

# SUSTAINABLE TENANT FIT-OUT AND IMPROVEMENT GUIDE



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A Better City is a diverse group of business leaders united around a common goal—to enhance Boston and the region’s economic health, competitiveness, vibrancy, sustainability and quality of life. By amplifying the voice of the business community through collaboration and consensus across a broad range of stakeholders, A Better City develops solutions and influences policy in three critical areas central to the Boston region’s economic competitiveness and growth: transportation and infrastructure, land use and development, and energy and environment.



The Boston Green Ribbon Commission is a group of business, institutional and civic leaders in Boston working to develop shared strategies for fighting climate change in coordination with the City’s Climate Action Plan.

To view a hyperlinked version of this report online, go to <http://www.abettercity.org/docs-new/Sustainable-Tenant-Fit-out-and-Improvement-Guide.pdf>.

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A Better City’s Sustainable Buildings Initiative is a leadership program for commercial real estate owners and tenants in the Boston area who have demonstrated commitment to sustainability at their properties. The goals of the program are to drive the elimination of greenhouse gas emissions in Boston and incorporate long-term climate resilience planning into standard business practices.

# SUSTAINABLE TENANT FIT-OUT AND IMPROVEMENT GUIDE

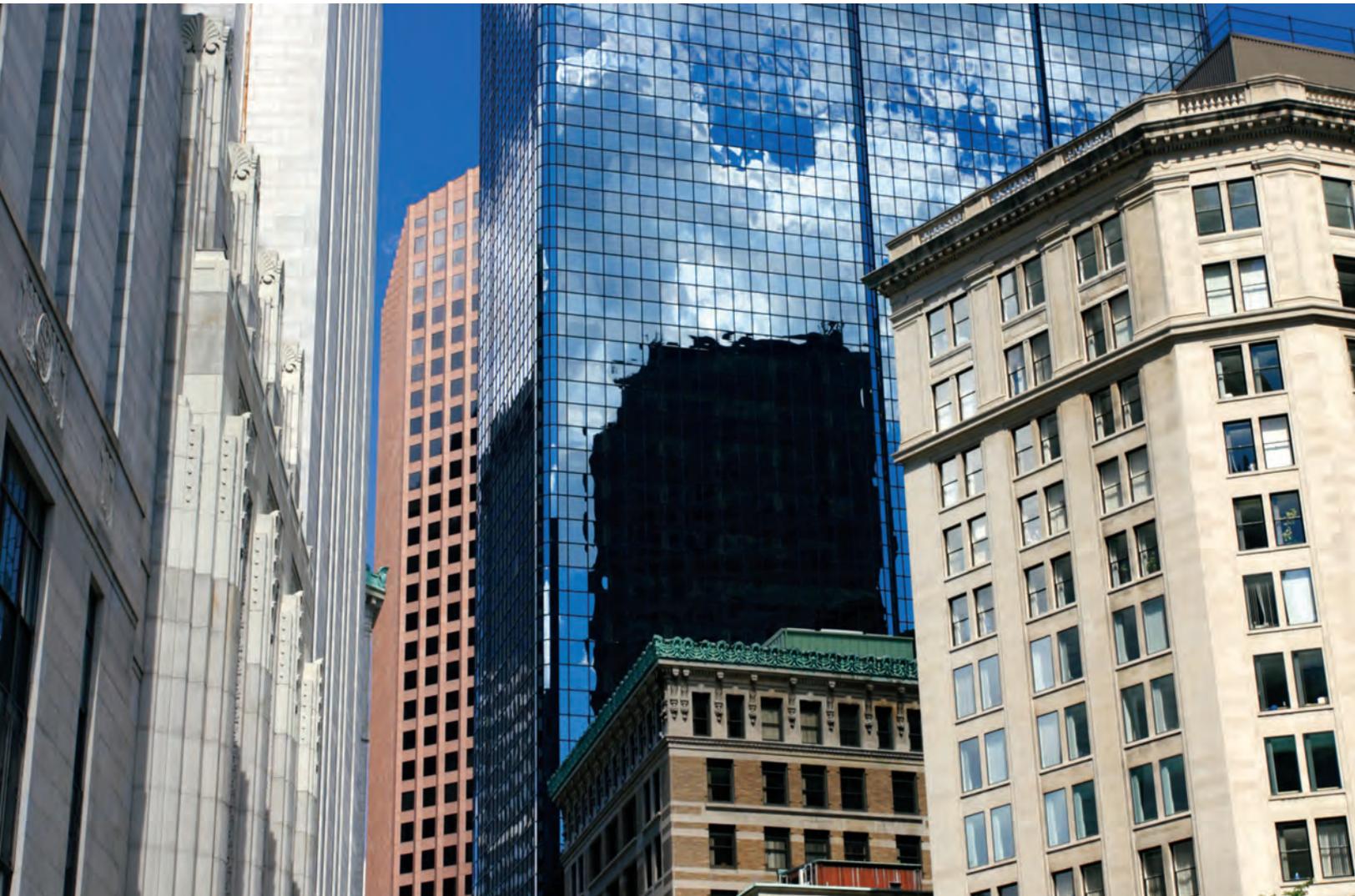
## SUMMARY

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Tenant fit-outs and retrofits of tenant spaces can be key opportunities to incorporate sustainability principles. Commercial tenants can take several key steps to ensure sustainability is embedded into their new space:

- Define sustainability goals and targets for their tenant space;
- Leverage a cross-sectional team of employees to ensure sustainability priorities are key factors used to evaluate new tenant spaces and early negotiations with brokers and potential landlords;
- Engage informed architects and utility program managers to understand the suite of options available and act upon those that meet occupant expectations and maximize available incentives.

*This Sustainable Tenant Fit-out and Improvement Guide provides suggestions, resources, and case studies for Boston tenants to incorporate sustainability into the process of selecting a new space. It also includes guidance on maintaining the efficiency of existing office spaces. For further support on sustainability strategies for existing spaces, A Better City offers additional tools and resources through its [Sustainable Buildings Initiative](#).*



