complete verification using the version of Envision at the time of registration. However, the sunset date for all Envision v2 projects to complete their verification is December 31, 2020. To ensure projects complete verification by this sunset date, ISI recommends submitting Envision v2 projects by no later than July 2020 (refer to *Policy 3.4.1 to 3.4.3*).

## 2.2.4 Start Verification

***Using the Envision Guidance Manual, in conjunction with the Envision Online Scoresheet, conduct an in-depth assessment of the sustainability aspects of your project. Your project is ready to submit for verification after levels of achievement are selected for each credit and credit submittals are uploaded.***

Your project is registered, and you are ready to begin conducting an in-depth assessment of the sustainability aspects of your project. This is the most detailed phase within the Envision verification process. During this phase, you will assess the sustainability aspects of your project, prepare your project for submission for third-party verification, and do a final quality assurance sign-off (refer to *Policy 3.8.2*).

During this stage of the verification process, you will:

- Provide additional details about your project (refer to *Appendix A*).
- Determine the credits your project will pursue and the appropriate level of achievement for each.
- Determine whether any credits are not applicable to your project (refer to *Section 3.2.2*).
- If pursuing verification Pathway A: Design + Post Construction, determine whether any credits should be marked as 'pending' (refer to *Section 1.1.1.6*).
- For each credit you are pursuing:
  - Complete a credit coversheet. Project teams must use ISI's coversheet templates (refer to *Policy 3.7.2*).
  - Collect documentation to demonstrate the level of achievement (refer to *Section 3.3*).
  - Upload your coversheet and supporting documentation as a credit submittal. (A credit submittal consists of a credit coversheet and supporting documentation – refer to *Section 3.3*.)
- Conduct a final quality assurance sign-off of the submission and complete the Verification Submittal Quality Assurance Checklist (refer to *Appendix G*).

## 2.2.5 Design Review

***This step only applies to projects that are pursuing verification Pathway A: Design + Post-Construction. At this stage in the verification process, you will be locked from making additional changes and your submission will be reviewed by an ISI appointed third-party verifier trained to evaluate projects according to the Envision framework.***

The ISI appointed third-party verifier will thoroughly review your project submission using the evaluation criteria in the Envision framework. Your project will also be reviewed by an ISI Reviewer to ensure decisions made by the third-party verifier are consistent from project to project, and to further validate the submission. The verifier's primary responsibilities are to review the credit submittals and then:

- Determine the appropriate levels of achievement, and
- Explain their level of achievement selection.

The verifier will return the project to you with their levels of achievement determinations, and feedback for each credit. The design review phase of the verification process is iterative; you will have an opportunity to address the verifier's feedback and requests for additional documentation by resubmitting your project for a second review. It should be emphasized that if you agree with the verifier's determination you are not required to address the verifier feedback or documentation requests. It is perfectly acceptable to agree with the verifier and accept the levels of achievement they have determined.

Refer to *Section 4.0* for more information about what to expect from the verifier and the verification process.

## 2.2.6 Post-Construction Review

***This step applies to projects that are pursuing either Pathway A: Design + Post-Construction, or Pathway B: Post-Construction. At this stage in the verification process, you will be locked from making additional changes and your submission will be reviewed by an ISI appointed third-party verifier trained to evaluate projects according to the Envision framework.***

### 1.1.1.1 Projects pursuing Pathway A: Design + Post-Construction

The post-construction review is a necessary step to maintain the Envision award that was granted after the design review phase was completed. ISI recognizes there could be a significant amount of time—potentially years—between the end of the design phase and the end of the construction phase. The project team is required to estimate the date of construction completion and keep ISI informed of any significant changes to that schedule.

The verifier will not review credits already awarded during the design phase. The verifier will only review credits marked as “pending” to confirm you have submitted the documents you committed to provide post-construction to demonstrate the selected level of achievement (e.g., final calculations of the recycled materials used for RA1.2 Use Recycled Materials, or final calculations of construction waste diverted from landfills for RA1.4 Reduce Construction Waste).

This post-construction review is **not** an iterative process for projects pursuing verification Pathway A. Rather, this step is meant to be a confirmation that commitments made during the project planning and design phases were carried out successfully through construction. No new credits may be pursued during this post-construction review for projects pursuing Pathway A.

During the post-construction review, if the required documentation for a pending credit is not provided or fails to demonstrate the level of achievement requirements were met, the credit level of achievement and final project score will be revised. It is also possible for the documentation to demonstrate that a higher level of achievement was attained. Therefore, it is possible that the

Envision award level granted after the iterative design review could change as a result of the final post-construction review.

**1.1.1.2 Projects pursuing Pathway B: Post-Construction**

The ISI appointed third-party verifier will thoroughly review your project submission against the evaluation criteria in the Envision framework. Your project will also be reviewed by ISI staff to ensure decisions made by the third-party verifier are consistent from project to project, and to further validate the submission. The verifier’s primary responsibilities are to review the credit submittals and then:

- Determine the appropriate levels of achievement, and
- Explain their level of achievement selection.

The verifier will return the project to you with their levels of achievement determinations, and feedback for each credit. Much like the design review process for Pathway A projects, this post-construction review for Pathway B projects is iterative; you will have an opportunity to address the verifier’s feedback and requests for additional documentation by resubmitting your project for a second review. It should be emphasized that if you agree with the verifier’s determination you are not required to address the verifier feedback or documentation requests. It is perfectly acceptable to agree with the verifier and accept the levels of achievement they have determined.

Refer to *Section 4.0* for more information about what to expect from the verifier and the verification process.

**2.2.7 Envision Award**

***An Envision award is earned after the ISI appointed third-party verifier has completed a thorough review of your project and provided a final score. Envision awards are based on the percentage of applicable points your project earned in the Envision framework.***

Award Level	Percentage of Total Applicable Points Earned
Verified	20 - 29
Silver	30 - 39
Gold	40 - 49
Platinum	50 or more

**Table 3: Envision Award Levels**

Once your project has completed the review process and a final score has been awarded, your project earns an Envision award provided at least 20% of applicable points in the Envision framework were earned. There are four (4) possible Envision award levels that can be earned: Verified, Silver, Gold, and Platinum. Once returned, your final score will be automatically accepted



and finalized after 30 days. During this time, you have the option to appeal credit decisions for an additional per-credit fee (refer to *Policy 3.8.6, and Policies 3.10.1 to 3.10.4*).

Refer to *Section 0* for more information on the appeals process.

### **1.1.1.3 Formal Recognition for Envision Verified Projects**

ISI believes in formally and publicly recognizing projects for their sustainable achievements. For projects that have earned an Envision award, the sections below outline the ways in which formal recognition of Envision verified projects is granted.

#### **1.1.1.3.1 Award Letter**

ISI issues an award letter via email to the project leader and lead ENV SP. ISI endeavors to issue award letters within one (1) week of the final Envision score being returned to the project team. This award letter indicates the Envision award level earned (e.g., Verified, Silver, Gold, Platinum) and may be used as evidence of Envision verification for other purposes (e.g., for sustainability awards offered by other organizations/associations).

#### **1.1.1.3.2 Certificate**

ISI provides a certificate of Envision verification for the project which can be accessed from the project file on the ISI website. This certificate indicates the project name, Envision award level, year of award, and is signed and dated by the ISI President and Chief Executive Officer.

You are free to reproduce these certificates and display them however you choose (e.g., framed in an office, online, in a sustainability report, etc.).

#### **1.1.1.3.3 Award Announcement/Press Release**

ISI prepares a press release, or project announcement, for your Envision verified project. The announcement contains information about the Envision framework, the award level earned, a quote from ISI, and highlights noteworthy sustainability aspects of your project. To prepare the award announcement, ISI will draw from information provided in the project registration form and credit submittals. ISI forwards this draft project announcement to the project contacts for thorough review and vetting.

The body of the project announcement is posted on the ISI website, social media channels (e.g., Twitter and LinkedIn) and in the monthly ISI newsletter. As the project team, you are encouraged to distribute the full announcement widely through your networks. ISI asks that the announcement not be released until the agreed-upon date between you and ISI.

If ISI does not hear from you within three (3) months after earning an Envision award, ISI will proceed with listing the project (name, location, brief description) and award level earned online.

Beyond this, ISI will not post detailed information on the project or issue other forms of public announcements about the project without express consent from the project team (refer to *Policy 3.11.2*).

