Sustainable Design and Construction Guidelines

How-To Guide

West Coast Ports Technical Committee
International Institute for Sustainable Seaports
American Association of Port Authorities
Overview: This document serves as a short “How-To” reference guide for the Joint West Coast Ports Technical Committee’s Sustainable Design and Construction Guideline referred to herein as the “tool”. The How-To Guide contains bulleted instructions and screenshots to assist in proper tool operation. Instructions are organized by worksheet “tab” as listed below.

General

Macros
1. Use of the “West Coast Ports Sustainable Design and Construction Guidelines (tool)” requires use of VBA macros. Macros must be enabled in order to secure full functionality of this tool.
3. The macros also are applied when a user opens or saves the workbook. These additional macros help track tool use over time.

User Privileges
1. This tool is built to restrict the basic user functionality to data entry only. The tool asks for user name upon log-in and tracks what user last updated and saved the tool in the “Project Manager Inputs” tab.
2. The User can add new strategies via the “Add New Strategy” macro. The user can then select strategies to implement (and provide supporting information) on the “Project Checklist Summary” tab.

Instructions by Tab

Start Page
1. The Start Page works as a “Table of Contents” for the rest of the tool. The Start Page provides limited instructions as well as links to other tabs in the workbook. The Start Page also provides links to the sponsoring organizations and tracks version number and date.
Project Manager Inputs

1. The Project Manager Inputs tab is used to enter general information about a specific project. On this tab, the User enters information in a user-friendly form (with on screen directions), in the following required text fields:
   a. Project Name
   b. Project Manager
   c. Sustainability Lead
   d. Last Updated (date of last save, this is updated automatically via macro)
   e. Updated By (last person to save file, this is updated automatically via macro)
   f. Port
   g. Sponsor
   h. Project Number
   i. Current Project Phase
   j. Project Location
   k. Review Operational Checklist (Yes/No dropdown)
   l. Consultant Name
   m. Sponsoring Agency
   n. Operational User
   o. Estimated Budget ($)
   p. Final Project Cost ($)
   q. Date of Approval (MM/DD/YY)
   r. Target Completion Date (MM/DD/YY)
2. In addition there are fields for the user to enter additional information about the project, which is optional.

3. Next the user selects applicable Project Areas for their Project. There are 14 Project Areas. As the user checks project area names, the tabs for those project area details become unhidden, and the hyperlinks to those tabs become active. Furthermore, project area definitions will be available by selecting the cell for each project area name.

**Master Checklist**

*Warning: Never add or delete rows manually on this tab. Use the macros to add new strategies. If a strategy is no longer used, just delete the “X” for each corresponding Project Area.*

1. The “Master Checklist” tab is a read-only tab whereby the user can see the list of all possible sustainability strategies to apply to their project. The tab is hidden and users can easily un-hide the tab when needed. Note worksheet is password-protected for administrative editors only.

2. Only the Tool administrator (I2S2) can change the text for existing strategies, or the list of which strategies are applicable (via “X”). This sheet is password-protected for administrator edits only.

3. The Project Users can “Add New Strategy” via the Add New Strategy button. This button brings up a user form that lets the user enter information about a new “Considered” strategy, strategy “Required by Regulation”, or “Additional (Project-specific)” strategy.
Project Checklist Summary

1. The Project Checklist Summary is where the user can see all relevant strategies that are applicable to only the project areas they selected on the ‘Project Manager Inputs’. Note if no project areas are selected on ‘Project Manager Inputs’, there will be no strategies listed here.

2. This tab is editable in columns AC-AK.
   a. T-U: On this tab, the user tracks which strategies are Proposed and/or Implemented (NOTE Any Implemented Strategy by default is proposed). Note the tally of proposed and implemented strategies (by project area and focus area) is incorporated into “Summary Reports”.

<table>
<thead>
<tr>
<th>Proposed</th>
<th>Implemented</th>
</tr>
</thead>
<tbody>
<tr>
<td>X</td>
<td>Yes</td>
</tr>
</tbody>
</table>

   b. V-X: here the user provides supporting information about the strategy and why it was or was not implemented.