## INTRODUCTION

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The City of Boston has taken some initial steps to increase awareness of energy and water use and resulting greenhouse gas emissions among building owners and commercial tenants. In 2013, the City adopted the [Building Energy Reporting and Disclosure Ordinance \(BERDO\)](#) requiring Boston's medium and large buildings to submit their annual energy and water consumption. The reporting required through BERDO is intended to encourage the implementation of energy and water efficient features in commercial and residential spaces. Buildings are required to report whole-building data, which includes the energy and water use of both common and tenant spaces – this necessitates coordination between landlords and tenants to achieve efficiency improvements. Additionally, BERDO data can serve as a useful tool for tenants to gauge the relative performance and efficiency of potential lease spaces.

Tenant spaces will be critical to achieving Boston's greenhouse gas reduction goals, which have recently been increased to 100% reduction by 2050. According to 2015 BERDO data—where 1,381

buildings reported energy and water usage<sup>1</sup>—offices accounted for the greatest square footage and highest percentage of GHG emissions for reporting properties. Sustainability investments can help mitigate greenhouse gas emissions and reduce energy and water consumption and waste production, achieving long-term economic savings for occupants and property owners. For example, when Bloomberg LP focused on making energy efficiency improvements in their new office space fit-out in Manhattan, they verified a 10.5% energy reduction, which will generate approximately \$173,880 over the 10-year term, with a payback of 2.5 years for these investments.<sup>2,3</sup> These types of gains were replicated across a series of efficiency-focused fit-outs in New York City and could translate to the Boston market.<sup>4</sup> Tenant fit-outs that invest in sustainable features can reduce resource consumption and also save money for tenants. This, in turn can increase the value of these spaces for landlords and property managers by creating higher-value tenant spaces for future renters.

To research this guide, A Better City conducted a series of discussions with tenants and brokers,



consulted with the winners of the Institute for Market Transformation's [Green Lease Leaders](#) program, and interviewed staff from leading cities that have developed resources for increasing efficiency in tenant spaces. Conversations with city staff and other experts informed the development of this process-oriented guide for Boston-area tenants.

The guide provides commercial tenants with comprehensive steps to incorporate sustainability at each stage of the fit out process, and during occupancy:

- Prior to the Fit-Out focuses on understanding and establishing sustainability goals;
- The Tenant Fit-Out Process includes: creating a project team; selecting a broker; selecting a site; issuing a Request for Proposal; negotiating the lease; and building out;
- Ongoing Efficiency and Occupancy for Fit-Outs and Existing Space focuses on moving in and occupying the space, and maintaining efficiency gains through behavior change.

Key factors that tenants should consider during each phase of the fit-out process are included and additional resources are provided in the Resources section at the end of the document. In the print version of this document, hyperlinked resources in the body of text are also included in that section.

