**Infrastructure Sustainability Council**
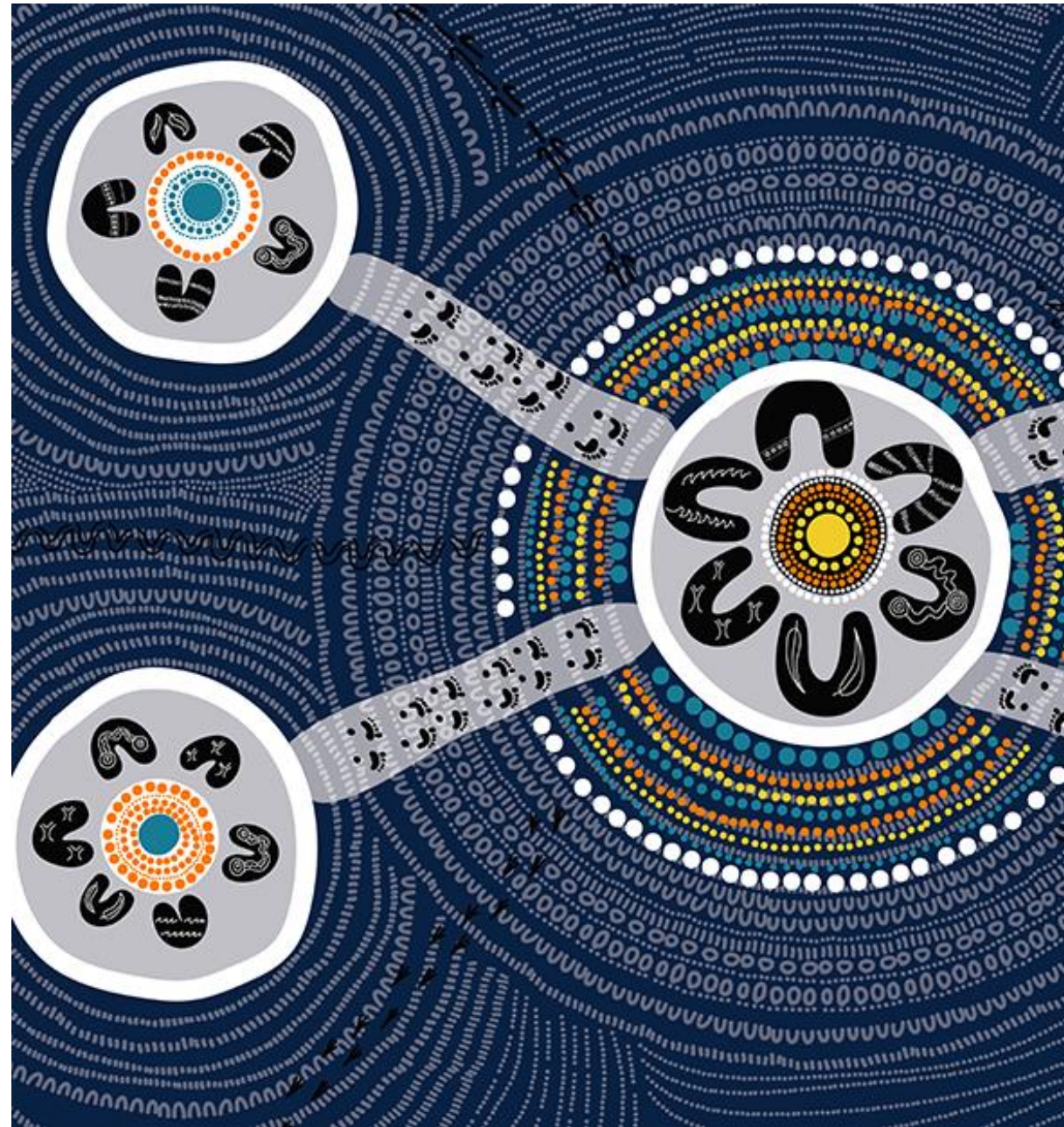
# IS Essentials Rating Tool Launch Event

16 July 2024

# Acknowledgement of country

ISC would like to begin by acknowledging the Traditional Custodians of the lands on which we meet today.

We acknowledge their deep connection to land, water and culture, and pay our respects to their Elders past, present and emerging.

Tēnā koutou katoa to our attendees in New Zealand.

