

## **9**

### **IMPLEMENTATION OF THE SUSTAINABLE HOME INCENTIVE PROGRAM**

**The Planning and Economic Development Committee recommends the adoption of the recommendations contained in the following report dated August 12, 2009, from the Commissioner of Planning and Development Services.**

#### **1. RECOMMENDATIONS**

It is recommended that:

1. Regional Council endorse the implementation program of the Sustainable Home Incentive Program (S.H.I.P.), substantially in accordance with Attachment 1, that establishes the technical requirements of York Region's voluntary low density residential green building incentive program.
2. Applicants of the 'Sustainable Home Incentive' Program be required to enter into an agreement with York Region setting out the terms of the Program and the terms of any required Letters of Credit to the satisfaction of the Regional Solicitor.
3. The Regional Chair and Clerk be authorized to execute the necessary agreements, required to implement the Program, subject to the recommendation of the Regional Solicitor as to form and content.
4. This report be circulated by the Regional Clerk to all local municipal Clerks and Planning Directors/Commissioners.

#### **2. PURPOSE**

The purpose of this report is to seek Council endorsement of the Sustainable Home Incentive Program Implementation Guide (*Attachment 1*).

#### **3. BACKGROUND**

##### **York Region Established a Policy Framework for Sustainability**

In 2007, Regional Council endorsed the York Region Sustainability Strategy, "Toward a Sustainable Region". The purpose of this strategy is to provide a long-term framework for making municipal decisions that better integrate the economy, environment and community.

In addition, Regional Council endorsed draft criteria for building new communities in York Region in March 2009. These criteria were developed in consultation with residents and stakeholders through a number of consultation sessions including the *New Communities Workshop* (2006) and the *Best Practises Workshop* (2007). In addition, the *Best Practices for New Communities Discussion Paper* (2007) provided a foundation for discussion on the creation of the draft criteria. As a result, it is proposed that new communities within York Region will achieve a higher level of performance in community design, water management, transportation, green space and energy and green buildings. Following the circulation of the criteria for review and comment, the finalized criteria will form part of the Region's new official plan.

### **York Region Builds Upon the Existing Sustainability Policy Framework**

In June 2007, Regional Council endorsed the Sustainable Development through LEED<sup>®</sup> program. This program was developed to provide additional servicing allocation as an incentive to encourage more sustainable high-density residential development with Regional and local Centres and Corridors. As a next step, it was envisioned that staff would develop a complementary program that encourages the construction of more energy efficient and sustainable grade related housing throughout York Region.

### **Summary of the Sustainable Home Incentive Program**

In April 2009, Regional Council adopted in principle, the Sustainable Home Incentive Program. The purpose of this program is to advance sustainable development practices as they relate to grade related residential developments through the provision of a servicing allocation incentive.

In developing the SHIP program, Regional staff determined the level of water savings associated with the proposed program elements related to water conservation. This analysis was used to determine the amount of servicing allocation incentive that could be extended to program participants who meet a specified set of home performance criteria.

### **Level One of the Sustainable Home Incentive Program: 10% Incentive**

In order to receive the 10% servicing allocation incentive, water savings must be achieved by implementing the following water conservation measures into new home construction, including:

- Low Flow (4.8 LPF) single flush toilets installed through out the home
- Low flow showerheads, faucets and aerators installed through out the home
- Water efficient clothes washers
- Water efficient dishwashers
- Hot water re-circulating systems

- Water efficient whole home furnace humidifiers
- Home Owner education
- Installation of smart meters
- A minimum of 6 inches of topsoil and water-efficient, drought resistant sod throughout the development.

### **Level Two of the Sustainable Home Incentive Program: 20% Incentive**

Developments that reach a higher level of conservation through more progressive and innovative approaches to home building should be rewarded. In addition to the criteria outlined above, to qualify for the 20 % servicing allocation incentive, the proposed home must include additional water conservation measures including the following:

- install permeable driveways surfaces (other than sod); and
- rainwater harvesting and storage systems for indoor and outdoor water use;

or

- greywater reuse.

### **Third Party certification is required to ensure success of the Sustainable Home Incentive Program**

The Sustainable Home Incentive Program relies on the requirements of third party rating systems to ensure that all aspects of sustainable construction are addressed including: energy conservation, water conservation, resource management, indoor air quality and home owner education. The Implementation Guide (see *Attachment 1*) provides detailed information on all the technical requirements for each Incentive Level of the Sustainable Home Incentive Program.

## **4. ANALYSIS AND OPTIONS**

### **SUMMARY OF CONSULTATION EFFORTS**

Regional Council requested that staff proceed with developing an Implementation Guide in consultation with municipal, industry and development representatives. This report provides a summary of the feedback received on the proposed Sustainable Home Incentive Program Implementation Guide.

### **Municipal and Industry Consultation on the Sustainable Home Incentive Program has been ongoing**

In November 2008, Regional staff conducted a municipal consultation session. The participants were provided with and asked to comment on a draft program framework and approval process. In general, municipal staff who attended the consultation session were

very supportive of the proposed program. There was discussion around the mechanisms for implementing the program including the need for third party verification.

Participation in the Sustainable Home Incentive Program is open to all of York Regions' local municipalities and the Town of East Gwillimbury specifically has been actively pursuing participation in the program. This interest has afforded Regional staff with the unique opportunity for detailed consultation through participation in the East Gwillimbury Water Conservation Working Group. This working group includes representatives from the development industry, engineers, water conservation experts, municipal and regional staff. The focus of the Water Conservation Group is to explore the feasibility of incorporating sustainable development criteria within East Gwillimbury. This Sustainable Home Incentive Program has been reviewed within this context and will be utilized to help advance sustainable development within the Town of East Gwillimbury.

There has also been ongoing consultation with representatives from the building industry. In July 2009, Regional staff circulated the draft implementation guide to area municipalities, water conservation experts, green building and BILD for further review and comment. The following is a summary and discussion of the comments that have been received to date.

### **Local Municipal Partners are generally supportive**

In general, municipal staff who reviewed the proposed Implementation Guide were supportive. Local municipal partners (CBO's) requested further information and clarification on who qualifies and who would be expected to provide the third party inspections. Local municipalities were advised that the Sustainable Home Incentive Program was designed to provide third party certification through the LEED Canada for Homes or an equivalent third party rating system. The advantage of utilizing an existing third party rating system provides York Region and program participants with an existing process and access to trained professional evaluators. As such, there would be no added inspection required from the local building departments/inspectors.

In addition, the SHIP implementation program has been created so that participation in this program is easily incorporated into the existing approvals process for site plans, and plans of subdivision and condominium.

### **The Building/Development Industry are encouraged by the incentive program**

Development industry representatives advised that they are encouraged to see that York Region has created a voluntary incentive program that recognizes the reduced servicing demands of homes with green building features. Community Planning staff have already received several inquiries and requests for information on the Implementation Guide from the development industry.

