Shade Policy Fact Sheet

This fact sheet is intended as an overview of how to incorporate shade into policies (e.g. a municipal policy, school board policy, a public health policy, a transportation policy, a parks policy, etc.). Whether your organization or group is responsible for designing, planning, operating or building outdoor public spaces such as seating and spectator areas, streetscapes, trails, playgrounds, schools, and parks, existing and new policy documents can be written to make a formal commitment to increasing and maintaining shade in our communities.

Note: Inclusion of shade into policies is an emerging area. To date, few policies have been evaluated. The following recommendations and considerations are based on the experience of the Shade Work Group of Waterloo Region and from others in the field.

Why Shade Matters?

Skin cancer, caused by exposure to ultraviolet radiation (UVR), is the most common cancer in Canada and is on the rise. It is also highly preventable. Shade is considered one of the most effective approaches to reduce exposure to UVR from the sun. Shade can also mitigate the urban heat island effect, encourage physical activity and reduce energy costs. Shade trees can improve air quality and stormwater management, and reduce soil erosion.

Incorporating Shade into Policies

Considering shade in your new or existing policies and/or writing a stand-alone shade policy or strategy will assist in making a formal commitment to shade and ensure it is part of your infrastructure.

Look for opportunities to collaborate, both within your organization and with other organizations and stakeholder groups. A collaborative approach that considers diverse viewpoints in the planning process not only strengthens your policy but helps with implementation and awareness.

Shade can be incorporated in a number of ways, at different levels of policy. A combination of overarching policies and guidelines or strategies can be included to operationalize and implement shade. For example, city official plans can include requirements for shade provision. Operational standards, guidelines and strategies (e.g. planting, mowing, parks management and environmental strategies) can be written or revised to incorporate shade principles. Similarly, request for proposal criteria for parks and landscape design can include a shade requirement which meets shade design considerations.

Policy is any written commitment by an organization that gives direction and ensures:

- Consistency
- Accountability and documentation
- Budget/resources are assigned
- A long-term commitment

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Existing Policy Examples:

The following table provides guidance on how to incorporate shade into various levels of policy documents. The examples are taken from Waterloo Region policy documents and demonstrate wording segments related to shade.

Policy document (What)	Relevant sections (Where)	Examples of how shade has been included in existing policies (How)
Official Plan * It may be possible to include shade in **by-laws** (zoning, trees, conservation) that conform to the official plan	Can be incorporated in different sections such as: • urban design • land use, public realm, open space, play areas/parks • transportation systems • urban forest • environmental sustainability Or shade can be a stand-alone section within the document	• Urban design requirements of the provision of shade for protection from sun exposure, including trees as site amenities, shade studies, and incorporating into landscape design, for example: City of Kitchener, Section 11: Urban Design (Page 129): *"The City will require the provision of shade, either natural or constructed, to provide protection from sun exposure, mitigate the urban heat island, and reduce energy demands […]"* • Specific wording related to planting of trees for shade, urban greens or smaller green spaces for rest/respite, for example: City of Waterloo, Open Space Land Use Policies, Parks and Other Green Spaces: *"The planting of trees within municipal parkland blocks is encouraged to provide shade and to enhance the urban forest."* • Pedestrian movement and the creation of pedestrian-friendly streets/streetscapes (shade as essential for this), for example: City of Kitchener, 13 Integrated Transportation System 13.C.1.4 (Page 148): *"The City will design pedestrian-friendly streets by: providing shade as an essential component of streetscape design."*
Strategic Plan	Sections related to the environment, health	• Regional Municipality of Waterloo 2011-2014: Notes partnership/collaborating to develop policies and programs that provide shade. Not included in Regional Official Plan so the strategic plan offered an opportunity to incorporate into policy.
Shade Policy or Shade Guidelines	Stand-alone documents/policy specifically related to shade	• Waterloo Regional District School Board, Sun Safety and Shading Board Policy: Acknowledges the rationale for providing shade and states that schools should be periodically reviewed (audited) *"[…] the provision of shade, […] as an essential element in the planning and design of new or renovations to board facilities."* • City of Toronto, Shade Guidelines: The Guidelines assist in the implementation of the Shade Policy by laying out the shade principles, tree species, how to audit a site and guidelines for specific sites. They also contain shade guidelines for specific sites.
Urban Design Guidelines/ Landscape Guidelines	Specifications related to city owned facilities/properties. Could also include: streetscapes, amenity areas, private developments	• City of Waterloo, Urban Design Guidelines, 2009: Use/planting of canopy trees to incorporate shade in sports facilities, spectator areas, and along trails. For example, planting in play areas, while respecting child safety, and around playground seating to provide ample shade.
Plans/ Masterplans– such as Urban Forest Plan, Park Masterplans	Can be included in: • operational considerations • asset management (retention of mature trees and establishment of new trees) • green infrastructure • policy revisions and development • monitoring • resources required • priority setting	• City of Cambridge Urban Forest Plan, 2015: Identifies the resources (capital, operating, and human) required for defined projects over the short term (5 or 10 years) and sets priorities for the longer term. It also sets a canopy target and forest health indicators to monitor the urban forest and manage it as a green infrastructure. When writing policy, we recommend the use of strong language to denote that it is a requirement (i.e. use of the word will/have/require).

