



**PRE-QUALIFICATION 740
for CARBON REDUCTION INITIATIVE CONSULTANT**

**Submission Deadline: Before 12:00:00 Noon Local Time on
Friday, April 26, 2024**

**Pre-Qualification Coordinator: Angela McManus
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**Pre-Qualification #740 for Carbon Reduction
Initiative Consultant**

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INSTRUCTIONS TO PROPONENTS

1. INTRODUCTION

1.1 INVITATION

- 1.1.1 The Thames Valley District School Board is one of the largest public school boards in the Province of Ontario and operates 160 schools within the City of London and counties of Elgin, Middlesex, and Oxford.
- 1.1.2 The TVDSB proposes to pre-qualify Prime Consultants who are interested in performing Carbon Reduction projects for TVDSB, as particularly described in this Pre-Qualification. Through this Pre-Qualification TVDSB intends to establish “vendor of record” lists (“VOR Lists”) of consultants who will each execute a 2-year MSA with the TVDSB.
- 1.1.3 TVDSB’s issuance of this Pre-Qualification, its evaluation of any Proposals, its prequalification and placement of any Proponent on a VOR List, or its execution of an MSA with any Proponent are not intended to and shall not obligate TVDSB to proceed with any projects or to issue any Request for Proposal to any Proponent. There is no guarantee that a Prequalified Proponent that is placed on a VOR List and executes an MSA will be required to perform any projects or will be issued any Request for Proposals and TVDSB specifically disclaims any obligation to do so.

1.2 PRE-QUALIFICATION OVERVIEW

- 1.2.1 This Section provides a brief summary of the Pre-Qualification and is provided solely as a convenience. Proponents are urged to read all of the Pre-Qualification Documents carefully and thoroughly to ensure they fully understand all of the terms and conditions, including all MSA requirements. Failure to fulfil procedural or content requirements that are stipulated in the Documents may have a negative effect on the evaluation of a Proposal or may result in a Proposal being rejected.
- 1.2.2 Proponents are required to deliver a Proposal which must include a Prequalification Submission. Proponents whose Prequalification Submissions achieve or exceed the Minimum Technical Score and based on section 1.4 will be identified as “**Prequalified Proponents**”.
- 1.2.3 Each Prequalified Proponent that is placed on a VOR List will be required to enter into the MSA
- 1.2.4 TVDSB will issue Request for Proposals for Prequalified Proponents on a project by project basis. Appendix A – Scope of Work is provided as a general outline of the anticipated scope of work. Award of projects will be made based on criteria outlined in the Request for Proposals.

1.3 KEY INFORMATION

- 1.3.1 The table below provides a summary of some key information contained in the Pre-Qualification Documents and is provided solely as a convenience.



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Pre-Qualification Coordinator	The “ Pre-Qualification Coordinator ” is Angela McManus, “angela.mcmanus@tvdsb.ca”.
Question Deadline	The deadline for Proponents to submit questions (the “ Question Deadline ”) is seven (7) business days before the Submission Deadline.
Submission Deadline	Before 12:00:00 Noon Local Time on Friday, April 26, 2024 , (the “ Submission Deadline ”).
Electronic Submission	An electronic bid submission is mandatory. See 1.7.2.

1.4 PREVIOUSLY PREQUALIFIED CONSULTANTS MUST APPLY

- 1.4.1 Proponents who have been previously prequalified or who are currently working or have worked for TVDSB must respond to this Pre-Qualification and must submit a Proposal in order to be prequalified and placed on a VOR List.

1.5 NO CONTRACT A

- 1.5.1 TVDSB does not intend to create any contractual relations or obligations, including “Contract A” (sometimes referred to as the “bid contract”), with any Proponent or any other person or entity, and none will be created by virtue of TVDSB issuing this Pre-Qualification or as a result of TVDSB’s receipt or review or evaluation of any Proposals.

1.6 THE MSA AND THE TERM

- 1.6.1 TVDSB intends to execute an MSA with each Prequalified Proponent that is placed on a VOR List. Provided that the execution of an MSA does not obligate TVDSB to issue any Request for Proposals or proceed with any projects, and the TVDSB does not guarantee any volume of Services that will be required or that will be performed under any MSA.
- 1.6.2 The term of each MSA will be 2 years plus one, one year renewal.

1.7 TVDSB PROCUREMENT WEB PORTAL

- 1.7.1 Proponents must use the TVDSB Procurement Web Portal (the “**Portal**”) to access the Pre-Qualification Documents. Instructions on using the Portal are set out in Schedule B – TVDSB Procurement Web Portal.
- 1.7.2 Proponents must also use the Portal to upload the electronic bid submission.

1.8 PROPONENTS’ EXPENSES

- 1.8.1 Proponents shall bear all costs and expenses incurred by them in any way related to any aspect of their participation in this Pre-Qualification including, without limitation, all costs and expenses related to the gathering of information, the preparation and delivery of a Proposal, responding to any questions or clarifications or Requests for Additional Information, or attending or participating in any interviews or meetings.



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2. DEFINITIONS

Capitalized terms used in this Prequalification and in the attached Schedules and not otherwise defined shall have the meanings indicated in this Article.

- 2.1.1 **“Conflict of Interest”** has the meaning assigned to such term in paragraph 10.2.1.
- 2.1.2 **“Evaluation Team”** means the team appointed by TVDSB to conduct the evaluation process described in this Pre-Qualification.
- 2.1.3 **“Local Time”** means the time of electronic receipt by TVDSB’s website portal.
- 2.1.4 **“MFIPPA”** means the *Municipal Freedom of Information and Protection of Privacy Act* (Ontario).
- 2.1.5 **“MSA”** means the written Master Services Agreement, substantially in the form of Schedule E, to be signed between TVDSB and each Prequalified Proponent.
- 2.1.6 **“Portal”** means the TVDSB Procurement Web Portal accessed at “www.tvdsb.ca”. Instructions for using the Portal are set out in Schedule B – TVDSB Procurement Web Portal.
- 2.1.7 **“Prequalified Proponent”** has the meaning assigned to such term in paragraph 1.22.
- 2.1.8 **“Proponent”** means a consultant that participates in this Pre-Qualification, whether or not it delivers a Proposal.
- 2.1.9 **“Proposal”** means, collectively, a Proponent’s completed Pre-Qualification Submission.
- 2.1.10 **“Question Deadline”** is the date identified as such in the table in paragraph 1.3.1 and is the last date by which Proponents can submit questions about the Pre-Qualification.
- 2.1.11 **“Request for Additional Information”** has the meaning assigned to such term in paragraph 7.2.1.
- 2.1.12 **“Pre-Qualification”** means the prequalification process described in the Pre-Qualification Documents.
- 2.1.13 **“Pre-Qualification Coordinator”** is the person identified as such in the table in paragraph 1.3.1.
- 2.1.14 **“Pre-Qualification Documents”** has the meaning assigned to such term in paragraph 3.2.1.
- 2.1.15 **“Services”** means some or all of the services described in paragraph 1.4.1.
- 2.1.16 **“Submission Deadline”** is the date and time identified as such in the table in paragraph 1.3.1.
- 2.1.17 **“Submission Location”** is the location identified as such in the table in paragraph 1.3.1.
- 2.1.18 **“Pre-Qualification Requirements”** means Schedule C – Pre-Qualification Requirements.
- 2.1.19 **“Pre-Qualification Score”** has the meaning assigned to such term in paragraph 7.3.2.
- 2.1.20 **“Pre-Qualification Submission”** means, collectively, a Proponent’s completed Pre-Qualification Submission Form and all other material submitted by a Proponent in response to the Pre-Qualification Requirements.
- 2.1.21 **“Pre-Qualification Submission Form”** means Schedule D – Pre-Qualification Submission Form.
- 2.1.22 **“TVDSB”** means the Thames Valley District School Board and includes its employees, agents, trustees, officers and directors, whether involved with the Pre-Qualification or not. For certainty **“TVDSB”** includes, as the context requires, the Pre-Qualification Coordinator.
- 2.1.23 **“VOR List”** has the meaning assigned to such term in paragraph 1.1.2.



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3. PRE-QUALIFICATION DOCUMENTS AND ACCESS

3.1 ACCESS TO THE PRE-QUALIFICATION DOCUMENTS

- 3.1.1 The Pre-Qualification Documents will only be made available to Proponents electronically through the Portal. The Portal will include all Pre-Qualification Documents, addenda and all other relevant notices, information and communications relating to the Pre-Qualification.
- 3.1.2 Each Proponent is solely responsible to ensure that it:
- (a) obtains access to the Portal;
 - (b) has the appropriate software to access and download the contents from the Portal; and
 - (c) visits and reviews the Portal as frequently as it deems necessary to ensure that it has the most current information and addenda.
- 3.1.3 The Portal will be updated from time to time and Proponents are solely responsible for accessing and checking the Portal for new addenda and other postings and to ensure the information and documents used by Proponents are the most correct and updated information and documents.
- 3.1.4 If there is a conflict or inconsistency between an electronic version of any Pre-Qualification Document posted on the Portal and any other version of the same document, whether in electronic or paper form, the latest electronic version posted on the Portal shall govern.

3.2 PRE-QUALIFICATION DOCUMENTS

- 3.2.1 Proponents should ensure they have all of the documents listed below (collectively the “Pre-Qualification Documents”). A Proposal will be deemed to have been prepared on the basis of all Pre-Qualification Documents issued before the Submission Deadline, and TVDSB accepts no responsibility for any Proponent lacking any part of the Pre-Qualification Documents.
- (a) Instructions to Proponents (this document).
 - (b) Schedule A – Scope of Work
 - (c) Schedule B – TVDSB Procurement Web Portal
 - (d) Schedule C – Pre-Qualification Submission Requirements.
 - (e) Schedule D – Pre-Qualification Submission Form
 - (f) Schedule E – Master Services Agreement.
 - (g) Appendix A – Sustainability Framework
 - (h) Addenda, if any, issued before the Submission Deadline.
- 3.2.2 Proponents should inform the Pre-Qualification Coordinator immediately if any documents are missing or incomplete and/or upon finding any discrepancies or omissions in the Pre-Qualification Documents.



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4. COMMUNICATIONS, QUESTIONS AND ADDENDA

4.1 COMMUNICATIONS

4.1.1 Except as provided in the Pre-Qualification Documents, Proponents are not to communicate with or contact any member of the Evaluation Team or the TVDSB, including any member of the TVDSB board of trustees, regarding this Pre-Qualification. A Proponent's failure to comply with this paragraph may result in the disqualification of the Proponent and its removal from any VOR List(s).

4.2 PROPONENTS' QUESTIONS

4.2.1 All Proponents' questions regarding this Pre-Qualification are to be in writing and must be sent by e-mail to the Pre-Qualification Coordinator.

4.2.2 Questions received by the Question Deadline will be reviewed and if TVDSB believes that a response is warranted, it will include the question and its answer in an addendum. TVDSB may, in its discretion, consider and respond to questions received after the Question Deadline but is under no obligation to do so. In responding to questions TVDSB may answer similar questions from different Proponents only once, may edit or rephrase the questions, and may ignore questions which, in TVDSB's opinion, do not require a response.

