

Description	N/A	✓	Notes
1. Assemble the design team			
a. Include engineers experienced and interested in energy-efficient buildings and energy simulations (consider defining the energy performance expectations for the consultants and clearly articulate these requirements contractually in an architect/consultant agreement);			
b. Include a lighting designer or a daylighting specialist;			
c. Consider a third-party commissioning consultant depending on the size and complexity of the project;			
d. Include the building maintenance personnel responsible for the building(s).			
2. Confirm client and user objectives.			
3. Establish long-term financial goals (such as 10-year combined operating + capital target).			
4. Establish performance targets and strategies to meet client and user objectives.			
5. Identify and address contradictions between objectives, financial goals and performance targets.			
6. Develop or assess the functional program (including objectives, performance targets and financial goals):			
a. See <i>Functional Program Checklist</i> .			