

The Neighbourhood Sustainability Framework and Assessment Kit

Part IV: Guidelines for Using the Observational Tool



The Observational Tool is designed to undertake a basic sustainability assessment of neighbourhoods. It is used for both existing and new neighbourhoods and is useful in quickly highlighting strengths and weaknesses. It enables decisions on how to prioritise interventions to improve neighbourhood performance to be made. In addition, this assessment identifies the need for further analysis of particular issues and informs development of resource applications.

Because the elements measured by the Observational Tool contribute to each of the six domains in multiple ways, assessment of each can be obscured when aggregated to the domain level. For this reason, assessment remains at the element level, with data entry and calculations over

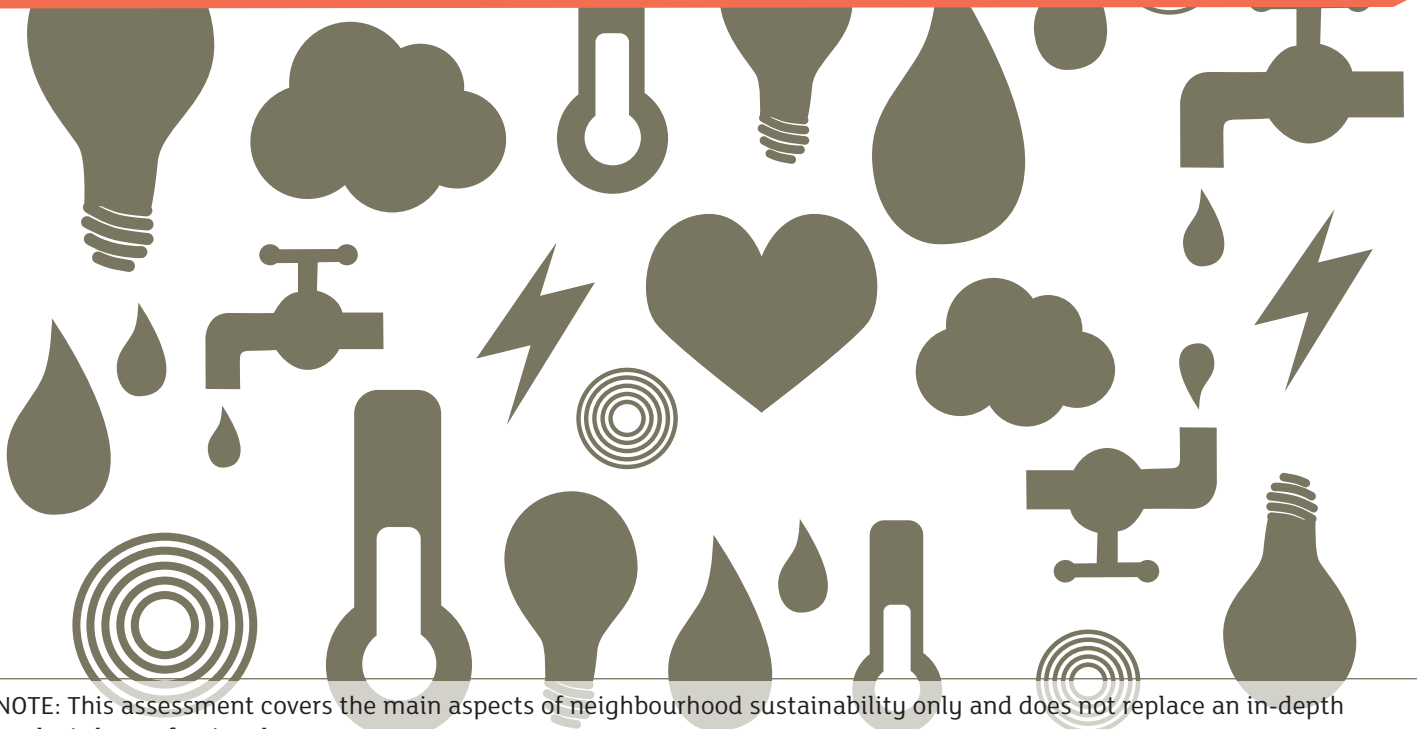
nine separate sections. Achievement for each section by sustainability bands is provided in the resulting report. The bands are:

- Very high sustainability
- High sustainability
- Medium sustainability
- Low sustainability.

The development of the Neighbourhood Sustainability Framework identified core issues that are determinant of good neighbourhood outcomes. These pre-requisite outcomes are listed and the report indicates whether or not they are met for each of the nine sections.

What is in this Guideline?