4.3 ADDENDA

4.3.1 This Pre-Qualification and the Pre-Qualification Documents may be amended only by written addendum which will be posted to the Portal and will not be sent to the Proponents. Proponents are solely responsible to access and check the Portal for new addenda and other communications and postings and to ensure the information and documents used by Proponents are the most correct and updated information and documents. Proponents are solely responsible to ensure their Proposal incorporates all addenda issued before the Submission Deadline, and TVDSB will not be responsible if any addenda are not obtained by a Proponent.

5. PROPOSAL CONTENTS, COMPLETION AND DELIVERY

5.1 PROPOSAL CONTENTS

5.1.1 Proponents must include the following in their Proposals:

(a) a Pre-Qualification Submission completed in accordance with Section 5.2

5.2 INSTRUCTIONS FOR COMPLETING THE PRE-QUALIFICATION SUBMISSION

5.2.1 The bid submission **must** be returned electronically as a file upload:

(a) upload of the files as per above is the responsibility of the proponent;

(b) submissions received as hardcopies **will not** be accepted;

(c) completed and signed Pre-Qualification Submission Form (Schedule D); and



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- (d) all information, documents and materials required by and responding to each of the items set out in the Pre-Qualification Requirements (Schedule C); and
- (e) an electronic copy of all of the above, in Adobe PDF readable format, must be uploaded back to TVDSB by using the Portal.

5.2.2 The Pre-Qualification Submission is intended to provide information which will enable the Evaluation Team to determine the Proponent's qualifications and ability to undertake and complete the work and services identified in the Proponent's Pre-Qualification Submission Form. All information submitted by a Proponent and included as part of its Pre-Qualification Submission will be deemed to be material representations by a Proponent to TVDSB, and the Proponent will be deemed to have warranted the accuracy of all representations so made.

5.3 PROPOSAL DELIVERY

5.3.1 The electronic submission must be uploaded to the Portal before the Submission Deadline. Proposals which are sent by fax, email or any means other than as set out in this Section will not be considered. The Portal will close at the Submission Deadline, and upload will no longer be possible at that point.

6. OPENING OF PROPOSALS AND THE ROLE OF THE PRE-QUALIFICATION COORDINATOR

6.1 ROLE OF THE PRE-QUALIFICATION COORDINATOR

6.1.1 The Pre-Qualification Coordinator will review the Proposal to confirm it contains the Pre-Qualification Submission.

7. EVALUATION OF PROPOSALS

7.1 GENERAL

7.1.1 Proposals will be evaluated by the Evaluation Team, which may obtain the assistance of such consultants and advisors as the Evaluation Team may deem appropriate.

7.2 REQUESTS FOR ADDITIONAL INFORMATION

7.2.1 TVDSB may contact any one or more Proponents to request clarification of any information or materials submitted as part of a Proposal, or to request supplementary information (collectively, "**Request for Additional Information**"), without any obligation to make the same or any Request for Additional Information of any other Proponent. Notwithstanding the preceding sentence, TVDSB has no obligation to make any Request for Additional Information.

7.2.2 Proponents should answer all Requests for Additional Information within the time and in the manner stipulated in each Request for Additional Information, and any answer received will form an integral part of a Proponent's Proposal. If a Proponent fails to provide an answer to a Request for Additional Information within the time and manner stipulated, its Proposal will be considered and evaluated based solely on the original Proposal contents submitted.



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7.3 EVALUATION OF PRE-QUALIFICATION SUBMISSIONS

- 7.3.1 The following illustrates some of the activities the Evaluation Team may undertake in the course of evaluating the Pre-Qualification Submissions, and does not limit the discretion of the Evaluation Team to take steps not expressly described. For greater certainty, the Evaluation Team has no obligation to undertake any such activities, and the fact the Evaluation Team undertakes a particular activity as part of its evaluation of a Pre-Qualification Submission and/or a Proponent will in no way obligate the Evaluation Team to undertake the same or any activity with any of the other Proponents or any Pre-Qualification Submissions delivered by any of the other Proponents.
- (a) The Evaluation Team may, in its sole discretion, invite a Proponent to one or more meetings and/or interviews. The nature and length of such meetings and/or interviews, the agenda, and the attendees will be determined by the Evaluation Team.
- (b) The Evaluation Team may contact and/or visit one or more of the Proponent's references and/or clients, and any other person or place as the Evaluation Team deems appropriate, with or without notice to the Proponent.
- 7.3.2 Pre-Qualification Submissions will be evaluated on a consensus basis based on criteria set out in the table below. If there is a meeting and/or interview with a Proponent, such meeting and/or interview will not be independently scored, however, the Evaluation Team reserves the right to take into consideration and incorporate what it learns from such meeting and/or interview in its evaluation and may adjust the scoring of the Proponent's Pre-Qualification Submission, regardless of when the meeting and/or interview is held.

Evaluation Criteria (Pre-Qualification Submission)	Points Available
EXPERIENCE/REFERENCES	
Proponent Information	25
School Project Experience	25
Case Study	60
Key Personnel	20
References	20
Location and address of head office	10
Number of employees in Ontario	10
MAXIMUM PRE-QUALIFICATION POINTS AVAILABLE	170

- 7.3.3 Under the Building Ontario Businesses Initiative Act, 2022, public sector entities (which follow the Broader Public Sector Procurement Directive, located at <https://files.ontario.ca/tbs-bpspd-en-2023-05-05.pdf>) are required to give preference to Ontario businesses, in accordance with the regulations, when conducting procurement processes for goods and services at contract values which are under the prescribed threshold amounts.

Further, the government of Ontario introduced the Building Ontario Businesses Initiative Act (BOBIA) as part of the "Fewer Fees, Better Services Act", 2022. BOBIA requires public sector entities to give Ontario businesses preference when conducting procurement processes for goods



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and services under a specified threshold, as noted in the act, located at <https://www.ontario.ca/laws/regulation/r23422>.

Accordingly, If a vendor is located outside of Ontario or Canada, weights will be applied per BOBIA.

7.4 DEBRIEFING

- 7.4.1 The TVDSB will offer separate debriefings to Proponents but only if requested in accordance with paragraph 7.4.2. Debriefings will be held in person or by telephone conference call, at the TVDSB's discretion, and will be scheduled on a date and time and for a duration to be confirmed by the TVDSB.
- 7.4.2 If a Proponent desires a debriefing it shall submit a written request to the Pre-Qualification Coordinator within 60 days after the TVDSB has posted the names of the Prequalified Proponents. Any request that is not timely received will not be considered and no debriefing will be held.

SIGNING THE MSA AND ISSUING REQUEST FOR PROPOSALS

7.5 SIGNING THE MSA

- 7.5.1 The TVDSB will issue a notice to each Prequalified Proponent and will enclose the MSA for execution. Within fifteen (15) business days of receiving such notice and MSA each such Prequalified Proponent is to sign and deliver the signed MSA to TVDSB.
- 7.5.2 A Proponent's failure to sign and deliver the MSA in accordance with paragraph 7.5.1 will result in the removal of that Proponent from all VOR Lists on which the Proponent was placed.
- 7.5.3 The execution of a MSA is not intended to and shall not obligate TVDSB to issue or execute any Request for Proposals or otherwise engage any Proponent.

7.6 ISSUING OF REQUEST FOR PROPOSALS

- 7.6.1 Request for Proposals submissions will only be accepted from those proponents who have been successfully pre-qualified.

8. TVDSB'S DISCRETION

8.1 GENERAL

- 8.1.1 In addition to any other options or express rights contained in the Pre-Qualification Documents or any other rights which may be implied in the circumstances, TVDSB may exercise any or all or a combination of the options described in this Article 8. TVDSB shall not be liable for any costs, expenses, losses or damages incurred or claimed by a Proponent resulting from TVDSB's exercise of its discretion.
- 8.1.2 A Proponent's delivery or TVDSB's evaluation of any Proposal, even where only one Proposal is delivered, will not obligate TVDSB to prequalify any Proponent, place a Proponent on a VOR List, proceed with any projects or Request for Proposals, or enter into a MSA with any Proponent.



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8.2 TVDSB's OPTIONS

8.2.1 TVDSB may, in its sole discretion, and for any or no reason:

- (a) reject any or all Proposals;
- (b) elect not to prequalify any Proponents;
- (c) cancel this Pre-Qualification at any time;
- (d) cancel this Pre-Qualification at any time and issue a new procurement process for the same or different Pre-Qualification.

8.2.2 TVDSB may in its sole discretion:

- (a) verify with a third party any information contained in a Proposal;
- (b) check references other than those provided by a Proponent;
- (c) adjust a Proponent's Submission Score or reject a Proposal on the basis of information received in response to a Request for Additional Information, in response to reference checks, during any meetings and/or interviews, or as a result of any other information obtained by the Evaluation Team;
- (d) disqualify and remove from a VOR List any Proponent whose Proposal contains misrepresentations or any other inaccurate or misleading information relating to matters which TVDSB, in its sole discretion, considers material.

9. ADDING TO OR REMOVING PREQUALIFIED PROPONENTS FROM A VOR LIST

9.1 ADDING PROPONENTS TO A VOR LIST

9.1.1 TVDSB may, from time to time and in its sole discretion, and only if there is space on a VOR List for a Service Category as provided in paragraph 1.4.1, do any or all of the following, in its sole discretion:

- (a) receive, consider and evaluate additional Proposals for such pre-qualification after the Submission Deadline and evaluate such Proposals as provided in this Pre-Qualification.

9.1.2 The TVDSB will issue a notice to each Proponent that is added to a VOR List and will enclose the MSA for execution. Within fifteen (15) business days of receiving such notice and MSA each such added Proponent is to sign and deliver the signed MSA to TVDSB, failing which the Proponent will be removed from all VOR Lists to which the Proponent was added.

9.2 REMOVING PREQUALIFIED PROPONENTS FROM A VOR LIST

9.2.1 TVDSB may, in its sole discretion but always acting reasonably, remove a Proponent from a VOR List. Circumstances under which TVDSB may exercise such discretion include, but are not limited to, the following:

- (a) the Proponent would currently fail to be prequalified for a Pre-Qualification for which it was prequalified;
- (b) the Proponent has been unable or unwilling to complete a Request for Proposal issued to it on three (3) separate occasions, unless the Proponent has provided, in TVDSB's sole discretion, a valid commercial reason for doing so;



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- (c) a significant change in the Proponent's operations, structure or control;
- (d) where TVDSB determines, in its sole discretion, that TVDSB's continued dealings with the Proponent would adversely impact TVDSB's reputation;
- (e) the Proponent's performance of the Services fell below TVDSB expectations and requirements, having regard to the complexity of the Request for Proposal and the Proponent's expertise and experience;
- (f) the Proponent has made claims or commenced legal proceedings, whether by litigation or arbitration, against TVDSB;
- (g) any other circumstances where removal from a VOR List is specifically provided for in the Pre-Qualification Documents.

10. GENERAL

10.1 PROHIBITION ON LOBBYING AND COLLUSION

- 10.1.1 Proponents and their directors, officers, employees, consultants, agents, advisors and other representatives are prohibited from engaging in conduct which is or could reasonably be considered as any form of political or other lobbying, or as an attempt to influence the outcome of this Pre-Qualification. Without limiting the generality of the foregoing, and except as provided in this Pre-Qualification, no such person shall contact, communicate with or attempt to contact or communicate with, directly or indirectly and in any manner whatsoever, any staff, personnel or representative of the Evaluation Team or the TVDSB, including any member of the TVDSB board of trustees, in connection with this Pre-Qualification.
- 10.1.2 A Proponent's failure to comply with this Section may result in the disqualification of the Proponent and its removal from any VOR List(s).