## PRIOR TO THE FIT-OUT

### UNDERSTAND AND ESTABLISH SUSTAINABILITY GOALS

Relocating to a new building provides the opportunity for businesses to align their company goals—economic, social, and environmental—with their new space. In addition to considering an organization's operational needs, it is important to identify key energy efficiency, water, waste, and transportation goals—both in terms of sustainability and cost savings.

In addition to company-wide or office-wide goals, insights from employees can guide the conversation about sustainability needs in an existing or new space. The priorities of the workforce can be assessed through employee surveys or targeted conversations. Considering employee perspectives can demonstrate a commitment to the needs of staff—which could ultimately impact recruitment and retention. In an online employee engagement study of larger

**“TENANT SPACES WILL BE CRITICAL TO ACHIEVING BOSTON’S GREENHOUSE GAS REDUCTION GOALS, WHICH HAVE RECENTLY BEEN INCREASED TO 100% REDUCTION BY 2050.”**

companies completed by Cone Communications, a public relations and cause-marketing firm, 78% of employees surveyed said they wanted to be active participants in the responsible business practices of their company and 51% will not work for a company that does not have social or environmental commitments.<sup>5</sup>

The following questions for employees were identified as options to assess employee needs and interests in their new space through a review of other tenant guidance documents and during A Better City's interviews to inform this Guide:

- What are your efficiency and sustainability priorities for the space?
- What targets or goals for energy reduction should our organization set?
- Do you use the public transit options available to you? If you do not use public transportation, why not? What would encourage you to use public transportation options?
- What kind of waste management practices would you like to see within our organization? Which would you participate in and/or promote?
- What incentive programs or resources can we leverage to encourage more sustainable behavior? (e.g. premium parking for zero-emissions vehicles, discounts on transit passes, bicycle commuter benefits, etc.)
- Is a green building certification or achieving another sustainability certification for the office space a goal?



By establishing business sustainability goals that include feedback from employees, these targets can then be communicated to brokers, landlords, and other key stakeholders, such as architects and utility staff, to identify opportunities in future or existing spaces. Whether an organization has committed to increasing energy efficiency, decreasing waste, improving the office environment for employees, or reaching greenhouse gas reduction targets in its operations, incorporating sustainability improvements into a new space is key to meeting these goals.

Determining how to measure progress toward sustainability goals and who will be responsible for managing those metrics is also important when choosing spaces and negotiating with property managers and landlords. For instance, if an organization adheres to established information disclosure standards for their sustainability measurement and verification—such as the [Global Reporting Initiative \(G4\)](#), the [Dow Jones Sustainability Indices \(DJSI\)](#), or the [Carbon Disclosure Project \(CDP\)](#)—then the impacts of additional space should be considered. Similarly, organizations should decide whether green building certifications such as the U.S. Green Building Council's [LEED Commercial Interiors](#) or [ENERGY STAR](#) are important to its internal goals or public affairs. If an organization is primarily interested in cutting operating costs by realizing new efficiencies within a space, the office's energy use or waste usage should be measured. In some cases,

this monitoring can be negotiated into a lease by installing sub-metering to verify an office's energy use, as opposed to the energy use of the entire building.<sup>6</sup>

## TENANT FIT-OUT PROCESS

### CREATE A PROJECT TEAM

A qualified internal project team for the site selection and tenant fit-out process should include a variety of stakeholders made up of a broad range of staff from across an organization to better inform fit-out needs and priorities. The team should be aware of the organization's overarching sustainability goals including feedback and input from employees to identify opportunities for improvement in a new or upgraded space. It is likely that these individuals would have also been surveyed or consulted during the goal setting process. Staff representatives could include:

- **Division Representatives:** Depending on the size of an organization, selecting at least one representative from each division will be important to ensure appropriate representation and inclusion of different needs.
- **Facilities/Operation Representatives:** Staff tasked with maintaining the existing tenant space and working on day-to-day operations will have insight into which areas could benefit



from efficiency improvements when moving to a new office, as well as on the maintenance considerations for different equipment and systems.

- **Finance Representatives:** The finance department will have familiarity with existing operating expenses and strategic investment decisions. They should help make informed decisions and advocate for sustainability projects with strong payback.
- **Human Resources (HR) Representatives:** HR can work with employees to understand their needs to ensure a high-quality work environment. Their connection to employees will provide insight into ideal fit-out design aligned with employees' needs and an organization's sustainability principles. HR departments are also important for relaying occupational information to employees, which could include the efficiency features of the office or different green incentives available (e.g. alternative commuter incentive programs).
- **Sustainability Representatives:** A company's sustainability team should be represented to ensure that the fit-out pursued aligns with the organization's sustainability goals and employees' needs.

