Smart Growth Scorecards

CRITERIA		POINT SYSTEM			SCORE		TOTAL Possible	TOTAL SCORE
Criteria based on information that is not complete or available for scoring		WEIGHT	VALUE	MAX. POINTS AVAILABLE	SCORE	COMMENTS		
Project does not conflict with adopted Neighborhood Plan for the area.								
Projects proposing demolition/modification of historically significant buildings require review.								
Project may not receive Smart Growth Zone Specific incentives.								
A,B, or C for a maximum possible 45 points)								
1. Anywhere		5	5	25				
2. Within a 1 block radius of a CMTA bus stop		5	4	20				
3. Consistent with transit station area plan								0
1. Anywhere		4	3	12				
2. Within one lot deep of a Smart Growth Corridor		4	4	16				

Credit | The City of Calgary

TOOL DESCRIPTION

Scorecards are assessment tools that determine whether a proposed development project meets the social, economic, environmental, and fiscal goals of a community. a scorecard provides an objective assessment of development proposals, and local jurisdictions can use them to guide the application and review process. Scoring criteria can be derived from community goals and planning principles determined through a public process for local and regional plan development (e.g., a Municipal Sustainability Plan). Results from a scorecard will show how development meets specific growth and development goals established by the community.

As a standardized evaluation tool, a scorecard is also useful when making comparisons between different alternatives, between proposals and similar existing developments, and between the original proposal and the development as built. At a larger scale, a scorecard can be used to compare overall impacts of the project – how a community meets criteria without and with consideration of a proposed development. This information can also be communicated to the public more easily.

Smart Growth evaluation criteria

A Smart Growth scorecard for evaluating development proposals can use a number of smart growth principles for developing criteria. This could include:

› Proximity to existing and future development and infrastructure
› Mix and balance of land uses
› Site optimization and compactness
› Accessibility and mobility choices
› Community context and site design
› Fine-grained block, pedestrian and park network
› Environmental quality
› Re-use and redevelopment options
› Process collaboration and the predictability of decisions

Each criterion would include several focused questions designed to assess specific aspects of the proposal.

Tool Intent

To evaluate greenfield development projects against community goals and performance targets.

Credit | O2 Planning + Design Inc.

USERS

Municipal Officials
✓ Municipal Planning Staff
✓ Planning + Design Professionals
Engineers
✓ Land Developers
Landowners
Community Members

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SMART GROWTH CRITERIA MATRIX
City of Austin Transportation, Planning and Design Department