There were some issues raised regarding the impact the Sustainable Home Incentive Program and green features may have on housing affordability.

### **Green features increase resale value 5 - 15%**

One of the considerations that guided development of the Sustainable Home Incentive Program was applicability to the production homebuilder. SHIP is a voluntary program and therefore it will be at the discretion of the builder/developer whether to participate or not.

Information from the Canadian Green Building Council, LEED® Canada for Homes Program Workshop estimates increased costs to the home purchaser of between 3 to 5 % for a LEED home over a conventionally built home. This increase in cost is variable depending on the green features that have been incorporated into the home and the builder's experience in constructing green homes.

In 2008, Enerquality Corporation conducted a Energy Efficiency/Green Building Study that indicated that Canadian buyers are willing to pay a \$10,000 dollar premium for energy efficient homes. Consumers are realizing that the monthly savings in utility costs offset the increased mortgage costs for energy efficient homes. There is also increasing evidence that energy efficient buildings and homes have an increased resale value of 5 to 15% over conventional buildings.

### **Letter of Credit ensures compliance**

In order to ensure that the anticipated water savings are realized through the Sustainable Home Incentive Program, program participants are required to post of a Letter of Credit in the amount of \$2,500 per home until performance has been demonstrated.

If a home does not achieve certification, the builder will have one year from the date of occupancy to take remedial action to achieve certification. If after one year, certification for a home isn't achieved, the Region will withdraw all of the funds from the Letter of Credit. The funds will be directed towards the Regional Water for Tomorrow Program. The Water for Tomorrow Program is a comprehensive water efficiency program designed to promote the importance of water conservation to existing housing and business.

### **HIGHLIGHTS OF THE IMPLEMENTATION GUIDE**

The Implementation Guide provides a detailed description of the Sustainable Home Incentive Program including:

- eligibility criteria
- technical specifications and supporting documentation
- easy to use forms

- checklists to clarify and simplify participation in the program

## **5. FINANCIAL IMPLICATIONS**

Administration of the program has been built into the existing planning review process and will be addressed through the existing staff complement. Utilization of third party rating system provides access to an established process and professional raters thereby reducing the need for additional municipal staff to administer the program. Training on the proposed program will also be provided to interested parties utilizing the existing staff complement.

## **6. LOCAL MUNICIPAL IMPACT**

The Sustainable Home Incentive Program supports the completion of planned communities by providing the local municipalities with the opportunity to advance additional residential development based on a more efficient use of resources and infrastructure. It may also result in a positive financial impact on the delivery of local services through enhanced conservation and servicing efficiencies.

The Sustainable Home Incentive Program utilizes LEED Canada for Homes (or equivalent third party rating system) to provide certainty that the required sustainability measures are effectively translated from design into construction. The use of an existing third party rating system provides York Region and program participants with an existing process and trained professional raters to facilitate implementation of this program. Municipalities who choose to undertake the creation of an independent third party verification process equivalent to LEED<sup>®</sup> Canada for Homes may incur resource and cost implications.

The local municipalities will be required to endorse this program in order for individual developers/builders to participate in the Sustainable Home Incentive Program.

## **7. CONCLUSION**

The Sustainable Home Incentive Program builds upon the Sustainable Development through LEED program. It is a voluntary green building incentive program that encourages the construction of a more sustainable form of grade related housing throughout York Region. It also serves to demonstrate to the broader development and building industry new ways of designing and building grade related residential housing that are both marketable and cost effective over the long term.

The Implementation Guide was developed in consultation with Regional staff, local municipalities, and representatives of the development industry to provide guidance on participation in the Sustainable Home Incentive Program.

The success of the Program is based upon a co-operative partnership between the Region, Local Municipalities and development industry. It is important to continually evaluate the Program and the implementation details, especially with the first few applications, to ensure the Program is successful and creates a true incentive to build more sustainable development creating a better living environment and reducing green house gas emissions.

For more information on this report, please contact Teresa Cline, Planner at (905) 830-4444, Ext.1533 or Heather Konefat, Director of Community Planning at Ext. 1502.

The Senior Management Group has reviewed this report.

*(The attachment referred to in this clause is attached to this report).*

# **“Sustainable Home Incentive Program”**

A Low Density Residential  
‘Green’ Building Incentive Program

The Regional Municipality of York

## **Implementation Guide**



**August 2009**



### **Important Note:**

This document may be revised from time to time for the purpose of clarification and streamlining. In this regard, applicants are asked to contact the York Region Community Planning Branch or visit the York Region website ([www.york.ca](http://www.york.ca)) to ensure that they have the most recent version of the document.

In addition, the Program may be modified in the future to reflect changes made to the LEED® Canada for Homes programs.



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# **1. Program Description**

In 2007, York Region introduced the program “Sustainable Development Through LEED®”. This program provides additional servicing allocation as an incentive to encourage more sustainable high density development within Regional Centres & Corridors.

As a next step, the “Sustainable Home Incentive Program” (SHIP) offers additional servicing allocation as an incentive to encourage more sustainable grade-related residential development. Together, the two programs are intended to cover the full range of housing forms in the Region.

Developers of grade related residential developments, meeting specified eligibility criteria and incorporating various sustainability requirements, may qualify for a reduction in the amount of water and wastewater servicing allocation credits of 10% or 20%. This percentage is based on the total number of residential units within the proposed development participating in the SHIP program.