**“THE INTERNAL PROJECT TEAM SHOULD BE MADE UP OF A BROAD RANGE OF STAFF FROM ACROSS AN ORGANIZATION TO BETTER INFORM FIT-OUT NEEDS AND PRIORITIES.”**

#### SELECT A BROKER

The team should select a real estate broker who is familiar with [green leasing](#) and relevant sustainability standards. Before proceeding, the selected broker should gain a firm understanding of an organization's sustainability goals and priorities. The broker should identify spaces to fit these needs and negotiate a green lease and fit-out, where necessary, with the landlord or property manager. For suggestions of sustainability-minded brokers, tenants should check the latest broker winners from the national [Green Lease Leaders](#) program or inquire with the [Commercial Brokers Association](#).

## SELECT A SITE

The selected broker should work to identify spaces that meet an organization's needs. When weighing the choices, the project team should review the company's identified sustainability goals, operational requirements, and employee needs. Additionally, the team should consider other relevant factors when choosing a building, such as:

- Does the building have energy reporting data available? If yes, what does that data show?
- Is the building involved in any existing sustainability programs or does it have any certifications?
- Is the building management willing to work with tenants on a fit-out and making improvements to the building?
- Will the space being evaluated qualify for utility incentive programs (i.e. the Sustainable Office Design Program)? Does it have strong potential for a green fit-out?
- Can the space have submeters installed if they don't currently exist?
- What waste management options does the building offer?

### BOX 1: Example of Site Selection and Transportation—Partners Health Care

If an organization has sustainability goals for greenhouse gas emissions, access to multi-modal transportation can be a strong driver for site selection for relocations of all sizes. The new **LEED Gold-Certified Partners Healthcare facility in Somerville** looked through over 53 sites to find a location that met their employees' transit needs. Ultimately, they located close to an MBTA station to allow employees to take public transportation. The site is also accessible via bike lanes and offers storage spaces and on-site showers to make cycling to work easier. For employees and visitors who drive, the building includes outlets for electric and hybrid vehicles, encouraging driving options that are better for the environment.<sup>8</sup>

- Does the location of the building and its amenities meet the transportation and commuting goals of the organization?<sup>7</sup>

The Institute for Market Transformation (IMT) and the Rocky Mountain Institute (RMI) created a [questionnaire for commercial tenants](#) to assess and compare different sustainable features of commercial spaces. Additionally, IMT and RMI created a [Deep Retrofit Value Green Leasing Tool](#), which identifies areas in which tenants can achieve higher cost savings through more expansive retrofits. This tool estimates the business value that arises from retrofits per square foot in the categories of recruitment, health insurance, and absenteeism.

## ISSUE A REQUEST FOR PROPOSALS

After narrowing down the initial options, the site selection team will need to work with the broker to issue a Request for Proposal (RFP). The RFP is submitted to the property manager or landlord through a broker. Sustainability priorities should be embedded in the RFP to communicate an organization's goals and needs clearly to potential landlords. This early communication of priorities will indicate the types of leases an organization is interested in and provide a foundation for future conversations with landlords that submit strong proposals.

## NEGOTIATE THE LEASE

Once a space is selected that fits the budget, operations, and sustainability goals, an organization should work with a lawyer to negotiate the elements of the lease. For lease negotiations, companies typically hire a lawyer who specializes in commercial real estate transactions to negotiate terms after a space has been located. Brokers, as well as the [Boston Bar Association](#), will have recommendations on lawyers with green leasing expertise.

Lease negotiations present the opportunity to integrate energy efficiency and other sustainability provisions into the lease. An organization's needs and priorities should be clearly communicated to the lawyer. The landlord's tenant improvement allowance, for example, provides opportunities for negotiation, and could be used to retrofit the office space and include energy and water use metering and monitoring, and waste reduction measures. There are many template lease clauses that have been developed by the Boston Bar Association and others to support sustainability in operations, including green purchasing, metrics and data sharing between landlord and tenants, and operational

clauses regarding HVAC systems, waste management, and energy efficiency.<sup>9,10</sup> Lease negotiations are complex and dynamic, and can be influenced by market demand for tenant spaces and the size of space an organization requires. Working with a team beforehand to develop clearly defined goals and organizational priorities will support the development of a lease aligned with stated sustainability objectives.