10.2 CONFLICT OF INTEREST

- 10.2.1 Proponents are required to declare, as part of their Proposal, that the Proponent is not aware of any perceived, potential or actual Conflict of Interest. For the purposes of this Pre-Qualification, "**Conflict of Interest**" includes:
 - (a) any situation or circumstances where, in relation to this Pre-Qualification, the Proponent's other commitments, relationships or financial interests could or could be perceived to exert an improper influence over the objective, unbiased and impartial exercise of independent judgment by any member or representative of the Evaluation Team or the TVDSB;
 - (b) any situation or circumstances where any member of the TVDSB board of trustees or any person employed by the TVDSB in any capacity:
 - (i) has a direct or indirect financial or other interest in any Proponent;
 - (ii) is an employee or a contractor to or under contract to any Proponent;
 - (iii) is negotiating or has an arrangement concerning future employment or contracting with any Proponent;
 - (iv) has an ownership interest in or is an officer or director or partner of any Proponent.
 - (c) any situation where:



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- (i) a Proponent owns or controls, or beneficially owns or controls, directly or indirectly, another person, partnership or corporation (such person, partnership or corporation referred to as a “Related Party”); or
- (ii) a Proponent is owned or controlled, directly or indirectly, by a Related Party, and such Related Party carries on business within one or more Service Categories.

10.2.2 If a Proponent discovers, at any time, any perceived, potential or actual Conflict of Interest, the Proponent shall promptly send a written statement to the Pre-Qualification Coordinator describing the perceived, potential or actual Conflict of Interest, along with a written proposal that, if implemented, would address the identified perceived, potential or actual Conflict of Interest. The TVDSB will review the Proponent’s written statement and proposal and, without limiting the generality of Article 8, the TVDSB may, in its sole discretion:

- (a) disqualify the Proponent from participating in this Pre-Qualification and/or remove the Proponent from one or more VOR List(s);
- (b) waive any and all perceived, potential or actual Conflict of Interest upon such terms and conditions, if any, as the TVDSB, in its sole discretion, requires to satisfy itself that the Conflict of Interest has been appropriately managed, mitigated and minimized.

10.2.3 The onus is on each Proponent to conduct any and all investigations necessary to confirm and satisfy itself that there is no perceived, potential or actual Conflict of Interest and that the declaration made as part of its Proposal is true and correct. If the TVDSB determines that a Proponent’s declaration is not materially true and correct, or if a Proponent otherwise fails to comply with this Section 10.2, the TVDSB may disqualify the Proponent and/or may remove the Proponent from one or more VOR List(s).

10.3 CONFIDENTIALITY, DISCLOSURE AND MFIPPA

10.3.1 Proponents acknowledge that the contents of their Proposals will be disclosed to the Evaluation Team and others within TVDSB and/or to TVDSB’s advisors. The TVDSB will use reasonable efforts to protect sensitive and confidential information provided by Proponents, however, the TVDSB shall not be liable in any way whatsoever if such information is disclosed, even if the TVDSB, its advisors, staff, members of the Evaluation Team, or any other person associated with them may have been negligent with respect to such disclosure. By delivering a Proposal each Proponent agrees to such disclosure and releases the Pre-Qualification Coordinator, the Evaluation Team, and the TVDSB from any liability for the same.

10.3.2 The TVDSB may be required to disclose parts or all of a Proposal pursuant to the provisions of MFIPPA or other legislation. Subject to the provisions of MFIPPA, the TVDSB will use reasonable efforts to safeguard the confidentiality of any information identified by a Proponent as confidential, however, the TVDSB shall not be liable in any way whatsoever if such information is disclosed based on an order or decision made under MFIPPA or any other applicable law. By delivering a Proposal each Proponent agrees to such disclosure and releases the Pre-Qualification Coordinator, the Evaluation Team, and the TVDSB from any liability for the same.

10.4 PREQUALIFICATION DOES NOT CONSTITUTE ENDORSEMENT

10.4.1 TVDSB’s prequalification of a Proponent and the placement and ranking on a VOR List does not constitute a general endorsement of that Proponent’s work or services.



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10.5 LIMIT OF LIABILITY

10.5.1 Each Proponent agrees that TVDSB's aggregate liability to any Proponent and the aggregate amount of damages recoverable by a Proponent against TVDSB for any and all claims relating to or arising from this Pre-Qualification or a Proponent's participation in this Pre-Qualification, including:

- (a) claims arising from negligence, wilful misconduct or other conduct; and/or
- (b) claims arising from a breach of any contract or any contractual or other relationship or obligation that may arise as a result of a Proponent's participation in this Pre-Qualification and/or delivery of a Proposal,

shall be limited to the lesser of \$5,000 and the Proponent's reasonable demonstrated costs of preparing its Proposal.

END OF INSTRUCTIONS TO PROPONENTS



SCHEDULE A – SCOPE OF WORK

SCHEDULE A – SCOPE OF WORK

Background:

TVDSB has an annual energy consumption of:

- 70,000,000 kWh of electricity
- 11,000,000 cubic meters of natural gas
- 100,000L of propane.

This energy consumption is responsible for approximately 28,000 tonnes of GHG (Greenhouse Gas) emissions per year and is paced to exceed 33,000 tonnes by 2030. The increase is based on a combination of TVDSB growth forecasts and GHG emission intensity of the Ontario electricity grid. TVDSB is investigating how to reduce GHG emissions in combination with current energy reduction strategies. The Sustainability Framework (see appendix A) was created to guide our efforts to reduce our effect on the surrounding environment.

The intent of this prequalification is to approve vendors that TVDSB can then engage to identify opportunities, design solutions and fund carbon reduction opportunities that can then be implemented to move us forward on our journey to a net-zero 2050.

Overview

The Board is seeking potential vendors with knowledge, skills, and capacity to:

- Assess facilities according to the Sustainability Framework's goals and objectives.
- Develop carbon reduction project proposals and designs for approval
- Design, implement and manage solutions
- Supply capital funding strategies/ opportunities mutually beneficial to TVSDB and proponent
- Provide Measurement and Verification (M&V) of solutions to ensure performance is meeting or exceeding expectations . In cases that solutions are not performing to expectations, work towards resolving the performance issues.
- Leverage project(s) to reduce deferred capital backlog through the replacement of equipment with new solutions that can take advantage of low carbon energy sources.

The Board is aware that the potential scope of projects that will result from engagement of successful proponents is varied. TVDSB is looking for innovative solutions that will incorporate multiple technologies/ equipment that will reduce GHG emissions and assist in TVDSB meeting provincial GHG reductions targets in 2030 and 2050.



SCHEDULE B – TVDSB PROCUREMENT WEB PORTAL

SCHEDULE B – TVDSB PROCUREMENT WEB PORTAL

This Schedule describes the process for accessing the Portal.

1. Go to “www.tvdsb.ca”
2. Click on “I’D LIKE TO”; and then click on “Go to Purchasing”.
3. Click on “Bids”; and then click on “Proceed to inquiry/download page”.
4. Locate the Pre-Qualification and click “New” icon. You will be directed to the “TVDSB Client Portal”.
5. Proponents that already have a TVDSB Client Portal account: Click “TVDSB Login” and log in using your TVDSB Client Portal account and password.
6. Proponents that do not already have a TVDSB Client Portal account:
 - (a) Click “Sign up now”;
 - (b) Read the TVDSB Client Portal Disclaimer, scroll to bottom and click “I agree” or “I do not agree”.
 - (c) Proponents that click “I do not agree” will not be able to participate in the Pre-Qualification.
 - (d) Proponents that click “I agree” will be taken to the “New Account Application” page. Complete the account information and click “Create My Account”; then click “TVDSB Login”.
7. Once logged in, you will be within the Client Portal. Click “Open to Bid” and then click on the “New” icon for the Pre-Qualification.

To access answers to questions and addenda:

1. Follow the steps outlined in steps 1 to 3 above.
2. Proceed to the Pre-Qualification and click “Answers to Questions”.

END OF SCHEDULE



SCHEDULE C - SUBMISSION REQUIREMENTS

SCHEDULE C - SUBMISSION REQUIREMENTS

It is important that Proponents present the information required by this Pre-Qualification so that it can be readily understood and evaluated. A Proponent's Pre-Qualification Submission should address all of the items set out in this Schedule in the order in which they appear and using the same headings and numbering sequence. A Proponent's failure to follow instructions or failure to provide a full response to this Pre-Qualification may have an adverse impact on the evaluation of its Pre-Qualification Submission.

Proponents should not assume that the TVDSB or any member of the Evaluation Team has any knowledge of the Proponent or its expertise, experience or qualifications, and should ensure that all required information is included and submitted as part of the Proponent's Pre-Qualification Submission.

References to web / internet sites or links are NOT acceptable and will NOT be considered.

Submissions must be 12 pages (8 1/2" x 11") or less in length with 10 point font size. Any additional information submitted beyond the 12 pages will not be reviewed.

Part 1	Completed and signed Pre-Qualification Submission Form
Part 2	Proponent Information
Part 3	School Project Experience
Part 4	Case Studies
Part 5	Key Personnel
Part 6	References

1. **Part 1 – Completed and Signed Pre-Qualification Submission Form**

Submit a completed and signed Pre-Qualification Submission Form (Schedule D) signed by the Proponent and uploaded in .pdf format.

2. **Part 2 – Proponent Information**

- (a) Provide the Proponent's legal name and the year the Proponent was established.
- (b) The Proponent **must** provide the location and address of the Proponent's head office.
- (c) The Proponent **must** provide the number of the Proponent's employees in Ontario.
- (d) Submit a corporate / business chart of the Proponent and the office from which the services will be delivered, including the number of principals and employees at that location. State whether you intend to use any sub-contractors for services.
- (e) Submit a narrative describing the Proponent's history and current activities and demonstrating the Proponent's experience performing services in the educational sector which are the same or similar to the Services within the last five years.
- (f) If the Proponent previously provided services to the TVDSB, identify the project(s) and the Proponent's role on such project(s).



SCHEDULE C – SUBMISSION REQUIREMENTS

- (g) Submit a list of litigation and/or arbitration disputes involving in excess of \$100,000 commenced by or against the Proponent by or against its clients within the last three (3) years, including a summary of each dispute and details of its resolution if applicable.
- (h) Submit copies of the following mandatory documents:
 - (i) Evidence of the following minimum insurance policies and coverages currently in force:
 - (a) commercial general liability insurance: \$5.0 million per occurrence; \$5.0 million aggregate;
 - (c) automobile liability insurance: \$2.0 million per occurrence.
 - (ii) Current WSIB clearance certificate.

3. **Part 3 – School Project Experience**

- (a) Provide a description of how the proposed solutions would tie into our Sustainability Framework?
- (b) Education is an important part of our Sustainability Framework. How would you provide educational opportunities to our staff, students and community in order for them to better understand carbon reduction and why this is important to everyone?
- (c) Describe how the solutions that the Proponent may recommend would responsibly manage maintenance costs throughout the lifecycle of the equipment/ solution.
- (d) Describe how the proposed carbon reduction solution would be leveraged to improve the School's Facility Condition index (FCI).
- (e) Energy Costs create budgetary pressures. How would the proponent balance the carbon reduction project's ongoing energy costs with responsible management of TVDSB Utility Budgets?
- (f) What is the Proponent's experience with similar type projects in an educational setting. Please describe lessons learned from those projects that will be used to improve implementation.
- (g) Ensuring that solutions provided are performing to the expectations set out in the proposal is of paramount importance. Please describe how the proponent will verify the short and long term performance as well as report on it to TVDSB.
- (h) Funding for a carbon reduction initiative like this can be difficult. Please provide some possible funding methodologies along with the advantages and disadvantages of each. Does the proponent have access to external funding? If so, please explain any funding limitations those sources may have.

