



CITY OF SOMERVILLE, MASSACHUSETTS
OFFICE OF SUSTAINABILITY AND ENVIRONMENT
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Development Review
Sustainability Submittal Requirements

This document summarizes the materials that must be submitted to the Office of Sustainability and Environment (OSE) at every stage of development review. There are three separate sustainability provisions that require different documentation to be reviewed by OSE:

- 1. LEED certifiability**
- 2. Sustainable and Resilient Building Questionnaire and Pilot Low Load Building Energy Calculator**
- 3. Net Zero Ready Building**

Applicability of Sustainability Requirements

LEED Certifiability	Applies to all new construction and major renovations over 25,000 square feet (Section 10.11 of zoning ordinance).
Sustainable and Resilient Building Questionnaire and Pilot Low Load Building Energy Calculator	Required for all buildings permitted by site plan approval. All projects that require site plan approval AND are over 25,000 sq ft must resubmit the Questionnaire and the Calculator with updates when applying for Building Permit and Certificate of Occupancy.
Net Zero Ready: PHIUS or ILFI Zero Carbon	Applies to: <ul style="list-style-type: none"> • Master Planned Development Districts (except for lab buildings) • Projects seeking increased residential density by meeting Net Zero Ready standards

It is the responsibility of the applicant to carefully review the requirements and submit the applicable documentation to OSE. Once accurate and acceptable documentation has been



reviewed, OSE will issue a Certificate of Receipt of Required Materials. Applicants must include a signed Certificate of Receipt of Required Materials with their applications for building permit and certificate of occupancy. Please note, additional conditions may be required.

Tips for expediting the review process:

- Include the Planning and Zoning tracking number and street address on all pages and in all titles and subject lines.
- Copy the assigned planner on all communications.
- For updated documents submitted during stages two through four, please submit the updates as track changes made to the original document when possible.
- Prior to submissions, ensure the documents are detailed, accurate, and complete. Each set of files will not be reviewed until all documents are submitted. Review of each set may take up to three weeks under normal circumstances.
- Submit your documents to: ose@somervillema.gov.

This document includes the following sections:

1. Sustainability submittal requirements for each stage of review
2. Requirements for the two Net Zero Ready compliance pathways

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Section 1: Sustainability submittal requirements for each stage of review

Stage 1 – Applying for Certificate of Zoning Compliance

- LEED Certifiability**
 - LEED checklist
 - LEED narrative
 - Signed affidavit by LEED accredited professional

- Sustainable & Resilient Building Questionnaire and Low Load Building Energy Calculator**
 - Projects over 25,000 SF must submit a completed Somerville Low Load Building Energy Input Form along with their completed Questionnaire

- Net-Zero Ready Building**

PHIUS	Zero Carbon
Net Zero Narrative	Net Zero Narrative
Copy of signed PHIUS+ Certification Fee Receipt	Evidence of ILFI Premium Membership
Copy of signed PHIUS+ Certification Contract	Evidence of ILFI New Zero Carbon Project Registration
PHIUS Feasibility Study, if completed (optional)	



Stage 2 – Applying for Building Permit

- LEED Certifiability**
 - Updated LEED checklist
 - Updated LEED narrative
 - Signed affidavit by LEED accredited professional

- Updated Sustainable & Resilient Building Questionnaire and Low Load Building Energy Calculator**
 - Projects over 25,000 sq ft must submit updated Questionnaire and Low Load Building Energy Input Form to reflect any design changes or updates

- Net-Zero Ready Building**

PHIUS	Zero Carbon
Identification of PHIUS+ Rater/Verifier	Updated Net Zero narrative to reflect any relevant design changes and updates.
Copy of PHIUS+ Rater/Verifier letter of intent submitted to PHIUS	Copy of the embodied carbon analysis required by ILFI (primary and internal material assemblies)
Copies of PHIUS+ Feedback Forms and responses for all completed pre-certification rounds. Must provide at least the second round of comments from PHIUS prior to issuance of Building Permit	
<ul style="list-style-type: none"> • Pre-certification documentation or, • If pre-certification has not yet been achieved, a signed affidavit from the PHIUS consultant affirming that the project will commit to completing all rounds of feedback to the satisfaction of PHIUS in order to obtain Pre-Certified status 	



Stage 3 – Applying for Certificate of Occupancy

- LEED Certifiability**
 - Updated LEED checklist
 - Updated LEED narrative
 - Signed affidavit by LEED accredited professional

- Updated Sustainable & Resilient Building Questionnaire and Low Load Building Energy Calculator**
 - Projects over 25,000 sq ft must submit updated Questionnaire to reflect any design changes or updates

- Net-Zero Ready Building**

PHIUS	Zero Carbon
If project has received PHIUS certification, submit a copy of Final PHIUS+ Certification to OSE.	Updated Net Zero narrative to reflect any relevant design changes and updates.
If project has not yet been certified by PHIUS, submit the following to OSE: <ul style="list-style-type: none"> • Copy of PHIUS+ Pre-Certification Letter. • Evidence of project submittal to PHIUS+ Final Certification Review Queue A signed affidavit from the PHIUS verifier confirming that all necessary documentation for final review has been provided to PHIUS to receive certification	Embodied carbon offset proof of purchase Copy of renewable energy contract



Stage 4 – After one year of occupancy

Net-Zero Ready Building

PHIUS	Zero Carbon
Copy of PHIUS+ Certified Project Certificate	Documentation for Final Audit, including performance data submitted to ILFI
N/A	Copy of ILFI Zero Carbon certification



Section 2: Net Zero Ready Compliance Pathways

These requirements are intended to show compliance with the Net Zero Ready Building definition in the Somerville Zoning Ordinance.