# Agenda

**1**   **IS Essentials Tool – Our Newest Rating Tool**
Patrick Hastings, Chief Executive Officer

**2**   **IS Essentials Tool in Action**
Andrew Aitken, Program Sustainability Principal, Inland Rail

**3**   **Tool Development Process & Rating Tool Overview**
Tyrel Momberg, Technical Manager

**4**   **Ratings Digitalisation**
Rob de Carvalho, Head of Technology

**5**   **IS Essentials Training**
Hayley Grieves, Head of Learning & Capability

**6**   **Getting Started & Question & Answer**

Infrastructure Sustainability Council

# IS Essentials Tool – Our Newest Rating Tool

Patrick Hastings, Acting Chief Executive Officer, Infrastructure Sustainability Council

# IS Essentials

The newest tool in the IS Ratings Scheme

**Design & As-Built Rating Tool for Projects $5m – $100m**

**ISC's first digital rating**

**Program Approach**

**Developed to support all assets to maximise the social, environmental and economic return from assets**

**Supported by the Westpac New Zealand Government Innovation Fund**

# The Value Proposition

✓ **Enable and support organisations to deliver broader benefit from assets**

✓ **Support a project and organisation to accelerate your sustainability objectives**

✓ **Measure the assets' sustainability performance**

✓ **Enable organisations to better manage social licence through third party assurance on performance**

✓ **Avoid threats such as greenwashing and improve reputation**

✓ **Support organisations to future proof assets**

# IS Essentials

✓ **Enable ratings for smaller projects**

✓ **Reach sectors / organisations with smaller average project size (water, energy, local government)**

✓ **Digital platform for improved assessments management**

✓ **Resource Hub for enhanced access to guidance and templates**

✓ **Possible entry level tool for organisations new to IS Ratings**

# Pilot Projects, Technical Working Group Members and Industry Reference Group

Pilot Projects

Technical Working Group Members

Industry Reference Group

# IS Essentials Pilot Projects

IS Essentials has been tested across a large variety of asset types, locations (Australia & New Zealand) and project sizes (Capex Range: $8m- $100m)

**Port**
- Channel Beacon Replacement
- Dock Upgrade

**Energy**
- Energy Substation
- Water to Energy Plant

**Water**
- Water Plant Upgrades

**Social**
- Board Walk
- Public Swimming Pool

**Rail**
- Corridor Repair Works

**Road**
- Pedestrian & Cyclist Bridge
- Road Realignment Upgrades
- Roundabout

**Airport**
- Aviation precinct and terminal expansion

# IS Essentials Tool In Action

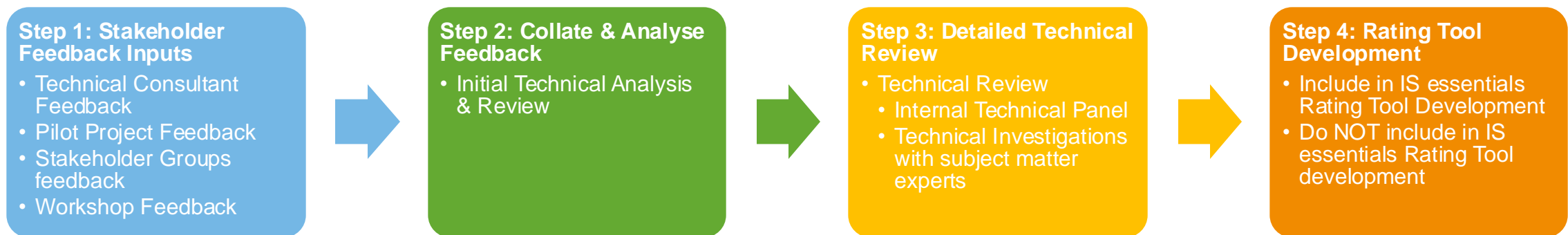Andrew Aitken, Principal Sustainability Advisor, Inland Rail