4. **Part 4 – Case Studies**

Archetype Secondary school #1

Based on the information provide below, Provide a plan of what improvements would be proposed to reduce carbon emissions. To be included in the plan should be a budgetary cost, timeline for implementation as well as the planned GHG emission reduction. Please also explain how this could be replicated at similar schools. Propose strategies on how to fund this project.



SCHEDULE C – SUBMISSION REQUIREMENTS

Description:

- (A) Urban Secondary School built in 1970. The school has 4 floors with 1st floor being partially subgrade. Gross floor area is approximately 28,500 m².
- (B) School is heated by 6 non-condensing boilers (2003), with a capacity of 10,200 MBH, that provide hot water to Heating and ventilating units, VAV boxes and radiators. School is chilled water from a Centrifugal chiller (2003) that provides chilled water to air handling units. Fan systems and VAV boxes should be considered original to school. The Building Automation System (BAS) is extensive, incorporating all mechanical systems to some extent.
- (C) The main electrical service is 600/347V, 3 phase 2000amp that is fed from an external Utility owned transformer. Exterior lighting is LED, interior lighting is a mixture of LED and T8 Fluorescent fixtures.

Historic Energy consumption #1

Archetype Secondary School #1 Historic Energy Consumption												
Natural Gas(m ³)												
	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug
2018-19	2400	18800	39100	43700	64100	52600	51900	28700	9800	1800	1600	1600
2019-20	3800	14100	39400	45600	51400	55600	37900	29500	16500	7200	11900	8200
2020-21	8500	26000	35400	52200	60000	68000	42300	30300	17500	6500	200	900
2021-22	1300	9600	41200	45200	72900	56500	55600	61700	16900	9100	5100	6300
2022-23	7000	23600	38800	58100	62100	79400	49600	27700	15200	4000	4300	3200
Electricity(kWh)												
	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug
2018-19	172000	176000	170000	157000	185000	156000	166000	159000	158000	164000	134000	131000
2019-20	166000	154000	168000	157000	171000	159000	141000	112000	113000	125000	129000	133000
2020-21	147000	153000	149000	156000	143000	150000	162000	130000	142000	158000	149000	159000
2021-22	172000	164000	163000	153000	158000	156000	166000	156000	177000	189000	142000	159000
2022-23	243000	150000	152000	155000	154000	157000	166000	156000	173000	182000	150000	133000

Archetype Secondary school #2

Based on the information provide below, provide a plan of what proposed improvements would be required to make this school Carbon Neutral. To be included in the plan is a budgetary cost, timeline for implementation. Please also explain how this could be replicated at similar schools. Propose strategies on how to fund this project.

Description:

- (A) Suburban Secondary School built in 1958 with an addition and renovation of existing in 1992. School is a mixture of 1 and 2 storeys. Gross floor area is approximately 14,500 m².
- (B) School is heated by 2 non-condensing boilers(2005), with a capacity of 6,200 MBH, that provide hot water to Heating and ventilating units, heat pump loop and radiators. School is partially cooled by water source heat pumps(2017) and a fluid cooler. Fan systems should be considered original to the 1992 renovation. The Building Automation System(BAS) is extensive, incorporating all mechanical systems to some extent.
- (C) The main electrical service is 600/347V, 3 phase 1200amp that is fed from an external Utility owned transformer. Exterior lighting is LED, interior lighting is a mixture of LED and T8 Fluorescent fixtures.



SCHEDULE C – SUBMISSION REQUIREMENTS

Historic Energy Consumption #2

Archetype Secondary School #2 Historic Energy Consumption												
Natural Gas(m ³)												
	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug
2018-19	1700	9800	20100	21600	30300	24600	22600	11800	4100	1200	0	300
2019-20	900	5700	18600	21500	23100	23500	16800	13700	7300	600	0	500
2020-21	2500	9300	12500	22400	24200	26200	15700	10900	5100	500	0	400
2021-22	2000	5700	16700	18900	29700	23500	18500	9300	1300	300	700	600
2022-23	1400	7800	9800	24000	14600	18700	19100	10300	6500	1600	700	700
Electricity(kWh)												
	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug
2018-19	93000	101000	101000	102000	107000	98000	104000	96000	95000	95000	86000	80000
2019-20	93000	96000	100000	97000	102000	97000	89000	71000	75000	85000	85000	87000
2020-21	90000	97000	98000	100000	99000	96000	100000	88000	93000	96000	91000	97000
2021-22	95000	96000	91000	87000	99000	92000	95000	92000	102000	102000	91000	94000
2022-23	99000	98000	95000	93000	96000	89000	96000	95000	107000	95000	79000	60000

5. **Part 5 – Key Personnel**

- (a) Provide the names and positions of the key personnel that would be involved in performing the Services;
- (b) Submit a resume for each person; and
- (c) Submit an organizational chart illustrating the lines of authority among the key personnel and identify the key person(s) that would be the “project manager” or the main point of contact between the Proponent and TVDSB.

6. **Part 6 – References**

The Proponent **must** submit information relating to up to four (4) projects undertaken and/or completed in the last five (5) years per category, including any projects which may be on-going, which best illustrate the Proponent’s expertise, experience and capabilities in connection with the performance of experience working for school boards and educational institutions is preferred. For each project submit the following:

- (a) Company Name, contact name, E-mail Address
- (b) a general description of the mandate, including location and size; and
- (c) a summary of the services performed; and
- (d) the start and completion dates; and
- (e) adherence to planned budget and schedule.

END OF SCHEDULE



SCHEDULE D - PRE-QUALIFICATION SUBMISSION FORM

SCHEDULE D – PRE-QUALIFICATION SUBMISSION FORM

TO: TVDSB Portal

Name and Business Address of Proponent:

Phone: _____ **Fax:** _____

Contact name for future correspondence and inquiries:

Name and Title _____ **Phone:** _____

E-mail: _____

We have read and we fully understand, acknowledge, accept and agree to the terms, conditions and the requirements of the Pre-Qualification Documents, including all Schedules and all addenda issued, and we hereby submit the forms, documents and other material required by the Submission Requirements. Without limiting the foregoing, we understand, acknowledge, accept and agree that:

- (a) **the issuance of the Pre-Qualification Documents, our preparation and delivery of our Proposal, and the receipt, review and evaluation of our Proposal will not create any contractual relations or obligations, including “Contract A” (sometimes referred to as the “bid contract”), between us and TVDSB;**
- (b) **notwithstanding that we may be prequalified and may be placed on a VOR List, TVDSB has no obligation to issue any Request for Proposal;**
- (c) **if we receive the written notice described in paragraph 7.5.1 of the Instructions to Proponents we will sign and deliver the signed MSA to TVDSB within 15 business days of our receipt of the same;**
- (d) **the execution of a MSA does not obligate TVDSB to issue any Request for Proposals or otherwise engage us to perform any projects;**
- (e) **Requests for Proposals, if any, will be issued in accordance with Section 8.2 of the Instructions to Proponents and will otherwise be subject to the other terms of the MSA;**

We hereby represent that the documents and other material attached to this Pre-Qualification Submission Form fully respond to Schedule C – Pre-Qualification Requirements, are complete and accurate, and that TVDSB may rely on all such documents and material submitted.



SCHEDULE D - PRE-QUALIFICATION SUBMISSION FORM

Capitalized terms used in this Pre-Qualification Submission Form and not otherwise defined shall have the meanings assigned to them in the Instructions to Proponents.

1. CATEGORIES

We are applying to the following Category(ies) for which we are applying to be prequalified:

Service Category (Project Value)	(Y/N)
\$0-\$2,000,000	
\$2,000,000 - \$10,000,000	
Over \$10,000,000	

2. CONFLICT OF INTEREST

If the box below is left blank, the Proponent will be deemed to declare that (a) there was no Conflict of Interest in preparing its Proposal; and (b) there is no foreseeable Conflict of Interest in performing the Services. Otherwise, if the statement below applies, check the box.

We declare that there IS an actual or potential Conflict of Interest relating to the preparation of our Proposal, and/or we foresee an actual or potential Conflict of Interest in performing the Services.

If a Proponent declares an actual or potential Conflict of Interest by marking the box above, the Proponent must provide and attach details of the actual or potential Conflict of Interest as well as the Proponent's proposed steps that, if implemented, would address the identified actual or potential Conflict of Interest.

3. ATTACHMENTS

We have attached all documents and other material required in response to Schedule B – Pre-Qualification Requirements. Each attachment addresses the items listed in Schedule B in the order in which they appear, using the same headings and numbering sequence.

Signed and submitted for and on behalf of:

PROPONENT _____

DATE _____

SIGNATURE _____

Name and Title _____

I have authority to bind the Proponent named above

END OF SCHEDULE



SCHEDULE E - MASTER SERVICES AGREEMENT

SCHEDULE E – MASTER SERVICES AGREEMENT

Refer to Master Services Agreement, attached separately.

A Proponent's failure to sign and deliver the MSA in accordance with paragraph 7.5.1 will result in the removal of that Proponent from all VOR Lists on which the Proponent was placed.

It is the Proponent's responsibility to read and review the MSA prior to submission.



MASTER SERVICES AGREEMENT

THIS MASTER SERVICES AGREEMENT (“MSA”) is made as of ● (the “Effective Date”)

BETWEEN:

●
(the “Supplier”)

and

THAMES VALLEY DISTRICT SCHOOL BOARD
(the “Board”)

WHEREAS

- A. The Board and the Supplier are signing this MSA in order to provide for the terms and conditions that will govern the performance by the Supplier of the Services.
- B. It is the intention of the parties that the terms and conditions of this MSA shall govern the underlying relationship between the Board and the Supplier, and that each signed Work Order, together with the terms and conditions of this MSA, shall constitute a separate Service Contract between the Board and the Supplier.

NOW THEREFORE, based on mutual covenants mentioned above, both parties agree to enter into this MSA on the following terms and conditions:

ARTICLE 1 DEFINITIONS

1.1 Definitions

Unless the context otherwise requires, capitalized terms not otherwise defined in this MSA shall have the meanings specified or referred to below. All references to an “Article” or “paragraph” are references to an Article or paragraph of the main body of this MSA and not to articles or paragraphs of any Appendix or any Work Order.

- (a) **“Applicable Laws”** means any domestic law, rule, statute, legislation, regulation, by-law, order, code, notice or direction issued by any federal, provincial or municipal government or regulatory authority which is or becomes in force after the Effective Date.
- (b) **“Blackout Period”** means the following dates in each calendar year:
 - (i) January 1 to January 7, inclusive; and
 - (ii) the week during the month of March identified as “March Break” by the Board; and
 - (iii) December 15 to December 31, inclusive.
- (c) **“Board Representative”** means an inspector, manager, staff member, technician or any other employee or representative of the Board.
- (d) **“Change Order”** has the meaning ascribed to it in paragraph 13.2.
- (e) **“Change Request”** means a written proposed change to a Service Contract.
- (f) **“Claim”** means any actual, threatened or potential civil, criminal, administrative, regulatory, arbitral or investigative demand, allegation, claim, action, charge, suit, investigation or proceeding, or any other claim or demand.
- (g) **“Confidential Information”** has the meaning ascribed to it in paragraph 26.1.



