

Whitby Green Standard
Staff Training Guide

2020

Whitby

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The Planning Partnership

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SECTION 1.

OVERVIEW OF THE WHITBY GREEN STANDARD

1.1 The Whitby Green Standard

The Whitby Green Standard (WGS) is a set of performance measures developed for the purpose of evaluating the sustainability of new development in the Town of Whitby. Implementing the WGS will require all staff, from the planners to building services, to public works to understand how to use and interpret the WGS. This Staff Training Guide, designed for internal use, describes the components of the WGS – what it is, how it works, and how staff will use it. It also advances a strategy for monitoring the WGS, understanding that Provincial, Regional, and Town policies may change, Ontario Building Code regulations may evolve, and technological advances may make achieving higher performance more tangible. It is important to note that the Staff Training Guide is meant to be read in conjunction with the **Whitby Green Standard Reference Guide and Glossary** and **Whitby Green Standard Development Review Checklists.**

The WGS supports several Town and Region strategic documents including the Town's Official Plan and Corporate Sustainability Plan, the Durham Community Energy Plan, and the Durham Community Climate Adaptation Plan.

The WGS is an information tool to assist the Town in implementing and achieving the vision for a sustainable community through the development review process.

The WGS will contribute to:

- **A more resilient building stock**
- **Adapting to climate change**
- **Improving energy efficiencies**
- **Efficient infrastructure use**
- **Reducing automobile dependence**
- **Encouraging physical activity**
- **Reducing potable water usage**
- **Lower greenhouse gas emissions**
- **Recognizing the positive impact of greenspace and vegetation**

1.2 Whitby Green Standard Principles

The WGS sustainable development principles incorporate and expand on the intent of the Whitby Official Plan. The following ten (10) sustainable development principles have been used to organize the performance measures in the **Draft Plan of Subdivision** and **Site Plan Checklists**. The Principles were chosen to reflect the three pillars of sustainability: social health, environmental health, and economic health.



Health and Happiness

Encouraging active, sociable, meaningful lives to promote good health and wellbeing.



Equity and Local Economy

Creating safe, equitable places to live and work which support local prosperity and international fair trade.



Culture and Community

Nurturing local identity and heritage, empowering communities and promoting a culture of sustainable living.



Land Use and Nature

Protecting and restoring land for the benefit of people and wildlife.



Sustainable Water

Using water efficiently, protecting local water sources and reducing flooding and drought.



Local and Sustainable Food

Promoting sustainable humane farming and healthy diets in local, seasonal organic food and vegetable protein.



Travel and Transport

Reducing the need to travel and encouraging walking, cycling, and low carbon transport.



Materials and Products

Using materials from sustainable sources and promoting products which help people reduce consumption.