# Tool Development Process & Rating Tool Overview

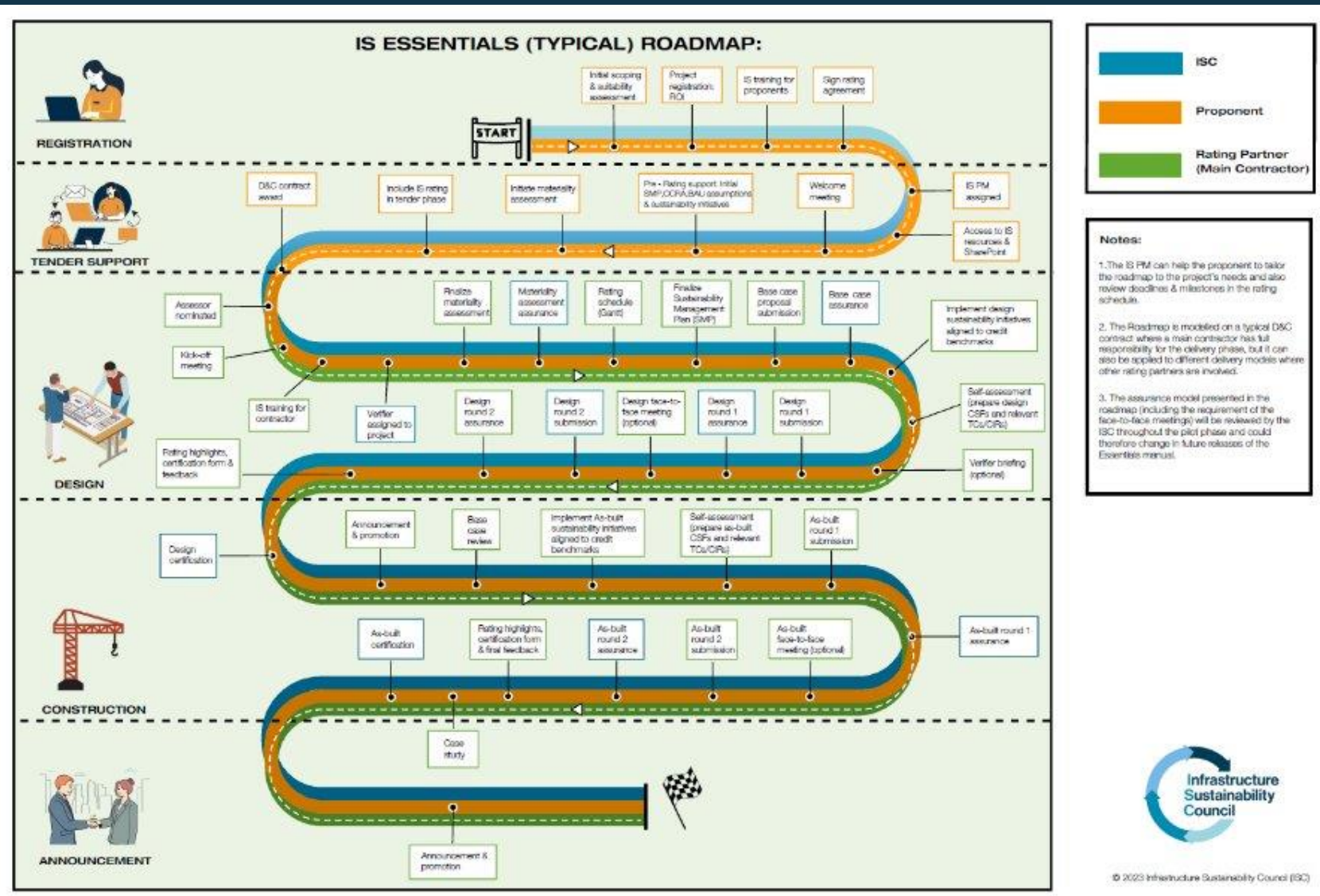Tyrel Momberg, Technical Manager, Infrastructure Sustainability Council

# Technical Tool Development Process

| IS Essentials Technical Manual – Rev 1 | IS Essentials Technical Manual – Rev 2 | IS Essentials Technical Manual – Rev 3 | IS Essentials Technical Manual – Final | IS Essentials Digital Tool |
|---|---|---|---|---|

## Iterative Process

**Step 1: Stakeholder Feedback Inputs**
- Technical Consultant Feedback
- Pilot Project Feedback
- Stakeholder Groups feedback
- Workshop Feedback

**Step 2: Collate & Analyse Feedback**
- Initial Technical Analysis & Review

**Step 3: Detailed Technical Review**
- Technical Review
  - Internal Technical Panel
  - Technical Investigations with subject matter experts

**Step 4: Rating Tool Development**
- Include in IS essentials Rating Tool Development
- Do NOT include in IS essentials Rating Tool development

# Roadmap

# IS Essentials is designed to reduce the complexity of IS ratings for projects $5-100m.

## Tool Developments that enable 'scalability'

- ✓ Materiality Assessment
- ✓ Base Case
- ✓ Capex Bands
- ✓ Program approach
- ✓ Templates/Examples
- ✓ Verification

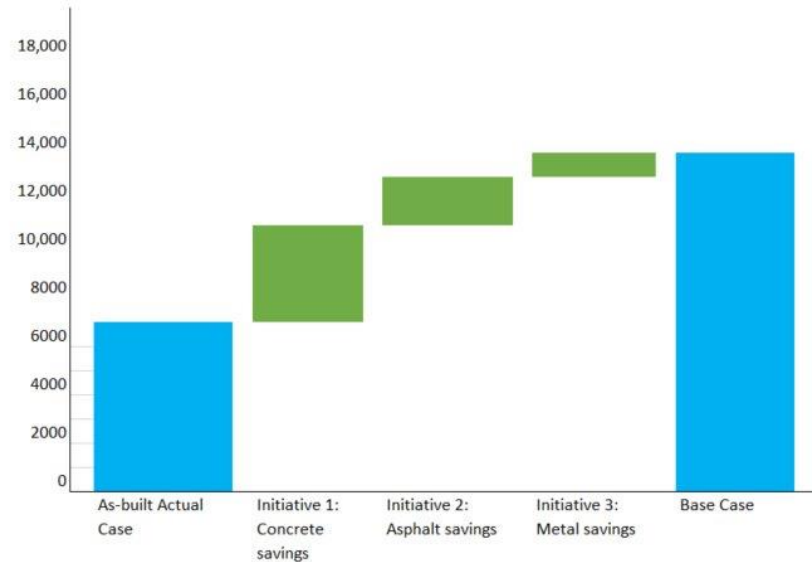# Item 1: Materiality Assessment
**(automated process)**

