

<Community Name> School Feasibility Study

Request for Proposals & Terms of Reference for
Architectural & Engineering Services



Indigenous Services
Canada

Services aux
Autochtones Canada

Canada

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DRAFT SAMPLE

INVITATION AND INSTRUCTIONS

Consultants are invited to submit proposals to complete a feasibility study including a long-range plan with recommended options based on demographics, education programming and services, education specifications, technical condition assessments, and site conditions specific to <Community Name>. Each proposal received prior to closing will be evaluated based on the merits of the written submission and its compliance with these Terms of Reference. Proponents that submit proposals agree to be bound by the instructions, clauses and conditions of the RFP and addenda.

1.1 Contracting Authority

The Contracting Authority for this contract is:

<Community Name>

<Address Line 1>

<Address Line 2>

The Contracting Authority, <Community Name>, is responsible for reviewing and selecting the successful proponent. The Contracting Authority is responsible for the award and the establishment of the Contract, its administration, confirming standard and policies, and resolving contractual issues relating to the Contract. <Community Name> shall have at its sole discretion the final approval or rejection of the project deliverables. The Contracting Authority provides approval of the draft and final report.

1.2 RFP Enquiries

All enquiries for clarification must be submitted prior to <Question Deadline>. Enquiries after that time may not be answered. All questions and responses to enquiries will be distributed to all participating proponents and/or posted as an addendum without revealing the enquirer. All enquiries must be submitted in writing to:

<Community Name>

Att: <Name of Project Manager>

<PM Email>

Subject: Enquiries for Feasibility Study for <Community Name>

Enquiries and other communications regarding the RFP must be directed only to the contact identified in this section. Failure to comply with this requirement may result in the proposal being declared non-responsive.

1.3 Mandatory Requirements:

Proposals must include the following mandatory requirements (as noted in Section 8.1 Proposal):

- Documentation that provides the following information:
 - The Proponent's firm has received authorization from the Provincial/Territorial association in the Province/Territory of <Province/Territory> to allow individuals and business entities to offer and provide professional architectural or engineering services to the public.
 - The assigned Project Lead within the Proponent's team on this project is permitted to practice as a registered or licensed member in good standing with the governing Architectural, or Engineering Association that governs the Province or Territory of

<Province/Territory> where the project is located.

- The Consultant has professional liability insurance coverage up to \$1,000,000
- A certificate of coverage from the applicable provincial safety/workers compensation service.
- Appendix “C” the ‘Cost of Services & Breakdown of Fees’ Form must be submitted in a separate sealed envelope with the overall lump sum of the Prime Consultant’s fees, including sub-consulting fees. Cash allowances for the specified services will be outlined in Appendix “C” for allowances for geotechnical investigations and environmental reviews that the desired outcome of the study justifies. Also, the “Breakdown of Fees” must show the fixed hourly cost for each member of the Consultant’s team. Costs and fees must be submitted in Canadian Dollars. See Section 1.6 for details on submission of costs.
- A third party consultant to prepare the Demographic Report with Student Nominal Enrolment Projections for planning future school facilities. (See section 4.3.)
- An education Consultant to identify education programming and inclusive/special education services within the learning environments. (See section 4.4.)
- Listing of three (3) references from three (3) different clients for which the Consultant has performed similar work within the last five years. The reference listing information must include: the contact’s name, current telephone number, e-mail address, and a short description of the proponent or individual’s role in the specified Project. The Contracting Authority reserves the right to contact references.
- Proposals must be concise (to-the-point). Proponents shall submit no more than 15 pages in total excluding cover page, index and appendices. Team members’ resumes, and previous project experience details may be attached as appendices outside of the 15 page total.

Failure to provide any of these mandatory requirements will result in the bid being rejected. By virtue of submission of a proposal, the Proponent certifies that they are in compliance with the mandatory documentation listed this section (1.3). And, the proponent acknowledges that the Contracting Authority reserves the right to verify any information in this regard and that false or erroneous certification or information may result in the proposal be declared non-responsive.

Proponents who have met the mandatory requirements will be evaluated on the merits of the proposed team qualifications, and experience. The evaluation of services, will be based on the rated criteria outlined in Appendix “D”. The evaluation team members will include representatives from <Community Name>.

1.4 Costs of Preparation

All costs associated with preparing and submitting a proposal in response to this RFP or negotiations are the sole responsibility of the Proponent and will not be reimbursed.

1.5 Language and Format

The proposal must be submitted in <English/French> in a 8.5” X 11” format using a font size equivalent to Arial 10, Calibri 11, or Times New Roman 11, or larger.

1.6 Submission:

Proponents must submit the following prior to the closing date and time: <Month Day, Year at Hour, Time Zone>.

- An electronic proposal in a PDF format with the subject line as noted below to the following

contact:

<Name of Contracting Authority>

Att: <Name of Project Manager>

<PM Email>

Subject: Professional Services for <Project Name>, <Project #>, by [Prime Consultant's Name]

- One (1) hardcopy of the electronic proposal addressed to the contact with the subject line as follows:

<Community Name>

c/o <Name of Project Manager>

<Address Line 1>

<Address Line 2>

Subject: Professional Services for <Project Name>, <Project #>, by [Prime Consultant's Name]

A return address must be included

- One (1) separate cost envelope with the 'Cost of Services Forms' of the lump sum fee for the specified services and a 'Breakdown of Fees'. The envelope should be addressed as follows:

<Community Name>

c/o <Name of Project Manager>

<Address Line 1>

<Address Line 2>

Subject: Cost Services for Professional Services for <Project Name>, <Project #>, by [Consultant's Name]

A return address must be included

1.7 Receipt of Proposal

Timely and correct delivery of the proposal in electronic and/or hardcopy formats are the sole responsibility of the proponent. Proposals delivered after the stipulated closing date and time will be returned unopened.

1.8 Modification or Amendment of Proposal

A proposal submitted may be modified or amended provided that the revision is submitted in writing to <Name of Project Manager> prior to the closing date and time.

1.9 Proposal Validity

A proposal must remain valid and open for acceptance for a period of 45 calendar days after the closing date of the RFP. <Community Name> may request the Proponents to extend the validity period of their proposal. Proponents who agree to this request will need to confirm the availability of the Personnel listed in the proposal.

1.10 Limitation of Liability

Except as expressly and specifically permitted in this RFP, no Proponent or potential Proponent shall have any claim for any compensation of any kind whatsoever in relation to this RFP, or any

aspect of the procurement process, and by submitting a proposal each Proponent shall be deemed to have agreed that it has no claim.

1.11 Indemnification

The Consultant shall indemnify and save harmless Canada, its employees and agents, from losses arising out of the errors, omissions or negligent acts of the Consultant, its employees and agents, in the performance of the Services under the Agreement.

The Consultant's liability to indemnify or reimburse Canada under the Agreement shall not affect or prejudice Canada from exercising any other rights under law.

1.12 Insurance Requirements

The Consultant shall carry Professional Liability Insurance as noted in the mandatory requirements.

- Coverage shall be in an amount usual for the nature and scope of the Services but, shall have a limit of liability of not less than \$1,000,000, \$250,000 per claim, and be continually maintained from the commencement of performance of the Services until three (3) years after their completion.
- Notice of Cancellation of Insurance Coverage: The Consultant shall immediately advise the Contracting Authority in writing upon being informed or in receipt of any notification of a pending cancellation of its professional Liability insurance or of any reduction to the claim limits it maintains.

1.13 Work Safety & Workers Compensation

A clearance certificate or verification of coverage for work safety/workers compensation covering prime consultant and sub-consultants showing by the applicable provincial board/association is required.

1.14 Acceptance of Proposal

- The Contracting Authority may accept any proposal, or may reject any or all proposals.
- In the case of error in the extension or addition of unit prices, the unit price will govern.
- While the Contracting Authority may enter into an agreement or contractual arrangement without prior negotiation, the Contracting Authority reserves the right to negotiate with Proponents on any procurement.
- The Contracting Authority reserves the right to cancel or amend the RFP at any time. Proponents will be notified of cancellations, or amendments.

1.15 Competition

- In order to protect the integrity of the procurement process, Proponents are advised that the Contracting Authority may reject a proposal in the following circumstances:
 - If the Proponent, any of its sub-consultants, any of their respective employees or former employees was involved in any manner in the preparation of the bid solicitation or in any situation of conflict of interest or appearance of conflict of interest;
 - If the Proponent, any of its sub-consultants, any of their respective employees or former employees had access to information related to the bid solicitation that was not available to other Proponents and that would, in the Contracting Authority's opinion, give or appear to give the Proponent an unfair advantage.
- The experience acquired by a Proponent who is providing or has provided the goods and

services described in the bid solicitation (or similar goods or services) will not, in itself, be considered by the Contracting Authority as conferring an unfair advantage or creating a conflict of interest. This Proponent remains however subject to the criteria established above.

- Where the Contracting Authority intends to reject a proposal under this section, the Contracting Authority will inform the Proponent and provide the Proponent an opportunity to make representations before making a final decision. Proponents who are in doubt about a particular situation should contact the Contracting Authority before bid closing.
- By submitting a proposal, the Proponent represents that it does not consider itself to be in conflict of interest nor to have an unfair advantage. The Proponent acknowledges that it is within the Contracting Authority's sole discretion to determine whether a conflict of interest, unfair advantage or an appearance of conflict of interest or unfair advantage exists.

1.16 Content Presentation

In order to expedite the evaluation process, Proponents are requested to follow the same order presented in Section 8, Proposal, with the exception of fees. (Note: fees are submitted separately.)

1.17 Proposal Evaluation

All proposals will be evaluated based solely on the merits of the written submission and its compliance with the entire Terms of Reference.

Proposals will be scored by the evaluation team based on the following criteria outlined in section "8 Proposal". **The final criteria are to be determined <Community Name>:**

- Qualifications and Experience of Proponent's Team 35%
 - Prime Consultant's qualifications and experience 5% of 35%
 - Demographics – Third party's experience 5% of 35%
 - Education Program – Team member/s and experience 5% of 35%
 - Inclusive Services – Team member/s and experience 5% of 35%
 - Facility Planning – Team member/s and experience 5% of 35%
 - Technical Condition Assessment – Team members and experience 5% of 35%
 - Costing Consultant – Team member and experience 5% of 35%
- Scope of Services, Responsibility Matrix, Work Breakdown, Schedule, Communication Plan, Risk Management 20%
- Approach and strategy to collaborate and facilitate the development of a long-term master plan that belongs to the community 20%
- Total Fees 25%

Proposals are expected to be concise in order to facilitate an efficient evaluation.

1.18 Debriefing of Unsuccessful Bidders

Should an unsuccessful Bidder desire a debriefing, the Bidder should contact the <Name of Project Manager>, <PM Email>, identified in the RFP within 15 working days of the notification of the results of the solicitation. The debriefing may be provided in writing, or by telephone.



1.19 Commencement of Services

The Proponent is not to start work or render the Services prior to the effective date on the contract, and the contract between the Prime Consultant and the Contracting Authority has been




signed. Costs incurred by the Proponent prior to the effective date of the Contract will not be reimbursed by the Contracting Authority.