**Table 1: Sustainable Home Incentive Program Levels**

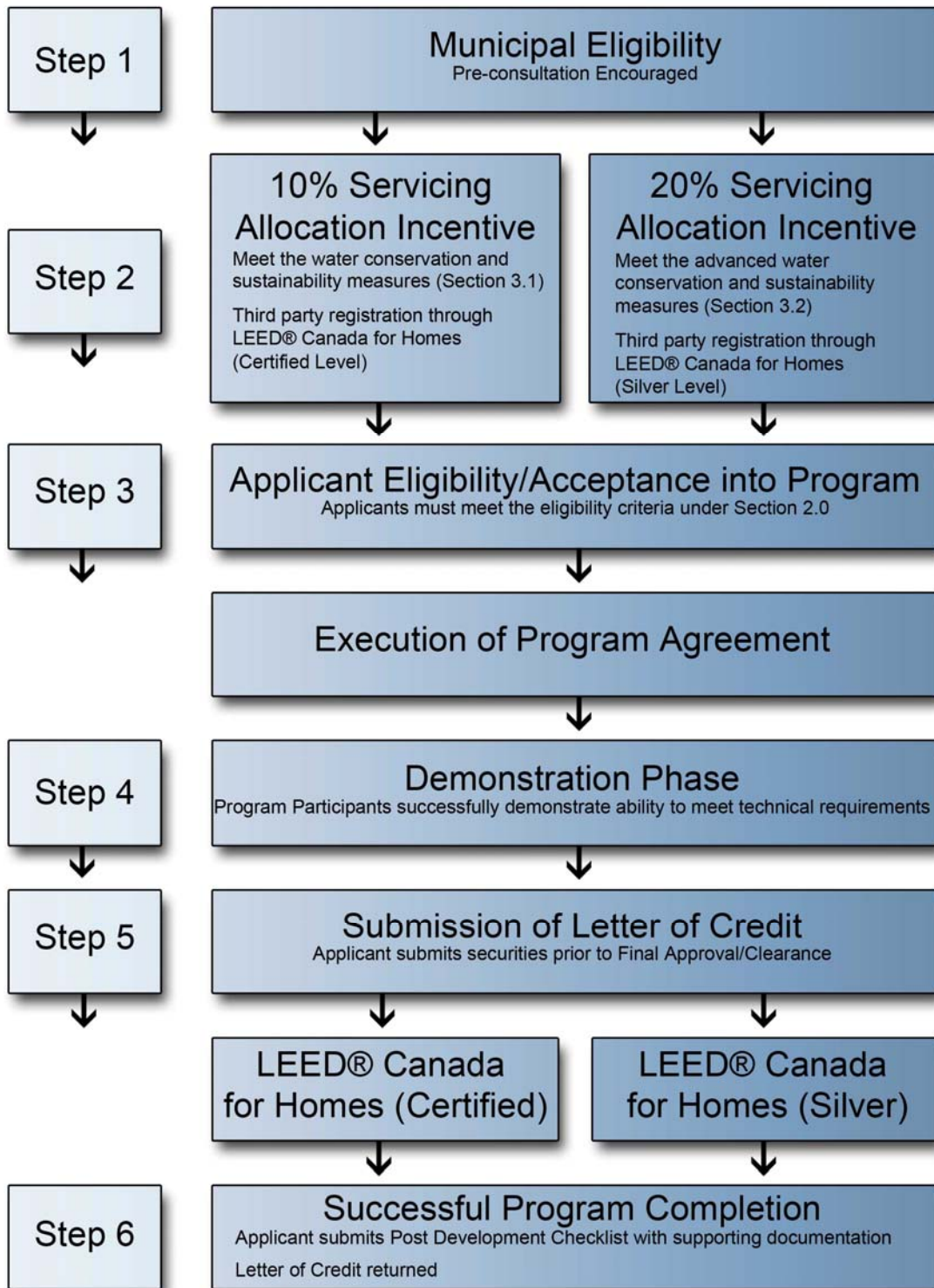
| <b>Incentive Level (%)</b> | <b>Sustainability Level</b>                                                               |
|----------------------------|-------------------------------------------------------------------------------------------|
| <b>20</b>                  | Low Density Development Achieving LEED® Canada for Homes – Silver or above or equivalent* |
| <b>10</b>                  | Low Density Development Achieving LEED® Canada for Homes Certified or equivalent*         |

This is a pilot program for initial 2 years duration. After the 2 year timeframe, the program may be revised and/or cancelled at the discretion of York Region Council.

\*Equivalent means a rating system that achieves a similar outcome and provides a creditable third party rating system – this will be assessed on municipal basis with the support by the local municipality.



**Table 2 - Sustainable Home Incentive Program Pathways**



## **2. Eligibility Criteria**

### **2.1 Municipal Eligibility Criteria**

Water Conservation is a critical component of sustainable development and a critical component of this program. The program requires the continued and enhanced partnerships with our local municipalities.

The SHIP program is available to grade-related development proposals within a municipality meeting all of the following eligibility criteria:

- i. The local municipality has formally advised York Region that they wish to participate in the program;
- ii. Participation in Regional Inflow and Infiltration (I-I) Reduction programs;
- iii. Participation in Regional water efficiency plans and policies that implement and support the Region's Water for Tomorrow program;
- iv. Adoption of Regional design, commissioning and construction standards/best practices for municipal and private water and wastewater connections;
- v. Partner with York Region to implement water system leakage reduction programs as they are developed;
- vi. Amendment of outdoor water-use by-laws to reflect best practices principles to be established by York Region; and

### **2.2 Development Eligibility Criteria**

Prior to acceptance in the program, developers are required to confirm that all homes within the proposed development will be eligible for certification under the LEED® Canada for Homes or equivalent program. In addition, the applicant will be required to confirm that the proposed development is permitted under all applicable official plan policies without the need for an official plan amendment.



### **3. Program Criteria**

To receive a servicing allocation credit, proposed developments must achieve a higher level of building performance than typically achieved through the current requirements of the Ontario Building Code Act.

This higher level of performance is guaranteed by identifying the technical specifications required in exchange for the servicing allocation credit of either 10% or 20%. This chapter outlines the technical specifications that are mandatory for each of the incentive levels.

Note: LEED® Canada for Homes includes 19 prerequisite measures that must be achieved to be eligible for certification. One of the prerequisites stipulates that the home meets the requirements of the US version of the ENERGY STAR® for New Homes program.

Applicants need to ensure that they satisfy the requirements of the Sustainable Home Incentive Program and obtain LEED® Canada for Homes certification.

#### **3.1 Technical Specifications for Level 1** **(10% Servicing Allocation Incentive)**

At this incentive level, third party certification can be achieved through the LEED® Canada for Homes program. The following provides an outline of the technical specifications (Form 3) required to achieve the 10% servicing allocation credit.

##### **1. Water Conservation Measures**

- 4.85 LPF high efficiency single flush toilets shall be installed in 100% percent of bathrooms or water closets;
- Low flow lavatory faucets (max flow of 5.87 litres per minute);

- Low flow shower faucets (max flow of 7.5 litres per minute);
- Water efficient Dishwasher ( $\leq 20.0$  litres per cycle);
- Water efficient Clothes washer (Water Factor of  $\leq 7.5$ );
- Hot Water Recirculation System;
- Installation of whole-home water- and energy-saving humidifiers;
- A minimum requirement of 6 inches of topsoil provided throughout the development;
- Provision of water-efficient, drought resistant sod throughout the development; and
- Irrigation systems will not be permitted.

## **2. Energy Conservation Measures**

- Homes to be constructed in accordance with Energy Star<sup>®</sup> for New Homes Technical Specifications;

## **3. Indoor Air Quality**

- Install water-resistant, hard-surface flooring in kitchens, bathrooms, entryways, laundry areas and utility rooms;
- Use of low VOC paints, varnishes, stains and sealers;
- Installation of heat recovery ventilation systems; and
- Installation of HVAC systems which reduce exposure to indoor air pollutants by ventilating with outdoor air.

## **4. Renewable Energy**

- Solar Ready - Conduit from roof to mechanical room to enable retrofit to solar energy;

## **5. Resource Management**

- Material efficient framing (i.e. wall stud spacing 24" on centre);
- Increased use of recycled and/or environmentally preferred products; and
- Construction waste management plans; and



## **6. Homeowner Education**

- Educational programs and informational brochures for Homeowners that explain the use and maintenance of the sustainability features incorporated into the home.