| Capital Band | 'Permanent' Credits Screened in | 'Additional' Credits Screened in | Total Credits Screened in | | 'Elective' Credits Screened in |
|---|---|---|---|---|---|
| | | | Lower Limit | Upper Limit | |
| $5 to <20 M | 10 | 0 - 5 | 10 | 15 | voluntary |
| $20 to <50 M | 10 | 5 - 10 | 15 | 20 | voluntary |
| $50 to 100 M | 10 | 10 - 15 | 20 | 25 | voluntary |

Possible scenario:

Small project <$20 M (with fewer Higher Materiality items) → 10 credits Screened in → Project targets 3 credits (at L2/L3) → Towards Bronze Rating

# Item 2: IS Essentials Base Case Approach

## Base Case option – as per larger project tool



- Demonstrates reductions beyond industry business as usual

## Lite credit option – for <$50M and low experience projects

*Applicable to these credits only*



- Monitor and model resource consumption for construction and operation phases.

- Identify and implement suitable reduction opportunities

16

# Item 3: Capex Bands – 'credits' & 'criterion'

## Impact of Capital Bands

### 1. Credit Applicability

- **Wfs-1 Jobs, skills and Workforce Planning**
  - $5 to <20 M - credit not applicable and scoped out in the materiality assessment
  - $20 - to 50M - only the As Built Criteria apply
  - $50 to 100M - both Design and As-Built Criteria apply

### 2. Credit Criteria Applicability

- **Wfs - 2 Workplace Culture and Wellbeing**
  - $5 to <20M - only the As Built criteria apply
  - $20 to <50M - only the As built criteria apply
  - $50 to 100M both the Design & As Built criteria apply

### 3. Credit Criterion Applicability

- **Sta - 2 Stakeholder Engagement Implementation**
  - $5 to <20M - this criterion is not applicable
  - $20 to <50M - this criterion is applicable
  - $50 to 100M - this criterion is applicable

### 4. Must Statement Applicability

- **WFS – 3 Diversity and Inclusion**
  - $5 to <20M – the must statement is not applicable
  - $20 to <50M – the must statement is applicable
  - $50 to 100M - the must statement is applicable

# Item 4: Program & Organisation Approaches

## Program Rating Approach

- **The purpose of an IS Program Rating is to maximise sustainability outcomes and impact across multiple projects through shared opportunities and efficiencies**

## Organisational Inputs

- **The ISC recognises that work undertaken at the 'Organisational level' may be used to meet multiple credit criteria (or parts thereof) within IS Essentials projects**

18

# Item 5: Templates

# Item 6: Verification Process

- One verifier (two rounds of verification)

- Materiality Assessment ISC agreed

IS ESSENTIALS (DESIGN AND AS BUILT) RATING AWARD LEVELS

| 80 - 100 | IS Essentials Design PLATINUM | IS Essentials As Built PLATINUM |
| 60 - 79.9 | IS Essentials Design GOLD | IS Essentials As Built GOLD |
| 35 - 59.9 | IS Essentials Design SILVER | IS Essentials As Built SILVER |
| 20 - 34.9 | IS Essentials Design BRONZE | IS Essentials As Built BRONZE |

<19.9 No Rating Awarded

# Fees



| Australia | New Zealand |

| Planning v2.1 | IS Essentials | Design & As-Built v1.2 & v2.1 | Operations v1.2 - 1 Year | Operations v1.2 - 3 Years |

| IS Essentials Ratings Fees (1 July 2024 - 30 June 2025) AUD$ | | | | | | | |
| --- | --- | --- | --- | --- | --- | --- | --- |
| | $5 - $19m | | $20 - $49m | | $50 - $74m | | $75 - $99m | |
| | Non-member | Member | Non-member | Member | Non-member | Member | Non-member | Member |
| Registration fee | $6,500 | $5,000 | $9,100 | $7,000 | $13,000 | $10,000 | $16,900 | $13,000 |
| Annual Support | $6,500 | $5,000 | $10,400 | $8,000 | $13,000 | $10,000 | $14,300 | $11,000 |
| Design Verification & Certification | $9,100 | $7,000 | $11,700 | $9,000 | $15,600 | $12,000 | $19,500 | $15,000 |
| As Built Verification & Certification | $7,800 | $6,000 | $9,750 | $7,500 | $11,700 | $9,000 | $14,300 | $11,000 |