#### **1.1.1.3.4 Plaques/Trophies**

ISI has an exclusive partnership with an awards manufacturer, Eclipse Awards. Eclipse Awards is the world's first carbon-neutral awards company. Projects that earn Envision awards may purchase physical awards (e.g., glass or metal wall plaques, desktop trophies) to commemorate their achievement. Visit <http://envisionawards.org> for more information and to see the suite of products available for purchase. Eclipse awards can provide specific information on the degree of customization allowed for Envision Awards and can assist with the award ordering process. To order an award, you must provide basic information about your project including the name of the project and the unique ISI assigned project ID.

For more information about Envision awards, refer to *Policy 3.11.1*.

#### **1.1.1.3.5 Award Presentations/Ceremonies**

On occasion, ISI is asked to present the Envision award at a ribbon cutting, open house, or other type of award ceremony. When availability permits, we are able to accommodate these requests if travel and other associated expenses are covered in full. Due to the significant volume of projects that pursue Envision verification, ISI is unable to guarantee attendance even if travel and related expenses are covered.

## **3.0 PREPARING YOUR PROJECT FOR VERIFICATION**

The following sections provide specific guidance for applicants preparing their project for verification.

### **3.1 MINIMUM PROGRAM REQUIREMENTS FOR VERIFICATION**

Projects submitted for Envision verification must meet the minimum program requirements as outlined in *Appendix B*.

ISI reviews each project submission prior to sending it to the verifier to ensure it meets the minimum program requirements for verification. Projects that do not comply with the above requirements will be notified by ISI and required to address any gaps before the project is verified. Refer to *Policy 3.1.1*.

### **3.2 ASSESSING CREDIT ACHIEVEMENT**

#### **3.2.1 Scoring Methodology**

Each of the credits and their associated levels of achievement are assigned points weighted in accordance with their estimated contribution to sustainability. Points achieved for each applicable credit are added together (numerator) and divided by the total possible points (denominator), to give the Envision score expressed as a percentage. The baseline total possible points that can be earned is 1,000. Credits that are deemed not applicable are removed from the total possible points that can be earned. Points earned for “Innovation or Exceed Credit Requirements” credits act as bonus points and do not impact the total possible points.

#### **3.2.2 Credit Applicability**

As a highly flexible and adaptable resource for all types and sizes of civil infrastructure, Envision recognizes that not all credits will be applicable to all projects or project types. Therefore, credits can be omitted from consideration by designating them as “not applicable”. This is reserved for cases where the sustainability indicator addressed by a given credit does not exist for the project. For example, on a project that is entirely underground external light fixtures would not exist and the project team would not be able to assess credit QL1.5 Minimize Light Pollution.

Credits deemed not applicable impact project scoring. The maximum point value associated with not applicable credits is removed from the total number of possible points in the Envision framework. Therefore, if a project team determines that QL1.5 is not applicable for their underground pipeline project with no external lighting, a total of 12 points will be removed from the denominator, lowering the total number of applicable points from 1,000 to 988.

If you believe one or more credits are “not applicable” to your project, you must provide a credit submittal for review. You must explain in the credit coversheet why the credit is not applicable to your project and provide supporting documentation as evidence.

Only whole credits may be deemed “not applicable”. ISI does not allow individual evaluation criteria to be deemed “not applicable”.

Determining whether a credit is “not applicable” can be difficult. The following are **not acceptable reasons** for determining a credit’s lack of applicability:

- The scope of a contract does not address the issue;
- Achieving the credit requirements is deemed to be too expensive, difficult, or time-consuming;
- Local laws or regulations prohibit meeting the requirements;
- Those conducting the Envision assessment do not have decision-making authority; or
- Stakeholders have indicated that the issue is not a priority.

In cases where local laws or regulations prohibit actions that would meet the credit requirements (e.g., local laws requiring the use of bright external lighting) the sustainability indicator does not become non-existent (e.g., QL1.5 Minimize Light Pollution). Rather, this means the project team will not be able to achieve the credit requirements and will need to look elsewhere in the Envision framework to earn points.

### 3.2.3 Evaluation Criteria and Documentation Guidance

When preparing your project for verification, it is important to pay close attention to the specific evaluation criteria and documentation guidance for your chosen level of achievement. You must fulfill all required evaluation criteria in order to achieve the level of achievement. You may not omit or deem individual evaluation criteria as “not applicable”.

There are several types of evaluation criteria in the Envision framework, including:

- **Yes/No:** An action taken, or an outcome achieved (e.g., the project is not located on sensitive sites)
- **Target:** a specified outcome with discrete quantifiable levels (e.g., the project reduces energy consumption by 15%)
- **Execution:** a process conducted, or a commitment made to accomplish a stated objective (e.g., the project team has a comprehensive sustainability management plan in place)
- **Accomplishment:** a process conducted with a general or unspecified result (e.g., the project team has ‘minimized’ the use of fertilizers and pesticides on the project)

Evaluation criteria are denoted with letters (e.g., A, B, C, D) and are accompanied by documentation guidance denoted with numbers (e.g., 1, 2, 3, 4). Refer also to *Policy 3.7.3* for additional information pertaining to evaluation criteria and supporting documentation.

### 3.2.4 Establishing Baselines

Several credits in the Envision framework—such as RA3.2 Reduce Operational Water Consumption—require project teams to demonstrate performance by percentage reductions compared to an acceptable base case or baseline. In the event a widely recognized industry standard does not already exist, project teams must establish a baseline. Acceptable methodologies for establishing baseline performance data for Envision include (in order of preference):

- **Existing conditions:** comparing your project against existing conditions or the existing system(s) the project will replace;
- **Project alternative:** comparing your project against a seriously considered project alternative;
- **Industry “standard practice”:** comparing your project against industry “standard practice” or existing codes, standards or regulatory requirements; and
- **Similar project:** comparing your project against a project of similar scope and size operating within the same geographical area or within a geographical area with similar operating conditions.

Regardless of the methodology chosen, you must provide:

- An explanation of why you selected the baseline and its relevance to your project,
- Documentation to support the establishment of the baseline, and
- The required percentage reduction calculations for your project compared to the baseline.

### 3.2.5 Innovation

Each credit category in the Envision framework includes one “Innovation or Exceed Credit Requirements” credit denoted with a 0.0 after the credit category abbreviation (e.g., QL0.0).

Innovation credits include three options to earn bonus points:

- **Innovation:** sustainability solutions that overcome significant problems, barriers, and/or limitations or create scalable and/or transferable solutions for the industry.
- **Exceptional performance:** Performance in one or more credits that exceeds the highest available level of achievement.
- **Additional Aspects of Sustainability:** A sustainability indicator not already included in the Envision framework.

Points awarded for innovation credits are discretionary and are awarded in 2-point increments (i.e., 0, 2, 4, etc.). Innovation points cannot be earned in multiple categories for the same thing, for example, an innovation submitted for points in LD0.0 cannot also be awarded under QL0.0 or RA0.0. Project teams must clearly explain why they believe their project deserves the number of innovation points selected and provide documentation to further justify their explanations. Specific guidance for these credits and examples for each type of innovation option is included in the Envision Guidance Manual.

Any points earned for innovation credits act as bonus points that are added to the project's total score (the numerator) but do not affect the total number of applicable points in the framework (the denominator).

### **3.3 PREPARING CREDIT SUBMITTALS**

A credit submittal must be prepared for each Envision credit being pursued for your project including "Not Applicable" credits – refer to *Policy 3.7.4*. A credit submittal consists of the following components:

- A credit narrative or coversheet (refer to *Policy 3.7.2*)
- Supporting documentation

A credit submittal does not need to be prepared for credits that you are not pursuing (i.e., no level of achievement).

*Section 3.3.1* provides more detail on Envision credit coversheets and *Section 3.3.2* provides more information about supporting documentation.

#### **3.3.1 Preparing a Credit Coversheet**

ISI has developed coversheet templates for each credit in the Envision framework. The full set of coversheets can be accessed on the ISI website after logging into your account. To facilitate a smoother verification process and to promote consistency from project to project, applicants are required to use ISI's coversheets.

Credit coversheets are meant to fulfill three main objectives:

- To specify the level of achievement being sought or the credit's applicability.
- To provide an explanation as to how the project meets the evaluation criteria and credit intent for the level of achievement sought.
- To direct the verifier to the supporting document(s) for each evaluation criteria.