2 INTRODUCTION & INFORMATION

The feasibility study follows the identification phase and precedes the design phase:

Stage 1	Identification Phase
	<ol style="list-style-type: none"> 1. A First Nation community identifies a need for education infrastructure. 2. Indigenous Services Canada (ISC) Regional Offices provide planning information and School Space Accommodation Standards (SSAS). 3. The First Nation provides background information and begins to develop a vision for education programs, and engages stakeholders. 4. The Contracting Authority reviews and updates the Terms of Reference (TOR) for a Request for Proposals (RFP). 5. A prime consultant is selected from proposals submitted.
Stage 2	Planning Phase – Feasibility Study
	<ol style="list-style-type: none"> 1. The First Nation and consultant collaborate through authentic engagement to develop a Long-term Education Master Plan for learning environments. 2. A Community Vision is established outlining education programs, and the preservation, revitalization and strengthening of language and culture. 3. A rigorous Demographic Report is prepared, complete with enrollment projections and justifications for a 10-year post construction design horizon. 4. Special/Inclusive Education services and number of recipients are identified and documented (no anecdotal assumptions). 5. Education Specifications are developed to outline learning environments based on vision, culture, language, traditions, demographics, and education programming, special/inclusive services specific to a community. 6. Existing facilities, site, and community assets are assessed for Functionality, Capacities, Building Condition, and Life span of systems. 7. A Sustainability Plan recommends achievable Green Building criteria and Resilient Infrastructure strategies. 8. A Risk Analysis identifies the level of exposure to risks in the existing facility and an assessment of exposure to risk in the recommends including the impact to climate change. 9. 40 year LC replacement schedules and costs are estimated. 10. Several Viable Options are developed with corresponding capital investments, and 40 year LC operating and maintenance costs. 11. Environmental and Archeological Reviews of the recommended option are completed as required. 12. A Project Approval Request is made pursuant to the current School Space Accommodation Standards (SSAS).

Following a feasibility study and project approval, the design and construction phases will commence.

Stage 3	Design
	<ol style="list-style-type: none"> 1. Design process starts with a Schematic Design, and progresses through Design Development, to construction documents to be “Issued for Construction”. 2. Building code reviews and inspections by a permitting authority confirms drawings and construction are code compliant. 3. A method of procurement is selected based on the best value for money. If an alternate to Design Bid Build method is selected, a community must be prepared to justify that selection, and adhere to the “Operational Parameters for the Review and Evaluation of Construction Management Projects”.
Stage 4	Construction
	<ol style="list-style-type: none"> 1. Contractor/s and consultants are procured following the First Nation Tendering Policy. 2. Depending on the method of procurement, the contractor will commence work either during the design phase, or at the completion of the tendering process.
Stage 5	Commission & Occupancy
	<ol style="list-style-type: none"> 1. Once the construction is complete consultants will issue a letter of assurance/schedule that the work complies with building codes and construction documents. 2. Consultants will issue a certificate of completion. 3. A safety codes officer may issue a permit to occupy.

2.1 Introduction to <Community Name>

(A brief introduction to be supplied by the Community)

- What is the history, language and culture of the Community?
- How are the Calls To Action in the TRC are to be addressed within the education program and within learning environments?
- Where is the Community located?
- Is there a volunteer working group to represent the community? Or will the consultant be expected to establish this group?
- What is the current education program within the Community?
- Will the community specify the education consultant? Or, should the consultant engage and select the education consultant?
- Who will verify inclusive/special education numbers? Will it be the service providers?
- Why has the Community requested a study and master plan?
- What existing reports within the Community would contribute to the study?
- Confirm the Building and Energy Codes that will apply to this project. Will the Provincial or National building and energy codes be used for this study?
- Who will represent the Contract Authority?
- Timeline

2.2 Current Education Facilities

(Details on the current school facilities to be supplied by the Community):

- Number of schools within the community and the grades they service (to be supplied by the Community):
- Age of existing facilities (to be supplied by the Community)
- Why a study has been requested (to be supplied by the Community)
- Please specify if any grades or services must be accessed outside the Community
- Any existing reports on education facilities within the community.

2.3 School Space Accommodation Standards (SSAS)

Indigenous Services Canada has established the School Space Accommodation Standards (SSAS) updated in 2021 to determine the allocation of Total Gross Space Allowance based on projected enrollments. The SSAS is not a prescriptive standard; it provides flexibility to suit site specific and community specific requirements. The education programs and services within a community will guide the development of a unique Education Specification that utilizes the allocation of space derived from SSAS (See Section 3.1). As a condition for ISC infrastructure funding, consultants must comply with applicable statutes, regulations, codes, standards, and criteria – those compliance requirements are outside the scope of the SSAS and are covered in most up-to-date version of the Protocol for ISC-Funded Infrastructure (PIFI), which is available on the departmental website.

2.4 List of ISC Reference Documentation

As a minimum, the following list of reference documentation must be followed:

- Truth and Reconciliation Calls to Action
 - Education
 - Language and Culture
- Policies and Directives for infrastructure in First Nation communities: <https://www.sac-isc.gc.ca/eng/1100100010585/1533644999181>
 - School Space Accommodation Standards (SSAS) 2021: <https://www.sac-isc.gc.ca/eng/1326828445933/1533650275139>
 - School Site Development Policy: <https://www.sac-isc.gc.ca/eng/1100100010640/1533650627200>
 - Level of Service Standards and Management of Teacherages on Reserve (LoSS): <https://www.sac-isc.gc.ca/eng/1100100010644/1533651868855>
- Protocol for ISC-Funded Infrastructure (PIFI): <https://www.sac-isc.gc.ca/eng/1409148994545/1533650060879>
- Tendering Policy on Federal Funded Capital Projects for First Nation on Reserve: <https://www.sac-isc.gc.ca/eng/1100100010608/1533651727486>
- Building Codes adopted by the First Nation's province/territory
- National Energy Code
- Canada Green Building Council – Zero Carbon Building Standards

- Provincial/Territorial Food Services Acts

Additional sustainable references are:

- Canada Green Building Council – LEED
- Collaborative High Performance Schools – CHPS
- British Columbia:
 - Sustainable schools Best Practices Guide:
- Alberta:
 - Technical Design Requirements for Alberta Infrastructure Facilities
- Manitoba
 - Guide for Sustainable Schools in Manitoba
- Ontario
 - Green Schools Resource Guide: A Practical Resource for Planning and Building Green Schools in Ontario
- Quebec
 - The Principle of Sustainable Development: A Guide for Action

2.5 Codes, By-Laws, Licenses, Permits

All First Nations within a given region are required to be in compliance with any applicable regulations, policies, directives, standards, protocols, specifications, guidelines, and procedures applicable in the region in which the First Nation is located in order to qualify for funding. The work of Consultant's Team must comply with energy and building codes, statutes, standards, policies, regulations and by-laws applicable to their work, including but not limited to those included in the Protocol for ISC Funded Infrastructure (PIFI) and that are applicable at this stage. Where necessary, the Consultant shall review their work plan with those public authorities having jurisdiction in order that the consents, approvals, licenses and permits required for the different school projects may be applied for and obtained.

2.6 Governing Law

The RFP, and resulting contract between the parties must be interpreted, governed, and determined by the laws in force in the province or territories of <Province/Territory> as outlined in the PIFI.

3 PROJECT GOAL & OBJECTIVES

The goal of this feasibility study is to collaboratively develop a long-range master plan for education programs services and facilities in the community. Consultants will work collaboratively with stakeholders to understand the project, vision, culture, language, education programs, services, and demographics to develop the required learning environments within the community. The consultant team will also assess the condition and life cycle costing of the existing learning environments and community assets. This long-range plan is a roadmap to guide the development of education programs and learning environments over the next 15+ years and LCC for 40 years.

3.1 Objectives

The objectives within the long-range plan within the feasibility study process are as follows:

- Establish a working group of Community Stakeholders to provide an opportunity for school administrators, parents, and the community to participate, and take responsibility for a master plan at the completion of the study. Collaboration with this group should build consensus, continuity (from one phase to another), and ownership of the development of learning environments within the community.
- Develop a Community Vision for education programs, and the preservation, revitalization and strengthening of language and culture;
- Identify opportunities to leverage existing assets, programs or facilities within the community;
- Develop an Education Specification specific to <Community Name>;

The education specification is the link between education programing and the planned physical facilities. It is a comprehensive document that describes and illustrates the following:

- Community vision;
- Projected enrolment and design horizon;
- Education Report that includes a long range planning for:
 - Education programing including traditional First Nation and provincial curriculum over the next 15 years;
 - Outdoor land-based learning that is aligned with the vision and culture of the community;
- Inclusive/special education programs and services that are required within the learning community, descriptions of how those services are delivered, and an outline of the facility requirements for those services;
- Pedagogical requirements describing how programs and services are delivered and what facility infrastructure, furnishings and equipment are required to support those pedagogies. This would include an understanding of how traditional knowledge is shared in a school setting.
- Allocation of space, capacity calculations, and utilization rates for all of the existing and proposed facilities that address language, culture and education programs, services, and emergency response plans;
- Pedagogy through diagrams and descriptions on how instruction and services are delivered. This information should respectfully consider the traditional ways of sharing knowledge, and curriculum instruction.
- Adjacency, circulation, and utilization illustrations and bubble diagrams (NOT FLOOR PLANS!);
- Provide program functional analysis of existing and proposed facilities;
- Identify strategies to allow programs to evolve over the next 15 + years. Strategies should identify ways to increase capacity internally and expand building systems for future growth. The education specification, should cover a range of requirements for learning environments for the next 15 years;
- Demographic Analysis:
 - Comprehensive Demographic Research

- Authentic engagement to gather both community and education data
- Population Modeling and Analysis
- Enrollment projections for 15+ years
- Provide a Technical Condition Assessment of the existing physical conditions;
- Options:
 - Develop three viable options including renovating existing facilities with risk and cost benefit analysis of the options
 - Provide an analysis of multiple siting options that support traditional land based programs, ecological education, historical stewardship, and sustainability.
 - Provide a Costing Report for recommendations complete with capital 40-yr Life Cycle Costing Analysis (LCCA) for replacement, operations, and maintenance.
 - Provide a recommendation for one option with justification.

4 SCOPE OF WORK

The consultant shall perform the scope of work necessary to complete the deliverables in section 5 and compile a long-range plan for facilities within <Community Name>.

4.1 Work with the community

Meetings, Interviews, Engagements, and Assessments are expected to be held within <Community Name>, unless the project team specifies alternate arrangements that are approved by the Contracting Authority. The consultant will also provide a means for community input through surveys, interviews, and engagement meetings. The method of collecting input from the community should be vetted and approved by the working group. Consultations with the community should include but are not limited to the following:

- One (1) project start-up meeting with the project manager to confirm dates, and stakeholders;
- One (1) meeting with stakeholders to establish the vision (this is an educational engagement, not a discussion about infrastructure or “bricks and mortar”);
- Language and Cultural Engagement;
- Meetings with multiple community departments to gather demographic information;
- Meetings with O & M personnel during school facility assessments to observe operations and document scheduling;
- Meetings with school administration to gather information on education services for programing and inclusive services;
- Interviews with teachers and community members;
- Student and Staff engagement, and/or participating in activities with Students and Staff;
- Meetings as required to review draft report findings and recommendations. Approval of draft reports should be recorded in meeting minutes;
- Presentation of final report.

4.2 Communication Plan

The prime consultant will be responsible to develop a communication plan. (See section 8.4.5) The communication plan must follow community protocols and include stakeholders as participants in the planning process. The communication plan, work breakdown schedule, and responsibility matrix should show how stakeholders will participate. Regular meeting schedule should be noted within the proposed timeline. Stakeholders should include a cross section of the community, possibly drawing from the following groups:

- Elders
- Chief and Council
- Education Department
- Band Administrator
- Education Administration & Staff
- Operations and Maintenance
- Students
- Parents
- Community Members

The consultant will send out meeting agendas one day prior to the meeting. After a meeting, the consultant will provide meeting minutes and relevant or requested reports within a week.