REVIEWER:
MARK ONE:
☐ SELF SCORE
☐ PRELIMINARY SCORE
☐ FORMAL SCORE

DEVELOPMENT: ___ DATE OF REVIEW: ___

GOALS	CATEGORY	ELEMENTS	CRITERIA	WEIGHT	VALUE	MAX. POINTS AVAILABLE	SCORE	COMMENTS	TOTAL Possible	TOTAL SCORE
			Criteria based on information that is not complete or available for scoring							
SMART GROWTH GOAL I: Determine How and Where Development Occurs	Eligibility	1. Neighborhood Plans	Project does not conflict with adopted Neighborhood Plan for the area.							
		2. Historic Review	Projects proposing demolition/modification of historically significant buildings require review.							
		3. Incentive Package	Project may not receive Smart Growth Zone Specific incentives.							
	Location (87 points)	1. Smart Growth Zones *(Eligible for only one zone - A,B, or C for a maximum possible 45 points)* A. Downtown	1. Anywhere	5	5	25				0
			2. Within a 1 block radius of a CMTA bus stop	5	4	20				
			3. Consistent with transit station area plan							
		or B. Urban Core	1. Anywhere	4	3	12				0
			2. Within one lot deep of a Smart Growth Corridor	4	4	16				
			3. Consistent with transit station area plan							
		or C. Desired Development Zone (DDZ) inside City Limits	1. Anywhere	3	1	3			45	0
			2. Within one lot deep of a Smart Growth Corridor/park & ride	3	3	9				
			3. Consistent with transit station area plan							
		2. Location Risk	A. Focus on area of economic need	4	3	12			42	0
			B. A "Trail Blazer" in an untested market			30				
	Process (135 pts)	1. Neighborhood Planning *(Choose A or B)*	A. Requires dialogue and support by adjacent neighborhoods (Projects outside of Downtown)			75			75	0
			B. Downtown Projects			35				
		2. Design Commission *(Choose A or B)*	A. Presentation & endorsement of plans without conditions (Projects outside of Downtown)	5	2	10			50	0
			B. Downtown Projects			50				
		3. Historic Landmark Commission	A. Presentation & endorsement of plans without conditions	5	5	25			50	0
			B. Historically zoned buildings or buildings within a historic district			50				
	Critical Mass (24 points)	1. Threshold Density A. Population (DUA)	1. Meets minimum threshold to support transit (7 to 12 dua average w/in one lot deep of Proposed Smart Growth Corridors. 12-25 dua average in Downtown) (Consistent with transit station area plan)	3	4	12				
		B. Employment (FAR)	2. Meets minimum threshold to support transit (Min. FAR of .35 w/in one lot deep of Proposed Smart Growth Corridors or min. FAR of .5 in Downtown) (Consistent with transit station area plan)	3	4	12			24	0
	Land Use (110 points)	1. Land Use Contribution *(Eligible for only one-A,B, or C for a maximum possible 35 points)* A. Downtown Projects	1. Regional draw - retail (anchor retail), entertainment, or cultural center	5	3	15				0
			2. Greater than 200 new housing units	5	4	20				
		or B. Urban Core Projects	1. Regional draw - retail (anchor retail), entertainment, or cultural center	4	3	12				0
			2. Variety of housing types (apartments, rowhouses, SF)	4	3	12				
			3. Greater than 200 new housing units	4	1	4				
		or C. Traditional Neighborhood Projects	1. Meets TND codes and ordinances	3	3	9			35	0
			2. Variety of housing types (rowhouses, gar. apts, sf)	3	3	9				
			3. Town Center with neighborhood retail	3	3	9				
	Land Use Cont/inued (110 points)	2. Land Use Compatibility	1. Part of a Downtown District Plan 2. Consistent with a Corridor Plan 3. Consistent with a Transit Node Plan			0			0	0
		3. Mixed Use per Building (Min. 20% for each use - residential, retail, office)	A. Includes residential above 1st floor	5	4	20			75	0
			B. Street level pedestrian uses	5	3	15				
			C. Includes 2 uses	5	3	15				
			D. Includes 3 uses	5	5	25				
SMART GROWTH GOAL II: Improve Our Quality of Life	Urban Design (44 pts)	1. Building Facade Treatment	A. Division of facade into traditional 30'± increments	2	2	4			16	0
			B. Variety of treatment and human scale details	2	2	4				
			C. 50% or more of facade in glass at street level	2	2	4				
			D. Well-defined entrances every 50' on street frontages	2	2	4				