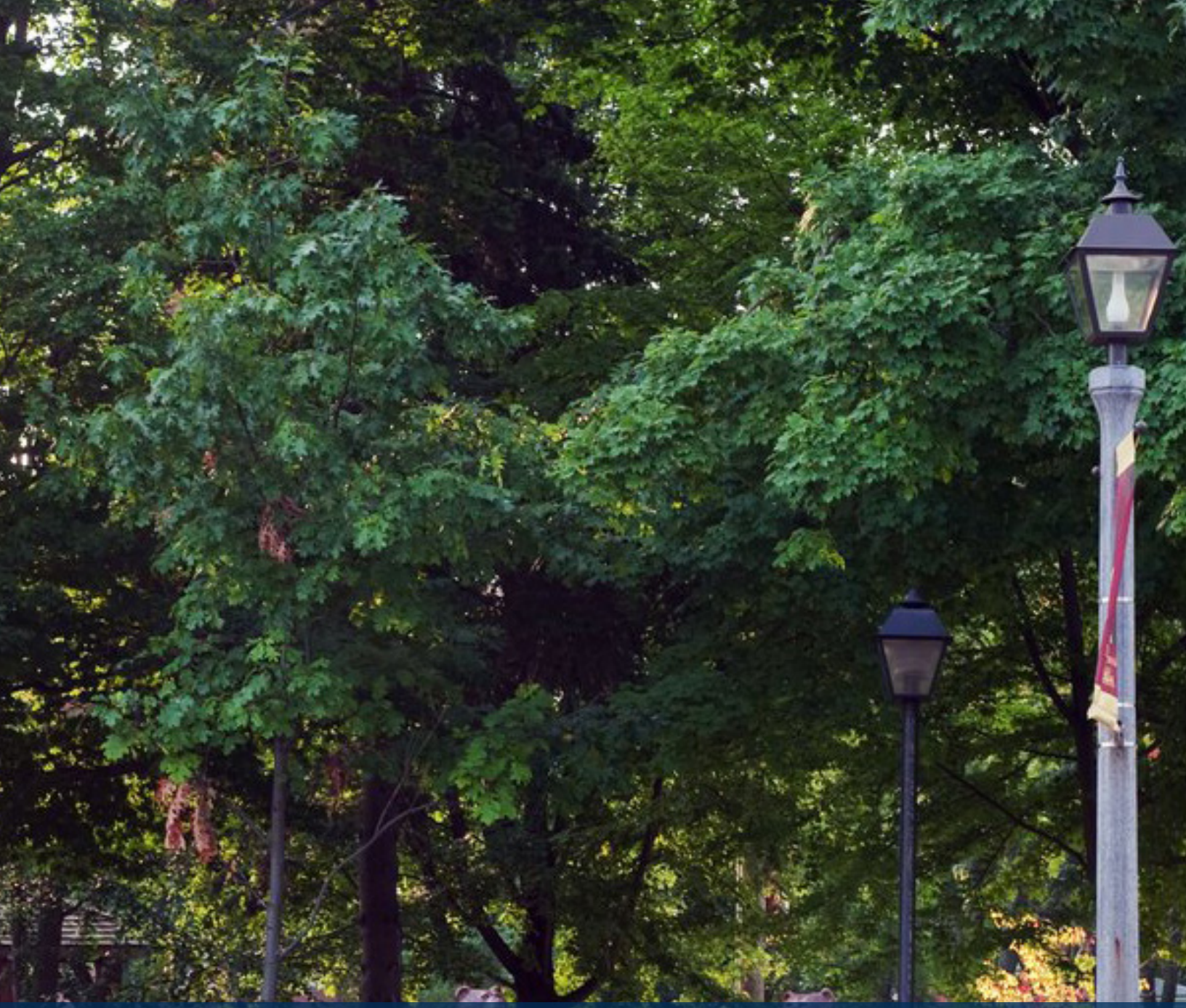
Zero Waste

Reducing consumption, reusing, and recycling to achieve zero waste and zero pollution.



Energy and Climate Change

Making buildings and manufacturing energy efficient and supplying energy with renewables.



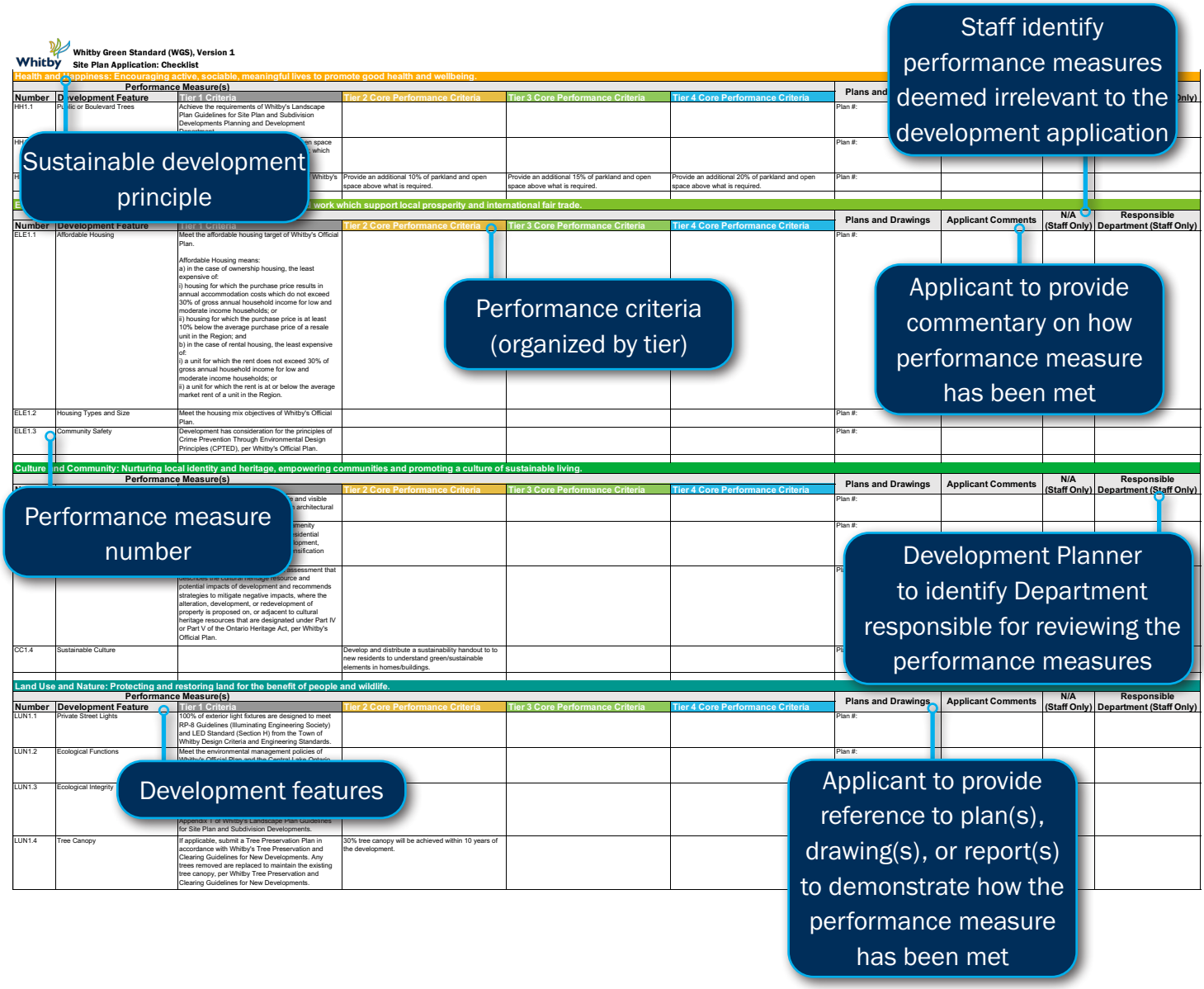
SECTION 2.