MASTER SERVICES AGREEMENT

- (h) **“Consultant” or “consultant”**, if used in a Work Order, shall mean the Supplier.
- (i) **“Effective Date”** is the date first written above.
- (j) **“Force Majeure Event”** has the meaning ascribed to it in paragraph 17.1.
- (k) **“Good Industry Practice”** means, in respect of any aspect of the Services or other actions or obligations contemplated in a Service Contract, in each case, that have been or ought to have been performed by the Supplier, and subject always to the Applicable Laws, the exercise of the degree of skill, diligence, prudence and foresight and practice which could reasonably and ordinarily be expected from a skilled and experienced supplier engaged in: (1) performing the same or similar responsibilities, actions or obligations as contemplated in a Service Contract; or (2) performing responsibilities, whether individually or as a package of responsibilities, which could reasonably be regarded as being comparable to the responsibilities contemplated in a Service Contract; in each case, performing its obligations under the same, reasonably comparable or similar circumstances.
- (l) **“Indemnitees”** means the Board and its directors, officers, employees, advisors, agents, trustees, volunteers, contractors, consultants, successors and assigns but does not include the Supplier or anyone for whom the Supplier is responsible at law.
- (m) **“Intellectual Property”** means in connection with a specified subject matter, on a worldwide basis, all registered or unregistered trade-marks, trade names, patents, copyrights, trade secrets, designs, rights of publicity and other industrial or intangible property rights of a similar nature, all grants and registrations worldwide in connection with the foregoing, and all other rights with respect thereto existing other than pursuant to grant or registration.
- (n) **“Intellectual Property Rights”** means all Intellectual Property in or associated with the Program Data and all Intellectual Property which, or the subject matter of which, is at any time before or after the Effective Date created, brought into existence, acquired, used or intended to be used by the Supplier, or jointly by the Supplier and the Board, for the purpose of performing Services.
- (o) **“Losses”** means, in respect of any matter, all Claims, losses (including, without limitation, any loss of use, revenue, profit or opportunity and any other commercial or economic loss of any kind), injuries (including, without limitation, injury to property, personal injury, bodily injury and death), damages (including, without limitation, incidental, indirect, special, punitive, exemplary or consequential damages), liabilities, penalties, payments, deficiencies, charges, costs and expenses (including, without limitation, all legal and other professional fees, disbursements, interest, penalties and amounts) arising directly or indirectly as a consequence of such matter.
- (p) **“MSA”** means this master services agreement between the Board and the Supplier, including any schedules or appendices attached, any valid amendments or restatements, and any supplementary agreements and succeeding amendments thereto. For greater certainty, **“MSA”** does not include a Service Contract.
- (q) **“OHSA”** means the *Occupational Health and Safety Act* (Ontario) as amended, and all regulations passed under it.
- (r) **“Open Book”** means the interactive process between the Board and the Supplier under which the Supplier makes available to the Board all Records prepared or maintained by the Supplier in respect of each Work Order, each Service Contract, and this MSA. Open Book is an active, co-operative process between the Board and the Supplier and is in addition to and not in substitution of the Board’s rights pursuant to Article 30 (Audit Rights).



MASTER SERVICES AGREEMENT

- (s) **“Personal Information”** means all personal information, as that term is defined in the *Municipal Freedom of Information and Protection Privacy Act* (Ontario) and the *Personal Information Protection and Electronic Documents Act* (Canada), in the custody or control of the Supplier or its Subcontractors other than personal information of employees of the Supplier or its Subcontractors and other than personal information that is wholly unrelated to this MSA and not derived directly or indirectly from the Board.
- (t) **“Program Data”** means all concepts, techniques, products, processes, drawings (including, without limitation, computer-aided designs and drawings), reports, documents, plans, software, methods, procedures and other data and materials (including images) developed, acquired, brought into existence or used, whether by the Supplier or jointly by the Supplier and the Board, in relation to the Supplier’s supply or performance of Services, including the solution resulting from the performance of any Service Contract by the Supplier, other than Intellectual Property Rights of third parties, such as commercially available and purchased software.
- (u) **“Proper Invoice”** means an application for payment delivered by the Supplier to the Board that fully complies with the requirements of paragraph 6.2.
- (v) **“Records”** has the meaning ascribed to it in paragraph 30.1.
- (w) **“Service Contract”** means a contract for the supply of Services between the Board and the Supplier created upon the Board’s issuance of a Work Order and the Supplier’s acknowledgment and acceptance or performance of such Work Order. The terms of each Service Contract shall include and incorporate all of the terms and conditions of such Work Order, including any documents attached or referred to in the Work Order, and all terms and conditions of this MSA.
- (x) **“Services”** means any work and/or services described:
 - (i) in this MSA including in Appendix A – Statement of Work; and
 - (ii) in any Work Order, including in any schedules and attachments to the Work Order.Services includes but is not limited to the supply of all staff, labour, services, products, materials, vehicles, equipment and everything else necessary to complete a Service Contract.
- (y) **“Subcontractor”** means a person or entity having a direct contract or agreement with the Supplier to perform a part or parts of a Service Contract, and includes material, equipment or other suppliers.
- (z) **“Term”** has the meaning ascribed to it in paragraph 2.1.
- (aa) **“Total Completion”** means, in connection with a Service Contract, that:
 - (i) the Supplier has completed all Services to the satisfaction of the Board; and
 - (ii) the Services meet all of the Board’s requirements set out in the Service Contract.
- (bb) **“Work Order”** means a written request, including in the form of a purchase order, issued to the Supplier that describes the work and/or services required by the Board.
- (cc) **“Work Product”** has the meaning ascribed to it in paragraph 15.1.

1.2 Interpretation

In this MSA, except where expressly otherwise provided:

- (a) the singular includes the plural and vice versa and any gender includes any other gender;
- (b) all usage of the word “including,” or the phrases “such as,” “inter alia” and “e.g.,” shall mean “including, without limitation,”;



MASTER SERVICES AGREEMENT

- (c) the division of this MSA into separate articles, sections, paragraphs and Appendices and the insertion of headings is for convenience of reference only and shall not affect the construction or interpretation of this MSA;
- (d) words or abbreviations not otherwise defined that have well known or trade meanings are used herein in accordance with their recognized meanings;
- (e) all references to currency means lawful money of Canada.

1.3 Appendices

The Appendices listed below which are attached to this MSA are incorporated herein by reference and shall be deemed to be an integral part of this MSA:

- (a) Appendix A – Statement of Work.
- (b) Appendix B – Supplier’s Submission, including price list.

1.4 Conflicts

If there is a conflict within the documents that comprise a Service Contract, the order of priority of documents, from highest to lowest, shall be:

- (a) this MSA, excluding Appendices;
- (b) the Work Order;
- (c) Appendix A – Statement of Work;
- (d) Appendix B – Supplier’s Submission, including price list.

ARTICLE 2 TERM

- 2.1 The term of this MSA shall be for a period of one (1) year commencing on the Effective Date (the “**Term**”).
- 2.2 If the Term ends, either as a result of expiry or termination of this MSA, while the Supplier is performing Services under one or more Service Contracts, the Term shall be automatically extended and this MSA shall continue in effect and in force with respect to such Service Contract(s) until all such Service Contract(s) have been completed or terminated, after which this MSA shall immediately and automatically terminate.
- 2.3 Nothing in this Article shall affect or limit the Board’s right to otherwise terminate this MSA in accordance with its terms.

ARTICLE 3 TIME IS OF THE ESSENCE

- 3.1 Time is of the essence in the performance by the Supplier of its obligations under this MSA and each Service Contract.

ARTICLE 4 WORK ORDER

- 4.1 The Board may, from time to time, issue a Work Order to the Supplier for the supply of Services described therein. Each Work Order will describe the work and/or services to be performed by the Supplier, the schedule for the performance of the Services (if applicable), as well as any additional instructions, directions or other information relevant to the performance of the Services.



MASTER SERVICES AGREEMENT

- 4.2 The Supplier shall review each Work Order and other information provided by the Board in connection with the Services. Should the Supplier discover any errors, omissions or inconsistencies in a Work Order or other information provided by the Board, the Supplier shall notify the Board of such errors, omissions or inconsistencies.
- 4.3 The Supplier shall acknowledge receipt of each Work Order and shall commence performing the Services as and within the time specified in the Work Order. If the Supplier fails to do so, the Board reserves the right to contract with any other person to complete the Services and, in addition, the Board may note the Supplier in default under this MSA.
- 4.4 The parties agree that the signing of this MSA is not intended to and shall not obligate the Board to issue any Work Order or otherwise engage the Supplier. The Supplier further understands, acknowledges and agrees that:
- (a) signing this MSA does not guarantee any fees or volume, level, value or quantity of Services and does not authorize or direct the performance of any Services;
 - (b) the Board has made no representations, promises, warranty, guarantee or agreement of any kind with regard to the fees or volume, level, value or number of Work Orders which the Supplier may receive or the Services it may perform under any Service Contract;
 - (c) the Supplier does not have an exclusive right to provide work and/or services to the Board during the Term.

ARTICLE 5 DOCUMENTS TO BE SUBMITTED BEFORE COMMENCING SERVICES

- 5.1 Upon receipt of each Work Order and before commencing the performance of the Services under each Service Contract, the Supplier shall deliver to the Board Representative, for each Service Contract:
- (a) a criminal background check in accordance with **Error! Reference source not found.** (Criminal Background Check);
 - (b) a current WSIB clearance certificate in accordance with paragraph 19.1;
 - (c) copies of the certificates of insurance evidencing that the Supplier has in place the insurance policy(ies) required by Article 20 (Insurance); and
 - (d) a copy of the Supplier's safety program described in paragraph 19.2(b); provided that if the Supplier had previously delivered to the Board a copy of the safety program in connection with an earlier Service Contract, and provided there are no changes to the safety program, the Supplier shall deliver a letter confirming there have been no changes to the safety program and identifying the earlier Service Contract and the date on which such safety program had been delivered to the Board.