Without a credit coversheet, the verifier will have insufficient context to review the supporting documentation and will not be able to verify the level of achievement being sought. Refer to *Appendix D* to see what an Envision credit coversheet template looks like.

Credit coversheets include the following sections:

##### **1.1.1.4 Level of Achievement / Credit Applicability**

Applicants must specify on the credit coversheet the level of achievement being sought. The selection on the coversheet should match the level selected online. Six (6) options are available on the coversheet: Not Applicable, Improved, Enhanced, Superior, Conserving, and Restorative.

### 1.1.1.5 Summary Statements

Summary statements are brief explanations as to why the project achieves the selected level of achievement. They are especially important for credits deemed “N/A”.

If you are pursuing verification Pathway A: Design + Post-Construction, and one or more documents required to demonstrate achievement will not be available until the post-construction review, you must clearly mark the credit as “Pending” online and on the coversheet.

### 1.1.1.6 Pending Credits

Under Envision v3, project teams pursuing verification Pathway A: Design + Post-Construction, conduct the primary review after 95% design completion. However, all the documentation necessary to demonstrate achievement for certain credit criteria may not be available at this point in the project timeline. Credits are marked as “pending” if documentation necessary to demonstrate achievement will only be available at the post-construction follow-up review. If a credit is not marked as pending the verifier will assume all the necessary documentation to demonstrate achievement has been provided.

The following credits will likely always be considered “pending” during the design phase reviews in Pathway A: Design + Post-Construction (not intended to be an exhaustive list):

- QL1.3 Improve Construction Safety
- QL1.6 Minimize Construction Impacts
- RA1.1 Support Sustainable Procurement Practices
- RA1.2 Use Recycled Materials
- RA1.4 Reduce Construction Waste
- RA2.2 Reduce Construction Energy Consumption
- RA3.3 Reduce Construction Water Consumption

For example, it will not be possible to provide all the documentation necessary to demonstrate achievement in construction credits, such as QL1.3 Improve Construction Safety or RA3.3 Reduce Construction Water Consumption, until after construction completion. In these cases, during the design review the project team must:

- Mark the credit as “pending”;
- Select a level of achievement;
- Provide documentation that credit requirements will be met during construction (e.g. construction specifications, targets, policies); and
- Identify and explain any additional documentation that will be available and provided in the post-construction review in order to demonstrate achievement.

Refer to *Section 3.2* for assessing credit achievement.

### 1.1.1.7 Explanations for Evaluation Criteria

Explanations must be provided as to how the project meets each of the credit's evaluation criteria for the selected level of achievement. Applicants are to assess each criterion separately; answers for multiple evaluation criteria should not be combined. Explanations must answer the specific questions posed by the evaluation criteria and must be supported by clearly referenced documentation. Bolded or highlighted references are preferable as this enables the verifier to efficiently locate supporting documentation. Supporting documentation is provided to back up explanations provided in the narrative, therefore, it is important to summarize key findings from the documentation in the explanations provided. For example, for QL1.1, criterion A "Has the project team identified and taken into account community needs, goals, and issues?", not acceptable responses would be: "Yes" or "Yes, see document XYZ, pages 4-6." These responses do not provide nearly enough context for the verifier to accurately determine a level of achievement. A far superior response to criterion A would be: "Yes, the project team has identified and taken into account the following community needs goals and issues: XX, XXX, XXX which are documented in Document A, pages 4-6 (sections also highlighted for ease of reference)."

Please note that this section is not required if a credit has been designated not applicable. In these cases, the summary statements should explain to the verifier why not applicable was selected and references to supporting documentation should also be provided in this section.

### 1.1.1.8 References to Supporting Documentation

When providing explanations for each evaluation criteria, you must also specifically direct the verifier to the supporting documents or sections of supporting documents (e.g., specific page numbers, headings) that support your statements. This enables the verifier to confirm explanations provided in the credit coversheet.

If you are pursuing verification Pathway A: Design + Post-Construction, and one or more documents required to demonstrate achievement will not be available until the post-construction review, you must clearly mark the credit as "pending" and explain to the verifier what documentation you will provide for the post-construction review and what it will demonstrate.

When referencing a supporting document in the body of the credit coversheet, please be sure to make the reference stand out. ISI recommends bolding or highlighting references to supporting documentation for the verifier's ease of reference.

### 1.1.1.9 Table of Contents

Each credit coversheet template includes a table of contents section. This is where you are required to list the documents that you have provided for the verifier to review. It is very important that you use intuitive file names and that the file names match the names of the documents listed in the table of contents.



### 1.1.1.10 Pending Documentation

Each credit coversheet template also includes a pending documentation table of contents. This section is only relevant for projects pursuing verification Pathway A. This is where you are required to list the documents that you will provide for the verifier to review during the post-construction review step. You will also be required to provide a brief description of each pending document.

### 3.3.2 Preparing Supporting Documentation

Supporting documentation validates statements made by applicants in the credit coversheet. In addition to referencing supporting documents in the credit coversheet, applicants are **strongly encouraged** to highlight and/or annotate supporting documentation to draw the verifier's attention to the specific sentences, pages, or sections that correspond to statements made in the credit coversheet. Supporting documentation must be provided for all credits and for all evaluation criteria to demonstrate a level of achievement, regardless of the verification pathway.

Highlighting and/or annotating the supporting documentation facilitates a smoother verification process and reduces the potential for verifiers to misinterpret the documentation or not be able to locate the required evidence.

For example, if you are pursuing RA1.4 Reduce Construction Waste, evaluation criterion A calls for evidence that a comprehensive waste management plan is in place. Projects pursuing verification Pathway B: Post-Construction should provide the actual construction waste management plan that was utilized during construction and demonstrate that it was implemented. If verification Pathway A: Design + Post-Construction is being pursued, projects may not be able to demonstrate implementation of a construction waste management plan during the design review, but should still provide policies, specifications, or contract documents indicating that such a plan will be developed and implemented. Criterion B requires the project team to demonstrate the extent to which construction waste was diverted from landfills. Again, projects pursuing verification Pathway B should provide calculations of the percentage of materials diverted to recycle or reuse. Projects pursuing verification Pathway A: Design + Post Construction will not be able to provide calculations during the design review, but should provide policies, specifications, contract documents, signed commitments or other related documents to achieve a target construction waste diversion rate. The verifier will assess the reasonableness of the assumptions used to set the target diversion rate.

Pathway B projects will earn a level of achievement based on sufficient documentation being provided for each evaluation criteria. Pathway A projects will also earn a level of achievement based on the documentation provided but the credit will be marked as pending until a post-construction review has been completed by the verifier.

### 3.3.3 Credit Submittals “Dos and Don’ts”

The following tips are intended to help you successfully compile credit submittals for verification.

#### 1. **Do: Clearly define your project boundary and keep it consistent across all credit submittals**

It is important to fully explain what is being included in a project submission versus what is not. For example, many infrastructure projects contain multiple elements such as a road and a bridge, and perhaps even a park. Using this road/bridge/park example, if you only wish to have the road and bridge components verified and not the park, the park component of the project cannot be counted towards credits when it may be especially beneficial to do so (e.g., for QL3.4 Enhance Public Space & Amenities).

#### 2. **Do: Prepare credit submittals as stand-alone submissions**

ISI’s third-party verifiers have been trained to reference only the documents submitted for a given credit. Applicants should not assume the verifier will remember or rely upon documents or explanations provided in other credits. Each credit submission should include all the explanation and documentation necessary to be assessed on its own, even if this means duplicating documents.

#### 3. **Do: Prepare high-quality and comprehensive credit coversheets**

The quality and comprehensiveness of the explanations provided in the credit coversheets are critically important and can either help the verifier to view the supporting documentation in the applicant’s favor or cause the verifier to view the supporting documentation incorrectly.

#### 4. **Do: Review any/all available Credit Interpretations prior to submitting a project for verification**

From time to time, ISI makes the determination that a Credit Interpretation is required. Credit Interpretations are developed when ISI determines that one or more elements in the Envision Guidance Manual for a given credit or group of credits require clarification or further explanation. All Credit Interpretations can be accessed on the ISI website.

#### 5. **Do: Use intuitive file names**

Please save your files using intuitive file names before uploading them to the ISI website. Where possible, save your files using the same names that you refer to them in the credit coversheet. For example, if you’re uploading a lighting schematic for your project as documentation for QL1.5 Minimize Light Pollution, save the file using an intuitive name such as “Lighting Schematic” rather than “Drawing C00167”.