4.3 Demographic Report

The consulting team will include an independent third party that is a qualified professional with experience and scope of expertise in collecting, analyzing and modeling demographic information. The report must show a thorough analysis of waiting lists, retention rates, repatriation, housing, migration, and community specific considerations. The recommended model must provide justifications for a minimum of 15 year projections based on 15+ years of data. (See Section 5.4 and Appendix E.)

4.4 Education Report

Confirm if the community has already engaged a specialist who will provide information to the consultant. If an education report is not prepared independently by the community, the consultant's team will include an independent third party that is a qualified educational professional who has experience and scope of expertise in planning Indigenous Education Programs and verifying inclusive/special education services to students with exceptionalities.

Working with stakeholders, the education specialist should identify goals, objectives, strategies and actions needed to provide adequate services to all learners. Information gathered will include language, culture, land-based learning, programing, curriculum, pedagogy, and operations. (See Sections 5.5, and 5.6) The planning consultant will utilize the education report to develop the education specifications.

4.5 Education Specifications

The Prime consultant is responsible to provide a detailed Education Specification. This detailed outline of learning environments should be developed by an accredited planner (ALEP) through the Association for Learning Environments, or one who has five years of experience preparing master plans and education specifications for school facilities. If the Prime Consultant does not

have the in-house expertise to complete this task, a sub-consultant specializing in this field should be included within the consultant's team. (See section 5.8 and Appendix A)

4.6 Technical Assessments and Inspections

The technical assessments, or building condition report, of existing school facilities and site are in-person visual and non-destructive inspections. The Contracting Authority and Indigenous Services Canada are to be notified immediately if there are life safety concerns. Also, the consultant is responsible to recommend further testing or assessment if a more detailed investigation is warranted. The assessment will also include the current condition of systems and if the expected design life has been compromised. (See section 5.11)

4.7 Sustainability Plan

The Prime Consultant is responsible to engage the working group of stakeholders and community to initiate a sustainable building plan. This would include working with community members who know the history of proposed sites to learn about potential issues that may affect the wellbeing of development of infrastructure. Consultants are responsible to document present impacts of the environment on facilities and future impacts of climate change. In addition to researching a proposed site/s, planning Low/Zero carbon is a priority. Sustainable planning reduces the negative impacts on environment, promotes the health and comfort of building occupants, and optimizes the life-cycle operation and maintenance of a facility. The consultant is responsible for documenting the achievable and sustainable Green Building criteria and Resilient Infrastructure strategies. (See section 5.13 Sustainable Deliverables, and Appendix I)

4.8 Background Information and Existing Reports

The consultant is responsible to request, access, and research background information and existing reports that relate to demographics, education, programming, building, site conditions, climate risk assessments and any documents related to the study.

As noted in section 6.9 all information that is collected is confidential and belongs to the community.

5 DELIVERABLES

The deliverables will include the scope of work within each section described below. As outlined in the Proposal Evaluation, Section 1.14, the successful consultant team must demonstrate that the members of their team have suitable credentials to perform each of the deliverables. All deliverables should be present in the draft report submitted for ISC's HQ National Technical Review Committee review.

5.1 Working Group of Stakeholders

In collaboration with Chief and Council and the Education Department, the consultant will establish a volunteer working group of stakeholders to develop, review, and take ownership of the long-range plan.

5.2 Community Vision

In collaboration with the Working Group, the consultant will document the Community's educational goals and objectives. The community vision along with the educational report are foundational document that will guide long-range planning within the education specification for learning environments for the next 15+ years.

5.3 Language and Cultural Engagement

In collaboration with the Working Group, the consultant must organize an engagement with community members and Elders to facilitate a discussion and subsequently document the interior and exterior spaces, furnishings, equipment, storage and finishes, required to support the preservation and instruction of language, culture, and land based learning.

5.4 Demographic Report

The demographic report must provide the following (See Appendix E for more details):

- Documentation of authentic engagement and research methodology utilized to collect data
- Sources of data identified
- Comprehensive community demographic information utilized to construct a defensible population projection of students in education programs, between Kindergarten and Grade 12, for 15 years
- Thorough analysis of demographic information complete with justification of methodology and process, modeling, assumptions, findings, and recommendations.
- Projected enrollment broken down by grades for 15 years
- Justification for a design horizon of 10 years post construction, or strong evidence that an alternative design horizon is required

5.5 Education Program Report

The education program report will identify goals, objectives, strategies and actions needed to provide a successful and equitable education program to provincial/territorial public schools. Outcome of planning should consider the language, culture, and land based programs specific to <Community Name>. The report will include education programming, curriculum, and inclusive/special education services that are required within the community. Also, it will identify the specialists and staff that deliver the services, and the projected number of recipients of services. The number of recipients must be verifiable and justifiable.

Note that regardless of provincial education curriculum requirements, ISC allows full-day attendance of kindergarten students. This should be taken into consideration in the education report and the subsequent Education Specification.

5.5.1 Engagements

Information gathered will include language, culture, programming, pedagogy, and operations. Developing a comprehensive Education Program Report will include the following interactions:

- Student engagement and interviews
- Staff engagement and interviews
- Elder engagement
- Surveys for all community members

These engagements and surveys should focus on the types of education programs, and how instruction is delivered. These engagements are not about infrastructure. Understanding the education program and Inclusive Education Report combined with the community's vision form the foundation of the education specifications.

5.6 Inclusive/Special Education Report

The consultant's team must work with School administration to identify and document products, services and supports required for students. Planning for inclusive/special education services should consider a wide range of health, social and educational needs, including the unique needs of First Nations 2SLGBTQQIA+ students.

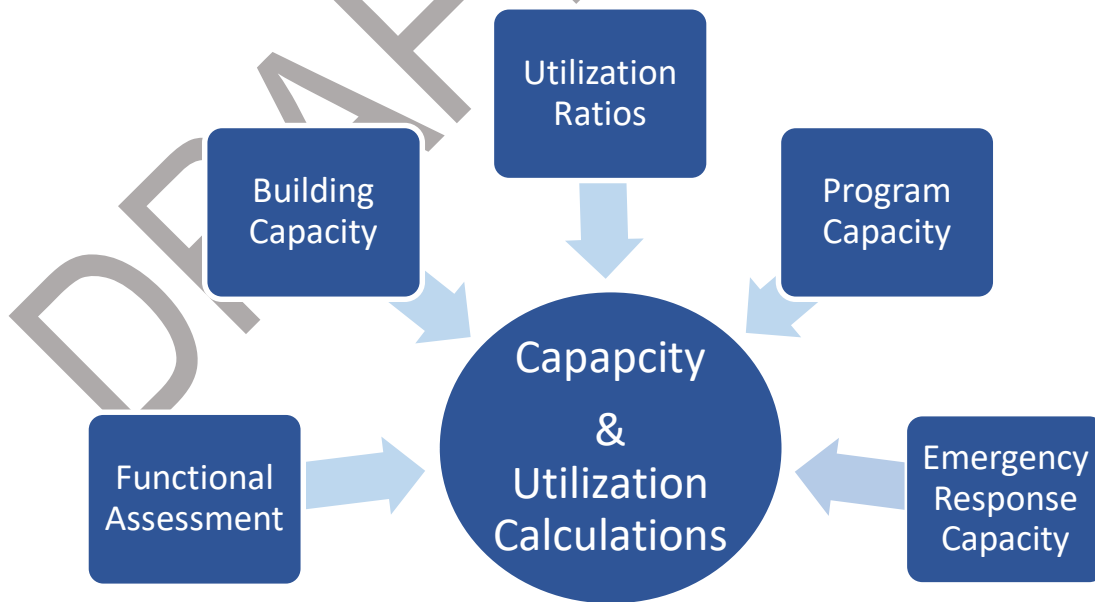
Documentation of Inclusive Services should include:

- A long-range plan to accommodate services required in the learning community;
- The services required within the community;
- A letter from Administration outlining the current services delivered in-house by school staff;
- Additional letters from external services and agencies supporting students;
- Verification of the number of students that receive special services beyond regular education programming services. Verification must be from registered health or educational professionals qualified to identify students that require services beyond the regular classroom instruction. For example, specialists working within the school community, or qualified health and education consultants contracted by the prime consultant;
- A breakdown of the number of students that may be classified as inclusive/special education. This number will determine the inclusive/special education space allocation within the SSAS calculations.

As defined in the SSAS, the number of students receiving inclusive/special education services will be considered in the growth projections. See Appendix F for more information on whole child services.

5.7 Functional Assessment and Capacity Calculations

The consultant team will assess the functionality and capacity of the spaces within existing infrastructure and calculate additional requirements. The following will be addressed within the study:

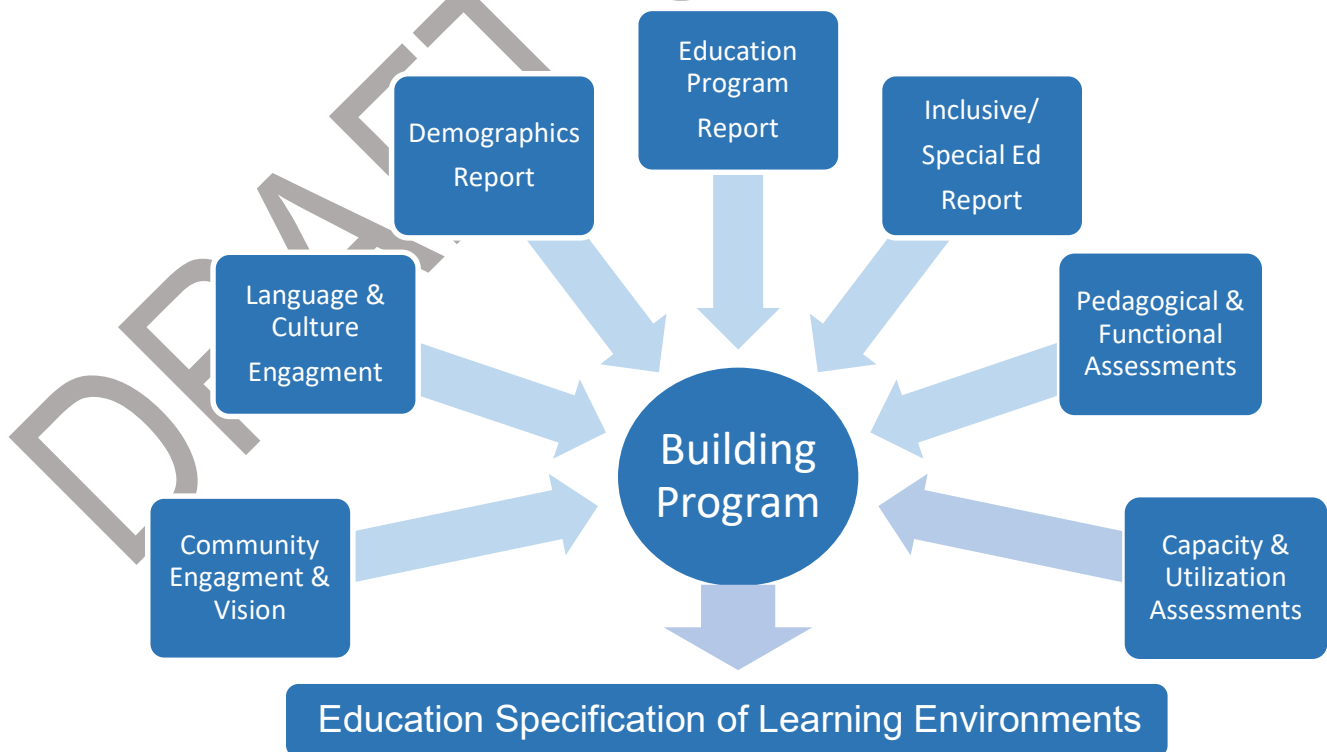


- Functional Assessment – an assessment of how existing spaces and proposed developments support and accommodate education programs.
- Building Capacity – the number of student seats that a facility can accommodate. This calculation would exclude spaces that do not include students, for example administration spaces, accessibility washrooms, and core building systems required to support those seats.
- Utilization Ratios – the ratio within a day that each space will be utilized within the school schedule.
- Program Capacity – the capacity to deliver Traditional Language and Cultural Programs, Provincial or Territorial Curriculum, and Inclusive Services. (Scheduling must be considered).
- Community Emergency Response Capacity – If the facility is used for emergency response, and what is the capacity to meet the temporary demands for emergency situations. This usage must be documented as outlined in the School Space Accommodation Standards.
 - Storing Emergency Supplies
 - Gathering/Mustering Station for the community
 - Sheltering in place
 - Emergency Response Services or Centre
 - Post Disaster Relief Services or Centre

More detailed information on calculating capacities is included Appendix H.