### **3.2 Technical Specifications for Level 2** **(20% Servicing Allocation Credit)**

Developments that reach a higher level of sustainability through more progressive and innovative approaches to home building should be rewarded. Developments that meet the following technical specifications (Form 4) will qualify for a 20% servicing allocation credit.

#### **1. Water Conservation Measures**

- 4.1 LPF single flush toilets shall be installed in 100 % percent of bathrooms or water closets;
- Low flow lavatory faucets (max flow of 5.60 litres per minute);
- Low flow shower faucets ( max flow of 6.6 litres per minute);
- Water efficient Dishwasher ( $\leq 20.0$  litres per cycle);
- Water efficient Clothes washer (Water Factor of  $< 5.5$ );
- Hot Water Recirculation System;
- Installation of whole-home water- and energy-saving humidifiers;
- Minimum of 6 inches of topsoil
- 100% drought resistant sod
- Design and provide landscape features that minimize the demand for water and synthetic chemicals by utilizing 100% native and drought resistant species;
- Install permeable driveways surfaces (other than sod);

And one of the following two options:

#### **Option 1**

- Design and install rainwater harvesting and storage systems for irrigation and outdoor water use and indoor water use; and





- External tap (marked “not for drinking”) connected to the rainwater harvesting system;

#### Option 2

- Greywater Reuse

### 2. Energy Conservation Measures

- Homes to be constructed in accordance with Energy Star® for New Homes Technical Specifications;
- Increased insulation levels throughout the building envelope;
- Triple pane windows with low emissive coatings to help reflect heat and sunlight;
- Design and provide landscape features that minimize solar gain in the summer and maximize solar gain in the winter; and
- Real time energy monitors for Homeowner awareness.

### 3. Indoor Air Quality

- Install water-resistant, hard-surface flooring in kitchens, bathrooms, entryways, laundry areas and utility rooms;
- Use of low VOC paints, varnishes, stains and sealers;
- Installation of HVAC systems which reduce exposure to indoor air pollutants by ventilating with outdoor air.
- Install heat recovery ventilation systems
- Enhanced combustion-venting measures for fireplaces;
- Enhanced outdoor air ventilation; and
- Garage pollution protection

### 4. Renewable Energy

- Solar Ready - Conduit from roof to mechanical room to enable facilitate use of solar energy;
- Orient homes or roofs for solar design (ensure 450 sq ft property oriented for solar applications);
- Installation of electrical systems needed to make home solar ready; and
- Solar assisted water and air preheating systems



## **5. Resource Management**

- Material efficient framing (i.e. wall stud spacing 24" on centre);
- Increased use of environmentally preferred products;
- Advanced on-site waste diversion and recycling programs during construction;
- Greater incorporation of recycled content in building materials; and
- Greater reliance on locally sourced materials.

## **6. Enhanced Homeowner Education**

- Enhanced training for the Homeowner that could include additional training, or group homeowner training supported by an operation and maintenance manual and/or DVD.



## **4. Program Flow**

### **1. Program Eligibility**

Applicants must ensure that the proposed development meets the program eligibility criteria identified in Section 2.21. Pre-consultation meetings between the development team, regional staff and local municipal staff are encouraged and should occur as early in the planning process as possible.

### **2. Submission Requirements**

Upon confirming eligibility, the applicant is required to submit a formal application package to the Community Planning Branch. This formal application package should include:

- The Sustainable Home Incentive Application Form;
- Eligibility Confirmation Letter from the Local Municipality;
- Confirmation that the proposed development has been registered in the LEED<sup>®</sup> Canada for Homes Program with the Canada Green Building Council or equivalent commitment;
- Commitment to implement the 'Sustainable Home Incentive Program' mandatory performance criteria, through submission of the appropriate Technical Specification Checklist.

### **3. Review and Acceptance in SHIP**

Upon acceptance into the Program, the applicant is required to enter into a Program Agreement outlining the terms and conditions of the program, including:

- Demonstration models/phases
- Letters of Credit – timing of submission and amounts
- Remedial action should performance expectations not be met (retrofits in existing housing stock).

Upon execution of the Program Agreement the Region will provide the following:

- Confirmation of Allocation Credit Letter to the area municipality with copies to the applicant.



Note: Participants in this program do not “own” the allocation earned through this program. The credit will be extended to the area municipality to assign in accordance with their respective allocation policies.

#### **4. Demonstration of Performance**

Program participants are required to build demonstration models or a demonstration phase to ensure program success. Program participants are required to post a Letter of Credit with York Region until the successful completion of the demonstration phase.

Please note, that once the demonstration model or phase has been successfully completed, the program participant can certify homes using the sampling methods available through LEED® Canada for Homes programs.

#### **5. Final Approval**

To initiate Final Approval, the applicant will be asked to submit a request for clearance to the Community Planning Branch. At this time, Community Planning will require program participants to submit a Program Letter of Credit (\$2,500 per unit within the proposed development) to secure the remainder of the proposed development.

#### **6. Post Development Submission**

In order to initiate release of the Letter of Credit, program participants are required to submit the information outlined in the Post Development Checklist, including:

- Documentation from third party certification verifying that each home within the development was built according to the specifications of the program;
- Documentation that each home within the development achieved the appropriate third party certification;
- A copy of the Homeowner education materials;
- A copy of the Construction Waste Management Plan(s); and



- A summary of the recycled/environmentally preferable products that were incorporated into the project

Upon review of the material, Community Planning staff will confirm if the Letter of Credit can be released. If the applicant is unable to achieve certification, the posted securities would be drawn upon to fund a water conservation retrofit program.



# Attachments



# FORM 1

## PROGRAM COMPLIANCE CHECKLIST

| SHIP Program Components                                 |                                                                                                                                                              | Check box to confirm completion of each step |
|---------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------|
| <b>Program Eligibility</b>                              |                                                                                                                                                              |                                              |
| Municipal Eligibility Criteria<br>Section 2.1 (i to vi) | Municipality has formally advised York Region that they wish to participate in the SHIP program and commit to fulfilling all municipal eligibility criteria. | <input type="checkbox"/>                     |
| Municipal Eligibility Criteria<br>Section 2.1 (vii)     | Letter from Local Planning Department indicating no objection to the development being considered under the program.                                         | <input type="checkbox"/>                     |
| Development Eligibility Criteria<br>2.2                 | Provide documentation that the proposed development has been registered for participation in the LEED® Canada for Homes Program or equivalent.               | <input type="checkbox"/>                     |

|                                            |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |                          |
|--------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------|
| <b>Application Submission Requirements</b> |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |                          |
| Program Criteria<br>3.1/3.2                | <p>Completed Submission and Technical Specification Checklists returned with supporting information to the Community Planning Branch including:</p> <ul style="list-style-type: none"> <li>▪ Subdivision/site plan application</li> <li>▪ Confirmation of eligibility (see above)</li> <li>▪ Indication of incentive level</li> <li>▪ Property, Owner and Agent Information</li> </ul> <p>**Developer/Third party certification service provider to sign off that the mandatory technical specifications have been/will be implemented into design process.</p> | <input type="checkbox"/> |