# Ratings Digitalisation

Rob de Carvalho, Head of Technology, Infrastructure Sustainability Council

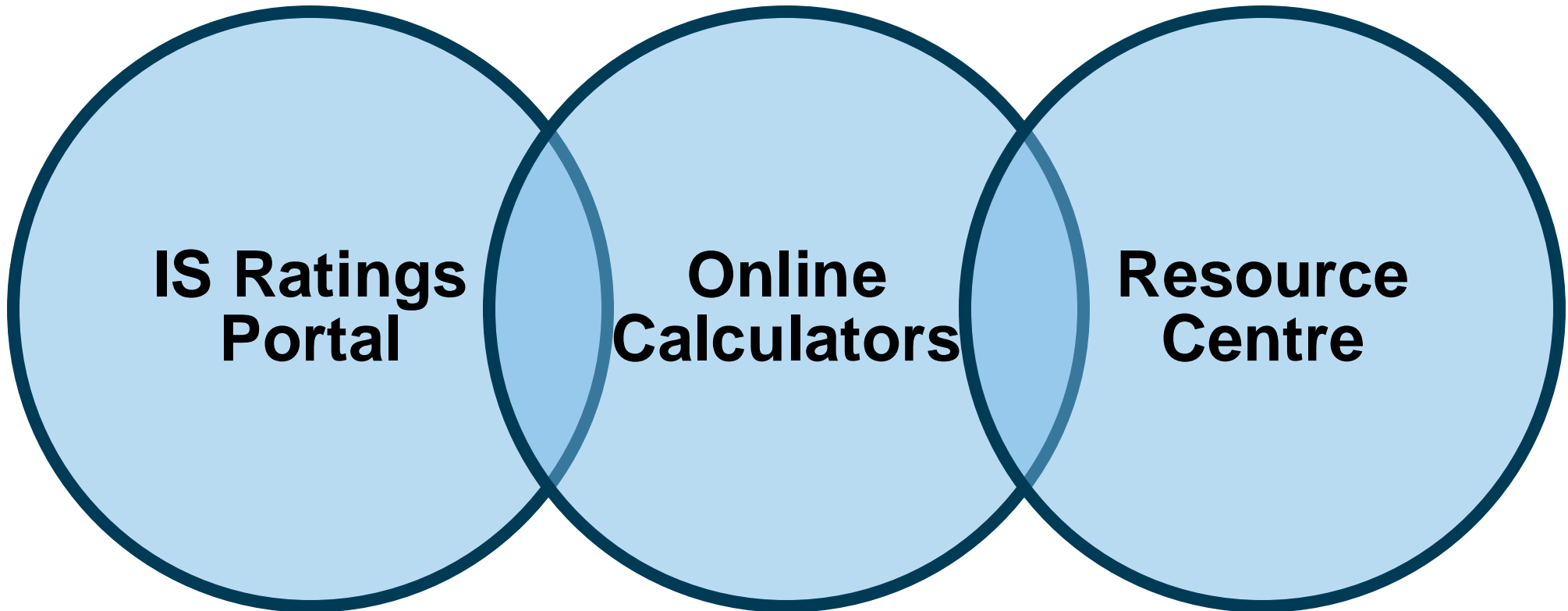# Our First Digital Rating

Introducing our new IS Ratings Portal

# Our digitisation journey



IS Ratings Portal

Online Calculators

Resource Centre

← Back to ratings

# Ratings > RDC15 - Dodgeball Stadium

Saved at: 5:21 pm

Summary   **Materiality Assessment**   Base Case Proposal   Design   As Built   Document library

The Materiality Assessment requires projects to identify 'material' or priority sustainability aspects in relation to project context. Prior engagement with key stakeholders including the community will assist projects to answer stakeholder-related materiality questions and have these responses verified. The requirements for completing the Materiality Assessment, including internal and external stakeholder involvement, are outlined in the IS Essentials (Design & As Built) Technical Manual. The completed Materiality Assessment needs to be verified. The IS Project Manager will manage the verification process with you.

Materiality does not change across the following categories: Leadership & Management, Sustainable Procurement, Innovation, Legacy and Workforce Sustainability.

For all other credits, questions related to project impacts and importance to stakeholders are used to generate a project-specific materiality score (from 0 to 4). Projects may propose an alternative materiality score (other than that generated via the assessment questions) with justification. Credits with a materiality score of 0 may be scoped out.  All materiality scores require justification and supporting evidence. A list of suggested evidence is provided in the Materiality Assessment tab - these are suggestions only and you should consider what is most appropriate for your project's context.