5.8 Education Specifications, an Outline of Learning Environments

The consultant team will be responsible for conducting, coordinating, and compiling an education specification based on the building program that has been developed in collaboration with the community.



The Learning Environment Planner and Consulting Team will be responsible to provide text, illustrations, and diagrams (not floor plans) to describe the learning environments that will support the education programs and services through the master planning process. This will include, but is not limited to:

- Outline of the site development that supports:
 - Traditional land based learning
 - Environmental, and historical context
 - Playgrounds and sports fields
 - Traffic flow, bus drop off zones, site services
 - Relevant community master planning that will impact demographics, traffic, services, sustainability, and resilience.
- Outline of the allocation of interior space, building systems, acoustics, storage, technology, furnishings and equipment (fit-up) required to support:
 - Community Programs that teach and preserve Language and Culture within the community.
 - Programing and services required for students within the community, that will allow students to transfer to an equivalent grade in another school within the province.
 - Inclusive/special education programing and services.
 - Collaborative Staff and Administration work and support spaces;
 - Strategies identified through engagement that increase student retention, attainment, and success.
- Illustrations that model how space, layouts, furnishings, and equipment support culture, language, pedagogy, curriculum and inclusive/special education services.
- Capacity calculations corresponding to the documented number of students within the learning community and recipients of inclusive/special education services.
- Utilization rates of existing and proposed spaces
- Adjacency, circulation, and utilization drawings to show connections between programs and after hour programs
- Flexible instructional spaces that can adapt to changing curriculum, pedagogy, and increased capacity;
- An outline of space for inclusive/special education learning environments, including size, adjacencies, and connections to other programs and services.
- Education programing for students and staff that provide green building and resilient infrastructure awareness, and skills.

Finally, while First Nations education programming reflects the needs of the community, additional space considerations to support unique education programming needs, are made when a community demonstrates that the SSAS is insufficient to accommodate programing requirements. The consultant is responsible to develop a comprehensive justification based on programing requirements for any request for additional space allowance. The justification will be subject to and supported by applicable capital project reviews and approvals.

5.9 Leveraging Assets within the Community

Consultants will identify if there is potential to leverage the utilization of community assets by assessing the capacity of existing facilities within a community to serve both education and community programs. This would include an evaluation of spaces beyond a school where education programs and work experience could happen. For example, is there a health centre close by that could provide shared space for first aid training or work experience?

The consultant team will also identify community programs that will potentially utilize the school facility for cultural events, continuing education and other community programs and services.

Lastly, the consultant will identify opportunities to share and leverage resources. Opportunities for shared “off-grid” generation and storage of energy, potable water, and communications should be sought after. The consultant should document if there is a shared back-up energy distribution system, or if a shared back-up system should be considered. Also, existing climate change risk assessments or mitigation and resilience strategies should be documented in the study.

5.10 Teacherages

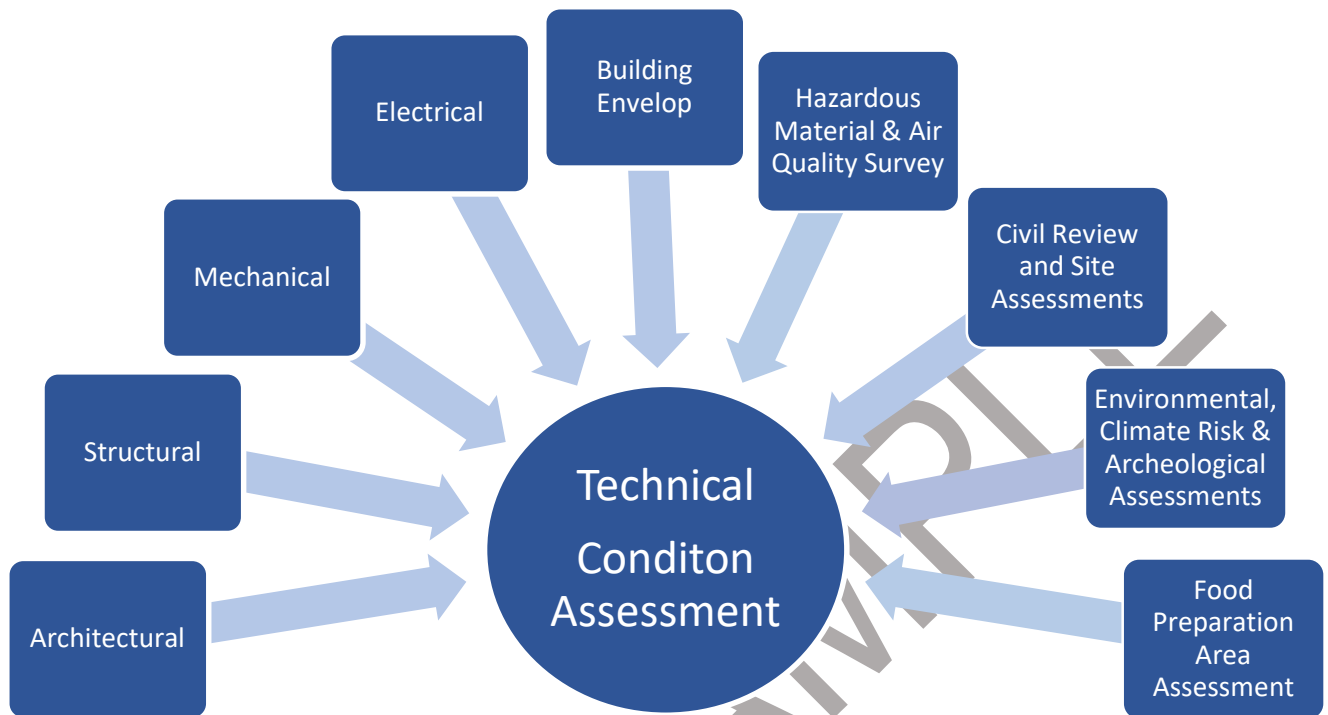
If applicable, the consultant will include the following assessments of teacherages:

- Capacity required in addition to available accommodations
- Building and site assessment of existing teacherages
- Condition, repairs and replacements for fixtures, furnishings and appliances
- LCCA, including operations and maintenance costs, of recommendations for modernizations, additions or replacements

See Appendix K for more details.

5.11 Technical Condition Assessment

The prime consultant is responsible to conduct, coordinate, and compile the technical condition assessment. The prime consultant will arrange for registered professionals within their areas of expertise to complete the following assessments:



5.11.1 Building Condition Assessment

The building condition assessment will include the following:

- Inspections of the following major building elements and systems:
 - Architectural
 - Structural
 - Mechanical
 - Electrical
 - Building envelope
 - Civil
 - Food Services
- Immediate notifications of any issues of that pose imminent danger are resolved immediately (Note: life safety issues are not considered within the value assessment unless a structure or facility are determined to be unsafe);
- Hazardous Materials and Air Quality Surveys of the existing structure(s) to be completed by a registered or licensed professional;
- Qualify and prioritize items that need to be repaired, upgraded, or replaced;
- Estimate life expectancy of elements, systems, facilities, and mobile/portable structures;
- Review findings of the Building Condition Assessment with the architect, engineers, and cost consultant, to determine the best outcomes of recommendations. Calculate the Facility Condition Index. Determine the best value for investments in repairs, upgrades, modernizations, additions, or new construction.

5.11.2 Site

If new infrastructure is required, the Consultant will provide a narrative, including traditional histories, drawings and sketches for a full analysis of a minimum of three siting options (including the existing site). The selection of a preferred site will be expected to include the following information:

- Existing development, services, and infrastructure on site. What currently exists?
 - Water and waste water
 - Fuel/Gas service
 - Electricity
 - Connectivity
 - Fire protection services
 - Roads
 - Drainage
- Energy Sources:
 - The consultant should verify what alternate sources of energy are available if there is a disruption from regular sources. Would life safety or building systems within the facility be at risk?
 - If backup energy systems are in place, the consultant should verify that there is a means to protect that system in emergencies (fires, floods, temperature, storms, etc.), and there is a scheduled maintenance program in place.
- The existing LCCA for existing services and infrastructure.
- Proximity to potential hazards and historical data of events –
 - Has there been any reasons to evacuate the site in the past 10 years for fires, extreme weather, flooding or other events?
 - What is the design flood elevation?
 - Do fires pose a risk to the community? Is there separation between the facility and condense combustible forest/brush/grasslands?
- Resiliency to climate change
- Outcomes of existing or preliminary Geotechnical Reports
- Future expansion – Is the site suitable for growth?
- Multiple sites – What is the proximity? How will this affect transportation to two sites?

5.11.3 Environmental Review

A desk top “Simple Environmental Review Report” of the proposed development and related activities to identify the potential impacts of such a development and how they can be anticipated and mitigated during design and construction. To complete the environmental project description, an environmental assessment scoping report must be completed

5.11.4 Archaeological Assessment

Prime consultant is to confirm the extent of the assessment required:

- Traditional knowledge and History of the site from Community Elders and Members

- Historical Resources Overview(HRO/AOA) – desktop review of project;
- Historical Resources Impact Assessment (HRIA/AIA) – field studies meant to assess in detail a development area;




5.12 Options

The consultant's team will make recommendations to develop learning environments that are equitable with publicly funded facilities and site development. The team will present a minimum of three (3) viable options with: justifications, costing, concept drawings, and sketches to fully illustrate all of the possibilities that have been considered. (Doing nothing is not a viable option.) One option must consider utilizing the existing school facility if it was constructed within the past 40 years. Options to replace conventional construction that are less than 40 years of age, or mobile facilities that are less than 17 years of age must include adequate justification such as O&M. Justification must take into account life safety and the value for money of modernizations, additions, or replacement scenarios. Preferred options must demonstrate the capacity to support the education specification.