ARTICLE 6 INVOICING AND PAYMENT

- 6.1 The Board will pay amounts invoiced in a Proper Invoice based on the fees and hourly rates set out in the Work Order, or as otherwise provided in Appendix B – Supplier's Submission. Such fees and hourly rates shall be in effect and not subject to change for the duration of the Term.
- 6.2 A Proper Invoice shall mean an application for payment made by the Supplier that:
- (a) is delivered to the Board by e-mail to Board Contact as assigned on an individual project basis; and



MASTER SERVICES AGREEMENT

- (b) includes all of the following:
 - (i) the Supplier's name and address and HST registration number;
 - (ii) the date of the invoice and the period during which the Services were supplied;
 - (iii) information identifying the authority, whether in the MSA, Work Order or otherwise, under which the Services were supplied;
 - (iv) a description, including quantities where appropriate, of the Services that were supplied;
 - (v) the amount payable for the Services that were supplied and the payment terms;
 - (vi) the name, title, telephone number and mailing address of the person to whom payment is to be sent;
 - (vii) the Board reference number assigned to each Work Order (including any Board purchase order number) and/or Service Contract pursuant to which the Services were performed;
 - (viii) the name and contact information of the Board Representative for each Service Contract being invoiced;
 - (ix) information relating to the percentage completion of the Service Contract, the total amount invoiced to date, the amount previously invoiced, and the current billing;
 - (x) where the invoice amount includes amounts charged on the basis of hourly rates, documentation in support of the amount claimed, including dates that Services were performed, identity of the person(s) involved, the hours spent, and a description of the Services performed;
 - (xi) a list and description of additional services / Change Orders for which payment is being claimed, together with all backup or supporting documentation;
 - (xii) a current WSIB clearance certificate.
- 6.3 The Supplier shall submit Proper Invoices on a monthly basis, unless otherwise agreed. Provided that the Supplier shall not submit a Proper Invoice on any day that is within the Blackout Period.
- 6.4 Subject to the Board's right to give notice of non-payment and subject to the holdback provisions of the Construction Act (Ontario), the Board will pay the amount payable under a Proper Invoice no later than 28 calendar days after the date the Board receives the Proper Invoice. Provided that the Board's obligation to make payment shall not arise unless and until the Supplier's invoice constitutes a complete Proper Invoice.
- 6.5 No payment by the Board shall constitute an acceptance of any Services which are not in accordance with the requirements of a Service Contract.
- 6.6 The Board may withhold payment of any invoice or part of invoice to the extent required to offset any previous over-payment made to the Supplier or to the extent as may be necessary to protect the Board from loss or damage as a result of:
 - (a) Supplier's failure to perform any of its material obligations under a Service Contract or this MSA, or where the Supplier is otherwise in default under any Service Contract and any such default is continuing;
 - (b) Services which are defective or which have not been performed in accordance with a Service Contract or in accordance with Applicable Laws; or



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- (c) the Supplier's failure to apply for payment in compliance with the requirements of a Service Contract.
- 6.7 Where the Board has withheld payment to the Supplier, the Board shall be entitled to apply the funds withheld toward the cost of any required remedial services or toward Losses suffered and for which the Board is entitled to compensation.
- 6.8 The Supplier will be responsible for all taxes and amounts exigible on, imposed, in respect of, or relating to amounts received by the Supplier under a Service Contract, including taxes based on its own capital or net income, employment taxes in respect of its own workers, and taxes on any property owned by the Supplier, and will be responsible for arrangements to pay all such taxes in a timely manner when due and payable.

ARTICLE 7 SUPPLIER'S PERFORMANCE OF THE SERVICES

- 7.1 In performing the Services under each Service Contract the Supplier shall protect the image and/or reputation of the Board and shall exercise a standard of care, skill, judgment and diligence that would normally be exercised by an experienced, skilled and prudent person supplying similar services. The Supplier acknowledges and agrees that the Supplier's obligations, duties and responsibilities under each Service Contract shall be interpreted in accordance with this standard. The Supplier shall exercise the same standard of care, skill, judgment and diligence in respect of any Subcontractors, products, materials, personnel or procedures which it may use in relation to the Services.
- 7.2 The Supplier shall provide the expertise and resources, such resources including manpower and equipment, as are necessary to:
 - (a) ensure conformity and compliance with all of the requirements of a Service Contract and so as to maintain the progress of the Services in accordance with the requirements, milestones and schedule set out, and so as to achieve Total Completion by the date specified in, each Service Contract; and
 - (b) effectively direct and supervise the Services.
- 7.3 The Supplier shall perform and complete the Services under each Service Contract in accordance with:
 - (a) the terms and conditions of each Work Order and this MSA;
 - (b) modern practice and all Applicable Laws, and shall employ only good workmanship;
 - (c) Good Industry Practice;
 - (d) the milestones and/or schedule and within the time specified in each Work Order, or within such time period which may be agreed between the Board and the Supplier.

Without limiting the generality of the foregoing, the Supplier is responsible for the interconnection of the various parts of the Services under each Service Contract so that no part shall be left in an unfinished or incomplete condition owing to any disagreement between Subcontractors, or between any of the Subcontractors and the Supplier, as to where the services of one begin or end with relation to the services of the other.

- 7.4 The Supplier acknowledges and agrees that all Services which are reasonably inferable as being necessary to complete a Service Contract shall be included in and provided by the Supplier as part of the Services to be performed, at no additional cost to the Board. When completed, the Services shall meet all of the Board's requirements set out in the Work Order or as may otherwise



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be reasonably inferable therefrom. If there is any conflict or disagreement in this respect, the Board's interpretation shall govern.

7.5 The Supplier shall submit details of the procedures, arrangements and methods which the Supplier proposes to adopt for its performance of the Services under a Service Contract, including:

- (a) the process and criteria for hiring Subcontractors, if any;
- (b) procedures for the backup and storage in safe custody of all electronic and other data, materials, documents and information.

The Supplier shall not make any changes to these arrangements and methods without the Board's prior written consent, such consent not to be unreasonably withheld. If the Board makes any comments on the Supplier's proposed arrangements or methods, the Supplier will incorporate such comments and promptly submit revised details for the Board's review.

7.6 The Supplier shall ensure the backup and storage in safe custody of all electronic and other data, materials, documents, and information, including Program Data and Personal Information, in accordance with Good Industry Practice. The Supplier shall comply and shall cause its Subcontractors to comply with all procedures for the backup and storage in safe custody of such electronic data, materials, documents and information to which the Board has not objected. In the event of any amendments to the foregoing procedures, the Supplier will provide the Board with sixty (60) days' prior notice of the implementation of such amendments.

7.7 The Supplier shall not suspend the performance of the Services under any Service Contract or any part thereof without the Board's prior written consent, with the exception of situations where safety of persons and/or property may be in jeopardy. The Supplier will notify the Board immediately following suspension of Services pursuant to this paragraph with a written detailed explanation of the reasons for such suspension.

7.8 The Board may at any time, and for any reason, instruct the Supplier to suspend progress of part or all of the Services under a Service Contract. Should a suspension last for thirty (30) days or more, the Board may at its option delete the suspended Services from the scope of the Service Contract, without in any way affecting the remainder of the Service Contract.

7.9 The Board, under special circumstances, may require the Supplier to perform Services during nights, on weekends and/or on holidays. The Supplier acknowledges that it is the Supplier's responsibility to obtain all required authorizations and approvals from the Board and from authorities having jurisdiction, and to take adequate measures to ensure performance of the Services in accordance with the terms of each Service Contract.

7.10 The Supplier shall obtain and maintain, at its own cost and expense, all licences, permits, certificates, registrations, approvals and all required authorizations required by any government department, ministry or agency which may be necessary to:

- (a) perform the Services in compliance with all Applicable Laws; and
- (b) ensure performance of the Services at such time or times as may be required by a Service Contract, including evenings and weekends.

7.11 The Supplier shall provide and pay for all labour, products, materials, equipment, tools, construction equipment and machinery, water, heat, utilities, transportation, and all other facilities, services and everything else necessary for the proper performance and completion of the Services.



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- 7.12 The Supplier shall monitor the progress of the Services and shall advise in writing of any variation from the schedule or any milestone dates, or any slippage in the schedule, within 24 hours of such variation or slippage becoming apparent. If at any time it should appear that the actual progress of the Services is behind schedule or is likely to fall behind schedule, the Supplier shall take appropriate steps, including assigning additional resources at no additional cost to the Board, to cause the actual progress of the Services to conform to the schedule and to achieve Total Completion by the date specified in a Service Contract.
- 7.13 The Supplier shall:
- (a) ensure that all Supplier personnel and Subcontractors have sufficient abilities, skills, knowledge, training, qualifications and experience to safely perform the Service;
 - (b) ensure that all Supplier personnel and Subcontractors have photo identification;
 - (c) ensure that all Supplier personnel and Subcontractors sign in/out at each Board site visited to perform the Services;
 - (d) ensure that sufficient reserve and replacement personnel, including supervisory personnel, are available to perform the Service at all times;
 - (e) comply with and implement, and shall cause all Supplier personnel and Subcontractors to comply with and implement, all of the Board's policies, rules and guidelines (including security regulations in effect at all of the Board sites) which are applicable to the Services;
 - (f) ensure that all Supplier personnel and Subcontractors:
 - (i) are at all times alert, polite and courteous towards Board staff and students and towards the public; and
 - (ii) maintain the highest standards of courtesy and consideration in all dealings with the Board staff and students and with the public, and wear appropriate attire and use vehicles in good repair; and
 - (iii) at all times protect and promote the image and reputation of the Board.
- 7.14 The Supplier shall make best efforts to ensure continuous improvement in the way the Services are performed having regard to a combination of economy, efficiency and effectiveness. The Supplier may propose changes to improve the economy and efficiency of the Service for the Board's consideration and approval.
- 7.15 The Supplier shall maintain full and complete Records and shall afford the Board Open Book access to the Records at all reasonable times.

ARTICLE 8 THE BOARD

- 8.1 In no event shall the Board have control over, charge of, or any responsibility for methods, techniques, sequences or procedures in connection with the Services, or for coordinating or supervising any portion of the Services, notwithstanding any of the rights and authority granted to the Board in this MSA or any Service Contract. No comments, suggestions, directions or instructions from the Board are to be relied upon or assumed to reduce or replace the Supplier's obligations or relieve the Supplier of any of its obligations, and the Board shall in no way accept or be deemed to have created any duty, responsibility or liability for errors, inconsistencies or omissions in any Services delivered by the Supplier.
- 8.2 The Board is the prime interpreter of the terms and conditions of this MSA or any Service Contract. No deviations shall be made by the Supplier without the Board's prior written approval.



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ARTICLE 9 SUBCONTRACTORS

- 9.1 The Supplier may only subcontract the performance of the Services or any part thereof with the Board's prior written consent, which may not be unreasonably withheld, and shall cease to so subcontract if the Board withdraws its consent, and the Supplier agrees to employ only those Subcontractors approved by the Board. The Supplier shall not change the approved Subcontractors without the Board's prior written approval.
- 9.2 The Supplier shall preserve and protect the rights of the parties under each Service Contract with respect to that part of the Services to be performed under subcontract, and:
- (a) shall enter into contracts or agreements with Subcontractors to require them to perform their work as provided in each Service Contract;
 - (b) shall incorporate the terms and conditions of the Service Contract (including this MSA) into all contracts or agreements with Subcontractors;
 - (c) shall ensure that all Subcontractors are at all times properly and sufficiently trained and instructed in the task or tasks to be performed; and
 - (d) shall not be relieved of any responsibilities or obligations under a Service Contract that are performed by a Subcontractor.
- 9.3 The Supplier shall be as fully responsible to the Board for acts, omissions, defaults or neglect of any Subcontractor or its agents or persons directly or indirectly employed by the Subcontractor in all respects as if they were the acts, omissions, defaults or neglect of the Supplier.
- 9.4 The Board, acting reasonably, shall have the right to order the Supplier to remove a Subcontractor and/or any representative or employee of the Supplier or a Subcontractor who, in the Board's opinion, is or is likely to be detrimental to the successful performance and/or completion of a Service Contract.