Key Ideas to Help Shape Your Policy:

Shade should be considered when planning and approving new public facilities or spaces and renovating existing ones which includes landscape design. In addition, it can be incorporated into the approval of planning permits and in urban and open space planning. The following are some key components to consider incorporating into your new or existing policy.

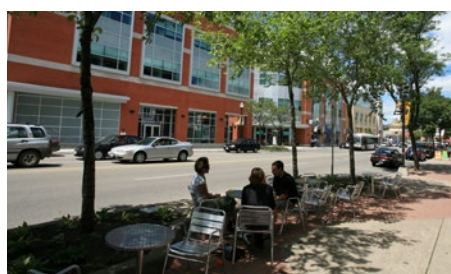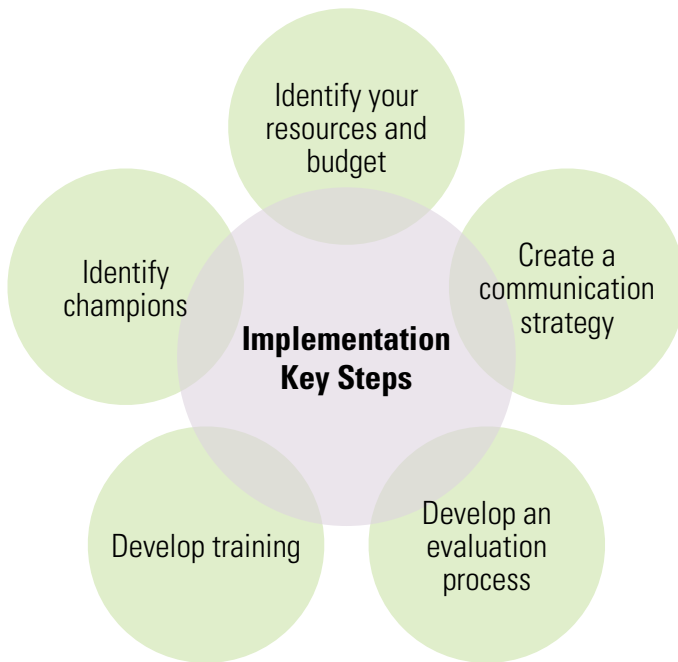| Key component	Examples of details to include in the policy infomation
1. Why Shade/ Shade Policy	• A statement about skin cancer (statistics and methods of prevention) • Information on shade trees, built shade and their respective co-benefits (encourages physical activity, reduces greenhouse gases and air pollutants, mitigates urban heat island effect, reduces energy costs, etc.)
2. Area Prioritization	• Spaces where people gather or move through that are used at critical peak UVR times (11 a.m. - 3 p.m., April to September) • Settings can include: public squares, seating and spectator areas; streetscapes, trails and pathways; child care facilities, schools, parks and playgrounds
3. Commitment to Auditing and Planning	• New or retrofitted sites will have a shade audit completed (see Shade Audit Information Guide + Tool) • A shade plan or strategy which includes a larger scale inventory • Shade targets for certain sites (XX% of playground shaded)
4. Specifications about Shade Selection and Installation *see Shade Design Fact Sheet	• Each site will be planned for its shade needs. This may be in the form of trees, built structures, or a combination of both to meet short and long-term needs • When young or smaller caliper sized trees are used, the installation of built shade will be considered to provide immediate shade until the trees have reached maturity • Trees will be selected and installed based on the standards, which includes details on tree selection (see Shade Tree List), site preparation, protection, and maintenance to ensure tree survival and optimal growth. Tree selection details can include: right tree for soil conditions and exposure to wind and sun, space and height allowances, diversity of species and ages, etc. • Existing shade from trees and built structures will be considered in designs. For example, placing seating or play structures under existing shade • New trees or built structures will be placed to the south and southwest of the area where shade is needed

5. Commitment to Management and Maintenance
 	
*see Shade Design Fact Sheet
	• A long-term plan for maintenance includes:
	  • A plan for tree care (e.g. wrapping, tree caging, mulching, watering, pruning)
	  • A plan for addressing vandalism, repairs, and replacement
	  • A commitment to keep the shade inventory up to date (status of trees and structures, and increase/decrease in shade)
	  • A commitment to dedicate resources (budget and staffing)

6. Planning Events	• Shade will be made accessible at outdoor events (trees, built structures, or portable shade)
7. Community Awareness	• Community members will be encouraged to use personal sun protection practices and to seek shade • Signage will be posted at outdoor facilities and spaces to encourage the use of sun protection practices

Image used with permission from Shade 'N Net

Implementation:

Often policy does not translate to practice. To ensure that your policy is implemented be sure to consider the five key steps below to build a strategy and support the policy.

Implementation Key Steps

- Identify your resources and budget
- Create a communication strategy
- Develop an evaluation process
- Develop training
- Identify champions

Shade plays an important role in creating a healthier, happier and safer community. From policymakers, municipal staff, businesses, employers, and education facilities to community groups and individuals - everyone has a role to play to increase shade in the community. So let's work together to make a formal commitment to ensure that we have the shade we need by managing shade and trees as infrastructure.

More about the Shade Work Group of Waterloo Region

The Shade Work Group of Waterloo Region is a collaborative that works to increase shade in publicly accessible spaces in Waterloo Region by: building the case for shade, providing support to organizations, sharing research and best practices, and creating tools and resources.

For more information:
www.regionofwaterloo.ca/shade

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