		2. Compatibility with Surrounding Area	A. Appropriate or compatible massing	2	2	4			12	0
			B. Integration of height with abutting facades	2	2	4				
			C. Rear building treatment	2	1	2				
			D. Mechanical equipment screened where visible	2	1	2				
		3. Provision of Accessible Public Outdoor Space	A. Area greater than 500 ft²	2	2	4			16	0
			B. Provides table and chairs	2	1	2				
			C. Landscape, including trees	2	1	2				
			D. Pedestrian scaled lighting, min. 3 footcandles	2	1	2				
			E. Located adjacent to Greenway or Street	2	1	2				
			F. Provision of outdoor public art	2	2	4				
	Multi-modal Transportation Elements (134 pts)	1. Transit Coordination	A. Project includes CMTA participation / coordination	4	5	20			20	0
			B. Provides facilities associated w/ bus to rail transfers							
		2. Building Location on Site	A. Oriented to pedestrian network	3	1	3			24	0
			B. No drive through facilities	3	1	3				
			C. Buildings built up to right of way	3	4	12				
			D. Parking in rear of lot behind building	3	2	6				
		3. Streetscape Treatment for Maximum Pedestrian Comfort	A. Street trees min. 4" caliper, 30' o.c. on all frontages	3	3	9			60	0
			B. Use of smaller scale pavement (pavers or scoring)	3	1	3				
			C. Rain protection (awnings, arcades)	3	1	3				
			D. Maintain existing alleys or extend walkable street grid plan	3	3	9				
			E. First floor level at street level or within 18"	3	1	3				
			F. On street parking along street frontages	3	1	3				
			G. Min. 12' wide clear sidewalk along street frontage	3	3	9				
			H. Provision of pedestrian scale street lighting	3	1	3				
			I. Continuation of existing sidewalk networks	3	2	6				
			J. Crossing treatment at street corners (bulb outs, crossings)	3	4	12				
		4. Alternative Pedestrian and Bicycle Access	A. Greenways 1. Access to and no interruption of greenbelt trails	2	2	4			16	0
			2. Office, retail, or residential uses facing creek	2	2	4				
			B. Internal Sidewalk Network 1. Pedestrian network linking buildings on site and to streetscape sidewalks	2	4	8				
		5. Bicycle Friendly	A. Bike racks (1:10), Bike Lockers (1:50) available	2	3	6			14	0
			B. Locker room facilities, showers and dressing room	2	2	4				
			C. Bicycle linkages	2	2	4				
	Parking (36 pts)	1. Structured Parking	A. Structured and/or underground parking	3	4	12			30	0
			B. Ground floor of structured parking retail	3	3	9				
			C. Provides for shared parking for adjacent businesses	3	1	3				
			D. Division of facade into 30'± increments & detailing	3	2	6				
		2. Driveway	A. Minimizes curb cuts along front property line	2	3	6			6	0
	Housing (40 pts.)	1. Reasonably Priced Housing	A. 20% of units for 80% (4 person) AMFI households	5	3	15			40	0
			B. 20% of units for 60% (4 person) AMFI households	5	5	25				
	Local Economy (48 pts)	1. Neighborhood Stabilization	A. Traditional neighborhood retail uses	3	3	9			18	0
			B. Neighborhood supported uses	3	3	9				
		2. Promote local business	A. Provision / retention of space for locally owned business	3	4	12			30	0
			B. Project supports or builds local music / film industry	3	4	12				
			C. Use of local contractors and architects	3	2	6				
	Sustainable Building Practices (35 pts)	1. Building Construction and Environmental Impact *(Choose A or B)*	A. Green Building Program Participation One star multi-family	5	1	5				
			Two star multi-family / one star commercial	5	2	10				
			Three star multi-family / two star commercial	5	3	15				
			Four star multi-family / three star commercial	5	4	20				
			Five star multi-family / four star commercial	5	5	25				
			B. LEED Certified Rating			10			25	0
			Silver Rating			15				
			Bronze Rating			20				
			Gold Rating			25				
			C. Green Choice Renewable Energy Program	5	2	10			10	0
SMART GROWTH GOAL III: Enhance Our Tax Base		1. Tax Base Enhancement	A. Meets AISD 60/40 Goal	4	3	12			12	
			A business case analysis for proposed developments seeking financial incentives is handled separately.			Check:	0			

