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Memorandum

Date: July 26, 2010
To: LEED for Homes Project Teams
From: USGBC's LEED for Homes Team
Subject: Instructions to Project Teams on the LEED for Homes
Operations and Maintenance (HOM) Manual

The LEED for Homes Operational and Maintenance (HOM) Manual was developed to streamline the process of meeting the requirements of the following LEED for Homes prerequisite:

Awareness and Education (AE) 1.1: Education of the Homeowner or Tenant

Under part (a) of this prerequisite, an operations and maintenance manual must be developed for each LEED home, and must be provided to the homeowner or tenant.

The attached document is intended as one optional approach to partially meet the requirements of this prerequisite. Note that this document meets most but not all of the requirements of AE 1.1(a). Project teams that choose to use the HOM Manual are required to add customized information on each LEED Home to the document.

The attached pages itemize the minimum amount of information that must be added to the HOM Manual by the project team. Project teams may choose to add only the minimum additional information, or may choose to extensively customize the HOM Manual. Either approach to customization will assist the project team in meeting the requirements for AE 1.1(a), an operations and maintenance manual.

Also note to fully satisfy the requirements of prerequisite AE 1.1, a minimum of a one-hour walk through of the home (under AE 1.1.b) must also be completed.

If you have any questions about this document, please send an email to: homes@USGBC.org



Instructions to Project Teams

To qualifying for Awareness and Education prerequisite AE 1.1 (a), a Project Team may choose to use the attached LEED for Homes Operations and Maintenance (HOM) manual. This approach includes 2 steps:

1. Project teams must customize the LEED for Homes Operations and Maintenance (HOM) Manual in at least the following three areas:
 - Part 3: Special Features.** If other LEED for Homes measures are installed in the home (beyond those already included in the HOM Manual), add one page descriptions of operations and maintenance procedures for these LEED for Homes measures, where needed. Note that these additional pages are only needed if these LEED for Homes measures have special operations and maintenance requirements.
 - Appendix A: LEED for Homes Documentation.** Insert the final, signed LEED for Homes Project Checklist, Durability Evaluation Form, Durability Inspection Checklist, and Accountability Forms in this section.
 - Appendix B: Product Manufacturer's Manuals.** Insert the product manufacturer's manuals in Appendix A, or a separate binder, referred to in Appendix A. See the "Additional Guidance" section below.
2. Project Teams must hand deliver the HOM Manual to the homeowner or rental tenants. Ideally, the information in the HOM Manual will also be reviewed with the homeowner during the required one-hour walkthrough of the home (under prerequisite AE 1.1.b).

Alternatively, instead of using the USGBC's HOM Manual, Project Teams may choose to:

- Create their own operation and maintenance manual; or
- Extensively modify the USGBC's HOM Manual, and customize the information throughout the manual. One suggested additional type of customization is to add selected photographs of the home, with appropriate labels, in Appendix B.



Additional Guidance

Part 3: Special Features

If a LEED for Homes project has a large number of unique sustainability measures, the Project Team is required to add new pages for these measures into the USGBC's HOM. The process for creating these new pages (in Section 3 of the HOM Manual) is:

1. Identify less common LEED for Homes measures installed in the home (i.e., are not discussed in Part 2 of this manual).
2. Determine if there are special operations and maintenance requirements for these measures. For example, if a LEED for Homes measure is hidden behind the walls, there are likely no operations and maintenance requirements to be performed by the homeowner or tenant.
3. Create one-half to one page descriptions for each of these special LEED for Homes measures with operations and maintenance requirements. A template for Part 3 is included in the HOM Manual.

Suggested LEED measures that may be included in this section are (but not limited to):

- Photovoltaic panels;
- Solar hot water systems;
- Heat pump or other heating or cooling system besides forced air, hydronic, or ERV/HRV;
- Graywater system, rainwater system, municipal recycled water system;
- Any special landscaping feature (e.g., turf that goes dormant during droughts);
- Irrigation system efficiency measures;
- Vegetated roof;
- Universal design features (e.g., reinforced bathroom walls);
- Enhanced indoor moisture control (e.g., humidity control system);
- Enhanced CO₂ protections (e.g., fireplace or stove with unique features);
- Passive ventilation system (if earning EQ 4.1(d));
- Enhanced water efficiency measures, especially in dry climates; and/or



- Any other special or unique green feature which requires maintenance that is not discussed in Part 2.

Note that features that are hidden behind the walls, ceilings, or floors (such as SIP panels) do not need to be included in the HOM Manual. These measures do not have maintenance requirements.

Appendix A: LEED for Homes Documentation

Project teams shall:

1. Compile the final, signed LEED for Homes Project Checklist, Durability Evaluation Form, Durability Inspection Checklist, and Accountability Forms
2. Insert them into this section of the HOM Manual.

Appendix B: Product Manufacturer's Manuals

Project Teams shall:

1. Compile all of the LEED for Homes-related product manufacturer's manuals.
2. Organize them into a logical organizational structure.
3. Place them in Appendix A of the HOM Manual. Alternatively, the literature can be placed in a separate binder that is referred to in Appendix A.