#### 6. **Do: Distinguish between initial credit submittals and revised credit submittals**

When preparing your project for resubmission (e.g., after the verifier has already reviewed the project and provided feedback), be sure to identify any “new” or “revised” documentation submitted

for review. For example, any revised coversheets should be saved with “revised” at the end (e.g. QL1.5\_Coversheet\_revised).

**7. Do: Put yourself in the shoes of someone who is learning about your project for the first time**

When preparing credit submittals, applicants are encouraged to put themselves in the shoes of someone who does not know anything about their project and has a limited amount of time to review your project. As an applicant, your role is to convey the details of your project in a clear, transparent, and accurate manner. You are very familiar with your project, but the verifier assigned to review your project will be learning about it for the first time. It is always better to err on the side of providing more detail than less (**though the goal is never to overwhelm the verifier** with too much information or documentation). This will reduce questions from the verifier and in turn reduce the amount of work to prepare a resubmission.

**8. Don't: Include links to webpages or videos as documentation**

The verifier will not rely on information provided on external websites unless the information from a website has been printed and uploaded as project documentation. Applicants wishing to provide videos as evidence must provide written transcripts as links to videos are not accepted.

**9. Don't: Type your responses to the evaluation criteria in the credit comments section online**

As previously mentioned, ISI credit coversheets must be used. The online credit “comments” section is a tool to enable teamwork and collaboration amongst members of the project team. This function is especially useful when members of the project team span different offices and cannot, therefore, work together in person on the project. Any information contained in the credit comments section will not be reviewed by the verifier and will have no impact on how the credit is verified.

**10. Don't: Assemble all supporting documentation for the entire project into one master file and provide it for reference**

Only supporting documentation relevant to a particular credit should be provided for reference. Providing extraneous documentation complicates the review process and will likely lead to the applicant receiving a lower level of achievement than originally sought as the verifier will have a more difficult time locating relevant documentation to back up statements made in the credit coversheet.

Adherence to these guidelines and tips will result in the verifier being able to complete the review of your project in a timely fashion and will increase the likelihood of a favorable review.

## 4.0 WHAT TO EXPECT FROM THE VERIFICATION PROCESS

### 4.1 VERIFIER SELECTION & COMMUNICATION

ISI hires verifiers from a range of backgrounds to conduct third-party peer reviews of infrastructure projects seeking formal recognition for their sustainable attributes. Once you notify ISI that you're ready to submit for verification, ISI will provide you with a list of three to five potential verification companies. Submitting teams may not select their verifier from this list; rather, they are to inform ISI of any potential conflicts of interest (e.g., a proposed firm worked on the project in any capacity) that exist with any of the proposed verification companies.

Typically, verifiers are not assigned to projects more than 2 weeks in advance of a project being submitted for verification. Project teams are expected to keep ISI apprised of any changes to the submission timeline and are expected to provide at least 2 weeks' notice prior to submitting for verification (refer to *Policy 3.8.4*).

ISI is the main point of contact for applicants. Any communication with the verifier and applicant is facilitated through the Envision Online Scoresheet. At no point in the verification process may the applicant communicate directly with the verifier or vice versa by any means (e.g., email, phone, or in-person), unless facilitated by ISI. Refer to *Policy 3.8.7*.

### 4.2 VERIFIER REVIEWS

#### 4.2.1 First Review Scores

It is common for a project to drop at least one award level after the first review. For example, if you submit your project at a Gold award level, you may find that your project is returned by the verifier at a Silver. This is especially true for first-time applicants that may not be as familiar with the Envision framework or the submission requirements. ISI allows for more than one review to provide applicants with the opportunity to address comments and/or questions posed by the verifier after they have completed their first review of the project. Often, the information the verifier needs to confirm a level of achievement is available but was not uploaded with the submittal, or the verifier was unable to locate the information in the credit submittal.

One of the reasons ISI offers a third-party verification program is to help Envision users calibrate their self-assessments by going through a rigorous review process. Therefore, ISI encourages applicants to view verification as an excellent learning opportunity for the current and future project submissions. ISI and its verifiers aim to provide helpful, informative comments to applicants by explaining why a level of achievement was verified different from the applicant's original selection. Note, however, that verifiers will not provide commentary beyond a simple message of agreement if they concur with your initial level of achievement selection.

## 4.2.2 Verifier Feedback

The verifier will either agree or disagree with the applicant's selected Level of Achievement for each credit. If the verifier agrees with the applicant, a simple "agree" or "verifier agrees" note will be included in the verifier comment box online. If the verifier disagrees with the applicant, and instead believes a different level of achievement is more appropriate for one or more credits, he or she will provide comments explaining why they have verified a different level of achievement and what would be required to advance to the applicant's desired level of achievement.

In cases where the verifier disagrees with the level of achievement chosen by the applicant, the verifier comments will:

- Focus on what is missing from the documentation and/or explanations provided in the credit coversheet;
- Align comments with the Envision Guidance Manual to the extent possible;
- Be as clear and as concise as possible;
- Be as direct as possible to avoid potential misinterpretation;
- Avoid the use of value judgments (e.g., the documentation is "bad", or the explanation is "poor").

Note that the verifier will not review or assign a level of achievement to any credits not being pursued by the project team (i.e., credits for which no documentation was submitted) even if the verifier feels the team could have or should have pursued the credit(s), and the verifier will not suggest that the project team pursue higher levels of achievement for credit(s). Refer to *Policies 3.8.10* and *3.9.7* for more information.

## 4.2.3 Preparing your Project for Resubmission

After receiving the first review feedback from the third-party verifier, applicants may decide to either accept the verified award level or re-submit select credits to address verifier comments and requested documentation. Applicants must keep ISI informed of the re-submission timeline to ensure the verifier's continued availability to review the project in a timely manner.

If you are planning to re-submit one or more credits to address verifier comments and documentation gaps, a revised credit submittal should be prepared in accordance with details provided in *Section 3.3*. The revised credit coversheet should be labelled as such, and any new or revised documentation should also be labelled as such.

Prior to re-submitting your project for another review as part of the iterative verification process, if you have questions or require clarification pertaining to any of the verifier comments, you must submit your questions to ISI in writing. ISI will coordinate with the third-party verifier to respond to your questions in writing. If further clarifications are still required after you receive written responses from the verifier, contact your ISI project manager to discuss the potential for further follow up questions in writing and/or setting up a short conference call with the verifier. When the verifier responds to question in writing and/or via conference call, the verifier will only clarify

feedback provided. The verifier will not discuss re-submission strategies, guarantee levels of achievement, or provide any other form of consultation. The onus is on you as the applicant to determine the best way to respond to the verifier comments and demonstrate a level of achievement based on the requirements set forth in the Envision Guidance Manual. Please allow at least one to two weeks to receive responses to your questions.

For projects pursuing verification Pathway A: Design + Post-Construction, “new” credits<sup>3</sup> may be submitted for review between the first and second design reviews, though ISI generally discourages this practice as many credits benefit from the iterative design review process. The number of new credits submitted are limited to two (2) unless the project team pays for an additional credit review – refer to *Section 4.4.2*). New credits may **not** be submitted in the post-construction review stage. During post-construction review, the verifier will only review credits that were marked as “pending” during the design review stage as the purpose of the post-construction review is to confirm that commitments made during design were carried out successfully through construction (refer to *Section 1.1.1.1*).

For projects pursuing verification Pathway B: Post-Construction, since the post-construction review step is iterative in nature (unlike in Pathway A when the post construction review step is not), “new” credits may be submitted for review between the first and second post-construction reviews, though ISI generally discourages this practice as many credits benefit from the iterative post-construction review process. The number of new credits submitted are limited to two (2) unless the project team pays for an additional credit review – refer to *Section 4.4.2*).

Refer to *Policies 3.8.10 and 3.8.11* for more information.

### 4.3 TIMELINES

Typical verification timelines vary depending on which verification pathway the project is pursuing. The figures below illustrate the typical verification timeline for verification Pathways A and B.

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<sup>3</sup> “New” credits refer to credits that were not previously pursued by the project team.