ARTICLE 10 SUPPLIER'S CONTROL, COORDINATION AND SUPERVISION ACTIVITIES

- 10.1 The Supplier shall have total control of the Services and shall effectively schedule, coordinate, direct and supervise the Services so as to ensure conformity with all of the requirements of a Service Contract, including maintaining the required schedule for the completion of the Services. The Supplier shall be solely responsible for the methods, techniques, sequences and procedures and for coordinating the Services.
- 10.2 Notwithstanding paragraph 10.1, Supplier agrees that it shall fully incorporate and comply with all of the Board's policies and procedures which are relevant to any activity to be performed under a Service Contract. Supplier shall inquire from the Board if such policies or procedures exist and the Board agrees that it will use reasonable efforts to communicate to Supplier all relevant policies and procedures.
- 10.3 In the event of an emergency threatening health, life or property, the Supplier shall take such immediate action as may be reasonably necessary to save lives and protect persons from injury and, this being done, shall take steps to protect and preserve property. The Supplier shall notify the Board of such emergency as promptly as is practical under the circumstances.
- 10.4 The Supplier shall appoint a competent supervisor and necessary assistants who shall be in attendance while Services are being performed. The supervisor shall not be changed for the



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duration of a Service Contract except for valid reasons and only after the Supplier has obtained the Board's prior written approval to the change.

- 10.5 The Supplier shall provide to the Board (and keep updated) an approved employee list, listing all of the Supplier's personnel, including supervisors, and the job titles of those providing Services to the Board under each Service Contract. The Supplier shall notify the Board within three (3) days if an employee is no longer employed and shall be removed from the approved employee list.
- 10.6 The Supplier shall ensure all employee records, including but not limited to training, licenses and certificates are kept up to date. Copies of such records shall be provided to the Board Representative or his/her designate upon request.

ARTICLE 11 SUPPLIER ON LOCATION

- 11.1 The Supplier will have full control of all Services.
- 11.2 The Supplier will perform the Services in an orderly state appropriate to the avoidance of danger to persons, equipment, tools and property. The Supplier shall take all reasonable steps at its own cost to protect the environment on and off the site and to avoid damage or nuisance to persons or to property resulting from pollution, noise or other causes arising as a consequence of the Supplier's operations.
- 11.3 The Supplier shall protect Board property and any other property from damage which may arise as a result of the Supplier's operations, and shall be responsible for such damage. Should the Supplier damage any property, the Supplier shall be responsible for rectifying such damage at the Supplier's expense and shall make good, at no additional cost to the Board, all surfaces disturbed by the performance of the Services.
- 11.4 The Supplier shall perform the Services without interfering with the work of Board employees, other contractors, or the Board's ongoing operations, and shall be responsible for all damages to persons or property occurring in connection with the Services until Total Completion and thereafter as may be provided in a Service Contract.

ARTICLE 12 CONCEALED CONDITIONS

- 12.1 The Supplier acknowledges and confirms that it carefully investigated and examined the Work Order and, where applicable, the relevant location and any other documents made available by the Board. To the extent that such investigations and examinations permitted, the Supplier has satisfied itself as to the conditions and requirements necessary for the Supplier to perform the Services in accordance with the Service Contract including, but not necessarily limited to, such things as:
 - (a) the nature and location of the Services including the availability / restrictions of access;
 - (b) the character and content of the Services to be performed; and
 - (c) the availability of Subcontractors, labour, equipment, material and facilities needed for the on-time performance and completion of the Services.
- 12.2 If the Supplier has not conducted the investigations and examinations described in paragraph 12.1, it is deemed to assume all risks of conditions or circumstances now existing or arising in the course of the performance of the Services which could make the Services more expensive or more difficult to perform than was contemplated at the time the Work Order was signed. No allowances will be made for additional costs and no Claims by the Supplier will be considered for



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an adjustment in the fees or schedule or any other terms of a Service Contract as a result of conditions which were reasonably apparent or which could reasonably have been discovered by undertaking such investigations or examinations before the Work Order was signed.

- 12.3 If the Supplier believes that the conditions of a project site differ materially from those reasonably anticipated or were concealed from discovery, the Supplier shall notify the Board in writing before the conditions are disturbed and, in any event, no later than five (5) days after the first observance of such conditions. Supplier's failure to give such notice will disentitle the Supplier from asserting a Claim for an adjustment in the fees or schedule or any other terms of a Service Contract arising out of materially different or concealed conditions.
- 12.4 Upon receiving the notice described in paragraph 12.3 within the time specified in paragraph 12.3, the Board will promptly investigate such conditions and make a finding. If the finding is that the conditions differ materially or were concealed from discovery, then, the Board will issue appropriate instructions including, if appropriate, a Change Request.

ARTICLE 13 CHANGE REQUESTS AND CHANGE ORDERS

- 13.1 The Board, without invalidating a Service Contract, may make changes to the Service Contract by issuing a written Change Request. The Supplier shall promptly submit to the Board a written response setting out a method of adjustment or an amount of adjustment of the fees under the Service Contract, if any, and the adjustment of the schedule, if any, resulting from the change described in the Change Request.
- 13.2 When the parties agree to the adjustment in the fees and schedule, if any, or to the method to be used to determine the adjustment(s), the parties will both sign the Change Request to evidence their agreement (such signed Change Request to be referred to as a "**Change Order**"), which will be effective immediately. All changes described in a Change Order shall be performed in accordance with the terms of the Service Contract, except to the extent specifically altered by the Change Order. Provided that, for greater certainty, a Change Order shall not be used to amend or vary the terms and conditions of this MSA.
- 13.3 If the Supplier forms the opinion that any work or services requested by the Board during the course of a Service Contract are not part of the Services to be performed under the Service Contract and, if performed, would entitle the Supplier to additional fees and/or an adjustment in the schedule, the Supplier shall, prior to performing the requested work or services and, in any event, within three (3) business days of the Board's request, deliver to the Board a written notice setting out the Supplier's position on the matter and indicating the requested amount of additional fees and/or the requested adjustment in the schedule. If the Board accepts the Supplier's claim for additional fees and/or an adjustment in the schedule, the Board will issue a Change Request. Except in the event of compelling circumstances, should the Supplier fail to provide timely written notice or should the Supplier undertake the requested work or services without a Change Order, the Supplier may, at the Board's sole option, be disentitled from receiving any additional fees or an adjustment in the schedule for performing the requested work or services.
- 13.4 If the Board does not accept a claim by the Supplier for additional fees or for an adjustment in the schedule made pursuant to paragraph 13.3, or if the Board requires the Supplier to proceed with a change to a Service Contract before the parties have agreed on the corresponding adjustment in the fees and/or schedule as provided in paragraph 13.2, the Board may direct the Supplier to perform the change or the disputed work or services. The Supplier shall comply with such direction without prejudice to any right the Supplier may have to assert a Claim for additional fees or an adjustment in the schedule, and the Supplier shall maintain detailed Records of the work or



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services performed and the time spent by the Supplier's and Subcontractors' personnel, and any disbursements incurred to perform the change or the disputed work or services.

- 13.5 Subject to paragraph 13.4, the Supplier shall not perform a change to a Service Contract without a Change Order and no bill, invoice, or Claim for payment based on verbal orders will be considered or accepted. Without limiting the generality of the foregoing, under circumstances of urgency, the Supplier may perform a change to a Service Contract or additional work or services without a Change Order where it has received from the Board Representative some form of written or electronic communication directing or agreeing to the change.
- 13.6 The Supplier agrees that changes resulting from coordination including, but not limited to, site coordination, and Subcontractor coordination, are included in the Service Contract fees and shall not entitle the Supplier to claim any increase in fees.
- 13.7 The Supplier shall not be entitled to maintain a Claim for damages, loss of profit or anticipated profit, or any other Losses at any time due to a Change Order which results in a reduction or deletion of any portion of the Services.

ARTICLE 14 DELAYS

- 14.1 If the Supplier is delayed in the performance of a Service Contract by:
- (a) an act or omission of the Board; or
 - (b) a stop work order issued by a court or other public authority, provided that such order was not issued as the result of an act or fault of the Supplier, any Subcontractor, or any person employed or engaged by them directly or indirectly,
- then, the Service Contract schedule shall be adjusted as the parties may agree. The Supplier shall be reimbursed by the Board for reasonable direct costs directly flowing from the delay but excluding the costs of the Supplier's head office personnel and overhead, and excluding all consequential, indirect or special damages, and all Claims for loss of profit or opportunity, and excluding all other Losses.
- 14.2 If the Supplier is delayed in the performance of the Services by a Force Majeure Event, then, the Service Contract schedule shall be adjusted as the parties may agree, but the Supplier shall not be entitled to payment for costs or expenses or any Losses incurred by or resulting from such delay.

ARTICLE 15 OWNERSHIP OF WORK PRODUCT AND INTELLECTUAL PROPERTY RIGHTS

- 15.1 Subject to paragraph 15.2, all designs, documents, plans, drawings, reports, processes, technology, techniques, methods and information prepared, conceived of, produced or delivered by the Supplier in the course of this MSA and/or any Service Contract (collectively the "**Work Product**") and all Intellectual Property in and/or generated or derived as part of and/or incorporated into the Work Product shall become the property of the Board (collectively the "**Board Property**"). All Intellectual Property Rights, together with the electronic data and computer programs created as part of the Work Product and which are necessary for the effective use of the Work Product, are and shall become upon creation and shall remain Board Property. To the extent the same are not transferable to the Board, the Supplier hereby grants to the Board an exclusive, perpetual and irrevocable license to use the same for such purpose as the Board shall desire in its sole discretion. For certainty, the Board's rights in and to the Board Property include, but are not limited to, the right to use and modify the Work Product without obtaining the consent of or providing notice to the Supplier.



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- 15.2 Board Property shall not include Intellectual Property of the Supplier or any Subcontractor that was developed prior to or independent of the Services and without reference to or reliance upon Board Confidential Information (collectively, "**Supplier Property**"). To the extent any Supplier Property is incorporated, in whole or in part, into the Services or any Work Product, the Board agrees and its assigns shall have a non-exclusive, royalty-free, irrevocable, world-wide, perpetual license and right to use, reproduce, disclose and distribute such Supplier Property including, without limitation, in connection with any operation, modification, maintenance, or replication of the Services and/or the Work Product.
- 15.3 Supplier shall, at its own expense, defend, indemnify and hold harmless the Indemnitees from and against all Claims and Losses arising out of or related to any actual or alleged infringement, violation or misappropriation of any Intellectual Property Rights of any Subcontractor or other third party incorporated in the Services, the Work Product or otherwise relating to or arising out of the Services or any part or parts thereof. In addition, Supplier shall, at its own expense, promptly take the following actions in the listed order of priority if any Services or part thereof become, or are likely to become, the subject of an infringement, violation or misappropriation claim: (a) secure the right to continue using the Services and any part thereof; or (b) replace or modify the Services or part thereof to make it non-infringing, such that the replacement or modification shall not degrade the performance or quality of the affected component of the Services.