HOW THE WHITBY GREEN STANDARD WORKS

The WGS is a flexible, living document designed to respond to current and emerging climate change challenges. The WGS consists of four performance Tiers. Tier 1 represents baseline performance and is mandatory; Tiers 2 (good performance), 3 (better performance), and 4 (best performance) are voluntary.

2.1 Whitby Green Standard Checklists

- All new Draft Plan of Subdivision and Site Plan applications submitted to the Town under the Planning Act are required to address the WGS at the pre-consultation stage and as part of an application submission.
- The WGS are organized into two Development Review Checklists: **Draft Plan of Subdivision** and **Site Plan**. The following excerpt illustrates the various components of the WGS Checklists. Note that two columns are to be filled out by Staff Only.



2.2 Performance Tiers

- The Checklists include four tiers (Tiers 1 to 4) of performance measures with supporting criteria that promote sustainable site and building design. Generally, the higher the Tier, the more sustainable the development.
- Over time, the Town will increase the minimum level of sustainability performance measures, where the Tier 1 performance measures will be replaced with Tier 2 performance measures.

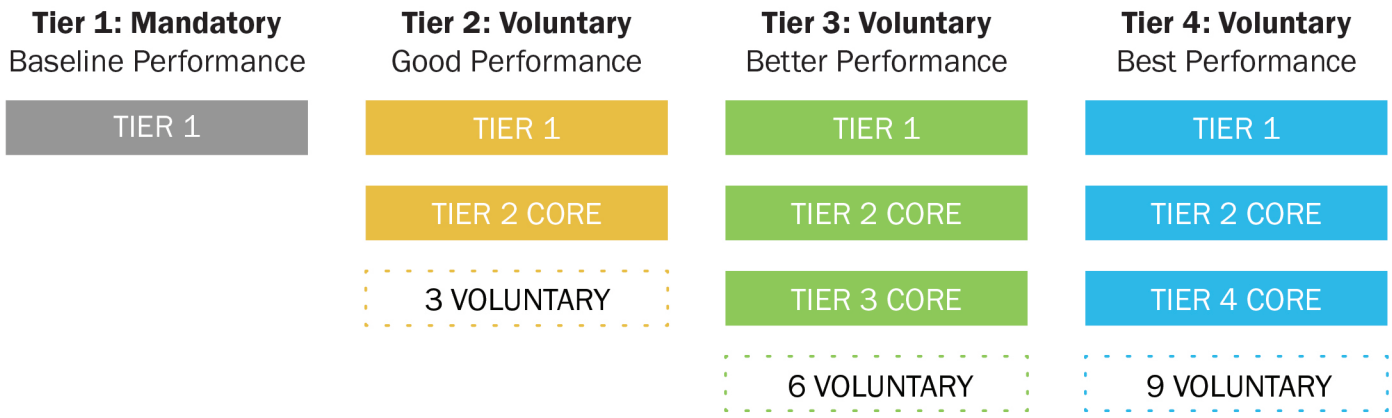
TIER 1 **Mandatory.** Reflects Official Plan policy direction and represents the minimum required Performance Measures.