|                                              |                                                                                                                                                                                                                                                                                                                                     |                          |
|----------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------|
| <b>Review and Acceptance in SHIP Program</b> |                                                                                                                                                                                                                                                                                                                                     |                          |
|                                              | Region to confirm acceptance of project into the program and the amount of the potential servicing allocation credit to the area municipality and the applicant.                                                                                                                                                                    | <input type="checkbox"/> |
|                                              | <p>Applicant is required to enter into a program agreement with York Region which outlines the terms and conditions of the program:</p> <ul style="list-style-type: none"> <li>▪ Demonstration models/phases</li> <li>▪ Letter of Credit – timing of submission and amount</li> <li>▪ Remedial action should performance</li> </ul> | <input type="checkbox"/> |



|  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |                          |
|--|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------|
|  | expectations not be met (retrofits in existing housing stock)                                                                                                                                                                                                                                                                                                                                                                                                          |                          |
|  | <p>York Region will provide conditions of draft plan approval/site plan approval on proposed development. The program-related conditions will be incorporated into our overall review and comment of the development application including conditions related to:</p> <ul style="list-style-type: none"> <li>▪ Hold provisions on bonus units;</li> <li>▪ Requirement for demonstration model homes/phases;</li> <li>▪ LC submitted Prior to Final Approval</li> </ul> | <input type="checkbox"/> |

| Demonstration of Performance |                                                                                                                         |                          |
|------------------------------|-------------------------------------------------------------------------------------------------------------------------|--------------------------|
|                              | Applicant to provide verification that program performance was achieved successfully in the demonstration phase/models. | <input type="checkbox"/> |
|                              | Region provides confirmation that Hold can be removed based on the above.                                               | <input type="checkbox"/> |

| Final Approval |                                                                                  |                          |
|----------------|----------------------------------------------------------------------------------|--------------------------|
|                | Applicant submits request for clearance                                          | <input type="checkbox"/> |
|                | Applicant to submit letter of credit to secure remainder of proposed development | <input type="checkbox"/> |

| Post Development Submission |                                                                                                                                                                                                                                                                                                                                            |                          |
|-----------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------|
|                             | <p>Completed Post Development Checklist returned with supporting information to the Community Planning Branch including:</p> <ul style="list-style-type: none"> <li>▪ Request for release of securities</li> <li>▪ Confirmation of Certification and SHIP program requirements</li> <li>▪ Property, Owner and Agent Information</li> </ul> | <input type="checkbox"/> |
|                             | Community Planning Staff will review materials submitted and confirm (as appropriate) to the Finance Department that the Letter of Credit can be released                                                                                                                                                                                  | <input type="checkbox"/> |





## Sustainable Home Incentive Program Application Form/Checklist

The following list of materials, along with this completed form, shall be submitted to the York Region Community Planning Branch in order it initiate a request for Servicing Allocation Credits under the 'Sustainable Home Incentive Program'.

| Submission Checklist                                                                                                                                                                                    | Check box to confirm that material is attached |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------|
| A formal subdivision application                                                                                                                                                                        | <input type="checkbox"/>                       |
| Confirmation from the local municipality that they wish to participate in the program and meets the <u>municipal</u> eligibility criteria.                                                              | <input type="checkbox"/>                       |
| Confirmation from the local planning department that the proposed development meets the <u>development</u> eligibility criteria                                                                         | <input type="checkbox"/>                       |
| Documentation confirming the development has been registered in the LEED® Canada for Homes Program or equivalent                                                                                        | <input type="checkbox"/>                       |
| Please indicate which Servicing Allocation Credit Option is being applied for: 10 % or 20 %.<br><br>Please indicate the total number of residential units within the proposed development.              | _____ %<br><br>_____                           |
| Confirmation from “third party rater” that the Mandatory Technical Specifications have been targeted and can be achieved through the home certification process.                                        | <input type="checkbox"/>                       |
| Technical Specification Checklist <ul style="list-style-type: none"> <li>▪ Use checklist associated with intended incentive level</li> <li>▪ Form 3 or Form 4 signed by Owner and Certifier.</li> </ul> | <input type="checkbox"/>                       |



### Subject Property Information

|                    |                    |
|--------------------|--------------------|
| Municipal Address: |                    |
|                    |                    |
| Lot Number:        | Concession Number: |
|                    |                    |
| Area Municipality: | Local File Number: |
|                    |                    |

### Registered Owner

|                   |                |
|-------------------|----------------|
| Owner:            | Contact Name:  |
|                   |                |
| Telephone Number: | Fax Number:    |
|                   |                |
| Address:          | E-mail Address |
|                   |                |

### Agent/Applicant (if different from Owner)

|                   |                |
|-------------------|----------------|
| Agent/Applicant:  | Contact Name:  |
|                   |                |
| Telephone Number: | Fax Number:    |
|                   |                |
| Address:          | E-mail Address |
|                   |                |



## Form 3

### Level One (10%) Technical Specifications LEED® Canada for Homes (Certified)

| Program Criteria – Level One Technical Specifications |                                                                     |                             |                          |
|-------------------------------------------------------|---------------------------------------------------------------------|-----------------------------|--------------------------|
| 3.1.1                                                 | Water Conservation Measures                                         | LEED® Canada for Homes      | Incorporated into Design |
|                                                       | 4.85 LPF high efficiency toilets in all bathrooms and water closets | WE 4.2 (1 point)            | <input type="checkbox"/> |
|                                                       | 5.87 LPM Lavatory Faucets                                           | WE 4.2 (1 point)            | <input type="checkbox"/> |
|                                                       | 7.5 LPM Shower Faucets                                              | WE 4.2 (1 point)            | <input type="checkbox"/> |
|                                                       | Water Efficient Dishwasher ( $\leq 20.0$ L/cycle)                   | EA 9.1 (0.5 points)         | <input type="checkbox"/> |
|                                                       | Water Efficient Clothes washer (WF of $\leq 7.5$ )                  | EA 9.1 (0.5 points)         | <input type="checkbox"/> |
|                                                       | Hot water Recirculation System                                      | EA 7.1 (2 points)           | <input type="checkbox"/> |
|                                                       | Whole home water and energy efficient humidifier                    | NA                          | <input type="checkbox"/> |
|                                                       | Minimum of 6 inches of topsoil                                      | NA                          | <input type="checkbox"/> |
|                                                       | 100 % drought resistant sod                                         | SS 2.2 (2 points)           | <input type="checkbox"/> |
|                                                       | No irrigation systems                                               | NA                          | <input type="checkbox"/> |
| 3.1.2                                                 | Energy Conservation Measures                                        | LEED® Canada for Homes      | Criteria Achieved        |
|                                                       | Energy Star® for New Homes – Technical Specifications               | EA 1.1 Prerequisite         | <input type="checkbox"/> |
| 3.1.3                                                 | Indoor Air Quality                                                  | LEED® Canada for Homes      | Criteria Achieved        |
|                                                       | Water-resistant hard-surface flooring in “wet” areas of the home    | ID 2.1 and 2.2 Prerequisite | <input type="checkbox"/> |
|                                                       | Use of low VOC paints, etc.                                         | MR 2.2(b) (8 points)        | <input type="checkbox"/> |
|                                                       | Installation of HVAC systems                                        | EA 6.1 Prerequisite         | <input type="checkbox"/> |
|                                                       | Install heat recovery ventilation systems                           | EQ 4.2 (B) (2 points)       | <input type="checkbox"/> |



