

# BOMI

Building Owners and Managers Institute



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## HIGH-PERFORMANCE SUSTAINABILITY BUILDING INVESTMENTS

BOMI's High-Performance Sustainable Building Investments course delivers the strategies to envision, plan, and manage large-scale sustainable projects that maximize ROI.

Learners will gain an in-depth understanding of how to effectively impact efficiency challenges through cutting-edge approaches that positively affect an organization's financial, social, and environmental bottom line.

Upon successful completion of this course, learners will be able to:

- Identify and engage business stakeholders by demonstrating the value of investments from a 3BL approach
- Illustrate how social and environmental returns enhance economic returns for a more substantial overall investment
- Illustrate the value of high-performance projects through operational-focused and asset-focused industry benchmarks and tools
- Implement project delivery using a whole-building approach by bundling retrofit projects that maximize potential benefits
- Leverage financing resources, including internal capital budgets, off-sheet financing, and utility and tax rebate programs, among others, to mitigate the overall costs of high performance projects

### **Chapter 1: The Value Proposition for High-Performance Investments**

- Introduction
- Defining Value through the Lens of a Sustainability Framework
- Balancing and Prioritizing the Triple Bottom Line
- Valuation for High Performance
- Aligning Valuation and the Business Case
- Investment Recommendations for Business Strategy Outcomes
- Creating the Business Case for High-Performance Investment
- Summary

### **Chapter 2: High-Performance Valuation Approaches**

- Introduction
- Tangible and Intangible Drivers for Valuation
- The Opportunity to Direct Prudent Investment for High Performance
- The Valuation Toolkit
- Evaluating Investors' Financial Calculation Criteria
- Integrating Lifecycle Analysis into Valuation and Bundling
- Valuation Approaches for High-Performance Buildings
- Translating the Impact of Common High-Performance Investments
- Summary

### **Chapter 3: Establishing a Baseline for High-Performance Investment**

- Introduction
- Benchmarking for High-Performance Investments
- Devices for Enabling Data Collection
- Rating Systems for Building and Business Performance
- Benchmarking beyond Energy
- Using Benchmarking to Establish Targets
- Conveying Value through Benchmarking
- Beyond Financial Targets
- Benchmark Disclosure
- Benchmarking for Business Investment Decisions
- Audit Contributions to Business Case Development
- Summary

**Chapter 4: Analyzing and Pursuing High-Performance Opportunities**

- Introduction
- Strategic Considerations for High-Performance Opportunities
- Analysis Aligned with Bidding and Procurement
- Bidding Process Approaches
- Industry Analytical Tools
- Risk and High-Performance Investment Decisions
- Triple Bottom Line Analysis
- High-Performance Investment Analysis Best Practices
- Summary

**Chapter 5: High-Performance Investments: Interiors and Internal Systems**

- Introduction
- Whole Building Design
- Internal Building Systems
- Advanced Lighting Overview
- Daylighting
- Indoor Environmental Quality
- O&M Strategies
- Procurement
- Occupant Engagement
- Summary

**Chapter 6: High-Performance Investments: Exterior and Building Systems**

- Introduction
- Building Envelope
- Advanced Building Control Systems
- Heating, Ventilating, and Air-Conditioning Systems
- On-Site Renewable Energy
- Landscape Management
- Transportation
- Summary

**Chapter 7: Financing Options and Modalities**

- Introduction
- Internal Funding Resources
- External Funding Resources
- Identifying and Mitigating Investment Barriers
- Opportunities for Using “Other People’s Money”
- Business Case Alignment for Funding
- Summary

**Chapter 8: Gaining Commitment for High-Performance Investments**

- Introduction
- Stakeholder Distinctions
- Engaging Stakeholders for Investment Commitment
- Gaining Commitment for High-Performance Investments
- Summary

**Chapter 9: Investment Validation: The Role of Measurement and Verification**

- Introduction
- Measurement and Verification Value for High-Performance Investments
- M&V Program as a Component of Project Delivery
- Value of the M&V Process
- M&V Plans
- M&V Project Management
- Performance Contracting and Energy Service Companies
- Sharing M&V Results
- Summary

**Chapter 10: Case Study: To Invest or Not to Invest**

- Introduction
- Case Study Challenge