The following Tiers are **Voluntary**.

TIER 2 Includes both **Core** and **Voluntary Performance Measures**. To achieve Tier 2, all Tier 2 Core Performance Measures must be achieved along with three (3) voluntary performance measures. Up to two (2) innovation performance measures may be used in lieu of two (2) voluntary measures.

TIER 3 Includes both **Core** and **Voluntary Performance Measures**. All Tier 2 and 3 Core Performance Measures must be achieved in addition to six (6) Tier 2 voluntary performance measures. Up to two (2) innovation performance measures may be used in lieu of two (2) voluntary measures.

TIER 4 Includes both **Core** and **Voluntary Performance Measures**. All Tier 2, 3, and 4 Core Performance Measures must be achieved in addition to nine (9) Tier 2 voluntary performance measures. Up to two (2) innovation performance measures may be used in lieu of two (2) voluntary measures.



2.3 Performance Measure Example

The following example provides a summary of a performance measure, its intent, instructions on how to review the measure based on the Tier the applicant is pursuing, and where the information should be referenced within the Applicant's submission package.

For further assistance in confirming compliance, please refer to the **Whitby Green Standard Checklists** and the **Whitby Green Standard Reference Guide and Glossary.**

PRINCIPLE: TRAVEL AND TRANSPORT
DEVELOPMENT FEATURE: Walkways (Sidewalks, Multi-use Pathways, and Trails)
APPLIES TO: Draft Plan of Subdivision and Site Plan
MEASURE INTENT Promote walkability and physical activity with the intention of reducing vehicle kilometres traveled and greenhouse gas emissions.
CRITERIA **Tier 1 - Mandatory** **TT1.6** Meet the Town's policies, design criteria, and standards for sidewalks. Adhere to the Town's Engineering Standards when designing multi-use pathways and trails. **Tier 2 - Core Performance Measure** Provide missing walkway connections between the subject site and existing public walkways.
DOCUMENT COMPLIANCE Included in Draft Plan and Site Plan Drawings and Transportation Study (Draft and Site Plans) Submission requirements: 1. Verify and document that the sidewalks comply with Town standards and are at a minimum 1.5m in width. 2. Quantify the percentage of street length where sidewalks are continuous and included on both sides of the street. 3. Identify the locations where connections, or missing links, have been provided to existing sidewalks, multi-use pathways, and trails.

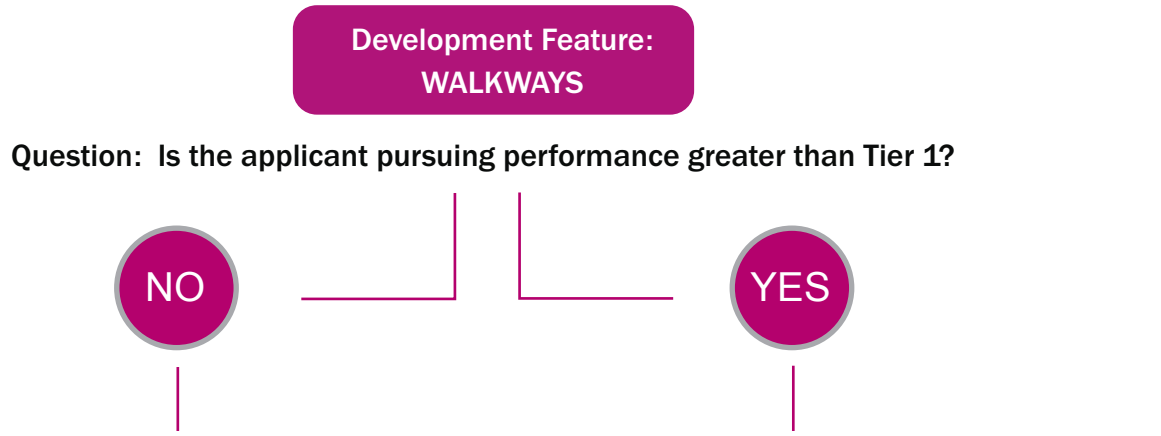
The WGS Checklist review process is initiated by asking two questions:

1. **What application type has been submitted?**
2. **What level of performance is the applicant pursuing?**

The applicant will have submitted the applicable WGS Checklist with the submission package, either Draft Plan of Subdivision or Site Plan.