|       |                                                            |                          |                          |
|-------|------------------------------------------------------------|--------------------------|--------------------------|
| 3.1.4 | Renewable Energy                                           | LEED® Canada for Homes   | Criteria Achieved        |
|       | Solar Ready - Install conduit from roof to mechanical room | NA                       | <input type="checkbox"/> |
| 3.1.5 | Resource Management                                        | LEED® Canada for Homes   | Criteria Achieved        |
|       | Material efficient framing                                 | MR 1.3<br>(3 points)     | <input type="checkbox"/> |
|       | Recycled/Environmentally Preferable products               | MR 2.2 (a)<br>(8 points) | <input type="checkbox"/> |
|       | Construction Waste Management Plans                        | MR 3.1<br>Prerequisite   | <input type="checkbox"/> |
| 3.1.6 | Homeowner Education                                        | LEED® Canada for Homes   | Criteria Achieved        |
|       | Basic homeowner education programs                         | AE 1.1<br>Prerequisite   | <input type="checkbox"/> |

#### Owner/Applicant Verification

By signing this form, I understand and commit to implementing the mandatory technical specifications identified in the checklist above. I understand that these mandatory measures must be achieved as a condition of participation in the Sustainable Home Incentive Program and may be above and beyond the technical specifications required through any third party certification process.

Date:

Signature

#### Third Party Certification Verification:

By signing this form, I am verifying that the applicant is pursuing the mandatory technical specifications of the Regional Sustainable Home Incentive Program through the third party certification program.

Date:

Signature



## Form 4

### Level Two (20%) Technical Specifications LEED® Canada for Homes (Silver)

| Program Criteria – Level One Technical Specifications |                                                                                                                          |                             |                          |
|-------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------|-----------------------------|--------------------------|
| 3.2.1                                                 | Water Conservation Measures                                                                                              | LEED® Canada for Homes      | Incorporated             |
|                                                       | 4.1 LPF Toilets in 100% of all bathrooms or water closets                                                                | WE 4.3 (2 points)           | <input type="checkbox"/> |
|                                                       | 5.6 LPM Lavatory Faucets                                                                                                 | WE 4.3 (2 points)           | <input type="checkbox"/> |
|                                                       | 6.6 LPM Shower Faucets                                                                                                   | WE 4.3 (2 points)           | <input type="checkbox"/> |
|                                                       | Water Efficient Dishwasher (≤ 20.0 L/cycle)                                                                              | EA 9.1 (0.5 points)         | <input type="checkbox"/> |
|                                                       | Water Efficient Clothes washer (WF of < 5.5)                                                                             | EA 9.2 (1 point)            | <input type="checkbox"/> |
|                                                       | Hot water Recirculation System                                                                                           | EA 7.1 (2 points)           | <input type="checkbox"/> |
|                                                       | Whole home water and energy efficient humidifier                                                                         | NA                          | <input type="checkbox"/> |
|                                                       | Minimum of 6 inches of topsoil                                                                                           | NA                          | <input type="checkbox"/> |
|                                                       | 100 % drought resistant sod                                                                                              | SS 2.2 (2 points)           | <input type="checkbox"/> |
|                                                       | 100 % native and drought resistant plant species utilized in landscaping                                                 | SS 2.4 (2 points)           | <input type="checkbox"/> |
|                                                       | Install permeable driveway surfaces                                                                                      | SS 4.1 (b) (4 points)       | <input type="checkbox"/> |
| And                                                   |                                                                                                                          |                             |                          |
|                                                       | Design and Install rainwater harvesting and storage systems                                                              | WE 1.1 (5 points)           | <input type="checkbox"/> |
|                                                       | rainwater harvesting system used for irrigation and outdoor water use (External tap should be marked “not for drinking”) | WE 2.4 (4 points)           | <input type="checkbox"/> |
| OR                                                    |                                                                                                                          |                             |                          |
|                                                       | Greywater reuse                                                                                                          | WE 1.2 (5 points)           | <input type="checkbox"/> |
| 3.2.2                                                 | Energy Conservation Measures                                                                                             | LEED® Canada for Homes      | Incorporated             |
|                                                       | Energy Star for New Homes – Technical Specifications                                                                     | EA 1.1 Prerequisite         | <input type="checkbox"/> |
|                                                       | Increased Insulation levels                                                                                              | EA 2.2 (2 points)           | <input type="checkbox"/> |
|                                                       | Triple pane windows with low emissive coatings to help reflect heat and sunlight                                         | EA 4.2 (2 points)           | <input type="checkbox"/> |
|                                                       | Design and provide landscape features that minimize solar gain in summer and maximize solar gain in the winter           | ID 1.5 (0.5 points)         | <input type="checkbox"/> |
|                                                       | Real time energy monitors                                                                                                | NA                          | <input type="checkbox"/> |
| 3.2.3                                                 | Indoor Air Quality                                                                                                       | LEED® Canada for Homes      | Incorporated             |
|                                                       | Water-resistant hard-surface flooring in “wet” areas of the home                                                         | ID 2.1 and 2.2 Prerequisite | <input type="checkbox"/> |
|                                                       | Installation of High efficiency HVAC systems                                                                             | EA 6.2 (2 points)           | <input type="checkbox"/> |
|                                                       | Enhanced outdoor air ventilation                                                                                         | EQ 4.2 (2 points)           | <input type="checkbox"/> |
|                                                       | Install heat recovery ventilation systems                                                                                | EQ 4.2 (B) (2 points)       | <input type="checkbox"/> |