		% of Total Points			
GOAL 1 Determine How and Where Development Occurs	50%		0.0	356	0
GOAL 2 Improve our Quality of Life	48%		0.0	337	0
GOAL 3 Enhance our Tax Base	2%		0.0	12	0
TOTAL	100%		0.0	705	0

CASE STUDIES | BEST PRACTICES
Smart Scorecard for Development Projects: Congress for the New Urbanism

Description: The CNU Smart Scorecard helps decision makers, municipal planners and staff, neighbourhood organizations, and developers determine whether a specific project fulfills community smart growth goals. It is comprehensive, thorough, and technical, but it is flexible enough to be adapted and revised according to the specific needs of a community. It is also a learning tool that can assist communities in identifying and discussing important land-use concepts related to growth and development.

CASE STUDIES | BEST PRACTICES
Smart Growth Criteria Matrix

Credit | flickr.com | shanepope

Location: Austin, Texas, USA
Description: The Smart Growth Matrix is used to determine the smart growth attributes of specific development projects. City staff use the tool to evaluate the quality of the development within the context of smart growth criteria. Projects that significantly advance identified smart growth goals are eligible for project incentives, including the waiver of development fees and subsidies for road, water, and sewer infrastructure.

Left: Austin Smart Growth Matrix
Source | http://www.epa.gov/smartgrowth/scorecards/project.htm

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Smart Growth Scorecards

Scoring methods

Scorecards can rely on several different scoring methods. Numerical point-systems can quantify performance of individual criterion, even those that are more conceptual or difficult to measure numerically. The sum of points in different categories would indicate the overall performance of the development. A scorecard can also use a simple checklist, allowing the assessment of criteria on a simple ordered scale (poor/good/very good/excellent) or with a simple yes or no evaluation. In this case, the proportion of answers that meet a set threshold would indicate overall performance of a development. A combination of these systems could also be used, as is done for the Smart Growth Leadership Institute's Smart Growth Project Scorecard (http://www.sgli.org/tool-kit/implementation-tools/project-scorecard/).

WHEN IN THE PROCESS IT IS USED?

Smart growth scorecards have two important roles in the development process: supporting proposal evaluation, and communicating the performance of the development to the public during consultation.

Proposal evaluation

A scorecard can be used in the review of development proposals to ensure that criteria are consistently applied through a transparent process. A preliminary evaluation by municipal officials and staff can help developers to understand expectations before the application, review, and approvals process has formally started. A scorecard can also be used directly during a review as a basis for approving, conditionally approving, or disapproving a proposal. If used throughout the evaluation process, the scorecard can help to educate both the development community and planning staff about how to work together effectively to meet community goals.

Public consultation

Scorecards are effective in communicating the performance of a development to the public in terms of community goals. A scorecard facilitates informed conversation about the overlap between community goals, site opportunities, and developer objectives, and approaches to growth and development that can benefit the community. This can work to educate the public and the development community about mutual interests, and can help to reduce potential conflicts and resulting delays.

POLICY SUPPORT

While no local policies specifically call for the use of a scorecard to assess development, a scorecard could easily be developed based on existing policies in Municipal Sustainability Plans, Municipal Development Plans, and Land Use By-Laws.

RELATED TOOLS

Development Incentives

LEED-ND Rating System

CASE STUDIES | BEST PRACTICES
Smart Growth Development Checklist

Source | The Smart Growth Leadership Institute | www.sgli.org

Location: New Westminster, British Columbia
Description: New Westminster developed an assessment tool for proposed development projects by adapting the New Jersey Future scorecard for proposed developments. The scorecard rates projects in six broad sustainability categories: accessibility; housing choice; efficient use of public funds; protection of open space and natural areas; place-making; and shorter commutes and more transportation choices. The scorecard enables applicants to discuss proposed developments effectively with city staff, and provides a strong example about how a community adapted a scorecard for its own needs.

ADDITIONAL RESOURCES

Evaluation Checklists for Evaluating Development Proposals (http://wcel.org/checklists)

Smart Growth Scorecards (http://www.epa.gov/smartgrowth/scorecards/project.htm)

The Smart Growth Leadership Institute: Project Scorecard (http://www.sgli.org/tool-kit/implementation-tools/project-scorecard/)

Vermont Smart Growth Scorecard (http://www.smartgrowthvermont.org/fileadmin/files/publications/SPRAWLscorecard.pdf)