The level of performance pursued by the applicant has a significant impact on how to review the Checklist for compliance. The diagram below summarizes the decision-making pathway when reviewing the 'Walkways' development feature based on performance tier.

Regardless of the Tier being pursued, it is important to note that all Tier 1 Performance Measures must be achieved. A review of an application must always begin with a review of the Tier 1 Checklist.



Ensure the application complies with the Tier 1 Performance Measure (see Checklist for details)

If so, the review of this development feature is complete.

Ensure the application complies with the Tier 1 Performance Measure (see Checklist for details)

This development feature has a stepped performance measure. Therefore the reviewer only needs to reference the Tier 2 Checklist. For example, if the applicant is pursuing Tier 2 for this development, they must demonstrate that they have provided missing walkway connections between the development and existing public walkways.

If so, the review of this development feature is complete.

2.4 The Whitby Green Standard Process

- The WGS Checklists must be read and completed in conjunction with the full WGS. For further information, please refer to the **Whitby Green Standard Draft Plan of Subdivision and Site Plan Checklists**, and the **Whitby Green Standard Reference Guide and Glossary** that provides additional direction and resources, such as a Glossary.

- The Town requires that the WGS Checklist be reviewed by the Applicant and Town staff at the time of the mandatory Pre-Consultation Meeting for all applications related to Draft Plan of Subdivision and Site Plan development. The applicant, along with the mandatory Pre-Consultation Request Form will submit a preliminary WGS Checklist and a conceptual plan.

- Prior to the Pre-Consultation meeting, staff will meet internally, where necessary, to review the preliminary WGS Checklist in the context of the development proposal in order to provide directions and expectations for the application.

- During the Pre-Consultation meeting, Town staff may identify performance measures that are not relevant to the development by denoting them as 'NA' on the Checklist.

- Town staff are expected to encourage Applicants to explore innovative features and emerging technologies that contribute to higher tiers of performance.

- As part of the development application submission, the Applicant is expected to submit the **WGS Checklist** and a **Sustainability Report** (see Section 2.5 for a description), along with all required plans, drawings, and supporting reports in order for a submission to be accepted by Town staff.

- The WGS Checklist must contain information provided by the Applicant indicating how the design meets the WGS and a reference to plan(s), drawing(s), or report(s) to demonstrate how the performance measure has been met.

- As part of the technical review, the Development Planner will circulate the WGS Checklist with submission materials included in the application as part of the regular review process. Using the **Staff Training Guide**, staff will assess the Checklist for conformity.
    - Development Control, Design and Technical Services
    - Building Services
    - Planning Policy and Heritage Planning
    - Strategic Initiatives, Sustainability, Economic Development and Downtowns
    - Public Works – Engineering, Transportation, and Operational Services
    - Parks - Parks Development, Long Range Parks Planning and Culture
    - Community Services

- To ensure compliance, staff will refer to the Sustainability Report and the identified reference plan, drawing, or report and confirm it has been met.

- Staff will submit detailed comments on compliance to the Development Planner.

2.5 Sustainability Report

The intent of the **Sustainability Report** is to provide an overview of the Applicant's sustainability commitment and how that commitment has been achieved. The Applicant should include the following components in the Sustainability Report:

1. **Executive Summary**: Provide an overview of the project and declaration of performance tier commitment.

2. **Purpose of the Application:** Provide a detailed description of the project.

3. **Sustainability Overview:** A summary of the project's sustainability vision and objectives.

4. **Innovation:** If applicable, provide an overview of any innovative technologies being pursued by the project.

5. **Sustainability Declaration:** Provide a statement declaring the performance tier that will be achieved by the project.

6. **Mandatory Performance Measures:** List all mandatory performance measures and their related reference document(s) in a tabular format.

7. **Voluntary Performance Measures:** Where a higher performance tier is being pursued, a list of all core and voluntary performance measures and their related reference document(s) will be prepared in a tabular format.



SECTION 3.

DEVELOPMENT REVIEW PROCESS

This section illustrates the key steps in the development review process, beginning with the pre consultation meeting and ending with implementation.

3.1 Integration into the Development Review Process

Applicants will be advised by the Town of the WGS Checklists at the earliest stage of the development review process to ensure an effective implementation of the standard. **The WGS Brochure** will be available at the Planning and Development Counter and on the Town's website to provide the Applicant with a clear and graphic introduction and overview of the WGS.

- The WGS Checklist is an information tool. The documents ensure that information is provided to developers before their application process begins and outlines what green standards the Town is advancing.