Consultants will provide the following:

- Justification for allocation of space for demographics, and inclusive/special education infrastructure. Both demographics and inclusive/special education services must include third party verifications;
- Master plans for future expansions and development of facilities on site plans;
- Strategies to accommodate students during the next phase of design and construction.
- A cost benefit analysis of:
 - Sustainability measures to mitigate the impact of climate change, improve performance of building systems, and increase the quality of the learning environment.
 - Continuing to utilize an existing facility
 - Modernization
 - Addition
 - Developing a new facility
- Justification for selecting a particular site;
 - Proximity to other community assets
 - Services
 - Have past events been considered? (Flood mapping, fire, or other)
- Justification for number of school facilities (ex. one large facility vs. two small facilities)
- A Full 40 year LCCA of all major building elements and systems to identify efficiencies in each viable conceptual option;
- Timeline of milestones proposed for the steps following the feasibility study as noted below time of the year to commence construction based on location, access, and school year.

Milestones following the feasibility Study:

Stage 3	Design	Estimated Months to Complete
	<ol style="list-style-type: none"> 1. Design development from schematic to construction documents for renovations, additions, and/or new schools. 2. A building code review. 3. Select a method of procurement based on the best value for money. If an alternate to Design Bid Build method is selected, a community must be prepared to justify that selection, and adhere to the “Operational Parameters for the Review and Evaluation of Construction Management Projects”. 	To be determined during Feasibility Study
Stage 4	Construction	Estimated Months to Complete
	<ol style="list-style-type: none"> 3. Contractor/s and consultants must be procured according to the First Nation Tendering Policy. 4. Depending on the method of procurement, the contractor will commence work either during the design phase, or at the completion of the tendering process. 	To be determined during Feasibility Study
Stage 5	Commission & Occupancy	Estimated Time to Complete
	<ol style="list-style-type: none"> 5. Once the construction is complete consultants will issue a letter of assurance/schedule that the work complies with building codes and construction documents. 6. Consultants will issue a certificate of completion. 7. A safety codes officer may issue a permit to occupy. 	To be determined during Feasibility Study

- A recommended method of procurement that provides optimal value for money, scheduling and economic development opportunities for the community. The chosen method must follow the Tendering Policy on Federal Funded Capital Projects for First Nation on Reserve.

Methods to consider include:

- General Contracting Approach:
 - Design, Bid, Build (DBB)
- Construction Management Approach. These methods may only be considered where the community demonstrates that the approach is more cost effective and the community has expertise to support one of these methods. Justification for this approach must provide specific information on how all competitively awarded work plus contingency could fall within the Total Expected Costs.
 - Construction Management (CM)
 - Design Build (DB)
 - Integrated Project Delivery (IPD)

5.13 Sustainability Plan

For each of the options presented, the Consultant is expected to provide the following specific to the location of the First Nation (See Appendix I):

- Green building criteria suited to location – to build an energy efficient, higher performing school that can be environmentally beneficial, offer improved learning environments and can be economical to build to day and operate for years to come. Net zero, or net zero ready should be included within the recommendations.
- Resilient infrastructure – to ensure building systems are adequate to:
 - Access to support the necessities of life
 - potable water, and removal of waste water
 - emergency shelter and supplies as noted in community emergency plans
 - staging areas, mustering and evacuation stations as noted in community emergency plans
 - Also, it is expected that the consultant will provide recommendations for infrastructure/building systems that are responsive to current and potential hazards such as:
 - Current and modelled future climate conditions (forest fires, floods, storms)
 - pandemic events
 - disruptions to services (water, heat, electricity, communications)
 - emergency maintenance of life systems for electricity, heat or other necessary systems.

5.14 40-Year Life Cycle Costing Assessment (40-year - LCCA)

An independent registered qualified quantity surveyor (CACQS) will provide total cost of ownership for preferred options including capital investment, life cycle recapitalization estimates, operations, and maintenance. This is the total investment in a facility/asset over a 40-year span. This calculation provides <Community Name> with costs and a timeline for replacing systems and components within each option.

5.14.1 Capital Investment

The cost consultant will prepare a “Class D” estimate of the capital investment costs of the preferred options. The preferred options should be developed in collaboration with the Working Group of stakeholders and satisfy the requirements listed in the Education Specification, the proposed outline of Learning Environments and site development.

5.14.2 40-Year Life Expectancy & Recapitalization Costs

The cost consultant will provide a 40-year life cycle cost analysis based on the life expectancy and re-capitalization (replacement costs) for components and building systems. This analysis should provide an elemental format breakdown of the building systems within conventional and mobile structures used for learning environments within the community.

5.14.3 Operations and Maintenance Costs

Estimates of the costs to operate and maintain the facility over 40 years should provide comparisons between the building systems of the proposed options.

5.15 Risk Analysis

During the technical condition assessment, the consultant will identify the level of exposure to risks exist in the existing facility:

- Life Safety
- Air quality
- Older equipment and systems at risk
- Exposure to extreme events and the impact that climate change will have on the scale of extreme events .
- Spike in construction or O & M costs
- Other site specific risks

In addition to the assessment, the Consultant shall complete a risk analysis for each option, including risk elements, responsible parties, mitigation strategies and associated risk allowances in the following areas:

- Community – Does the community have capacity to manage funding agreements and capital projects proposed in the options, or a project management is required?
- Emergency Response – Is the facility part of an emergency response plan? What is the expectation to utilize the facility if it is undergoing renovations?
- Swing Space – How will renovation/construction mitigate the impact of work on existing programs and facilities?
- Consultant/Contractor Capacity – Are there are consultants/contractors with capacity that would bid on the scope of work that is outlined in the proposed options.
- Environmental – Does the work proposed have biological, physical, or social impacts on the surrounding environment?
- Climate Change Analysis – what is the impact of climate change on the proposed options?
- Remoteness – What is the accessibility to the site during construction?
- Project Duration – Is there a possibility that the duration of the project may impact the scope, budget, or schedule?
- Project Complexity – Is the scope of work outlined in the proposed options typical, or will special expertise be required?
- Cost Sharing – Will the community be sharing the cost of the project/s outlined in the proposals?
- Other – What are the risk elements that are specific to this project?

5.16 Selected Preferred Option

The selected preferred option must be approved by the contracting authority. It must demonstrate it has capacity to deliver a complete education program within the SSAS. The justification for this option must consider value for money within the asset LCCA of existing and/or proposed construction.

5.17 Draft Report

The Consultant shall prepare a draft report detailing the study methodology, supporting data assumptions, findings, and recommendations. The Draft Report shall include:

- Preliminary Long-range plan
 - Community Vision
 - Opportunities to leverage assets
- Preliminary Demographic Information
 - Preliminary SSAS calculations
- Education Programs
 - Inclusive/special education services allocation
 - Functional and capacity Assessments
- Building Condition Assessments
- Recommendations for three options

The draft report shall be submitted electronically to the Contracting Authority. Once approved by the Contracting Authority, the draft report must be submitted to ISC for review and feedback. The draft report must be submitted by the date specified in the contract. Approval of drafts should be recorded in meeting minutes. Significant meeting minutes should be included in the final report.

5.18 Final Report

The final report shall be presented in the same format as above. It shall address issues and incorporate comments identified as part of the review of the draft report. The final report will include all final deliverables including:

- Complete analysis of three options
 - One option must consider renovation of the existing facility
- Justification for the preferred option

Acceptance of the final report should be included in meeting minutes and submitted in the final study. All work must be signed and stamped by the consultants. The Consultant shall submit the final report in three (3) identical copies appropriately bound, and an electronic version. All documents considered being a part of the final report shall bear and signatures of the responsible professionals.

5.19 Schedule of deliverables

The selected preferred option must be delivered within the schedule that is approved by the contracting authority. Approval of the preferred option will also be by the contracting authority.

6 CONSULTANTS' RESPONSIBILITIES

Once the contract has been awarded, The Consultant shall perform the services described herein in accordance with the terms and conditions of this RFP.

6.1 Standard of Care

In performing the services, the Consultant shall provide and exercise the standard of care, skill and diligence required by customarily accepted professional practices and procedures developed

by professional bodies, and building codes in the performance of the services at the time when and the location in which the services are provided.

6.2 Time Schedule

The Consultant shall:

- Submit in a timely manner to the Project Team, for approval, a detailed time schedule for the services to be performed;
- Adhere to the approved time schedule and, if changes in the approved time schedule become necessary, indicate the extent of, and the reasons for such changes, and obtain the approval of the Working Group Stakeholders. See Appendix C;

6.3 Project Information, Decisions, Acceptances, Approvals

The Working Group, Contracting Authority, and/or Chief and Council shall provide, in a timely manner, project information, written decisions and instructions, including acceptances and approvals relating to the services provided by the Consultant.

No acceptance or approval by the Working Group, whether expressed or implied, shall be deemed to relieve the Consultant of the professional or technical responsibility for the services provided by the Consultant within the contract.

Sufficient time should be allocated for the review and approval of projects exceeding \$15,000,000 in total estimated cost, or deemed to be high risk. Draft reports, including all deliverables, for these projects must undergo an additional review by the National Technical Review Committee (NTRC). At the draft stage, approximately 3-4 weeks should be taken into consideration for the receipt of recommendations.

6.4 Build on Existing Research

The Prime Consultant shall collect all relevant studies, reports, and surveys that have been completed in the last two years from Band and School Administrations.

6.5 Changes in Services

The Prime Consultant shall advise the Contracting Authority in writing of any changes, including increases, or decreases of the original scope of services described under this RFP. Also, prior to commencing such changes, the consultant must advise both the Contracting Authority and the Working Group of any known and anticipated effects of the changes from the proposal's consulting team members, fees, and schedule.

6.6 Provision of Staff

The Prime Consultant must maintain throughout the project the proposed persons and their roles, including principals and sub-consultants, that were to be employed by the Prime Consultant. Any changes from the staff and team listed in the proposal must be approved by the Contracting Authority through a written request. The Project Team may object to changes within six (6) days of receipt; of notification and on notification of such objection, the Consultant shall find a suitable alternative that is qualified with recent and relevant experience. Any unauthorized changes will result in the termination of the contract.

6.7 Sub-Consultants

The Consultant shall:

- Identify in the proposal all the sub-consultants with whom the Consultant intends to enter into agreements for part of the services and, on request, provide details of the terms, and

Services to be performed under the said agreements and the qualifications and names of the personnel of the Sub-Consultants proposed to be employed on any Project.

- The Project Team may object to any Sub-Consultant within six (6) days of receipt of notification and, on notification of such objection, the Consultant shall not enter into the intended agreement with the Sub- Consultant.
- Neither an agreement with a Sub-Consultant nor the Project Team's consent to such an agreement by the Consultant shall be construed as relieving the Consultant from any obligation under this Agreement or subsequent Projects, or as imposing any liability upon the Contracting Authority.

6.8 Health and Safety

First Nations recognize their obligation to protect health and ensure safety of all persons working on projects for which it manages consultant and construction contracts. In order to meet those responsibilities, <Community Name> insists that their consultants implement due diligence to help ensure that roles and responsibilities assigned under Part II of the Canada Labour Code and the Canada Occupations Health and Safety Regulations are implemented and observed when involving consultant staff to undertake works on federal sites and workplaces.

6.9 Information Privacy & Intellectual Property

Any information made available to the Consulting Team, including sub-consultants, related to the services shall be treated as privileged and confidential by the Consultants except where the nature of the services requires the release of such information or where such release is authorized by the First Nation.