Verification Step	Weeks																	
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
Start verification	█																	
Design review (1 <sup>st</sup> )	█	█	█	█	█	█	█											
Initial score returned to project team							█											
Project team prepares project for second design review if required. Timeline up to the team.																		
Project re-submitted for verification							█											
Design review (2 <sup>nd</sup> )							█	█	█	█	█							
Final score returned to project team – Envision award if applicable												█						
Project team prepares project for post-construction review. Timeline up to the team and depends upon the construction schedule.																		
Start verification													█					
Post-construction review													█	█	█	█	█	█
Final score returned to project team – Envision award maintained																		█

**Figure 2: Typical timeline for verification Pathway A: Design + Post-Construction**

Verification Step	Weeks											
	1	2	3	4	5	6	7	8	9	10	11	12
Start verification	█											
Post-construction review (1 <sup>st</sup> )	█	█	█	█	█	█	█					
Initial score returned to project team							█					
Project team prepares project for second post-construction review if required. Timeline up to the team.												
Project re-submitted for verification							█					
Post-construction review (2 <sup>nd</sup> )							█	█	█	█	█	
Final score returned to the team – Envision award if applicable												█

**Figure 3: Typical timeline for verification Pathway B: Post-Construction**

## 4.4 THE APPEALS PROCESS

### 4.4.1 Credit Appeals

Once the verifier returns the final score the project team, the team has the option to appeal one or more credit decisions. You must appeal credit decisions within 30 days of the final score being returned to you by the verifier.

For verification Pathway A: Design + Post-Construction, there are two opportunities to appeal credit decisions:

- Once the final Envision score is returned at the end of the Design Review phase; and
- Once the final Envision score is returned at the end of the Post-Construction review phase.

For projects pursuing verification Pathway B: Post-Construction, there is one opportunity to appeal credit decisions:

- Once the final Envision score is returned at the end of the Post-Construction review phase.

You must notify ISI which credits you wish to appeal and pay the per-credit appeals fee (refer to the fee schedule in *Appendix E*) in advance of final credit decisions being rendered. ISI will convene a panel of three verifiers to conduct independent reviews of the credit. They must arrive at a unanimous decision. Their decision is final and cannot be appealed again.

Applicants may not alter their credit submittals for the appeals process. The most current credit coversheet(s) and supporting documentation will be reviewed by the panel of verifiers.

The appeals process can take up to one month.

Should the Envision award for the project change as a result of the appeals process ISI will issue a new award letter and certificate.

Refer to *Policies 3.10.3* and *3.10.4* for more information.

### 4.4.2 Additional Credit Reviews

The Envision verification fee includes three (3) reviews under Pathway A: Design + Post-Construction (2 design reviews and 1 post-construction review) and two (2) reviews under Pathway B: Post-Construction (2 post-construction reviews). From time to time project teams may find it necessary to submit one or more credits for an additional review over and above the number of reviews included in the verification fees. For example, sometimes additional documentation is made available for credits previously submitted to support a higher level of achievement after a credit review has already been completed by the verifier. This option is available to project teams for the same per-



credit fee as the appeals process (refer to *Appendix E*). The differences between this option and the appeals process are:

- The credit may be modified before re-submission;
- The same verifier assigned to the project will review the credit.

How this process works: the project team has the option to submit one or more credits for another review once the verifier has returned the final score to the project team. You must let ISI know of your intention to resubmit credits for another review within 30 days of the final score being returned to you by the verifier.

For verification Pathway A: Design + Post-Construction, there are two opportunities to re-submit credits for an additional review:

- Once the final Envision score is returned at the end of the Design Review phase; and
- Once the final Envision score is returned at the end of the Post-Construction review phase.

For projects pursuing verification Pathway B: Post-Construction, there is one opportunity to re-submit credits for an additional review:

- Once the final Envision score is returned at the end of the Post-Construction review phase.

You must notify ISI which credits you wish to re-submit for another review and pay the per-credit appeals fee in advance of final credit decisions being rendered.

Note that new credits (e.g., credits that were not previously submitted by the project team for review) will not be allowed to be submitted once a verification review phase has been concluded (e.g., the end of the design review phase or the end of the post-construction review phase).

Refer to *Policies 3.8.10, 3.8.11, 3.10.1, and 3.10.2* for more information.

## 5.0 POLICIES

Throughout this document, references to a number of policies and guidelines have been made. All verification policies are listed in *Appendix I* for ease of reference. These policies should be reviewed in conjunction with the master ISI Policies document and should be reviewed prior to submitting a project for verification. Policies are applicable to all applicants seeking to verify a project under the Envision framework, regardless of type and size of infrastructure project. The latest ISI Policies document is available for download from the ISI website. If you previously downloaded a copy of this document or the ISI Policies document, be sure to check the website often for updates as the latest versions of both of these documents will always be online.

## **Appendix A            PROJECT INFORMATION**

### **A.1    PURPOSE**

Project teams are required to provide ISI with important information about their projects prior to submitting them for verification. This information is necessary in order to facilitate a smoother verification process for both the project team (applicant) and verifier (third-party reviewer).

As a project progresses from the initial creation of the Online Scoresheet to registration and verification, additional fields become mandatory to complete.

### **A.2    INFORMATION TO BE PROVIDED WHEN AN ONLINE SCORESHEET FOR A PROJECT IS CREATED**

- Project Name and Location (City, State/Province, Country, Postal Code)

### **A.3    INFORMATION TO BE PROVIDED BEFORE REGISTRATION**

- Project address / coordinates
- Project owner(s)
- Lead ENV SP
- Infrastructure Sector
- Primary and Secondary Project Types
- Key Dates (Estimated Submission Date, Estimated Design Completion Date, Estimated Construction Completion Date)
- Verification Pathway (Pathway A, or Pathway B)
- Total Constructed Costs

### **A.4    INFORMATION TO BE PROVIDED BEFORE SUBMITTING FOR VERIFICATION**

- Project Description
- Main Issues / Problems / or Needs this Project is Addressing
- Project Team Description – companies involved and their role(s) on the project
- Project Delivery Method
- Site Map (upload)
- Reasons for Pursuing Verification
- Name of Project as it should appear on Final Award

## Appendix B MINIMUM PROGRAM REQUIREMENTS

The following minimum program requirements (*Policy 3.1.1*) must be met by all projects prior to submitting for Envision verification:

1. The project team must acknowledge they have read this document and all associated verification policies.
2. Levels of achievement for all 64 credits must be selected online. If you decide not to pursue one or more credits, “No Level” must be selected as the level of achievement.
3. All required fields about your project must be completed online (refer to *Appendix A*).
4. A credit submittal (coversheet<sup>4</sup> + supporting documentation) must be provided for each credit being pursued, including “Not Applicable” credits.<sup>5</sup>
5. Confirmation that the project meets the Envision prerequisites which are a series of environmental, social, and governance (ESG) safeguards (refer to *Appendix C* and *Policy 3.1.3*).
6. Project registration fees must be paid, and verification fees are due in full prior to the initial project score being returned to the team by the verifier (typically this is between 45 and 60 days after the project is submitted for verification).
7. Conduct a final quality assurance review of the submission and complete and sign the Verification Submittal Quality Assurance Checklist (refer to *Appendix G* and *Policy 3.8.2*).

---

<sup>4</sup> ISI coversheet templates must be used.

<sup>5</sup> A credit submittal is not required if “No Level” of achievement is being pursued.

## **Appendix C PROJECT PREREQUISITES**

### **C.1 PURPOSE**

Applicants submitting their project for Envision verification must attest that, to the best of their knowledge, a set of environmental, social, and environmental standards were adhered to on the project.

### **C.2 ENVIRONMENTAL, SOCIAL AND GOVERNANCE SAFEGUARDS**

- All documentation provided to ISI for review is accurate and true
- All applicable national, state/provincial/territorial, and local health and safety laws and regulations were strictly adhered to
- All applicable national, state/provincial/territorial, and local environmental laws and regulations were strictly adhered to
- All applicable human rights, labor laws, and regulations were strictly adhered to
- All development is legally permitted
- No illegal resettlement took place
- There were no violations involving rights of indigenous peoples
- No forms of bribery, corruption, or anti-competitive behavior has taken place by any of the owners and firms involved with this project
- No endangered or critically endangered plant or animal species on the IUCN Red List were negatively impacted by this project without all reasonable efforts to mitigate
- No child labor was used
- No forced or compulsory labor was used



RESOURCE ALLOCATION: MATERIALS

## RA1.2 Use Recycled Materials

### Levels of Achievement

**Note:** In the table below, please mark selection with an "X" in the "Applicant Selection" row.

Levels	NA	Improved	Enhanced	Superior	Conserving	Restorative
<b>Criteria</b>	NA	A	A	A	A	Not Available
<b>Applicant Selection</b>						

### Summary

**Pending? (Yes/No):** \_\_\_\_\_

**Note:** If pursuing verification Pathway A: Design + Post-Construction please indicate whether the level of achievement selection is **pending** future construction phase documentation. Be sure to also clearly indicate this in the credit summary text and evaluation criteria documentation.