1. Understanding the Observational Tool
2. Instructions for using the Observational Tool



NOTE: This assessment covers the main aspects of neighbourhood sustainability only and does not replace an in-depth analysis by professionals

1. UNDERSTANDING THE OBSERVATIONAL TOOL

The Observational Tool is designed for New Zealand conditions and the requirements of the Neighbourhood Sustainability Framework, and can be applied to existing as well as planned neighbourhoods. The NSF defines key drivers that make a neighbourhood sustainable (see Part 2. The Neighbourhood Sustainability Framework), and the Observational Tool requires different approaches to assess each (Figure 1).

Features	Method of measurement
Walking access to every day basic facilities	Measured credits
Access to public transport	
Efficient use of space and viability of local centres	
Protection and enhancement of the natural environment	
Dwelling sustainability	
Quality of space	A mixture of measurement and professional judgement within tight guidelines
Diversity and resilience	
Appropriate street network	
Eco-alternatives	

Figure 1: Features measured in the Observational Tool and how they are assessed

In relation to each of these key drivers, the observational assessment process takes the following characteristics into account:

- Access to basic every day facilities within walking distance
 - Schools
 - Reserves
 - Local shops
- Access to and adequacy of public transport within walking distance
- Quality of space
 - Streetscape, including but not limited to walkability
 - Public open space
- Efficient use of space and viability of local centres
 - Residential density
 - Previous use of the site
- Diversity
 - Mixed use
 - Public space
 - Housing diversity (cost, size and typology)
- Protection and enhancement of the natural environment
 - Stormwater management
 - Protection and creation of habitat
 - Riparian, coastal and wetland management

Within the tool, there are two distinctly different types of credits:

- Credits which can be measured, such as the density of the development or the percentage of dwellings within a certain distance of a bus stop (Sections 1-5).
- Credits which require professional judgement and/or direct observation, such as whether there is good surveillance of a public space (Sections 6-9).

The Observational Tool provides an assessment to help you think about the neighbourhood and how the built environment supports, or does not support, sustainable behaviours. **It is not a rating tool.** It does not give you directions about what to do in the neighbourhood, but rather it identifies where neighbourhood outcomes need to be addressed.

Descriptions of key terms are provided on each page and descriptions of how points are awarded are also provided on key pages. Guidelines are embedded within the calculator and it can be applied based on plans. Sections 6-9, especially, will also require a degree of professional judgement during on-site observation by those with training and professional expertise in the assessment of built environments, including basic urban design and sustainability principles. In-built criteria mean the calculator delimits the values that can be entered to ensure consistency in judgement between different users.

The assessments and associated reporting derived from the Observational Tool provide an insight into the sustainability of the observable and measurable aspects of neighbourhoods. Together with the Resident Self-Report Tool, it also provides a means by which priorities for optimising sustainability in the neighbourhood can be identified and acted on, thereby providing valuable information, including clear indications of neighbourhood strength and weaknesses, to various neighbourhood stakeholders.

2. INSTRUCTIONS FOR USING THE OBSERVATIONAL TOOL

Observations are entered into the Observational Tool calculator, available on the disk included in the Kit.

To use the calculator, you need to choose from the predetermined value ranges and enter points in the orange shaded cells. Instructions are given on the introductory page as well as in blue in each section and sub-section.

The maximum possible points able to be scored may change in each section, according to the answers given. This is done automatically.

Error messages will pop up if you exceed the maximum points possible for each section, or if you answer a question more than once, or complete the wrong fields based on previous answers given.

Points are analysed in the Results section and achievements as well as any critical issues are flagged.

The usefulness of the tool is, of course, dependent on the accuracy and validity of the inputted data. While options for data values are limited, it is recommended that any analysis that includes the results from this tool makes available the working data sheets. This will enable any interpretation of results to be clearly and transparently linked to the original data choices.

NOTE: The tools provided here have been developed in good faith and on the basis that every endeavour has been made to be accurate and not misleading and to exercise reasonable care, skill and judgement in providing them.

The usefulness of the Neighbourhood Sustainability Framework and tools is, of course, dependent on the accuracy and validity of inputted data. This Kit provides guidance to support a robust process by which users should gather, input and interpret data about individual neighbourhoods.

This information is freely given and so the user has responsibility for the quality of surveying, data inputting, interpretation of outcomes and any subsequent decision-making. Neither Beacon Pathway Limited nor any of its employees, subcontractors, agents or other persons acting on its behalf or under its control accept any responsibility or liability in respect of any interpretation of outcomes / subsequent decision making.

All information and tools associated with this Kit are free to use and to share. They are available from http://www.beaconpathway.co.nz/neighbourhoods/article/the_neighbourhood_sustainability_framework