Materiality Assessment Status:  **Prepare**

```
         1                          2                          3
   Questionnaire           Alternative materiality       Elective credits
```

Answer all questions by expanding each credit. Ensure all credits are marked as 'Valid' then click 'Next'.

Next →

**Expand all**

> [Valid] Pla-2 | Urban and Landscape Design

> [Valid] Res-1 | Climate and Natural Hazards Risks

> [Incomplete] Ene-1 | Energy Efficiency and Carbon Reductions

?

Ratings

Resources

← Back to ratings

# Ratings > RDC15 - Dodgeball Stadium

Saved at: 5:40 pm

Summary    **Materiality Assessment**    Base Case Proposal    Design    As Built    Document library

The Materiality Assessment requires projects to identify 'material' or priority sustainability aspects in relation to project context. Prior engagement with key stakeholders including the community will assist projects to answer stakeholder-related materiality questions and have these responses verified. The requirements for completing the Materiality Assessment, including internal and external stakeholder involvement, are outlined in the IS Essentials (Design & As Built) Technical Manual. The completed Materiality Assessment needs to be verified. The IS Project Manager will manage the verification process with you.

Materiality does not change across the following categories: Leadership & Management, Sustainable Procurement, Innovation, Legacy and Workforce Sustainability.

For all other credits, questions related to project impacts and importance to stakeholders are used to generate a project-specific materiality score (from 0 to 4). Projects may propose an alternative materiality score (other than that generated via the assessment questions) with justification. Credits with a materiality score of 0 may be scoped out.  All materiality scores require justification and supporting evidence. A list of suggested evidence is provided in the Materiality Assessment tab - these are suggestions only and you should consider what is most appropriate for your project's context.

Materiality Assessment Status:  **Prepare**

**Submit for verification**    **Update →**

Expand all

| Credit | | Materiality | Design Points available | As-Built Points Available | Status |
|---|---|---|---|---|---|
| › Pla-2 │ Urban and Landscape Design | Screened in | 4 | 8.3 | 8.3 | |
| Lea-1 │ Integrating Sustainability | Permanent | 2 | 4.7 | 4.7 | |
| Lea-2 │ Risks & Opportunities | Permanent | 2 | 3.04 | 3.04 | |
| Lea-3 │ Knowledge Sharing | Elective | 2 | 3.04 | 3.04 | |

?

Ratings

Resources

← Back to ratings

# Ratings > RDC15 - Dodgeball Stadium

Saved at: 5:42 pm

Summary    Materiality Assessment    Base Case Proposal    **Design**    As Built    Document library

The IS Essentials (Design) rating is an interim verification step, following the completion of project design. Once the IS Essentials (As Built) component of the rating has been verified, the IS Essentials (Design) rating score is replaced with the final IS Essentials (Design & As Built) rating score. Refer to the **Technical Manual** for more information.

The **Overview** tab lists the credits included in the current rating, based on the results of the Materiality Assessment.
- You may modify your *Estimated submission date* prior to submitting for Round 1 verification. Please keep this date as accurate as possible and inform your ISC Project Manager as soon as you become aware that the date may change.
- The icon next to each credit indicates if you have completed the work required for that credit, including responding to verification feedback if you are in Round 2. A green tick indicates complete, an orange bar indicates incomplete.
- Prior to submitting for verification, you may change the *Target level* for each credit. This will adjust the *Targeted points* and alter the form for the credit shown in the *Credits* tab. Level 0 indicated you will not be attempting the credit.

The **Credits** tab is where self-assessment and verification is completed for each credit.
- The list on the left is the list of credits included in this rating. Clicking on a credit will update the main pane with the details of the credit.
- For each credit, a list of criteria within the targeted level appears at the bottom of the screen. Expand each criteria to see a list of requirements (must statements) from the Technical Manual.
- For each criteria, a *Self-assessment Complete?* dropdown is provided for you to track your progress. All criteria must be either *Complete* or *Not attempted* prior to submitting for verification.
  - Incomplete - criteria has work still to be completed. You may enter draft responses and update them at any time prior to submitting for verification.
  - Complete - all work on the criteria is complete and it is ready to be verified.
  - Not attempted - this criteria will not be attempted. Only applies where the credit does not require all criteria to be attempted.
- For each requirement (must statement), you may make notes for yourself or your team using the comments icon. These notes are for your use only and do not form part of the submission (although ISC staff will be able to see them). An empty icon indicates there are no notes, a filled in icon indicates there are notes.
- During verification, feedback will be added under *Verification feedback*.