If you indicated that this credit is not applicable, explain why and make specific references to supporting documents or sections of supporting documents presented as evidence. If the credit is applicable, use this space to present an executive summary explaining why the selected level of achievement has been chosen for this credit.

[Insert text here]

### Evaluation Criteria and Documentation

**Note:** State how each criterion was met by the project and to what degree it was met. Make direct reference to supporting documents or sections of supporting documents (e.g., page numbers, headings) to enable the verifier to confirm explanations provided.

**A. To what extent has the project team used recycled materials, including materials with recycled content and/or reused existing structures or materials?**

[Insert text here]

### Table of Contents

**Note:** Please list all supporting documents for this credit in the spaces provided. Rows may be added if required. If supporting documentation has been assembled as a single PDF, please insert the page within the PDF where the file begins.

Document Title / Name:	Page(s):
[Insert document name]	[Insert page #]


## Pending Documentation

**Note:** If pursuing verification Pathway A: Design + Post-Construction please indicate documents that are not currently available but will be provided during the post-construction review in order to demonstrate achievement.

Document Type / Name:	Brief Description:
[Insert document name]	[Insert brief description of document and contents]

## Appendix E VERIFICATION PRICING SCHEDULE

All fees listed are in US dollars.

Project Size (\$M)	Registration Fees	Verification Pathway A: Design + Post-Construction		Verification Pathway B: Post-Construction		Appeals (per credit)
		Member	Non-member	Member	Non-member	
< 5	\$2,000	\$12,000	\$14,000	\$9,000	\$11,000	\$500
5 - 25	\$2,000	\$17,000	\$20,000	\$14,000	\$17,000	\$500
25 - 100	\$2,000	\$26,000	\$30,000	\$21,000	\$25,000	\$500
100 - 250	\$2,000	\$33,000	\$39,000	\$28,000	\$34,000	\$500
250 - 500	\$2,000	\$41,000	\$48,000	\$35,000	\$42,000	\$500
500 - 1000	\$2,000	\$48,000	\$56,000	\$42,000	\$50,000	\$500
> 1000	\$2,000	Contact ISI for a quote. (Quotes are valid for 6 months.)				\$500



## Appendix F RELEVANCE TO ENVISION V2 PROJECTS

While this document was initially written for projects pursuing verification under Envision v3, this document is also relevant for projects pursuing verification under Envision v2. Particularly relevant sections and any notable differences for projects pursuing verification under Envision v2 are outlined in the table below.

Section in Document	Title/description of section	Notable differences for v2 project verifications
<i>Section 1.1</i>	Description of the components that make up the Envision framework	The v2 Envision Guidance Manual contains fewer credits and some of the credit subcategories are different. Refer to the answers provided for <i>question 3</i> , above.
<i>Section 1.2</i>	Using Envision	No notable differences for v2 project verifications.
<i>Section 1.3</i>	Benefits of using Envision and pursuing third-party verification	No notable differences for v2 project verifications.
<i>Section 1.4</i>	Determining the eligibility of projects for verification	No notable differences for v2 project verifications.
<i>Table 1</i>	Steps in verification Pathway A: Design + Post-Construction	This option is not available for v2 project verifications.
<i>Table 2</i>	Steps in verification Pathway B: Post-Construction	The steps articulated for verification Pathway B are similar to the verification steps under Envision v2, though projects proceeding with verification under Envision v2 may submit for verification any time at or after 95% design completion. There is no “post-construction review” review step, only a “review” step.
<i>Section 2.2.1</i>	Create Envision Online Scoresheet	No notable differences for v2 project verifications.
<i>Section 2.2.2</i>	Conduct Self-Assessment	All Envision v2 projects must complete a self-assessment of the project prior to submitting it for verification, though the self-assessment is conducted against the Envision v2 framework, instead of the v3 framework.
<i>Section 2.2.3</i>	Register project	All Envision v2 projects must register prior to submitting for verification, though information required at the time of registration differs slightly from the information that is required of Envision v3 projects.
<i>Section 2.2.4</i>	Start Verification	This step is also relevant for Envision v2 projects through there are no “pending credits” in Envision v2, and v2 projects are not required to provide the same project information prior to submitting for verification as outlined in <i>Appendix A</i> .

Section in Document	Title/description of section	Notable differences for v2 project verifications
<i>Sections 2.2.5 and 2.2.6</i>	Design Review and Post-Construction Review	Both of these sections are generally applicable for Envision v2 projects though v2 projects may submit for verification anytime at or after 95% design completion, up to three years post-construction. Under Envision v2, the project reviews conducted are not referred to as “design reviews” or “post-construction reviews” as there is only one verification pathway for Envision v2 projects; there is no differentiation for v2 projects that submit for verification during design, construction, or post-construction.
<i>Section 2.2.7</i>	Envision Award	The v3 “Verified” award level is called “Bronze” in v2.
<i>Sections 1.1.1.3 to 1.1.1.3.5</i>	Formal recognition for Envision verified projects	No notable differences for v2 project verifications.
<i>Section 3.2.1</i>	Scoring Methodology	The scoring methodology in Envision v2 is the same as v3 though there are fewer total points in the Envision v2 system (refer to the Envision v2 manual for details).
<i>Section 3.2.2</i>	Credit Applicability	No notable differences for v2 project verifications.
<i>Section 3.2.3</i>	Evaluation Criteria and Documentation Guidance	No notable differences for v2 project verifications.
<i>Section 3.2.4</i>	Establishing Baselines	No notable differences for v2 project verifications.
<i>Section 3.2.5</i>	Innovation	Envision v2 does not explicitly offer the same three options to earn innovation or “bonus points” – refer to the Envision v2 Guidance Manual for details on the Innovation credits which are indicated with 0.0 after the category ID, e.g., QL0.0, LD0.0. Also, under v2, innovation points are earned in 1-point increments, not 2-point increments.
<i>Section 3.3</i>	Preparing Credit Submittals	No notable differences for v2 project verifications.
<i>Section 3.3.1</i>	Preparing a Credit Coversheet	Envision v2 credit coversheet templates are available on the ISI website for projects pursuing verification under this version of the system. The v2 coversheet templates function the same as v3 coversheet templates and contain similar components. The only significant difference between the v2 and v3 coversheet templates are the “pending credit” and “pending documentation” sections in the v3 coversheets (there are no “pending credits” or “pending documentation” provisions in Envision v2).
<i>Section 3.3.2</i>	Preparing Supporting Documentation	Project documentation should be prepared for v2 projects in accordance with the information contained in this section. Credit references made in this section are v2 credits, and in v2, the concepts of “pending credits” and “pending documentation” is not applicable.
<i>Section 3.3.3</i>	Credit submittals Do’s and Don’ts	No notable differences for v2 project verifications.
<i>Section 4.1</i>	Verifier Selection	No notable differences for v2 project verifications.
<i>Sections 4.2 to 4.2.3</i>	Verifier Reviews	No notable differences for v2 project verifications.
<i>Section 4.3</i>	Timelines	The timeline for verification under Envision v2 is the same as the timeline for verification under Envision v3 Pathway B.
<i>Section 0</i>	Appeals Process	Projects pursuing verification under Envision v2 have the opportunity to appeal credits or request additional credit reviews after the second and final project review.

**Project Name:** \_\_\_\_\_

**Project ID:** \_\_\_\_\_

As a key step in the verification quality assurance process, the ENV SP is responsible for ensuring a high-quality submission that adheres to ISI's policies and guidance, as issued and updated from time-to-time. Please indicate that you have reviewed the submission for the following common errors and omissions. Failure to address these items will likely result in no level of achievement being verified for one or more credits and a lower overall score.

**PLEASE SUBMIT** your signed checklist by emailing it to your assigned ISI contact person or include it as part of the upload for credit QL1.1.

#### **Guide, Policies, and Credit Interpretations**

I acknowledge that I have reviewed the latest *Guide to Envision Verification for Applicants* (the Guide), policies, and published Credit Interpretations posted on the ISI website. (Note, these documents are updated from time to time and the latest versions would apply at the time of project submission.)