- Performance Measures have been informed by Official Plan direction. Mandatory Performance Measures are adopted directly from regional and municipal policy documents, standards, and guidelines.

- All technical staff should have a copy of the WGS Checklist.

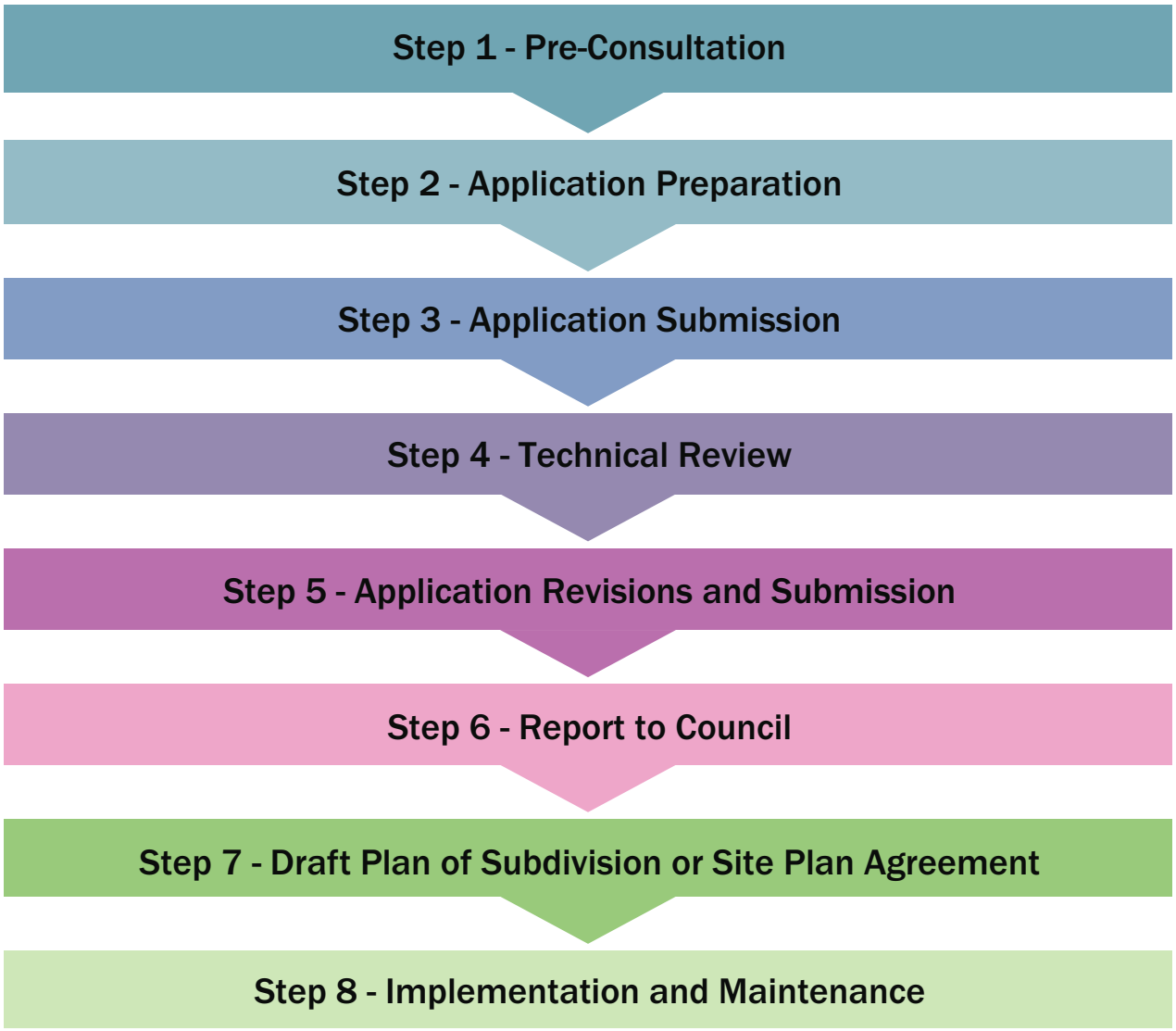
- An internal process will be developed to circulate, review, and document WGS Checklist compliance for an application.

- Roles and responsibilities for internal staff will be determined, such as staff resourcing and main point of contact in each department:
  - Development Control, Design and Technical Services
  - Building Services
  - Planning Policy and Heritage Planning
  - Strategic Initiatives, Sustainability, Economic Development and Downtowns
  - Public Works – Engineering, Transportation, and Operational Services
  - Parks - Parks Development, Long Range Parks Planning and Culture
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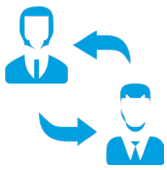
- Completion of the applicable Checklist must be confirmed at the approval stage (final submission).