When you have completed all credits you are attempting, use the *Submit for verification* to submit your self-assessment. During verification you will not be able to make changes to your submission. In Round 2, your ISC Project Manager will update the *Status* to "Round 2 Prepare" to allow you to update your self-assessment and respond to verification feedback.

Overview    **Credits**

### Credits

Place

✓ Pla-2 Urban and Landscape Design

Leadership and Management

### Pla-2

**Intent:** To create infrastructure that has been influenced by the local context, fits its setting, and meets the needs of the people that will use it, while preserving and enhancing scenic, aesthetic, cultural, community and environmental resources and values

🔗 Technical Manual

🔗 Additional Guidance

Target level

1 ⌄

Targeted points:
Current points: 2.77

?

Ratings

Resources

← Back to ratings

# Ratings > RDC15 - Dodgeball Stadium

Saved at: 6:10 pm

Summary    Materiality Assessment    Base Case Proposal    Design    As Built    **Document library**

🔍 Search by file name

**Upload New Document**

⌄ Really useful plan v2.pdf                                                              ⋮

Design | Pla-2 Urban and Landscape Design | DL1.1

Materiality Assessment | Ene-1 Energy Efficiency and Carbon Reductions | MA

?

# IS Essentials Training

Hayley Grieves, Head of Learning & Capability, Infrastructure Sustainability Council

# IS for Professionals Pathway



**CORE**

- IS Foundations
- IS Rating Skills

**STANDARD**

- Planning training → Planning certificate →
- D&AB training (IS E, IS E, IS E) → D&AB certificate → Essentials →
- Operations training → Operations certificate →

**ISAP**

- ISAP Accreditation Exam

**RENEWAL**

- Annual ISAP Renewal

30
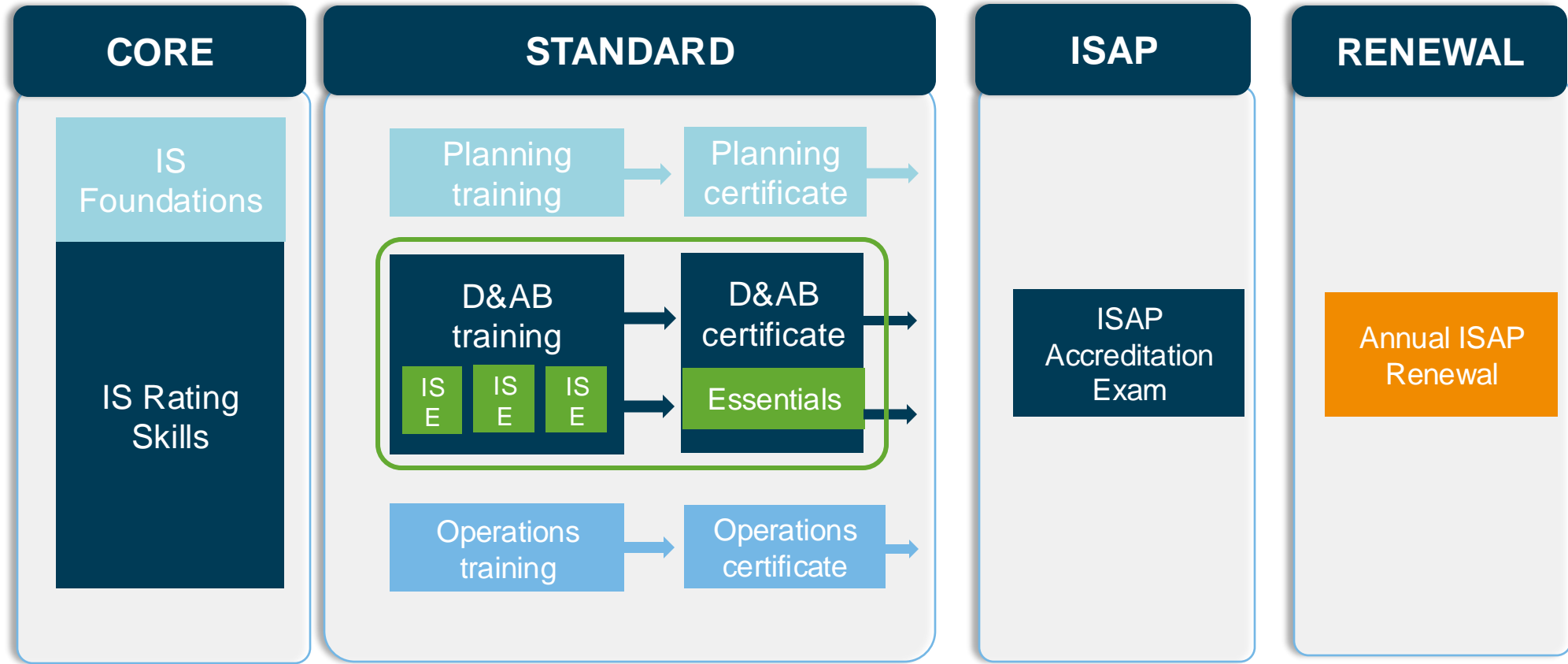
# IS Essentials

Explore the key differences in an IS Essentials Design & As Built Rating and supporting materials, empowering you to seamlessly navigate your infrastructure sustainability rating from the initial design to the final construction phase.

