Sustainability Performance Metrics - Scoring (Dynamic) Tool Manual

Introduction:

In partnership with Halsall Associates, an excel-based sustainability scoring tool (the dynamic tool) was developed by the Cities of Brampton, Vaughan and the Town of Richmond Hill to help quantify, rank and inform the sustainability score of proposed projects and plans. The dynamic tool is based on the sustainability performance metrics developed by the three municipalities. The intent of the scoring tool is to provide an efficient platform for applicants (i.e. developer/planning team) to fill out the appropriate fields indicating the target level achieved for applicable sustainability performance metrics. All cells that are highlighted in orange require an entry by the applicant. The order of the metrics presented in the dynamic tool, for the most part, align with the order and grouping that is presented in the sustainability metrics tables.

Getting Started:

The General Information section of the dynamic tool defines the information that applies specifically to the proposed plan/project. The first three fields (User Name, Company Name, Project Name) are intended solely for recording purposes. The applicant will enter in the following information:

- User Name
- Company Name
- Project Name

The following four fields require the applicant to answer various questions about the proposed plan/project by selecting from a drop-down menu, including:

- The relevant Municipality (Brampton, Vaughan, Richmond Hill);
- Plan Type (Site Plan, Draft Plan or Block Plan); and
- The Development Properties of the proposed plan/project (i.e. does the plan/project include: single family homes (yes/no), multi-family buildings (yes/no), commercial, retail, or institutional buildings (yes/no)?).
- Type of Development Site (Greenfield, Intensification, Employment Lands);
  - "Greenfield" should be selected where the proposed plan/project is located outside of or on the edge of the existing built-up area of the municipality.
  - "Intensification" should be selected where the proposed plan/project is for the development of lands at a higher density than currently exists. Examples include: redevelopment of a site, including brownfields or greyfields; development of vacant or underutilized lands in the built up area of the municipality; infill developments; and the expansion or conversion of existing buildings.
  - "Employment lands" should be selected where the proposed plan/project is located on lands designated in an "Employment" designation in the municipal Official Plan.

Based on the information entered by the applicant in the above four fields, the applicable sustainability metrics and their associated point allocation will be filtered specifically for the proposed plan/project. **These fields must be filled in order for the sustainability score to automatically tabulate.**

Filling out the Tool:

The scoring tool provides an efficient platform for the applicant to enter information about the target level achieved for applicable sustainability performance metrics provided in the proposed plan/project. The applicant will only be able to enter information in the applicable sustainability metrics fields (highlighted in the tool). All non-applicable sustainability metrics are greyed-out or hidden and their associated points are not considered in the "Application" or "Community" score (see "Point Allocation" section below).

For the most part, the answers to each of the sustainability metric questions are either Yes, No, Not Applicable (N/A) or entered as a percentage. A Sustainability Metrics Guidebook has been developed to accompany the dynamic tool. The Guidebook provides instructions for applicants to follow, describing how to quantify various sustainability metrics. The applicant is expected to fill out the scoring tool including which of the applicable sustainability metrics they have decided to provide in the proposed plan/project.

Using the Site, Block and Draft Macro Buttons:

The Site, Block and Draft Macro buttons are used to hide metrics which are not applicable to a specific plan type. Please note that this only hides metrics based on the applicability to Site, Block and Draft Plans. Metrics which are applicable to these plans but not are not applicable to the selected development type (i.e. Greenfield, Intensification or Employment Lands, Single Family, Multi-Family, Commercial/Residential/Institutional) will not be hidden, instead they will appear greyed out.

Note: Ensure that macros are enabled in the work book. To enable macros go to File > Options > Trust Centre > Trust Centre Settings > Macro Settings > Enable all Macros. Before using any of the Site, Block or Draft macros make sure that the "Show all Metrics" macro has been used.

Mandatory Metrics:

As shown within the Sustainability Metrics table, Mandatory requirements are listed for many of the metrics. These Mandatory requirements reflect the Municipalities' Official Plan, Municipal Standards or the Ontario Building Code. These requirements are considered mandatory and do not have a point allocation.

Should a plan/project not comply with a Mandatory requirement, the specific metric will be flagged red. The counter in the top right hand corner of the dynamic tool keeps track of the total number of Mandatory Metrics that are unsatisfied. In order for a proposed plan/project to be approved by the municipality, all of the Mandatory Metrics must be satisfied.

Point Allocation:

The points allocated for the metrics are listed in the Sustainability Metric table. The point structure for the Recommended Minimum and Aspirational targets align with the Municipalities' sustainability priorities, namely:

1) Energy conservation/District energy;
2) Water conservation;

3) Stormwater management;
4) Walkability and Mobility;
5) Natural heritage/Community stewardship; and
6) Local food production/distribution.

Based on the information entered by the applicant, the point tally only reflects those sustainability metrics that are applicable to the proposed plan/project. The point allocation for the greyed-out metrics is not counted as part of the point tally. As the applicant fills in which of the applicable sustainability metrics is being provided in the proposed plan/project, the point tally is automatically updated to reflect the entry.

The dynamic tool outputs two scores for the plan: an Overall Application score and an Overall Community score. In addition, it breaks the Overall Community score out into the municipal sustainability priority areas (i.e. energy, water, walkability, natural systems). The Overall Application score only considers design elements that the applicant has control over/the ability to do as part of their proposed plan/project. The Overall Community score includes the Application score, along with those sustainability metrics that are typically controlled/influenced by the municipality or the region (i.e. proximity to schools, transit, proximity to cycling network, etc…). Only the Application score will be used when considering whether a proposed plan/project's should be considered for any municipal incentives. The Overall Community score will be used to monitor the implementation of the sustainability metrics and may influence future policies or implementation projects (e.g. refining engineering standards) that the municipalities or region may need to develop to further the implementation of the sustainability metrics as part of the planning application review process.