Net Zero Ready Building: Any building that 1) has no on-site combustion for HVAC system operation and cooking equipment (all electric systems), excluding floor area Eating & Drinking Establishment principal uses, and is certifiable as Zero Carbon or higher from the International Living Future Institute, or PHIUS+ from the Passive House Institute US.

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Passive House Pathway

Stage 1 – Applying for Certificate of Zoning Compliance

Submit the following documents to OSE (to receive receipt of OSE PHIUS Document Receipt Certification for DRA submittal):

- Building Resilience & Sustainability: Net Zero Narrative
 - Provide a narrative describing how the proposed design incorporates the Passive House design principles.
 - Identify the PHIUS team members: Certified Passive House Consultant (CPHC)
 - Commit to no on-site combustion for HVAC system operation and cooking equipment and describe plan for meeting that commitment.
- Copy of Signed PHIUS+ Certification Contract
- Copy of PHIUS+ Certification Fee Receipt
- PHIUS Feasibility Study, if completed (optional)

[The above requires submittal of development plans and copies of all documentation to OSE prior to Site Plan Approval]

Stage 2 – Applying for Building Permit

Submit the following documents to OSE:

- Identification of PHIUS+ Rater/Verifier
- Copy of PHIUS+ Rater/Verifier letter of intent submitted to PHIUS.
- Copies of PHIUS+ Feedback Forms and responses for all completed pre-certification rounds.
 - Must provide at least the second round of comments from PHIUS prior to issuance of Building Permit.
- Pre-certification documentation or, if pre-certification has not yet been achieved, a signed affidavit from the PHIUS consultant affirming that the project will commit to completing all rounds of feedback to the satisfaction of PHIUS in order to obtain Pre-Certified status

[The above requires project to have progressed through at least two rounds of feedback in the pre-certification review process and hired PHIUS+ Rater/Verifier prior to construction]

Stage 3 – Applying for Certificate of Occupancy

Submit the following to OSE:

- If project has received PHIUS certification, submit a copy of Final PHIUS+ Certification to OSE.
- If project has not yet been certified by PHIUS, submit the following to OSE:



- Copy of PHIUS+ Pre-Certification Letter.
- Evidence of project submittal to PHIUS+ Final Certification Review Queue
- A signed affidavit from the PHIUS verifier confirming that all necessary documentation for final review has been provided to PHIUS to receive certification.

[The above requires submittal of project for final certification to PHIUS prior to occupancy]

Stage 4 – After one year of occupancy

Submit the following to OSE:

- Copy of PHIUS+ Certified Project Certificate prior to 3-year Certificate of Inspection



ILFI Zero Carbon Pathway

Requires 100% of operational energy use to be offset by new on or off-site renewable energy and 100% of embodied carbon associated with construction and materials to be disclosed and offset. Projects must register with the International Living Future Institute and pursue certification to the [Zero Carbon Standard](#).

Stage 1 – Applying for Certificate of Zoning Compliance

Submit the following documents to OSE (receive OSE ILFI Document Receipt Certification for DRA submittal):

- Net Zero Narrative. Narrative must include a description of how the proposed design will achieve the requirements of ILFI’s Zero Carbon Standard, including a definitive plan to offset energy use, construction emissions, and embodied carbon of building materials.
- Evidence of ILFI Premium Membership
- Evidence of ILFI New Zero Carbon Project Registration

[The above requires membership in and project registration with ILFI and submittal of copies of all related membership/registration documentation to OSE prior to Site Plan Approval]

Stage 2 – Applying for Building Permit

Submit the following documents to OSE:

- Updated Net Zero narrative to reflect any relevant design changes and updates.
- Copy of the embodied carbon analysis required by ILFI (primary and internal material assemblies)

[The above requires project to complete embodied carbon analysis for foundation, structure, and enclosure]

Stage 3 – Applying for Certificate of Occupancy

Submit the following documents to OSE:

- Updated Net Zero narrative to reflect any relevant design changes and updates.
- Embodied carbon offset proof of purchase
- Copy of renewable energy contract.

[The above requires all offsets and renewable energy to be purchased]



Stage 4 – After one year of occupancy

Submit the following documents to OSE:

- Documentation for Final Audit, including performance data submitted to ILFI for audit and certification.
- Copy of ILFI Zero Carbon certification

[The above requires collection of 12 months of data in the first year of operations]