The Consulting Team must keep confidential all information provided to the Consulting Team by or on behalf of the Owner in connection with the Work and all information conceived, developed or produced by the Consulting Team as part of the Work. Information provided to the Consultant Team by or on behalf of the Owner must be used solely for the purpose of the Contract and remains the property of the Owner.

Copyright and other intellectual property rights in the Contract and any documents issued by the Owner to the Consulting Team under or in connection with the Contract shall (as between Parties) remain the property of the Owner. The Consultant may, at its cost, copy, use and obtain communication of these documents for the purposes of the Contract. Such documents shall not, without the Owner's written consent, be used, copied or communicated to any third party by the Consultant.

6.10 Ownership

The Work or any part of the Work belongs to <Community Name> after delivery and acceptance by the latter.

6.11 Media

The Consultant shall not respond to requests for project related information or questions from the media. Such inquiries are to be directed to <Community Name>.

6.12 Performance Evaluation

The Consultant shall take note that an evaluation of its performance during and upon completion of the mandate could be performed by the Contracting Authority. The evaluation is based on the following criteria: completion of deliverables, communications, scheduling, and cost.

7 GENERAL CONDITIONS AND TERMS OF PAYMENT

7.1 Cost Control

The Consultant shall monitor project costs closely during the progress of the work. If by some unforeseen event or change in scope of the work, project costs (including construction, project management services and consultant services) are expected to exceed contract or budgeted values, the Consultant shall immediately notify the Contracting Authority, with the details.

At no time shall the project costs be exceeded without the prior written authorization of the Contracting Authority.

7.2 Terms of Payment

Payments will be based on the consulting services contract. The Prime Consultant will on a monthly interval, submit an invoice detailing the services performed in accordance with the terms of the CCDC, architectural, or engineering services contract.

This is a fixed lump sum fee contract. The Prime Consultant shall submit a proposed fixed lump sum fee, which includes all fees and disbursements, to perform the duties specified in these Terms of Reference. The fee shall include all costs associated with site visits to <Community Name> throughout the Project. The fixed lump sum fee for the work shall include all applicable taxes.

The following costs, as applicable, shall be included in the fixed lump sum fee submitted by the Design Consultant and shall not be reimbursed separately:

- reproduction and delivery costs of drawings, AutoCAD and other electronic files, specifications, and other technical documentation specified in this Terms of Reference;
- standard office expenses such as photocopying, computer costs, Internet access and use, cellular phone costs, long distance telephone and fax costs, including that between the Prime Consultant's main office and branch offices or other team members' offices;
- courier and delivery charges for specified deliverables;
- plotting;
- presentation material;
- parking fees;
- taxi charges;
- travel time;
- travel expenses;
- local project office.

The following disbursements reasonably incurred by the Prime Consultant for additional site visits or other supplementary work not specified in this Terms of Reference, that are related to the services required and approved by the Contracting Authority and the ISC Project Officer, shall be reimbursed to the Prime Consultant at actual cost:

- reproduction and delivery costs of drawings, AutoCAD and other electronic files, specifications, and other technical documentation additional to that specified in this Terms of Reference

- transportation costs for material samples and models additional to that specified in this Terms of Reference;
- project-related travel and accommodation additional to that specified in this Terms of Reference (note: reimbursement shall be in accordance with current Treasury Board Travel Policy);
- other additional disbursements made with the prior approval and authorization of the ISC Project Officer.

Approved additional disbursements are to be detailed in the invoice submission. Supporting documentation for approved disbursements will be required. Disbursements will be paid for at cost as incurred by the Prime Consultant. Generally, approved disbursements shall be project-related and shall not include expenses that are related to the normal operation of the Prime Consultant's business.

No payment will be made on the cost of work incurred to remedy errors or omission for which the Prime Consultant is responsible.

8 Proposal

As noted in the mandatory requirements, proposals are expected to be as concise and no more than 15 pages in total. Additional information may be included in appendices.

8.1 Mandatory Requirements

The proposal must include the mandatory requirements listed in section 1.3.

8.2 Qualifications and Experience of Firm(s)

Tell us about your depth of experience working on Indigenous feasibility studies, and education facility master planning (two – three pages maximum). Information to be supplied:

8.2.1 Introduction to Proponents

Provide background, past projects, resources and competencies of your firm. (One-page maximum)

8.2.2 Experience on Similar Projects

List educational facility feasibility studies or master planning completed in the past five years by proponents (One-page maximum):

- Name of Project
- Location
- Client representative
- Project lead from Prime Consultant
- Major Sub-consultants
- If a project was undertaken by a consortium, identify other firms and professionals in the consortium and the role of the proponent on that project.

8.3 Proponent Team Members

Tell us how you will organize participants and the individuals from your team who will be assigned to this project (four - five pages maximum). Provide the following information:

8.3.1 Organizational Chart

Submit an organizational chart/diagram that shows the structure and relationship of participants within this project.

8.3.2 Proponent Team Members

Details on each of your team members:

- Individual's name
- Assigned role/s on this project
- Connection to indigenous projects or communities and how that relates to this project
- Qualifications, certifications, accreditations and specific scope of practice
- Experience on past projects/positions
 - Name of project/position
 - Role and how it relates to this project
 - Lead/manager for that project/position
 - Client representative or reference for that work
- Commitments
 - Estimate of percentage of time devoted to current and pending work on other projects
 - Percentage of time that will be devoted to this project if proposal is successful

8.4 Scope of Services

Tell us how you propose to deliver services:

8.4.1 Project Understanding

Write a summary of your understanding of this project, its goal, scope of work, and objectives. Be brief.

8.4.2 Assignments and responsibilities

Provide a responsibility matrix of participants (an example is given in Appendix A).

8.4.3 Schedule & Milestones

Provide your proposed schedule of milestones and meetings (an example is shown in Appendix B).

8.4.4 Work Breakdown

Develop a Work Breakdown Structure complete with a schedule (for example, a Gantt chart or equivalent).

8.4.5 Communication Plan

Provide the details of the proposed communication plan between collaborators and stakeholders including:

- Key communications during the project - What
- Recipients of communications and information - Who
- Methods of sharing and disseminating information - How
- Frequency and/or timeframe to distribute information - When
- Formats used to present information

- Strategies to effectively reach out to the First Nation school community and First Nation community at large and invite participation in the planning process.

8.4.6 Risk Analysis Matrix

- Provide an example of the risk analysis matrix that your team will utilize to identify risk elements, responsible parties, and mitigation strategies for the proposed options that will be developed.

8.4.7 Approach

Provide brief descriptions of the strategies your team will utilize to complete the following:

- Approach to develop an understanding of the community's vision, values, goals, and objectives for education within the community;
- Methods to establish a working group of stakeholders, and strategies to encourage participation and collaboration with the community members;
- Examples of engagements;
- Methodology used to understand traditional language, pedagogy, and cultural;
- Process to collect demographic information;
- Methodology used to document Education Programs and Inclusive Services;
- Development of the Education specification

APPENDIX A – Responsibility Matrix (proposal)

This is an example of a responsibility assignment matrix that an evaluation team may expect. It lists activities and correspondingly assigns the type of responsibility for each participant within the project. This type of matrix may be customized or replaced by a more suitable alternative by a **community** or **consulting team members** based on the requirements of a project.

	Community								Team Members						
Establish Working Group and Lines of communication															
Engagement															
Community Vision															
Demographics															
Preservation of Language & Culture															
Education Program															
Inclusive Services															
Capacity Calculations & Leveraging Assets															
Functional Assessment															
Building Condition, Site & Environmental Assessments															
Developing Options															
Outline of Learning Environments															
Life Cycle Costing Assessment															

Symbols, role, and definitions:

S: Sign-off – This role reviews the plan, report or deliverable. This individual needs to approve the main deliverable.

A: Accountable – This individual (or group) holds responsibility for submissions.

R: Responsible – This person gives advice, which the accountable person weighs.

C: Contributing – This person works as part of the team performing the activities to create the deliverable.

I: This person reviews the plans or performance and may or may not provide feedback. This person is being kept in the loop.

APPENDIX B – Milestone Schedule (proposal)

Proponents will provide a proposed schedule with milestones. The following example of a milestone schedule may be customized or replaced by a more suitable alternative.

Stage	Milestone	Projected Timeline
Project Start-up	Stakeholder Working Group has been established.	
	Draft schedule for regular meetings and correspondence.	
	Community Vision, Goals and Objectives are documented	
Research	Demographic Information Collected	
	Community Engagements underway	
	Education Planning underway	
	Surveys have been distributed	
	Inclusive Services and number of students are documented	
	Capacity calculations	
	Past environmental events and the expected impact of climate change on the community	
Building Condition Assessment	Architect and Engineers complete an onsite review of existing facilities	
Preliminary Reports	Preliminary Demographic Report & Projections	
	Preliminary SSAS Calculations	
	Analysis of Surveys and Engagements	
	Preliminary Education Plan	
	Preliminary Inclusive Services and SPED allocation	
Additional reports as required	Air Quality, Geotechnical, Environmental, Archeological, Climate Risk Assessments	
Draft Report	Education Specifications & Preliminary Reports	
Costing Analysis	Architectural and Engineering Consultants and Cost Consultant do a Life Cycle Cost Analysis of options	
Recommendations	Updating report based on feedback	
	Submitting recommendations for review	
Final Report	Prepare a draft for the Community to review and comment on	
	Update report	
	Complete development of options	
	Complete Life Cycle Costing Analysis	
	Submit final report	

APPENDIX C - Cost of Services & Breakdown of Fees (proposal)

Detailed Price

- The Consultant's fee will be a fixed lump sum in Canadian Dollars.
- The fee will cover all services and disbursements of the Consultant and his sub-consultant(s).

Contact:

The contact for further cost information is:

Name:

Phone Number:

Email:

Fax Number:

Location of Work:

<Community Name>

<Address Line 1>

<Address Line 2>

Description of Work: Feasibility Study and Master Planning for <Community Name>

Fees	
Allocation for Geotechnical and/or Other Assessments (Environmental, archeological, etc.)	TBD
Total Fixed Lump Sum Fee	

Name of Firm:	
Phone:	Fax:
Authorized Signature of Proponent:	

The following will NOT form part of the evaluation process

Canada may accept or reject any of the following fees, disbursements and/or hourly rates.
Canada reserves the right to negotiate on these fees, disbursements and/or hourly rates.

i.e. OTHER ADDITIONAL SERVICES

DISBURSEMENTS

At cost without allowance for mark-up or profit, supported by invoices/receipts - see clause R1230D (2016-01-28), GC 5 - Terms of Payment– Architectural and/or Engineering Services, section GC5.12 Disbursements:

(specify and enter limit)

..... \$.....
..... \$.....
..... \$.....

Premium, if any, for the required Supplementary Liability

Insurance as per SC ? \$.....

MAXIMUM AMOUNT FOR DISBURSEMENTS \$.....