|                                                                                                                                                                                                                                                                                                                                                                                                |                                                                      |                         |                          |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------|-------------------------|--------------------------|
|                                                                                                                                                                                                                                                                                                                                                                                                | Use of low VOC paints, etc.                                          | MR 2.2(b) (8 points)    | <input type="checkbox"/> |
|                                                                                                                                                                                                                                                                                                                                                                                                | Enhanced combustion-venting measures for fireplaces                  | EQ 2.1 (2 points)       | <input type="checkbox"/> |
|                                                                                                                                                                                                                                                                                                                                                                                                | Garage pollution protection                                          | EQ 10.2 (2 points)      | <input type="checkbox"/> |
| 3.2.4                                                                                                                                                                                                                                                                                                                                                                                          | Renewable Energy                                                     | LEED® Canada for Homes  | Incorporated             |
|                                                                                                                                                                                                                                                                                                                                                                                                | Install conduit from roof to mechanical room                         | NA                      | <input type="checkbox"/> |
|                                                                                                                                                                                                                                                                                                                                                                                                | Orient homes or roofs for solar gain                                 | ID 1.5 (c) (0.5 points) | <input type="checkbox"/> |
|                                                                                                                                                                                                                                                                                                                                                                                                | Installation of electrical systems required to make home solar ready | ID 1.5 (d) (0.5 points) | <input type="checkbox"/> |
|                                                                                                                                                                                                                                                                                                                                                                                                | Solar assisted water and air preheating system                       | EA 7.3 (3 points)       | <input type="checkbox"/> |
| 3.2.5                                                                                                                                                                                                                                                                                                                                                                                          | Resource Management                                                  | LEED® Canada for Homes  | Incorporated             |
|                                                                                                                                                                                                                                                                                                                                                                                                | Material efficient framing                                           | MR 1.3 (3 points)       | <input type="checkbox"/> |
|                                                                                                                                                                                                                                                                                                                                                                                                | Use of locally sourced materials                                     | MR 2.2 (b) (8 points)   | <input type="checkbox"/> |
|                                                                                                                                                                                                                                                                                                                                                                                                | Greater incorporation of Recycled/Env. Preferable products           | MR 2.2 (a)              | <input type="checkbox"/> |
|                                                                                                                                                                                                                                                                                                                                                                                                | Advanced Construction Waste Management and recycling programs        | MR 3.2 (3 points)       | <input type="checkbox"/> |
| 3.2.6                                                                                                                                                                                                                                                                                                                                                                                          | Homeowner Education                                                  | LEED® Canada for Homes  | Incorporated             |
|                                                                                                                                                                                                                                                                                                                                                                                                | Enhanced homeowner education programs                                | AE 1.2 (1 point)        | <input type="checkbox"/> |
| <b>Owner/Applicant Verification</b>                                                                                                                                                                                                                                                                                                                                                            |                                                                      |                         |                          |
| By signing this form, I understand and commit to implementing the mandatory technical specifications identified in the checklist above. I understand that these mandatory measures must be achieved as a condition of participation in the Sustainable Home Incentive Program and may be above and beyond the technical specifications required through any third party certification process. |                                                                      |                         |                          |
| <b>Date:</b>                                                                                                                                                                                                                                                                                                                                                                                   |                                                                      | <b>Signature</b>        |                          |
|                                                                                                                                                                                                                                                                                                                                                                                                |                                                                      |                         |                          |
| <b>Third Party Certification Verification:</b>                                                                                                                                                                                                                                                                                                                                                 |                                                                      |                         |                          |
| By signing this form, I am verifying that the applicant is pursuing the mandatory technical specifications of the Regional Sustainable Home Incentive Program through the third party certification program.                                                                                                                                                                                   |                                                                      |                         |                          |
| <b>Date:</b>                                                                                                                                                                                                                                                                                                                                                                                   |                                                                      | <b>Signature</b>        |                          |
|                                                                                                                                                                                                                                                                                                                                                                                                |                                                                      |                         |                          |



## Sustainable Home Incentive Program Post Development Submission Checklist

The following list of materials, along with this completed form, shall be submitted to the York Region Community Planning Branch in order to initiate the release of securities held under the 'Sustainable Home Incentive Program'.

| Post Development Submission Checklist                                                                                                                                                                                                                                | Check box to confirm that material is attached |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------|
| Request for release of securities                                                                                                                                                                                                                                    | <input type="checkbox"/>                       |
| Please indicate the development certification program and level<br><br>Please indicate the number of residential units that obtained the targeted certification level.<br><br>Please indicate the total number of residential units within the proposed development. | _____<br><br>_____<br><br>_____                |
| Documentation confirming the development has been achieved in the GreenHouse™ Certified Construction or LEED® Canada for Homes Program                                                                                                                               | <input type="checkbox"/>                       |
| Confirmation from "third party verifier" that the Mandatory Technical Specifications have been achieved through the home certification process.                                                                                                                      | <input type="checkbox"/>                       |
| Homeowner Education materials                                                                                                                                                                                                                                        | <input type="checkbox"/>                       |
| Summary of the Recycled/Environmentally preferred products                                                                                                                                                                                                           | <input type="checkbox"/>                       |
| Construction Waste Management Plans                                                                                                                                                                                                                                  | <input type="checkbox"/>                       |



### Subject Property Information

|                    |                    |
|--------------------|--------------------|
| Municipal Address: |                    |
|                    |                    |
| Lot Number:        | Concession Number: |
|                    |                    |
| Area Municipality: | Local File Number: |
|                    |                    |

### Registered Owner

|                   |                |
|-------------------|----------------|
| Owner:            | Contact Name:  |
|                   |                |
| Telephone Number: | Fax Number:    |
|                   |                |
| Address:          | E-mail Address |
|                   |                |

### Agent/Applicant (if different from Owner)

|                   |                |
|-------------------|----------------|
| Agent/Applicant:  | Contact Name:  |
|                   |                |
| Telephone Number: | Fax Number:    |
|                   |                |
| Address:          | E-mail Address |
|                   |                |





# DEFINITIONS

## **ENERGY STAR® Qualified Homes:**

A home built to a higher standard of energy efficiency (at least 15% more efficient than the International Energy Conservation Code).

Information on Energy Star can be found at the following link.

[http://www.energystar.gov/index.cfm?c=new\\_homes.hm\\_index](http://www.energystar.gov/index.cfm?c=new_homes.hm_index)

## **ENERGY STAR® with Indoor Air Package:**

A certification program that recognizes homes with systems to ensure high standards of indoor air quality and rated as an ENERGY STAR home.

## **ENVIRONMENTALLY PREFERABLE PRODUCTS:**

For the purposes of this program, qualified products are referenced in the LEED Canada for Homes Rating System – Table 24.

## **GRADE-RELATED/LOW-RISE HOUSING:**

For the purposes of this program, grade-related housing has been defined to include single detached residential, semi-detached residential development, townhomes and low-rise multi-unit residential development with a maximum height of three-storeys.

## **LEED® CANADA FOR HOMES:**

LEED® Canada for Homes is a third party rated program designed to promote sustainable building practices in homebuilding. The Canada Green Building Council (CaGBC) released the LEED® Canada for Homes program in March 2009. The Canadian LEED® for Homes program is based on the following areas of performance, including:

- Innovation and Design Process,
- Location and Linkages
- Sustainable Sites
- Water Efficiency



- Energy & Atmosphere
- Materials and Resources
- Indoor Air Quality, and
- Awareness and Education.