- The Development Planner will report on the compliant WGS Checklist and Tier level achieved (staff report) prior to final approval.

3.2 Development Review Process



Step 1. Pre-Consultation



The Applicant will fill-out and submit the mandatory Pre-Consultation Request Form and a preliminary WGS Checklist, as well as a conceptual plan (as per the mandatory Pre-Consultation Request Form). Prior to the Pre-Consultation meeting, staff will meet internally, where necessary, to review the preliminary WGS Checklist in the context of the development proposal in order to provide directions and expectations for the Application Submission.

The Applicant's team will come prepared for the Pre-Consultation Meeting with the preliminary WGS Checklist and conceptual plan. The Pre-Consultation meeting is the opportunity for the Applicant to discuss opportunities for addressing the WGS with Town staff. Staff should be prepared to answer questions and provide suggestions or alternative options for achieving the performance measures. During this meeting, Town staff may also identify performance measures that are not relevant to the development by denoting them as 'NA' on the Checklist.

Step 2. Application Preparation



Following the Pre-Consultation Meeting, the Applicant will revise the proposal or reports based on staff feedback and direction and prepare the Sustainability Report.

Applicants will revise and complete the relevant WGS Checklist and identify which Performance Measures the application will achieve and how the criteria will be met. The Applicant must also indicate the drawings, plans, or reports that demonstrate criteria compliance.

Step 3. Application Submission



The Applicant must submit the final version of the applicable WGS Checklist and a Sustainability Report as part of the Application Submission package to the Town. The Development Planner must ensure that the complete WGS Checklist is submitted at the initial application submission before it is processed.

Step 4. Technical Review



Staff (Development Planner) will circulate the WGS Checklist to the applicable Town departments and main point of contact within each department as part of the development review process. Comments on the application and the WGS Checklist will be provided to the Development Planner.

- Development Control, Design and Technical Services
- Building Services
- Planning Policy and Heritage Planning
- Strategic Initiatives, Sustainability, Economic Development and Downtowns
- Public Works – Engineering, Transportation, and Operational Services
- Parks - Parks Development, Long Range Parks Planning and Culture
- Community Services

Step 5. Application Revisions and Resubmission



The Applicant will revise and resubmit plans, reports, and other materials based on comments through the overall evaluation of the development application. If any revisions are proposed to the development plan, the revised WGS Checklist and Sustainability Report must be included in the resubmission.

To ease the review process, Applicants should indicate how the revised Checklist responds to the feedback in the “Applicant Comments” column.

Step 6. Report to Council



Where required, Planning staff reports will address the WGS performance measures that an applicant has committed to in their development application. Where there is not a report sent to Council, staff will provide condition of approval.

Step 7. Draft Plan of Subdivision or Site Plan Agreements



Pending approval of the development application, development agreements or final plans will contain specific conditions for meeting the WGS measures that an Applicant has committed to undertake in their approved WGS Checklist.

Step 8. Implementation and Maintenance



As development proceeds, the applicant will implement the approved WGS commitments. Letters of Credit will be required as a mechanism to hold Applicants accountable. Once assumption of services has occurred, no more action is required on the part of the applicant.

As a component of the WGS Checklist maintenance, Town staff will undertake a review of which metrics or standards have seen the most uptake and the rate of compliance to assist with improving the applicability and content of the WGS. The Sustainability Coordinator will be responsible for coordinating the findings of the review from each Development Planner.



SECTION 4.

ROLE OF DEVELOPMENT PLANNER AND STAFF

4.1 Role of the Development Planner

- The Role of the Development Planner is to inform the Applicant about the WGS requirements prior to the pre-consultation meeting, ideally before design work has commenced. The Applicant is required to provide a completed WGS Checklist and a conceptual plan with the mandatory Pre-Consultation Form.

- Determine roles and responsibilities for internal staff such as staff resourcing and the main point of contact in each department:
  - Development Control, Design and Technical Services
  - Building Services
  - Planning Policy and Heritage Planning
  - Strategic Initiatives, Sustainability, Economic Development and Downtowns
  - Public Works – Engineering, Transportation, and Operational Services
  - Parks - Parks Development, Long Range Parks Planning and Culture
  - Community Services

- Ensure that the complete WGS Checklist is submitted at the initial application submission.