APPENDIX D – Mandatory Requirements & Rated Criteria (evaluation)

Mandatory Requirement Checklist

Requirement	Included
Firm is Registered	
Lead Proponent is permitted to practice	
Liability Insurance	
Appendix "C" is included in a separate envelope	
A Qualified Demographer is included within the team	
An Education Specialist is included within the team	
Three references are included	
Proposal is 14 or less pages	

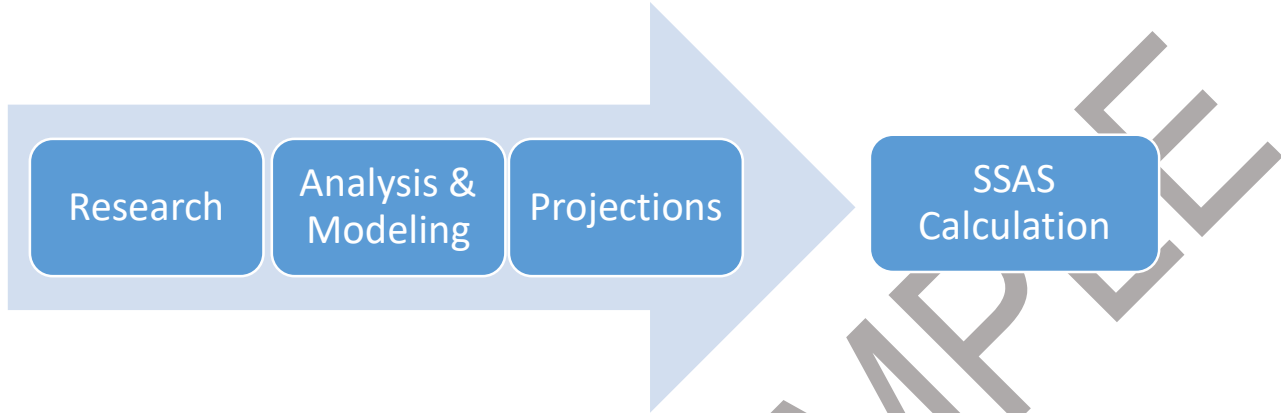
Rated Criteria

Scoring Matrix

Criteria	Possible Score	Score
Qualifications of Experience of Proponent's Team		
Prime Consultant's Qualifications and Experience	5%	
Demographics – Experience of sub-consultant	5%	
Education Program – Experience of Team Member	5%	
Inclusive/Special Education Services – Experience of Team Member	5%	
Accredited Learning Environment Planner – Team member/s and experience	5%	
Technical Condition Assessment – Team members and experience	5%	
Costing Consultant – Team member and experience	5%	
Scope of Services: <ul style="list-style-type: none"> • Responsibility Matrix • Work Breakdown • Schedule • Communication Plan • Risk Management 	20%	
Strategy, Approach and Methodology to collaborate and facilitate the development of a long-term community education master plan	15%	
Fees	30%	

APPENDIX E - Demographic Report (deliverable)

The Demographic Report provides the projected number of students, by grade. The Prime Consultant's team is required to thoroughly research demographic information from the community, analyze and model the data, and justify the projected results. The projected enrollment numbers are used to calculate the School Space Accommodation Standards (SSAS).



All information collected and the subsequent analysis and projections are strictly confidential. This information belongs to the Community can only be released to Indigenous Services Canada once it has been approved by the Contracting Authority.

Research

The research must be comprehensive to ensure all students are included and justified, and that the growth rate considers all relevant factors. **Demographic research must be collected through authentic engagements and documented in meeting minutes and correspondence** with the departments responsible for the following:

Community Research

Consultants are responsible to research the following sources of information:

- Band Membership: for ages 0 to 50 (broken down by ages) for the past 15 years
- Federal Registries for ages 0 to 50 (broken down by ages) for the past 15 years – if community Band Membership is not available
- Housing: Plans to increase residences
- Social Services: Number of children in care that are expected to return to the Community
- Health: Birth rates and mortality rates
- Migration: Document effects of contributing factors to "In" and "Out" Migration:
 - Education
 - Housing
 - Economics
 - Environment
- Federal records for families within the First Nation region
- All legislation, events, and factors that have affected the demographics of a community

Education and Enrollment Research

Consultants are responsible to collect and research the following Education information:

- Current and historical enrollment numbers broken down by grades
- Current and historical number of students on waiting lists
- Historical number of students that cannot access services within the existing facilities
- Number of nation students that attend schools off reserve
- Number of nation students living off-reserve that attend nation schools
- Enrollment of non-status students and members of other First Nations
- Legislation that affects enrollment, curriculum, accessibility, and programs

Analysis

A thorough analysis of the data must be completed. A high level summary of the steps used for this analysis may include:

- Review of baseline data from membership, registries, and health (adjusting for late reporting of births)
- Calculated birth rate trends
- Factor into analysis the historical trends over 15 years accounting for local community conditions, events, and legislation that have affected demographics
- Utilize historical enrollment rates while taking into consideration the waiting lists, accessibility issues, and other factors that have affected enrollment
- Develop an enrolment projection model/s
- Evaluate model/s with historical data

Methodology, process, constructs and modeling must be comprehensive and justified.

Deliverables

The demographic report is expected to include:

- Documentation of authentic engagement and research methodology utilized to collect data
- Sources of data identified
- Comprehensive community demographic information utilized to construct a defensible population projection of students in education programs, between Kindergarten and Grade 12, for 15 years
- Thorough analysis of demographic information complete with justification of methodology and process, modeling, assumptions, findings, and recommendations.
- Projected enrollment broken down by grades for 15 years
- Justification for a design horizon of 10 years post construction, or strong evidence that an alternative design horizon is required

APPENDIX F – Inclusive/Special Education (deliverable)

Inclusive/special education services to support the whole child must be documented and detailed to outline the building program requirements. Education specifications should include proposed furnishings and equipment required for services. See SSAS for inclusive/special education services allocation of space.	Location of Services (in class or separate space)	Service Provider	Resources & Area Required	Number of Students
Speech and Language – assessing and providing interventions for speech language, literacy, cognitive communication, and oral/feeding/swallowing skills.				
Sensory Therapy – engaging senses, developing skills and preparing students for instruction.				
Push-in Services – collaboration between the specialists and staff and direct support for students.				
Mental Health & Counselling – providing support for personal wellbeing, social relationships, educational achievements, and career development.				
Behavioral Counselling – Supporting positive interactions.				
Occupational Therapy – providing services to students to develop fine motor skills, eye-hand coordination, cognitive and sensory development, basic life skills, and positive behaviors. Also, OT provides training to use adaptive equipment.				
Physiotherapy – helping students develop mobility, motor skills, strength, and range of movement.				
Medical Health Services / Wellness Practitioners – providing health services for students and families.				
Pull-out Services – providing direct instruction or services to students beyond the classroom. (Corridors are not adequate spaces for pull-out services.)				
Resource, Collaboration, and Training Space – providing space for resource materials, collaboration and training meetings. Spaces to support staff, students, and families.				
Inclusive/Special Ed Office – Coordination of services.				
Elder & Knowledge Keeper – preserving language, culture, food preservation/preparation, skills, and traditions.				
Literacy & Numeracy – intense individual and small group direct instruction to supplement whole class literacy instruction.				
Equipment, and Technology – providing support through assistive equipment and technology.				
Additional Exceptionalities – supporting giftedness, complex needs, physical, audio, and visual exceptionalities.				
Life Skills – building abilities and confidence.				
Other				
Total				

APPENDIX G – Education Specifications (deliverable)

The Education Specification must show support for language, culture, pedagogy, curriculum, inclusivity, push-in/pull-out interventions, vision of success and levels of achievement. Through an engaged process the Education Specifications will develop and include the following information:

- Allocations of space required for each of the learning environments required for language, culture, instruction, services, and career exploration;
- Allocations of space required for administration services, building systems, custodial, operations, and maintenance supplies and operations.
- Diagrams of adjacencies and connections between programs and spaces;
- Strategies to provide a sense of place – through engagement with Elders and community members
 - Cultural aesthetics specific to the community
 - Traditional imagery specific to the community
 - Traditional entry and progression through the facility or learning environments
 - Other
- Building elements required to accommodate display, curriculum, pedagogy, engagement, and activities:
 - Types of surfaces and or display required
 - Finishes that support instruction
 - Sizes and number of display and instructional surfaces/rails
 - Electronics and connectivity
 - millwork & fixtures required for specific programs
- Proposed fit-up that supports education programs and delivery:
 - Furnishings
 - Types of furnishings required
 - Layouts of furnishings for instruction, group work, and actives (not floor plans)
 - Equipment required for programs and operations
- Quality of spaces
 - Connections to location and community – occupants recognize place, culture, language, etc.
 - Connections to exterior spaces and landscape through sounds, smells, windows, doorways, exterior learning labs, and other areas.
 - Lighting
 - Sounds
 - Acoustics
 - Textures
- Other requirements specific to <Community Name>

APPENDIX H - Capacity Calculation (deliverable)

The following may be used as tools to evaluate the capacity within the school to deliver programs. The Prime Consultant is not to be limited to provide only the following calculations, but should be prepared to work with staff to accurately represent if the facility has adequate space for the demographics, education programs, and emergency response (if required).

Building Capacity

The total number of student seats within the facility limiting considerations should include spaces for administration, accessibility, and core building systems required to support those seats.

Instructional Space or Administration Space	Number of Students or Admin. Occupants	Area sq m	Students or Admin. Occupants per m ²
Total			

Additional Building Capacity Considerations:

- Compliance with National or Provincial Building Code Capacity (whichever is more rigorous, or the code that is selected in writing by Chief and Council)
 - Number of water closets comply with the code
 - Capacity of gym, gathering spaces and cafeterias to accommodate gatherings complies with regulations
- Offices are on site for administration personnel
- Accessible facilities and equipment:
 - Washrooms (Are showers and plinths required?)
 - Audio
 - Visual
 - Physical Access
 - Other

Functional Capacity

The Consulting Team will determine if spaces, furnishings and equipment meet the functional requirements of the current of education programs, inclusive services administration, custodial services, operations and maintenance. Spaces and equipment must be adequate to function. Evaluation of spaces should answer the following:

- Educators and students have adequate spaces, furnishings, and equipment that function adequately for the courses that are offered.
- Administrators and SPED have adequate space, furnishings and equipment to perform their work.
- Custodians have adequate storage, space and equipment to adequately perform their work.
- Operations and Maintenance have adequate storage, workspace, equipment and space to perform their work.

Program Capacity

The Consulting Team shall work with staff to identify if the facility has capacity to deliver Traditional Language and Cultural Programs, Provincial/Territorial Curriculum, inclusive education, and other services. To calculate program capacity, the following should be considered:

- Curriculum and services:
 - Traditional Curriculum and courses that are taught within the learning community such as: Language, Music, Dance, Arts, Culture, Food, Land-based Learning, History
 - Provincial/Territorial programs and courses that are taught within the community for Kindergarten – Grade 12. This would include mandatory courses to graduate from high school and continue into post-secondary training.
 - Inclusive services and programs: Exceptionalities, literacy, numeracy, counselling, occupational therapy, speech and language, physiotherapy
 - Medical and Dental services

- Instructional Pedagogy for education programs

The Consulting Team will collaborate with educators to develop illustrations to represent activity centres, group and individual spatial arrangements, gathering configurations, instructional formats, and seating arrangements. Examples of pedagogy might include:

- Traditional ways of sharing knowledge (This would be defined by Elders and Teachers within the Community)
- Teacher led instruction
- Peer to peer led instruction
- Lecture based learning
- Demonstration based learning
- Activity based learning
- Collaborative group work learning

The Consulting Team will also work with educators to understand how students demonstrate knowledge, for example through presentations, visuals, computer based programs or other forms of evaluation.

The Outline of Learning Environments will need to support methods of instruction and evaluation.

- Teacher Preparation and Administration Workspaces



The Consulting Team will interview educators and administration to determine the most suitable workstations. Consultants will need to determine:

- How staff collaborates?
- Where teacher preparation happens (within a classroom or a staff room)?
- How Administration engages with students?