Additionally, a lease provides the opportunity to further clarify goals when seeking specific sustainability certifications (see Resources: Understand and Establish Sustainability Goals for a list of potential certifications). This will require tenants and landlords to communicate and agree upon objectives regarding certifications and creating a high-value space. When pursuing certifications, the Eversource and National Grid Sustainable Office Design (SOD) incentive program could be leveraged to pursue greater efficiency within the space (see Box 2). The ideal time to engage with the SOD program is during the leasing process. If working with an architect or design team, it is important to engage them in this initial scoping process to see which efficiency measures could be utilized and for which incentives an organization qualifies. For more information about choosing a design team, please see the Build-Out Section below.

For more information about green leasing and incorporating sustainability elements into a lease, please refer to A Better City's guide on [Green](#)



[Leasing](#) which identifies tenant fit-outs as a way to break down barriers and encourage landlord and tenant cooperation.<sup>11</sup>

### BUILD-OUT

When approaching the build-out phase, a team experienced in green fit-outs should be chosen. Property managers and landlords may already have a preferred team for renovations within their properties. The organization pursuing the fit-out should consider the strengths of the property manager's preferred fit-out team versus bringing in specialty

## BOX 2: Resource—Eversource Incentive Programs for Tenant Improvement Projects

Eversource offers two incentive programs specifically aimed at tenant improvement projects. Both programs contribute to LEED Commercial Interiors credits and can help tenants or building owners save on operating costs, depending on how the lease is structured.

The **Sustainable Office Design Program**, offered by Eversource and National Grid, provides a \$0.50 incentive per square foot for tenant improvement projects that make investments in high efficiency lighting and controls. The program is available to commercial tenants and building owners with a space smaller than 50,000 square feet.

The **Tenant Energy Efficiency Program** from Eversource provides incentives for tenants and building owners in existing leases for high efficiency lighting and controls. The program includes free energy audits and bonus incentives for landlords who successfully encourage multiple tenants to participate.

To learn more about the Tenant Efficiency Program and other opportunities for commercial tenant spaces, please contact James Cater at Eversource ([james.cater@eversource.com](mailto:james.cater@eversource.com)).

**Further Reading:** Sustainable Office Design ([www.massave.com/en/business/incentives/sod](http://www.massave.com/en/business/incentives/sod))

### **BOX 3: Example of Tenant and Landlord Collaboration—Boston Properties and Blue Cross Blue Shield of Massachusetts**

In May 2015, **Blue Cross Blue Shield of Massachusetts** (BCBSMA) relocated its office after a search for a new space that began in 2010. The process was guided by a cross-functional team including senior leadership and members from the Facilities, Finance, Supplier Diversity, and Sustainability Departments. At the time, BCBSMA had three company-wide sustainability goals—greenhouse gas emissions, waste, and paper reduction targets. During the site-selection process, the team expanded upon these criteria to create a holistic framework in the areas of sustainability, health, and staff collaboration. They looked for sites located close to public transportation and focused on spaces that would support their goals for a sustainable office.

When the BCBSMA team identified potential sites, they ensured that health, energy, and sustainability were discussion points during all parts of the search process. In their lease negotiations with **Boston Properties for 101 Huntington Ave. at the Prudential Center**, both parties agreed to apply for LEED Existing Building certification, and collaborate on BCBSMA's LEED Commercial Interiors application for its space. This process led to the building receiving LEED Gold certification for Existing Buildings and LEED Platinum certification for the BCBSMA office. Further collaboration with Boston Properties has included coordinating single stream recycling and composting in the building.

The BCBSMA team chose an architect to design their space by touring similar projects by the final candidates. Throughout the build-out process, the organization stressed the importance of sustainability and employee well-being—staying committed to the initial criteria they created for the space. By working with their architects and utilities, they could leverage a substantial amount of incentives to support the fit-out.

design consultants and contractors to meet the organization's sustainability goals. Examples of the property fit-out team's similar projects should be reviewed, if applicable, and their experience with specific certifications or the types of sustainability improvements an organization would like to incorporate. During this phase, the organization should decide which procurement and construction practices to follow to support their sustainability goals. The [Boston Society of Architects](#) (BSA) and the [International Interior Design Association](#) have many sustainability-minded architecture and interior design firms within their membership. Architects can qualify for additional utility bonuses for the work through the available [Sustainable Office Design](#) program. The organization should also identify firms who can leverage additional incentives available through Mass Save for electric and gas systems and equipment. The Urban Land Institute's [Tenant Energy Optimization Program](#) offers a resource guide for design and construction of an office space for optimal energy performance.