It is important to note that the LEED® Canada also includes 19 pre-requisite measures that must be met to be eligible for certification. One of these prerequisites requires that the home meet the requirements of the US version of Energy Star® for New Homes.

Information on LEED® Canada for Homes can be found at the following link:

<http://www.cagbc.org/leed/systems/homes/index.php>

#### **OR EQUIVELANT:**

An alternative rating system that achieves a similar level of home performance as achieved through LEED® Canada for Homes Program and provides a credible third party verification system.

#### **SERVICING ALLOCATION CREDIT:**

The amount of additional allocation that a development achieves through program participation, which reduces the required servicing allocation assignment required from the local municipality. For example:

| <b>20% Scenario</b>                                                                    | <b>#</b> |
|----------------------------------------------------------------------------------------|----------|
| Total Residential Units Proposed                                                       | 100      |
| Servicing Allocation Credit Generated under 20% Scenario (100 residential units * 20%) | 20       |
| Minimum Reduced Servicing Allocation Assignment required by Municipality               | 80       |
| Allocation Assignment + Credits                                                        | 100*     |
| <i>* No Residual Allocation</i>                                                        |          |

#### **SOLAR READY:**

A home that is equipped for the future use of solar power to heat water or produce electricity for your household.



To be Solar Ready, a home must meet the five basic requirements, including:

- A roof location of suitable size, pitch and orientation
- Labeled conduits from the mechanical room to the attic
- Extra plumbing valves and fittings on the water heater
- An electrical outlet at the planned solar tank location
- Construction plans that indicate the future component locations.

Information on Solar Ready New Homes can be found at the following link.

<http://oee.nrcan.gc.ca/residential/business/new-homes/solar-builder.cfm?attr=4>

#### **SUSTAINABLE DEVELOPMENT THROUGH LEED® PROGRAM:**

An incentive program, offered by York Region, that provides additional servicing allocation to encourage more sustainable high density development within Regional Centres and Corridors.

#### **SUSTAINABLE HOME INCENTIVE PROGRAM:**

An incentive program, offered by York Region that provides additional servicing allocation to encourage more sustainable grade-related development throughout the Region.



# Frequently Asked Questions

## **1. What types of grade-related housing are eligible for participation in the Sustainable Home Incentive Program?**

The types of grade related housing eligible for participation in the 'Sustainable Home Incentive Program, include:

- single detached residential units
- semi-detached residential units
- townhouses; and
- multi-unit residential development with a maximum of three storeys.

## **2. Who at the Region is responsible for developing the municipal programs for water conservation?**

The Environmental Services Department has established the Environmental Promotion and Protection Branch. One of the primary functions of this Branch is the creation and implementation of water conservation programs in partnership with our local municipalities.

## **3. Who is responsible for advising York Region that the local municipality has complied with all the eligibility criteria?**

It is anticipated that each local municipality will review and determine if they wish to participate in this program. The local municipal councils would pass a motion indicating participation in the 'Sustainable Home Incentive Program' as well as committing to comply with the municipal eligibility criteria.

## **4. Would York Region award the allocation credit to a LEED® certified home if it did not have all the water conservation measures required?**

York Region is offering a servicing credit through the Sustainable Home Incentive Program. To be eligible for the incentive, homes must incorporate the water conservation measures as outlined.



We would not be able to award the incentive to a home that was LEED® certified without the water conservation measures.

**5. If I am building a mid-rise residential development, am I eligible to participate in both the Sustainable Development through LEED® program and the Sustainable Home Incentive Program.**

Mid-rise residential developments are only eligible for participation in the Sustainable Development through LEED® program.

**6. Why do I have to be third party certified if the Region has already outlined the mandatory technical specifications?**

In order to offer the program, Regional staff needed a mechanism to ensure that the homes are built to the expected performance standards. The third party certification programs offer existing infrastructure, including trained staff, to provide “in-the-field” verification.

**7. What happens if I don’t achieve third party certification in the demonstration phase?**

There are several options:

1. The applicant would be provided the opportunity to take remedial action to achieve certification.
2. The applicant, third party certification verifier, municipality and Region would meet to discuss why certification was not achieved. If the third party certification service provider was confident that the builder was gaining the necessary experience to obtain certification, York Region would consider another demonstration phase subject to the applicant demonstrating that the demonstration homes met water conservation targets.
3. The allocation credit would be rescinded and the development would no longer be eligible for participation in the Sustainable Home Incentive Program. The Region would draw on the



Letter of Credit to fund Water for Tomorrow program in the subject municipality.

**8. Would the Region consider alternative valid technologies permitted under the certification program?**

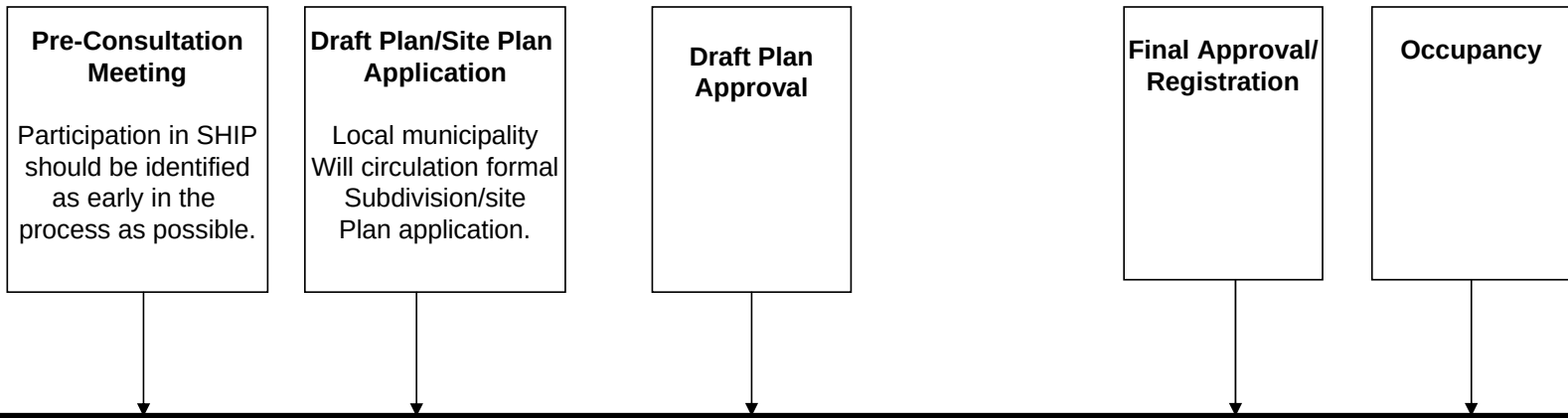
The servicing allocation incentive offered through this program is based on the analysis of potential water savings achieved through the mandatory water conservation measures. If the applicant could demonstrate equal or greater water savings between technologies then the Region would consider alternative technologies.





# Process Flow Chart

## Local Municipal Approval Process



## Sustainable Home Incentive Program