- Circulate the application and applicable checklists to the technical staff main point of contact in each department for review.

- Verify satisfaction of relevant performance measures and request any necessary additional information from technical staff.

- Confirm completion of applicable Checklist at approval stage (final submission).

- Report on compliant WGS Checklist and Tier level achieved (staff report) prior to final approval.

4.2 Role of Technical Staff

- The WGS is an approved component of the development review process and is to be used in the review of applications.

- Review the WGS Checklists and verify performance measures relevant to their area of discipline:
  - Development Control, Design and Technical Services
  - Building Services
  - Planning Policy and Heritage Planning
  - Strategic Initiatives, Sustainability, Economic Development and Downtowns
  - Public Works – Engineering, Transportation, and Operational Services
  - Parks - Parks Development, Long Range Parks Planning and Culture
  - Community Services

- Provide technical comments on compliance or improvements to Development Planner. The applicant will have identified in the WGS Checklist and the Sustainability Report which Performance Measures the application will achieve and how the criteria will be met. The Applicant will indicate the drawings, plans, or reports that demonstrate criteria compliance.

- As part of the development application submission, the Applicant is expected to submit a Sustainability Report. The intent of the Sustainability Report is to provide an overview of the Applicant's sustainability commitment and how that commitment has been achieved. This report will provide a summary resource for staff to assist with the review of the application.

- Refer to **Whitby Green Standard Reference Guide and Glossary.**

4.3 Role of Administration

In terms of the Implementation of the performance standards and Checklists, there is an internal administrative process that the Town will need to consider for the implementation phase of the WGS.

- Revisions to submission requirements.
- Revisions to the mandatory Pre-Consultation form.
- Evaluation/confirmation of Town standards and specifications in relation to the final performance metrics.
- Analysis of incentive programs.
- Pilot projects, where relevant.
- Staff resourcing, assign a main point of contact in each department.
- Development of an internal Task Force with members from each department to assist with implementing the WGS Checklist and the alignment of municipal standards (if required).



APPENDIX A.

RESOURCES

This section provides links to documents and references referred to in the Draft Plan of Subdivision and Site Plan WGS Checklists.

The documents and information below will assist with further explaining and describing the performance measures and provide a point of reference for performance measures that are outside of the policies of the Official Plan and not included in Town Standards.

Accessibility for Ontarians with Disabilities Act (AODA)
For more information, click here.

Active Transportation Plan
For more information, click here.

A Place to Grow: Growth Plan for the Greater Golden Horseshoe
For more information, click here.

Brooklin Urban Design and Sustainable Development Guidelines
For more information, click here.

Central Lake Ontario Conservation (CLOCA): Technical Guidelines for Stormwater Management Submissions
For more information, click here.

City of Toronto, Toronto Green Standard
For more information, click here.

Crime Prevention Through Environmental Design (CPTED)
For more information, click here.

Durham Community Energy Plan
For more information, click here.

Durham Region Official Plan
For more information, click here.

Keeping Our Cool: Managing Urban Heat Islands in Durham Region
For more information, click here.

Living Building Challenge
For more information, click here.

Low Impact Development Stormwater Management Planning and Design Guide
For more information, click here.

Native Plant Species
For more information on trees and shrubs native to Ontario, click here.

Ontario Building Code (OBC)
For more information, click here.

The Planning Act (Ontario)
For more information, click here.

Port Whitby Sustainable Community Plan
For more information, click here.

Provincial Policy Statement
For more information, click here.

Renewable Energy, Natural Resources Canada
For more information, click here.

Solar Ready Guidelines, Natural Resources Canada
For more information, click here.

Town of Whitby Design Criteria and Engineering Standards
For more information, click here.

Town of Whitby Landscape Plan Guidelines for Site Plan and Subdivision Developments
For more information, click here.

Town of Whitby Lighting Guidelines
For more information, click here.

Town of Whitby Official Plan
For more information on Whitby's Official Plan, click here.

Town of Whitby Shadow Study Guidelines
For more information on Whitby's Official Plan, click here.

Town of Whitby Tree Protection Requirements for New Development
For more information, click here.

USGBC, LEED for Neighbourhood Development
For more information, click here.

West Whitby Urban Design and Architectural Design Guidelines
For more information, click here.

WELL Community Standard
For more information, click here.

Town of Whitby Zoning By-laws
For more information about the Town of Whitby's zoning bylaws, click here for Zoning By-law 2585, here for Zoning By-law 1784, or here for Zoning By-law 5581-05.