## **ONGOING EFFICIENCY AND OCCUPANCY FOR FIT-OUTS AND EXISTING SPACES**

### **MOVE-IN AND OCCUPY SPACE**

Changing elements of current space can provide long-term savings. Moving is expensive; as such, identifying ways to realize efficiency in existing spaces is a valuable investment.

Increasing an office's sustainability and energy efficiency can be accomplished by leveraging existing incentive programs from [Mass Save](#) as well as maintaining ongoing conversations with building owners / property managers. If building-wide efficiency or sustainability upgrades are being considered at a building level for example, there could be opportunities to coordinate. Some buildings have found success creating green teams, comprised of tenants and landlords, who have worked together to make improvements.

If there is interest in an organization to alter an existing space, there are many ways to create a more sustainable work environment. As new incentives



are made available or needs of building owners and tenants change, there may be options to retrofit an existing space. For example, the Eversource Tenant Energy Efficiency Program (see Box 2) is designed to adapt the available commercial incentive process for existing tenants.

When considering energy upgrades or sustainability improvements:

- **Measure:** Examine historic energy bills and existing sustainability practices. Eversource and National Grid have included some basic energy analytics into customer log-in portals, which may assist in identifying areas and time periods of high energy usage. Eversource has recently expanded the use of, and access to, interval data for commercial accounts. Interval meters measure data points for energy usage at much smaller time increments (15 to 30 minutes) than monthly energy bill data. This increased granularity enables a more comprehensive understanding of building energy usage and opportunities for savings.
- **Audit:** Eversource makes free energy audits available to tenants through Mass Save and its Tenant Energy Efficiency program. Audits

of waste streams can also be conducted using tools such as the EPA's [Waste Reduction Model](#) or by hiring a company to help audit a space's waste stream.<sup>12</sup> There may be additional opportunities for building-wide electricity and energy bill savings through Eversource and National Grid's commercial and industrial efficiency programs and demand response service providers. These opportunities would need to be pursued by the landlord, but could also be encouraged via conversation with tenants.

- **Prioritize:** Using the results of discussions, outputs from the audits, and input from an organization's sustainability and operations teams or key staff, work should be done to prioritize identified opportunities and leverage incentives to improve the space.<sup>13</sup>

Lease renegotiations and lease extensions are also opportunities to encourage building owners and property managers to support tenant space upgrades. One Boston-area company was able to negotiate a lighting retrofit as part of their lease extension, which was reimbursed by the building owner. Both the tenant and the building owner benefited from the reduced energy use.<sup>14</sup>

## MAINTAIN EFFICIENCY GAINS THROUGH BEHAVIOR CHANGE

The sustainability of an office space also depends on the occupants. Organizations need to encourage behavior and initiatives that promote energy efficiency and reduce waste. By introducing behavior change programs early, the unsustainable habits can be prevented or changed, and energy, waste, and water savings realized. To ensure organizations meet desired sustainability goals, facilities operators and building occupants need to be trained to use new high efficiency equipment and sustainability functions in the building. Even if spaces are designed to be highly efficient, achieving maximum performance is not possible without optimal operation of equipment. Working with relevant programs from Mass Save's commercial and industrial programs can not only provide additional savings for a business, but can also provide technical assistance and training for building operators.

**“ORGANIZATIONS NEED TO ENCOURAGE BEHAVIOR AND INITIATIVES THAT PROMOTE ENERGY EFFICIENCY AND REDUCE WASTE.”**

For tips and strategies to promote sustainable behaviors, please refer to the [Sustainable Buildings Initiative Sustainability and Behavior Change toolkits](#).

## CONCLUSION

This report provides process-oriented guidance on how to pursue fit-outs for energy efficiency and sustainability in new commercial office spaces or upgrades to existing spaces. Moving to a new space or upgrading an existing space provides key opportunities to define an organization's sustainability goals and realize those goals through decisions and investments made during the fit-out process. Investing in a sustainable office space can also help an organization realize financial savings in the long-term and improve the workspace for employees.

Building the commercial real estate sector's leadership in energy efficiency and sustainability is critical to helping the City of Boston meet its greenhouse gas emissions reduction goals and the utilities' energy savings targets.



# RESOURCES

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## PRIOR TO THE FIT-OUT

### Understand and Establish Sustainability Goals

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