#### **Environmental, Social, and Governance Safeguards**

I attest that, to the best of my knowledge, all environmental, social, and environmental safeguards were adhered to on the project. Please reference the Guide - Appendix C.

#### **Levels of Achievement**

I confirm that a level of achievement has been selected for all credits on the Online Scoresheet. (Note, if you decide not to pursue one or more credits, 'No Level' must be selected as the level of achievement.)

#### **ISI Credit Coversheet Templates**

I confirm that, in accordance with Policy 10.2 in the Guide, the ISI issued Credit Coversheet Templates were used for all submitted credits. (Note, no coversheets are required for credits for which 'No Level' of achievement is selected; applicants are not required to explain why they are not pursuing credits.)

#### **Not Applicable Credits**

I acknowledge that credits deemed Not Applicable, are appropriately justified as outlined in the Guide, section 3.2., noting that project scope, local laws, budgets, stakeholder priorities, etc. are not justifiable reasons. I further confirm that credit coversheets, along with a rationale, have been provided for any credits assessed as Not Applicable. (Note that even if a credit is deemed Not Applicable, a coversheet is required along with the rationale and documentation illustrating the credit's lack of applicability to the project. Refer to the Guide, section 3.2.)

**Evaluation Criteria**

I confirm that each criterion (A, B, etc.) relevant to the assessed level of achievement has been addressed individually and that explanations are provided. (Note that supporting documentation is required to back-up your claims / statements made in the credit coversheet, so a narrative / explanation is necessary to outline key findings from the documentation and your rationale. Explanations should not be combined for more than one evaluation criterion. Also, an individual evaluation criterion cannot be assessed 'Not Applicable'. Refer to the Guide, sections 3.2. and 3.3.)

**Stand-alone Credit Submittals**

I confirm that narratives provided in credit coversheets do not reference other credits, or documentation provided for other credits. (Refer to the Guide, section 3.3.)

**Supporting Document Attachments**

I confirm that supporting documentation is in PDF format and that relevant sections are highlighted and/or annotated to draw the verifier's attention to sections / pages / excerpts that back-up statements made in the coversheet. (Note that only PDF files are accepted. Pertinent information found on web pages should be submitted as PDFs for review rather than web links and video files may be incorporated as screen shots with transcribes / summaries. On occasion, ISI may request documentation in a format other than PDF, e.g., an Excel file, if the PDF document does not contain sufficient detail for the verifier to interpret it. However, all efforts should be made by the project team to clearly explain files, how calculations were conducted, etc. Refer to the Guide, section 3.3.)

**Project Boundary / Scope**

I attest that a project boundary and scope has been provided and is consistently applied across credits. A site map has also been included in the project submittal, indicating the boundary and all project elements. (Note, Envision v3 applicants can share this information in the 'define the project' section on the ISI website, while Envision v2 applicants are required to provide this information as part of the upload for credit QL1.1, or by email to their assigned ISI contact for dissemination to the verifier. Refer to the Guide, section 3.3.)

**Innovation Points**

I have reviewed that the Innovation points claimed fall within one of the options to earn points and that points are assessed according to the guidelines. (Refer to the Guide, section 3.2. for the options to earn innovation points. Note that in Envision v3, points are awarded in 2-point increments, whereas in Envision v2, points are awarded in 1-point increments. Innovation points cannot be earned in multiple categories for the same innovation strategy.)

**Pending Credit Submittals** (Envision v3 only)

I confirm that credit coversheets, along with supporting documentation, have been provided for any “Pending” credits. (Note this is applicable to v3 project submissions only. If a credit is deemed “Pending”, a coversheet needs to be submitted along with the rationale and supporting documentation to justify your assessment of the pending level of achievement. Refer to the Guide, section 3.3.)

**Naming Resubmitted Files** (Round 2 review only, for both Envision v2 and v3 project submittals)

I acknowledge that, if required, resubmitted files require clear renaming. (When resubmitting credits for second review, please be sure to label the file accordingly so that it can be clearly distinguished from the original file submitted for first review by the verifier.)

**ENV SP:**

\_\_\_\_\_

name

signature

**Date:**

\_\_\_\_\_

## Appendix H FREQUENTLY ASKED QUESTIONS

**1. Does this guidance document apply to me if I am pursuing verification under Envision v2?**

Yes. Refer to Appendix F.

**2. What are the benefits of Envision and Envision verification?**

There are many benefits associated with using Envision and pursuing third-party verification. Please refer to *Section 1.3* for more information.

**3. What are the main differences between Envision v2 and Envision v3?**

The table below summarizes the changes at a glance:

Section in Document	Envision v2	Envision v3
Number of credits	60	64
Minimum total points in the framework	809	1000
Credit categories	Five (5): Quality of Life, Leadership, Resource Allocation, Natural World, Climate and Risk	Five (5): Quality of Life, Leadership, Resource Allocation, Natural World, <b>Climate and Resilience</b>
Cost of Envision	The Envision sustainability framework is available for free.	The envision sustainability framework will continue to be free for all ISI members.
Award Levels (based on % of applicable points earned)	20% - Bronze 30% - Silver 40% - Gold 50% - Platinum	<b>20% - Verified</b> 30% - Silver 40% - Gold 50% - Platinum
Verification Process	Single verification pathway (projects may submit at or after 95% design completion)	Two verification pathways:  Pathway A: Design + Post-Construction (projects may submit at or after 95% design completion).  Pathway B: Post-Construction (projects may submit at or after 95% construction completion).

Many of the Envision credits that were in Envision v2 have been revised or improved to enhance clarity and address the lessons learned by applying Envision on projects over the past several years. In addition, Envision v3 contains a number of new credits, addressing aspects of sustainability that were not previously addressed in prior versions of Envision. Changes to credits are summarized on page 18 of the Envision Guidance Manual.

One of the biggest changes is the Envision v3 verification program. Under Envision v3, projects may choose to pursue one of two verification pathways: Pathway A: Design + Post-Construction or Pathway B: Post-Construction. The two pathways are discussed in greater throughout this document, starting with an overview provided in *Section 2.1*.

Fees associated with Envision v3 verifications have also changed slightly. Registration fees have increased from \$1,000 for Envision v2 projects, to \$2,000 for v3 projects. Pathway A is new for Envision v3, and the fees associated with that pathway are outlined in *Appendix E*.

**4. May I re-submit an already verified project in order to attempt to increase my score?**

Refer to *Policy 3.8.6, Policy 3.8.10, Policy 3.8.11 and Policy 3.10.1* for the conditions under which a previously Envision-verified project may re-submit for verification.

**5. How long does it take for the verifier to review my project once I submit it for verification?**

Refer to *Section 4.3* of this document for the Envision verification timelines which vary by verification pathway.

**6. Will the verifier visit the project site as part of the verification process?**

No, the verification process is an online review of project documentation only; there are no site visits as part of the verification process.

**7. What project boundary should I use to define my project?**

ISI does not dictate what project boundaries are appropriate for Envision verification; rather, ISI and its team of verifiers rely on submitting teams to clearly define the boundaries of their project(s) being submitted for verification. Project boundaries must remain consistent across all credits. Refer to *Section 3.3.3* for more information.

**8. Will ISI recommend a firm to help us with our project submission for verification?**

ISI will not recommend specific organizations to assist with project applications. We do, however, have a list of Envision Qualified Companies on our website. These are ISI member companies that

have one or more Envision Sustainability Professionals on staff. (If you do not see your company listed here, please contact ISI by email at [info@sustainableinfrastructure.org](mailto:info@sustainableinfrastructure.org).)

**9. Can I choose my verifier?**

Verifiers are hired at ISI's sole discretion; however, you will be given an opportunity to review a short list of verification companies in order to perform a conflict of interest check. Refer to *Section 4.1* for more information on verifier selection.

**10. I've never submitted a project for verification before. Is it possible to get pre-verification assistance from ISI?**

While ISI does not provide consulting services to applicants, there are many benefits to registering your project for verification, including a pre-verification credit review. Refer to *Section 2.2.3* for more information.

Also, you might consider working with one of the Envision Qualified Companies listed on our website. These are ISI member companies that have one or more Envision Sustainability Professionals on staff. Many of these firms have submitted one or more projects for verification.

