Evaluation Report

1.0 Background

A stakeholder workshop was held on March 4, 2011 in Mississauga to evaluate the usability of the new Health Background Study (HBS) User Guide, which builds on the HBS Terms of Reference (TOR). The HBS is intended to ensure new development promotes and supports healthy and active communities, and to provide a mechanism for municipalities to evaluate development proposals on that basis.

Approximately 50 people participated in the workshop, including staff from the local and regional municipal departments of planning policy, development planning, urban design, traffic planning and engineering, environmental health, chronic disease and injury prevention, and recreation and parks. Representatives of private developers, special interest groups, planning consultants, a school board and a conservation authority also participated in the workshop.

2.0 Workshop Format

The workshop was based around three case examples, which were used by participants to test the usability and applicability of the new HBS User Guide. Participants were organized into six groups and given mapping, measurement tools, and data, and asked to go through the User Guide and apply selected Standards for five of the six Core Elements (Density, Service Proximity, Land Use Mix, Street Connectivity, and Streetscape Characteristics). The sixth Core Element (Parking) was excluded due to the specificity of the Standards. The three case examples were selected to represent infill and greenfield developments, and included:

- Aurora 2C Secondary Plan (Greenfield)
- Oakville Uptown Core (Phased Greenfield-Infill)
- Toronto Infill

Based on their experience applying the User Guide and HBS Standards to their case example, the participant groups were asked to answer the following three questions:

1. Was the User Guide useful and easy to follow?
   • Was the information provided about each of the six core elements useful and complete?
   • Was it clear how each of the core elements relate to healthy community development in practice?

2. How applicable were the HBS Standards to your test case?
   • Discuss the applicability of the HBS in terms of your test case’s location (greenfield/infill) and scale.

3. Based on your experience, where in the planning process does the HBS fit best and why?

The participants’ feedback is summarized below, with TPP’s response provided in italics.

3.0 Feedback

3.1 Usability

In general, the stakeholder participants gave the User Guide a favourable review in terms of its usability. Several groups commented the document was clearly written, logically formatted, concise and made good use of illustrations.

There was some disagreement over the Standards among the six stakeholder groups. Some groups felt the Standards were too prescriptive, and wanted to see more flexibility in applying the Standards, for example by:

- using words like “should” instead of “shall” or “must”;
- providing ranges for the targets; or
- framing the Standards more as “Guidelines”.

Other groups appreciated the provision of minimum targets, and some wanted the Standards to be more specifically defined by clearing up language, such as “where applicable/appropriate”. It was also suggested that where possible, it would be useful to draw a connection between the Standards and the Provincial Policy Statement and
Places to Grow, as a way to further legitimize the Standards.

The degree of flexibility or specificity will, and should, vary by Standard depending on its content, so an overarching revision of all Standards to make them either more flexible or specific is not being considered. However, where clarification is needed, the Standards will be updated with definitions, numbers and/or expanded Glossary terms. In addition, the Introduction to the User Guide stresses the role of local municipalities in implementing the HBS and provides room for discretion to mould the Standards to the local context. Finally, the connection between the HBS Standards and provincial planning policies has been outlined in the Situational Analysis, and will not be repeated in the User Guide for the sake of brevity.

Several groups also noted that some Standards are applicable to areas of regional jurisdiction, while other Standards apply to areas under local jurisdiction. These groups suggested the two-tiered nature of planning in the Region of Peel be reflected in the Standards.

Most commonly, the issue of regional/local jurisdiction arises with regard to Streetscape Characteristics and this is because there are local and regional roads in Peel. The HBS Standards as a whole apply regardless of jurisdiction, and their applicability should be determined by the existing distribution of roles and responsibilities between the region and local municipalities – not by the HBS.

All groups identified certain terms and Standards that needed further definition (to be done in the Glossary), and made suggestions for minor changes to the content of specific Standards. In addition, one group suggested compiling the Standards into one checklist to ease usability. Another group recommended a final component be added to the User Guide to evaluate how the six core elements have been integrated, which is an important measure of whether the development lives up to the healthy communities vision.