- Utilization Ratios

Consultants will collect information on daily schedules and programs to calculate utilization of spaces

APPENDIX I – GUIDING PRINCIPLES FOR SUSTAINABLE INFRASTRUCTURE (deliverable)

Stage 1	Identification Phase
	<p>The initial action items from the Identification Phase may need to be completed when the feasibility study commences.</p> <p>Begin to engage stakeholders:</p> <ul style="list-style-type: none"> • Establish a working group of Community Stakeholders • Meet with ISC project manager to review Green & Inclusive Community Building (GICB), Net Zero, LEED – Leadership in Energy and Environmental Design, CHPS – Collaborative High Performance Schools, and Green Globe with Indigenous Services Canada Project Manager to determine grant funding opportunities for Green Building Programs and certifications that are the best fit <p>Develop preliminary sustainability objectives:</p> <ul style="list-style-type: none"> • Identify Green initiatives that have been successfully utilized in the community, and future goals • Identify examples of resilient infrastructure within the community, and potential hazards • Identify joint use opportunities to use existing and future infrastructure • Update the TOR with the qualifications required by consultants to achieve the criteria
Stage 2	Planning Phase – Feasibility Study
	<ul style="list-style-type: none"> • Facilitate an Integrative workshop with consultants (planner, architect, engineers, project managers) and the working group of Community Stakeholders to: <ul style="list-style-type: none"> ○ Establish an integrative process and identify opportunities to support both Green building practices and resilient infrastructure ○ Assess community “in-house” resources and training opportunities. ○ Review the National Energy Code of Canada for Buildings and the prescriptive, trade-off and performance paths ○ Confirm the Green Building and/or high performance programs that are achievable and suited to the location. Identify tasks and objectives for the working group of Community Stakeholders to achieve within the planning phase ○ Confirm tasks, follow-up communication and meeting schedule • Select green building objectives that are achievable for the following: <ul style="list-style-type: none"> ○ Location and site <ul style="list-style-type: none"> ▪ Site master plan ▪ Placement within the community and community assets ▪ Places of respite for healing and wellness ▪ Connection between interior and exterior learning environments ▪ Environmental review of impact on flora and fauna ▪ Resilient Infrastructure review – the potential for natural disasters (climate, earthquake, etc.) ▪ Historical archeology review <ul style="list-style-type: none"> • Natural disaster events ▪ Rain water management

Stage 2	Continued – Planning Phase – Feasibility Study
	<ul style="list-style-type: none"> ○ Connection to Community <ul style="list-style-type: none"> ▪ Joint use strategies ▪ Connection to community programs ▪ Emergency response ○ High performance energy strategies: <ul style="list-style-type: none"> ▪ HVAC – Efficiency, thermal comfort, and acoustics ▪ Building Envelop – performance ▪ Lighting – illumination, glare control, flexibility, daylight integration and rhythm ▪ Electrical consumption – plug load, lighting, educational metre ▪ Disruption of services – the impact to occupants and infrastructure and mitigation strategies ○ Water consumption strategies: <ul style="list-style-type: none"> ▪ Existing source – quality and treatment ▪ Waste water – removal and treatment ▪ Usage – efficiency, educational metre ▪ Disruption of service – the impact to occupants and mitigation strategies ○ Indoor environmental quality: <ul style="list-style-type: none"> ▪ Performance of existing building envelopes – testing for mold where there is failure ▪ Low emitting materials ▪ Adequate ventilation and operable windows ▪ Views to nature ○ Materials and resources: <ul style="list-style-type: none"> ▪ Life cycle impact – 40-year replacement timeline for materials and systems ▪ Maintenance – materials and resources required to maintain materials and systems ▪ Installation/construction waste ▪ Source – Distance from manufacture ▪ Recycling & waste – post occupancy

Appendix J - Outdoor Education

Traditional and cultural land-based learning:	Community Programs	Pedagogy	Adjacencies
Examples of land-based Learning:	What are the Community land-based education programs?	How are lessons delivered?	What are the connections to other programs?
Language			
Oral traditions – story telling			
Other			
Cultural Traditions			
Culture Camp			
Other			
Traditional Foods			
Cultivation - Gardens			
Hunting & fishing			
Harvesting			
Preparation			
Preserving			
Other			
Traditional structures			
Types			
Cultural Arts			
Dance			
Drumming			
Visual Arts			
Other			
Land-based Activities & Physical Education			
Snow shoeing /cross country skiing			
Skating/Hockey			
Hiking/Trail running			
Swimming/Rowing			
Traditional competitive sports			
Other			
Additional curriculum that might be taught in exterior learning environments:			

Outdoor Education Continued:

Class configurations:

What will be the groupings for instruction:

- Large group participation
- Small group participation
- Independent work

Enclosure requirements

What is required for:

- Fencing
- Canopy
- Other

Work Storage requirements:

What is the type of storage required?

Furnishing requirements

What is required for:

- Seating
- Work surfaces or tables
- Writeable surfaces
- Display framework or surface

ANNEX A – Schedule A2 – Services required of the Consultant

This schedule of services must be included with the A1 contract document used by the Prime Consultant. ISC, RAIC, ACEC, CCDC contract documents are acceptable. The client, <Community Name>, requires the Prime Consultant to provide services described in schedule A1 of the client's preferred contract. Any exclusion of services must be approved by the **contracting authority**, <Community Name>. The Prime Consultant is also responsible for the services in this Schedule A2. It is based on the project specific goals, objectives, scope of work and deliverables listed and defined in the Terms of Reference for the Feasibility Study. Any modifications to Schedule 2 must be approved by the contracting authority <Community Name>.

The Consultant WILL BE RESPONSIBLE FOR PROVIDING the services described below.

Number	Services:
1.	Volunteer Working Group of Stakeholders – Working with the First Nation to establish a group of stakeholders within the community to develop, review and take ownership of a long range plan for school facilities.
2.	Community Vision for Learning Environments - Organizing and documenting through engagements with community members and Elders the learning environments that are required to support the preservation and instruction of language, culture, land-based learning and education programing.
3.	Long Range Plan – Developing a long range plan for learning environments within the First Nation.
4.	Consultation – Meeting, interviewing, surveying, hosting and organizing engagements with the First Nation as described in the Terms of Reference.
5.	Communication Plan – Organizing meetings, interviews, surveys, engagements, and correspondence following community protocols, and respecting the schedules within the Frist Nation and project.
6.	Demographic report – Engaging an independent third party that is a qualified professional with experience and scope of expertise in collecting, analyzing and modeling demographic information. The report must show a thorough analysis of waiting lists, retention rates, repatriation, housing, migration, and community specific considerations. The recommended model must provide justifications for a minimum of 15 year projections based on 15+ years of data.
7.	Education Programing Report – Identifying goals, objectives, strategies and actions needed to provide a successful and equitable education program to provincial/territorial public schools. Outcome of planning should consider the language, culture, and land based programs specific to <Community Name>. The report will include education programing, curriculum, and inclusive/special education services that are required within the community.
8.	Inclusive/special Education Report – Identifying the number of recipients and the types of services they require. It will also include the types of specialists and services that they deliver within the school. This may be part of the Education report or a separate document. It must be verified by a registered professional whose scope of expertise includes education.
9.	Outline of learning environments – Describing the interior and outdoor spaces, building systems, acoustics, storage, and technology required to deliver education programing.
10.	Furnishing and Equipment – Identifying the furnishing and equipment required to deliver education programing.
11.	Illustrations of Learning Environments – Modeling how space and furnishing layouts will be utilized to deliver education programing(traditional and academic curriculum) and how it is delivered (pedagogy). This will also include: illustrations/models that show circulation, public space, and connections between spaces and programing.

12.	Pedagogy and Functional Assessments – Assessing how the existing and proposed learning environments support/will support education programming and pedagogy.
13.	Capacity and Utilization Assessments – Assessing the capacity of a facility to support a specific number of students, programming, and schedules throughout a school day, week, semester and year. It will also include the utilization calculations for the existing and proposed spaces.
14.	Education Specification – Developing an education specification from community vision, traditional language and culture learning engagements, demographics report, education report, special/inclusive education report, pedagogical and functional assessments, capacity and utilization assessments.
15.	Facility 3-D Green Learning Opportunities – Identifying opportunities for the facility to become the 3-D textbook to teach green building technology and/or resilient facility design.
16.	School Emergency Response Capacity – identifying the function the school facilities have within the community and regional emergency response plan.
17.	Community Assets – Identifying if there is potential to leverage the utilization of an existing community asset.
18.	Teacherage Assessment – Reviewing and documenting the capacity of the teacherages, condition assessment, repairs, and life cycle. The scope of procurement will include conducting, coordinating and compiling the condition assessment of the teacherages.
19.	Existing School Facility Technical Condition Assessments – Procurement of building condition reports by registered professionals within their areas of expertise. These reports will include: architectural, structural, mechanical, electrical, building envelop, hazardous material and air quality survey, civil site review and assessments, environmental, climate risk, and archeological assessments, and food preparation assessments. The scope of procurement will include conducting, coordinating and compiling the technical assessments.
20.	Viable Options – Developing a minimum of three (3) viable options with: justifications, costing, life cycles, concept drawings, and sketches to fully illustrate all of the possibilities that have been considered. Options must show learning environments that are equitable with publicly funded facilities and site development.
21.	Risk Analysis – Identifying the level of exposure to risk in the existing facility and risk analysis for proposed viable options. The risk analysis will include the deliverables described in the Terms of Reference.
22.	Sustainability Plan – Identifying best sustainable and achievable practices for site selection, community planning, energy and water consumption, indoor quality, materials, and resources. For each of the options: identifying preliminary net zero options, green building criteria, and recommendations for resilient infrastructure. Recommendations must include the current and potential hazards due to climate change, pandemic events, disruptions to services, and emergency maintenance of life and building systems (electricity or heat).
23.	Environmental Review – Procuring a desk top “Simple Environmental Review Report” of the proposed development and related activities on the proposed site.
24.	Archaeological Assessment – Engaging Elders and community members to share traditional knowledge and history of the site identified on the proposed site. If warranted, the archaeological assessment will include a Historical Resources Overview (HRO/AOA) desktop review of the proposed site.

25.	Costing Report, Class “D” Estimate, 40 Year Life Cycle Costing, Maintenance & Operations – Procuring an independent registered qualified quantity surveyor (CACQS) to provide a Class “D” estimate for preferred options including capital investment, life cycle recapitalization estimates, operations, and maintenance. This report is a total costing investment for the facility/asset over a 40-year span including all of the deliverable described in the Terms of Reference.
26.	Selected Preferred Option – Demonstrating that the preferred option has capacity to deliver a complete education program within the SSAS. Justification for this option must consider value for money within the asset LCCA of existing and/or proposed construction.
27.	Draft Report – The draft report will include: Long-range Plan (community vision, and opportunities to leverage existing assets), draft demographic information, draft education report, preliminary education specification, SSAS calculations, draft inclusive/special education report, draft building condition assessment, and recommendations for three options including, draft risk analysis and draft sustainability plan. The draft report is submitted to both the First Nation and ISC for review.
28.	Final Report – The final report will include the Education Specification complete with the Community Vision, Language and Culture requirements, Demographic Report, Education Program Report, Inclusive/Special Education Report, Pedagogical & Functional Assessments, and Capacity and Utilization Assessments. The final report will also include the Building Condition Assessment, Viable Options, Risk Analysis, Sustainability Plan, Environmental Review, Archeological Assessment, Costing Report, and justification for Selected Option.