**11. Why are the verification fees for Pathway A: Design + Post-Construction higher than verification under Pathway B: Post-Construction?**

Under verification Pathway A, up to two (2) design reviews and one (1) post-construction review are included in the verification fees for a total of up to three (3) reviews of the project, whereas under Pathway B, up to two (2) post-construction reviews are included. Due to the higher number of project reviews included in Pathway A, the verification fees are slightly higher as the verifier requires more time to verify projects pursuing verification under Pathway A.

**12. Is it possible to pay for a portion of the verification fees upfront, and a portion later?**

It is possible to split up the verification fees across two payments or split the fees across more than one firm, however, ISI will not return scores until all applicable fees (e.g., registration fees and verification fees) have been paid in full. Refer to *Policy 3.8.9*. This applies to projects that are submitting for verification under both Pathways A and B.

**13. Is it possible for me to have direct contact with my verifier if I have any questions about the verification process or the feedback he/she provided?**

If you have questions or require clarification pertaining to any of the verifier comments, you may contact your ISI project manager to discuss or schedule a conference call with the verifier – refer to *Section 4.2.3* for more information. Any other direct communication between the verifier and the project team is prohibited per *Policy 3.8.7*.



**14. Does ISI have verifiers capable of reviewing documentation in other languages, such as French or Spanish?**

Yes, ISI has a limited number of verifiers who are able to verify projects in other languages, such as French, Spanish, and Italian. If you are planning to submit a project in a language other than English, please contact ISI to make arrangements.

**15. Will ISI share information about my project publicly?**

Please refer to *Policy 3.11.2 and 3.11.3*.

**16. How can I become a member to receive the discounted verification fees for my project?**

Contact ISI at [info@sustainableinfrastructure.org](mailto:info@sustainableinfrastructure.org) for membership information and assistance.

**17. What are the benefits of registration prior to verification?**

There are many reasons why project teams benefit from registering their project in advance of submitting it for verification. Refer to *Section 2.2.3*.

**18. Is a project required to proceed to verification following registration / can a project register and not proceed to verification?**

While ISI certainly prefers that projects not register unless they are intent upon pursuing verification, you may cancel your registration at any time. Registration fees paid are not refundable or transferrable - refer to *Policy 3.4.4*.

**19. How many reviews of my project is included in the project verification fee?**

The verification fee covers up to three (3) reviews of the project by a third-party verifier and ISI staff for projects pursuing verification pathway A: Design + Post-Construction and up to two (2) reviews of the project by a third-party verifier and ISI staff for projects pursuing verification pathway B: Post-Construction.

Refer to *Section 2.1* for an overview of the two verification pathways available to projects pursuing verification under Envision v3.

**20. What factors should be considered when choosing the right verification pathway for my project?**

Verification Pathway A: Design + Post-Construction may be suitable for your project if:

- It is a long-term project in the planning and/or design stage
- Early recognition is important for the owner and/or project team

- The owner or project team wishes to confirm the sustainability of the project design prior to the start of construction
- More reviews of the project by a third-party verifier would be beneficial to the owner or project team

Verification Pathway B: Post-Construction may be suitable for your project if:

- The project has already been constructed
- The owner or project team wishes to confirm the sustainability of the project as constructed
- The owner or project team wishes to retroactively apply Envision on a constructed project and use the experience/lessons learned to inform future projects

**21. If my project earns an award after going through the verification process, how do I obtain a plaque or trophy to commemorate the achievement?**

Plaques and/or trophies are available for purchase through our exclusive awards manufacturer, Eclipse Awards. Visit [www.envisionawards.org](http://www.envisionawards.org) to see the range of products available and refer to *Section 2.2.7* for more information on Envision awards and recognition.

**22. If I did not pursue one or more credits in my initial Envision project submission, am I allowed to submit those credits for review later (e.g., when I re-submit my project for another review)? In other words, am I allowed to submit new credits for review after receiving feedback from the verifier in an effort to boost my score?**

See *Section 4.2.3* and *Policy 3.8.11*.

**23. If new information becomes available to support a higher level of achievement for a credit after my project has completed the verification process, may I re-submit that credit with the additional documentation for another review in an attempt to boost my level of achievement/overall project score?**

There is an option for projects to submit one or more credits for an additional review over and above the number of reviews included in the verification fees. Refer to *Section 4.4.2* along with *Policy 3.8.11*, *Policy 3.10.1* and *Policy 3.10.2* for more information.

**24. Does ISI have any information on how to specify the use of Envision or incorporate Envision into procurement documents or design guidelines?**

Given the range of infrastructure projects covered by the Envision sustainable infrastructure framework and the number of project delivery and procurement methods used by projects, ISI does not at this time provide guidance on how to incorporate Envision into procurement documents, how to specify the use of Envision or how to incorporate Envision into design guidelines. As more and more Envision users share case studies and examples with us, ISI plans to build a library of such resources and make them available.

## **Appendix I LIST OF ENVISION VERIFICATION POLICIES**

### **3.0 VERIFICATION AND AWARDS**

#### **3.1 MINIMUM PROGRAM REQUIREMENTS AND PREREQUISITES**

- 3.1.1 Compliance with Minimum Program Requirements
- 3.1.2 Minimum Program Requirements Updates and Revisions
- 3.1.3 Program Prerequisites
- 3.1.4 Program Prerequisites Updates and Revisions

#### **3.2 PROJECT ELIGIBILITY**

- 3.2.1 Project Type
- 3.2.2 Project Phase

#### **3.3 PROJECT REGISTRATION**

- 3.3.1 Project Registration
- 3.3.2 Payment of Registration Fees
- 3.3.3 Registration Timeline

#### **3.4 REGISTRATION CLOSURE AND CANCELLATION**

- 3.4.1 Registration Closure
- 3.4.2 Registration Closure Sunset Date for Registered Projects
- 3.4.3 Registration Cancellation After Sunset Date
- 3.4.4 Registration Cancellation by Project Teams
- 3.4.5 Registration Cancellation Due to Inactivity
- 3.4.6 Effect of Registration Cancellation

#### **3.5 ROLES**

- 3.5.1 Envision Sustainability Professional
- 3.5.2 Project Leader
- 3.5.3 Verifier
- 3.5.4 ISI Reviewer

#### **3.6 INQUIRIES & INTERPRETATIONS**

- 3.6.1 Credit or Rating System Inquiries
- 3.6.2 Credit Interpretations

#### **3.7 DOCUMENTATION REQUIREMENTS & CONFIDENTIALITY**

- 3.7.1 Credit Submittals
- 3.7.2 Credit Coversheets
- 3.7.3 Evaluation Criteria and Documentation
- 3.7.4 Credit Applicability

- 3.7.5 Classified Information and Export Controls
- 3.7.6 Non-Disclosure Agreement
- 3.7.7 Transfer of Registration or Online Scoresheet Ownership

### **3.8 PROJECT SUBMISSION AND REVIEW**

- 3.8.1 Project Submission
- 3.8.2 Quality Assurance
- 3.8.3 Project Verification
- 3.8.4 Notice of Submission
- 3.8.5 Verification Timelines
- 3.8.6 Project Completion
- 3.8.7 Direct Contact with Verifier
- 3.8.8 Verification Fees
- 3.8.9 Payment of Verification Fees
- 3.8.10 Credits Not Pursued
- 3.8.11 New Credit Submittals

### **3.9 VERIFIER POLICY**

- 3.9.1 Verifier Selection
- 3.9.2 Use of Tools and Guidance Provided by ISI
- 3.9.3 Direct Contact with Project Team
- 3.9.4 Scoring Disagreements
- 3.9.5 Project Confidentiality
- 3.9.6 Verifier Anonymity
- 3.9.7 Suggesting Higher Performance than Submitted
- 3.9.8 Assessing Credits not Submitted

### **3.10 ADDITIONAL CREDIT REVIEW & APPEALS**

- 3.10.1 Additional Credit Reviews for Previously Submitted Credits Following Verification Completion
- 3.10.2 Additional Credit Review Fees
- 3.10.3 Appeals
- 3.10.4 Appeal Fees

### **3.11 AWARDS POLICY**

- 3.11.1 Physical Awards
- 3.11.2 Public Announcement
- 3.11.3 Use and Disclosure of Project Information
- 3.11.4 Revocation
- 3.11.5 Change of Award Level

Note: Policies listed above are subject to modification and new policies may be added from time-to-time. Always visit the ISI website ([www.sustainableinfrastructure.org](http://www.sustainableinfrastructure.org)) to access the latest ISI Policies.