Where further clarification is needed the Standard will be updated with definitions and/or expanded Glossary terms. Specific requests for changes to the Standards have been compiled for review and the Standards will be updated, where appropriate. A response matrix will be provided before the completion of this project. With regard to compiling the Standards into one checklist, a new Matrix will be developed that lists all of the Standards and where they fit in the planning and development approvals process, as described below. The existing Key Questions and Reporting Requirements are intended to encourage the consideration of Standards for all six Core Elements as a whole.

3.2 Applicability

All stakeholder groups agreed that the HBS Standards were easier to apply to greenfield development than infill, and suggested that more guidance is needed in the User Guide to differentiate how to apply the various Standards depending on the location and type of development. The particular challenge of applying the HBS and Standards to a development application for a single building was noted by one group looking at the Toronto Infill case example.

Icons have been added to each Standard to indicate whether it applies to greenfield development, infill development or both. The icons are introduced at the beginning of the document with some explanatory text that addresses the distinction in applicability. In addition, an effort has been made throughout the User Guide to provide direction on how the Standards apply in greenfield or infill development, or both. As stated in the User Guide, every Standard is not meant to apply to every development – staff and proponents should assess the applicability of the Standards to a specific development during the pre-application stage, based on the location and scale of development, and other relevant factors.

3.3 Planning Process

All groups reported back that the HBS is applicable throughout various stages of the planning process, depending on the specific Standards being applied. Some Standards/Core Elements can be assessed at a higher level of planning (e.g. Density, Service Proximity, Street Connectivity), while others are more applicable at a more detailed design level (e.g. Land Use Mix, Streetscape Characteristics, Parking).

The most common steps in the planning process where participants felt the HBS fit best were the Secondary Plan and Block Plan. Other steps in the planning process that were identified as relevant to the HBS were the Draft Plan, Site Plan, Area Study, and the Community Design process. Several participant groups noted the need to differentiate where in the planning process each Standard may best be evaluated, as well as the need for general awareness of the HBS at the pre-application stage.

A new matrix will be added as an Appendix to the User Guide. The matrix will list each Standard and note where it applies during the planning and development approval process, including the Secondary Plan, Draft Plan, Block Plan, and/or Site Plan. This matrix will also be included in the Implementation Strategy.

In considering who should be responsible for reviewing the HBS, most groups identified the need for an interdisciplinary team (to include planners, urban designers, engineers, public health staff, etc.), and highlighted a special role for public health staff, as guardians of the HBS. The specific functioning and implementation of this interdisciplinary team was not dealt with in detail, other than suggestions that development applications be circulated to the team, or that the team meet physically as a committee to review
applications.

*We will consider this feedback and make recommendations regarding “who does what” in the Implementation Strategy.*

Finally, the question was raised how to proceed when there is a conflict between an HBS Standard and another existing standard (e.g. engineering standard) – a common challenge when implementing emerging standards that may not yet be incorporated into technical manuals, and with which technical staff may have less familiarity.

*Conflicting standards will be addressed in the Implementation Strategy.*

### 3.4 Other Feedback

In addition to the questions posed to the workshop participants, most groups also provided suggestions on how to improve the introductory section of the User Guide. For example, one group wanted to see greater consideration and discussion of air quality and mental health issues in relation to healthy development. Other groups wanted the introduction to clearly outline the economic imperatives for healthy development using public health research and statistics.

In terms of the introductory discussion of scope and applicability, workshop participants suggested the User Guide needs to more clearly define the intended audience, and the roles and responsibilities of the end user. They also noted that the User Guide should acknowledge the need for balance between economic considerations, logistics and timing in achieving the various standards. Finally, the workshop participants communicated a general sense of urgency “to get on with it” – that is the business of building healthier communities.

*The Introduction of the User Guide will be updated to address all of these comments.*

### 4.0 Next Steps

In finalizing our work on the HBS TOR and User Guide, The Planning Partnership will work with the Region of Peel staff to:

- finalize the Standards;
- improve the Glossary;
- develop greenfield/infill “menu” icons to clarify the applicability of HBS Standards;
- prepare a matrix that identifies where in the planning process each HBS Standard is applicable; and ,
- submit final recommendations for how the HBS should be implemented by the Region of Peel.

It is expected that this work will be completed by the end of March, 2011.