   Why Not Implemented / Why Not Applicable? | Supporting Details | Resources for Additional Information
   -------------------------------------------|-------------------|----------------------
   i. These are text fields for supporting information only.

   c. Y: Here the user enters optional “Strategy Weight” for Implemented Strategies, on a scale of 1-10. This column is completely optional.
d. **Z-AB:** Here the user optionally marks an “X” for any strategies with Economic, Environmental, and/or Social impacts. This column is completely optional.

### Project Areas (14 tabs)

*Note: These tabs are read-only at this time. Please make any updates to strategy selection and supporting data on “Project Checklist Summary” tab.*

1. The Project Area tabs are visible if a given Project Area is checked in the “Project Manager Inputs” checklist.
2. When the user clicks on a Project Area tab (i.e. ‘Project Area – Demolition and Disposal’) they automatically see strategies that are applicable to that Project Area.
3. At the top the user can also select a Focus Area to filter by on the same tab.

### Summary Report

The ‘Summary Report’ tab is used to tabulate project “success” against various metrics.

1. **First** the user must “Select Project Area” to populate charts. The user can select an individual project area or “ALL” project areas.
2. **Chart 1** tracks average weight by strategy vs. number of strategies selected. Furthermore this graph shows three-dimensionally the percent of strategies selected, as represented by size of bubble. Note this Chart displays optional data only, as strategy weights are not required for this tool.
3. **Chart 2** tracks summary of strategy select by focus area. This chart is simply a stacked bar chart tallying selected vs. unselected strategies for each focus area.
4. **Chart 3** tracks a tally of Economic, Environmental and Social Contributions. Simply put, this is a bar chart for each of the three metrics, and counts how many strategies incorporate each. Note this Chart displays optional data only, as Economic, Environmental, and Social Contributions by strategy are not required for this tool.
5. **Summary Tables** show a summary of selected strategies for the selected project area, by focus area. These tables comprise the data that populate the charts above, and are populated as part of a macro by the “Select Project Area” option at top.
   a. These tables, similar to charts, focus on the “Implemented” strategies vs. the Proposed Strategies, as shown in “Project Checklist Summary”.

6. **List of Criteria Implemented.** At the bottom of the sheet is a summary of the criteria (strategies) implemented for a given project area (or “ALL”) as selected on button “Select Project Area”. This table summarizes all data from “Project Checklist Summary” in a concise fashion, and list details on each strategy selected for the given project.

Example ‘Summary Report’ graphs:

Example ‘Summary Report’ tables:

<table>
<thead>
<tr>
<th>Summary Tables</th>
<th>Project Area</th>
<th>Focus Area</th>
<th>Summary of Selected Strategies</th>
<th>Percent</th>
<th>Total Weight</th>
<th>Economic</th>
<th>Environmental</th>
<th>Social</th>
<th>Implemente d Strategies</th>
<th>Proposed Strategies</th>
<th>Proposed Avg Score per Strategy</th>
</tr>
</thead>
<tbody>
<tr>
<td>ALL</td>
<td>As</td>
<td>2 out of 12 (17%)</td>
<td>50%</td>
<td>1</td>
<td>2</td>
<td>0</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>4</td>
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<tr>
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<tr>
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<tr>
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</tbody>
</table>

Example ‘Summary Report’ graphs:

Summary
This tool is a useful way for Project Managers to track sustainability strategies proposed and implemented across all types of projects at their port. The tool is set up to work for any port, but can be made more specific by addition of Port-specific strategies. The tool is useful for Project Managers in decision-making, reporting, and recordkeeping.

The West Coast Ports Technical Committee is a collaborative of seven west coast ports (Port of Vancouver US, Port of Seattle, Port of Tacoma, Port of Portland, Port of Los Angeles, Port of Long Beach, Port of San Diego) and the International Institute for Sustainable Seaports (I2S2) who worked together to develop these Sustainable Design and Construction Guidelines.
I2S2 is a partnership between the Global Environment & Technology Foundation, a 501 c (3) not-for profit and the American Association of Port Authorities. I2S2 is dedicated solely to providing sustainable practices information, field test-tools and materials to support implementation by all ports and members of the maritime community. For more information on I2S2 or the Sustainable Design and Construction Guidelines please contact Noeleen Tillman ntilman@getf.org or Meredith Martino mmartino@aapa-ports.org.