## STANDARD

### D&AB training, plus…


Overview of IS Essentials
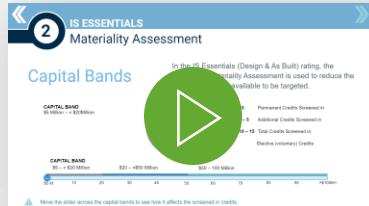

Materiality assessment
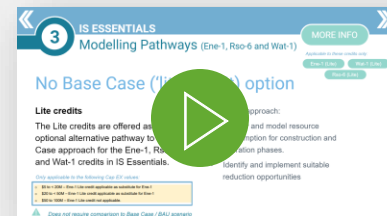

Modelling pathways
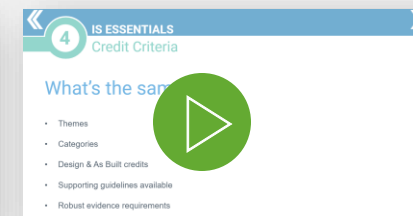

Credit criteria
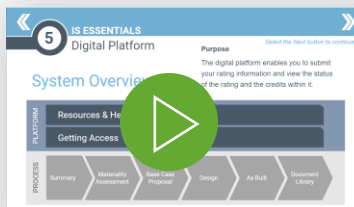

IS Rating portal
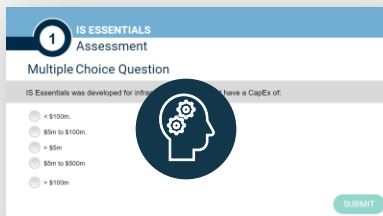

End of course assessment


IS Essentials certificate
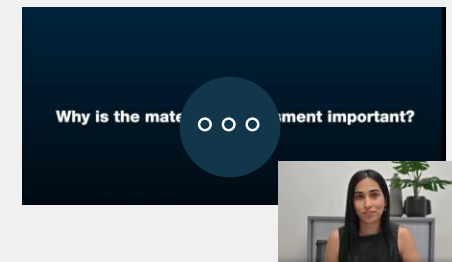

Supplementary resources

# Existing ISAPs

## Free access until 31st July 2024

- All existing ISAPs

- Free enrolment

- Register via website

- Access for up to 6 weeks

Register for IS Essentials toolkit

Complete all IS Essentials modules

Complete end of course assessment & download certificate
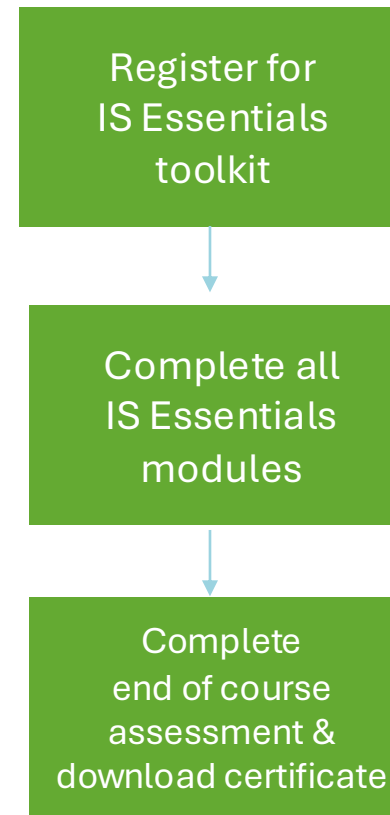
# New ISAP

## From August 2024

- New to the IS Rating Scheme

- Trained in Planning or Operations

- Members: $2,600 +GST, Non-members: $3,675 +GST

- Essentials is free as part of pathway

- Register via website

- Access for up to 6 weeks from D&AB course completion

# Register for IS Essentials

https://www.iscouncil.org/our-offerings/51-is-essentials/region-AU/



Use promo code **ISAPEssentials** for free registration until 31st July 2024

16 July 2024

# IS Essentials registrations are now open

**1**    Register for a Rating

**2**    Upskill by enrolling in Training

**3**    Visit our website, FAQ's, read our brochures and case studies

**4**    Visit our Resource Centre



IS Essentials for LOCAL GOVERNMENTS
Sustainability Rating Tool for Infrastructure Projects with $5 - 100m Capital Value

IS Ratings for WATER ASSETS
Assured Sustainability Outcomes

# Thank You