ARTICLE 16 PROTECTION OF PERSONAL INFORMATION

- 16.1 The Supplier acknowledges the importance of maintaining the confidentiality and privacy of Personal Information.
- 16.2 The Supplier shall, and shall require Subcontractors to, only collect, hold, process, use, store and disclose Personal Information with the prior written consent of the Board and only to the extent necessary to perform the Supplier's obligations a Service Contract.
- 16.3 The Supplier shall, and shall require Subcontractors to, at all times:
- (a) treat Personal Information as strictly confidential and comply with all Applicable Laws related to the collection, maintenance and use of Personal Information;
 - (b) use the Personal Information only for the purpose of and only to the extent necessary to perform Services;
 - (c) treat Personal Information as Confidential Information and not disclose Personal Information to any third party (including Supplier's affiliates) without the prior written consent of the Board which may not be unreasonably withheld;
 - (d) limit access to Personal Information to those persons with a need-to-know for the purposes of a Service Contract;
 - (e) not collect, create, handle, use, copy, disclose, dispose of or destroy any Personal Information except as necessary to perform the obligations under a Service Contract;
 - (f) use, without limitation, physical, organizational and technological measures to safeguard Personal Information so as to protect Personal Information from loss, theft, unauthorized use, access, disclosure, copying, alteration or destruction. Specific safeguarding methods include, but are not limited to, access controls, encryption or other suitable means as agreed upon by the Board and, when transmitting, providing to or otherwise making Personal Information available to the Board in an electronic form (including data files sent by e-mail), ensuring that such Personal Information is password-protected;



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- (g) maintain, return or destroy, at the direction of and in the manner and at such time as required by the Board, all Personal Information, in whatever form, obtained in relation to a Service Contract;
- (h) take all such further steps as may be reasonably requested by the Board to ensure compliance with all Applicable Laws related to the collection, maintenance and use of Personal Information.

ARTICLE 17 FORCE MAJEURE

- 17.1 If and to the extent that a party's performance of any of its obligations under a Service Contract is prevented, hindered or delayed directly or indirectly by any cause or event beyond such party's reasonable control including but not limited to fire, flood, earthquake, elements of nature or acts of God, acts of war, states of belligerency, acts of the public enemy, power or utility failures that extend beyond one day, labour disputes, strikes, lock-outs, abnormally adverse weather conditions, material changes in laws or regulations, terrorism, riots, or civil disorders (each a "**Force Majeure Event**"), then the nonperforming, hindered or delayed party will be excused from such non-performance, hindrance or delay, as applicable, of those obligations to the extent affected by the Force Majeure Event for as long as such Force Majeure Event continues and such party continues to use efforts consistent with Good Industry Practice to promptly recommence performance, including through the use of alternate sources, workaround plans, or other means. The party whose performance is prevented, hindered or delayed by a Force Majeure Event will promptly notify the other party by telephone (confirmed in writing as soon as possible following the inception of the delay) of the occurrence of the Force Majeure Event, and describing in reasonable detail the nature of the Force Majeure Event, and the parties shall engage in good faith negotiations to arrange achievement of the Service Contract's purposes through alternative methods. The party claiming that a Force Majeure Event has occurred will bear the burden of proving the existence of such Force Majeure Event and its consequences.
- 17.2 Neither party shall be liable to the other for any delay or non-performance of its obligations under a Service Contract or this MSA in the event and to the extent that such delay or non-performance is due to a Force Majeure Event, and so long as the nonperforming or delayed party continues to use efforts described in paragraph 17.1 to recommence performance.
- 17.3 The party whose performance is prevented, hindered or delayed by a Force Majeure Event may suspend such performance under this MSA and any Service Contract, in whole or in part, for the duration of the Force Majeure Event (save and except for continuing to use efforts described in paragraph 17.1 to recommence performance) and shall resume performance of the MSA and any Service Contract once the Force Majeure Event ceases.
- 17.4 If the Supplier's performance under a Service Contract becomes substantially suspended as a result of a Force Majeure Event for a continuous period exceeding thirty (30) days, the Board shall have the right to modify the unperformed part of the Service Contract. In such case the Supplier may invoice the Board for the value of the Services actually completed for which the Supplier has not yet invoiced. Subject to any right of set off available to the Board, the Board will pay such invoice in accordance with Article 6 (Invoicing and Payment).

ARTICLE 18 TERMINATION OF A SERVICE CONTRACT AND/OR THE MSA

- 18.1 It is understood and agreed that if this MSA ends or is terminated while the Supplier is performing Services under one or more Service Contracts, the MSA shall continue in force and effect but only with respect to such Service Contract(s) and only until all such Service Contract(s) have



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- been completed or terminated, after which this MSA shall immediately and automatically terminate.
- 18.2 If the Supplier should be adjudged bankrupt, or makes a general assignment for the benefit of creditors, or if a receiver is appointed over the Supplier's business or assets, the Board may, without prejudice to any other right or remedy it may have, by giving the Supplier or receiver or trustee in bankruptcy notice in writing, terminate this MSA and any Service Contract.
- 18.3 Either party may terminate an individual Service Contract by giving written notice to the other party if:
- (a) the other party materially breaches the Service Contract and such breach is not cured within ten (10) business days or within such other period of time as may be agreed to between the parties after the other party receives written notice of such material breach; or
 - (b) a Force Majeure Event exists which has a material adverse effect on the affected party's ability to perform its obligations under the Service Contract for a period in excess of thirty (30) days and the parties have been unable to find an equitable solution; or
 - (c) the other party abandons or otherwise plainly demonstrates the intention not to continue performance of its obligations under the Service Contract.
- 18.4 Without prejudice to and without limiting its rights under paragraph 18.3, either party may terminate this MSA by giving written notice to the other party if:
- (a) the other party materially breaches this MSA and such breach is not cured within ten (10) business days or within such other period of time as may be agreed to between the parties after the other party receives written notice of such material breach; or
 - (b) a Force Majeure Event exists which has a material adverse effect on the affected party's ability to perform any of its obligations under this MSA for a period in excess of thirty (30) days and the parties have been unable to find an equitable solution; or
 - (c) the other party abandons or otherwise plainly demonstrates the intention not to continue performance of its obligations under this MSA.
- 18.5 The Board may notify the Supplier in writing that the Supplier is in default of its obligations under this MSA and/or a Service Contract if the Supplier:
- (a) refuses or fails to acknowledge receipt of and/or refuses or fails to perform a Work Order;
 - (b) refuses or fails to deliver any of the documents required by Article 5;
 - (c) refuses or fails to perform the Services under a Service Contract when scheduled or to diligently perform the Services or any part thereof; or,
 - (d) refuses or fails to supply sufficient and properly skilled personnel for the scheduled performance of a Service Contract or any Services; or,
 - (e) fails to promptly complete the Services under a Service Contract in accordance with the applicable schedule; or,
 - (f) fails to obtain the Board's consent prior to employing Subcontractors; or,
 - (g) fails to make payments due to Subcontractors or employees; or,
 - (h) fails to comply with its obligations under OHSA, including those described in Article 19; or,



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- (i) neglects, disregards or refuses to perform a Service Contract in accordance with its requirements, or to comply with all Applicable Laws governing a Service Contract; or,
 - (j) assigns a Service Contract or this MSA without the Board's prior written consent; or,
 - (k) otherwise violates the provisions of a Service Contract or this MSA to a substantial degree.
- 18.6 If the Board issues a written notice pursuant to paragraph 18.5 the Board may, without prejudice to any other right or remedy it may have, instruct the Supplier to correct the default in the five (5) business days immediately following the receipt of such notice. If the correction of the default cannot be completed within the five (5) business days specified, the Supplier shall be considered to be in compliance with the Board's instructions if the Supplier:
- (a) commences the correction of the default within the specified time; and,
 - (b) provides the Board with an acceptable schedule for such correction; and,
 - (c) corrects the default in accordance with such schedule.
- 18.7 If the Supplier fails to correct the default in accordance with and within the time specified in paragraph 18.6, the Board may, without prejudice to any other right or remedy:
- (a) arrange for the correction of such default and deduct the costs thereof from any payment then or thereafter due to the Supplier under any Service Contract; and/or
 - (b) terminate the Supplier's right to continue the Services and/or one or more Service Contracts, in whole or in part; and/or
 - (c) terminate this MSA.
- 18.8 The Board may terminate a Service Contract and/or this MSA at any time and for any or no reason. In such event, the Board shall pay for all Services performed by the Supplier up to the effective date of termination and for such additional costs, if any, directly flowing from such termination and which are a reasonable consequence of the termination, but excluding the costs of the Supplier's head office personnel and overhead, and excluding all consequential, indirect or special damages, and all Claims for loss of profit or opportunity. The Board shall not be liable to the Supplier for any other Claims or Losses whatsoever arising from such termination.

ARTICLE 19 WORKERS' COMPENSATION AND SAFETY

19.1 Workers' Compensation

The Supplier shall provide and maintain workers' compensation coverage for all Supplier employees engaged to perform the Services. The Supplier shall provide proof of this coverage to the Board upon receipt of each Work Order and with each billing statement and invoice.

19.2 Safety

- (a) General.
 - (i) The Supplier shall ensure all Services are performed strictly in accordance with the provisions and regulations of OHSA, and the Supplier shall at all times comply with all other applicable federal, provincial and municipal legislative requirements, regulations and standards having application to the Services, including all applicable federal, provincial or municipal legislative requirements, regulations and standards relating to occupational health and safety, and all other rules, guides, guidelines and industry best practices having application to the Services.



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- (ii) The Supplier represents and warrants to the Board that appropriate health and construction safety instruction and training have been provided and will be provided to the Supplier's employees and Subcontractors attending a project site at which Services are being performed. No comments, suggestions or instructions from the Board are to be relied upon or assumed to reduce or replace the Supplier's obligations under paragraph 19.2.
- (iii) The Supplier shall comply, and shall cause all of its Subcontractors and employees to comply, with the instructions, directions, rules and procedures of the person identified as the "constructor" under OHSA.
- (b) For each Service Contract the Supplier shall, prior to commencement of the Services, prepare and submit to the Board a safety program specific to such Service Contract.
- (c) The Supplier shall indemnify, defend and save harmless the Indemnitees from and against any and all Claims and Losses and all other consequences arising from any and all safety infractions under a Service Contract, including the payment of legal fees and disbursements on a full indemnity basis, except where, the Supplier having fully complied with its obligations under paragraph 19.2, such safety infractions arise solely from a negligent act of any Indemnitees.

ARTICLE 20 INSURANCE

- 20.1 The Supplier shall maintain and pay for the following insurance policies, each to be underwritten with an insurer acceptable to the Board:
- (a) Commercial General Liability (CGL) insurance in the amount with limits of coverage of not less than \$5,000,000 per occurrence. A combination of CGL and Umbrella policies is permitted.
 - (b) Automobile Insurance with limits of coverage of not less than \$2,000,000 per occurrence. A combination of Automobile Insurance and Umbrella policies is permitted.
 - (c) Professional Liability Insurance with limits of coverage of not less than \$1,000,000 per claim.
- 20.2 Each policy of insurance (certificates of which will be provided to the Board prior to commencement of Services under any Service Contract) shall:
- (a) be placed with insurers licensed to underwrite insurance in Ontario;
 - (b) include the Board as an additional named insured in respect of all operations performed by or on behalf of the Supplier;
 - (c) shall not be altered, cancelled or allowed to expire or lapse without thirty (30) days' prior written notice to the Board.
- 20.3 Except for policies of automobile insurance, all insurance policies secured and maintained by the Supplier shall be primary and shall include clauses stating each underwriter and insurer will waive all rights of recovery, under subrogation or otherwise, against any Indemnitees, and will not call into contribution any insurance maintained by the Board.
- 20.4 The Supplier will be entirely responsible for the payment of deductibles under all insurance policies.
- 20.5 The Board's acceptance of the Supplier's delivery of any document evidencing the required policies of insurance does not constitute approval or agreement by the Board that the insurance



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requirements have been met or that the insurance policies are in compliance with the requirements of this MSA or any Service Contract. Failure by the Board to identify a deficiency from evidence provided will not be construed as a waiver of the Supplier's obligation to maintain the insurance policies required by this MSA or any Service Contract.

- 20.6 The fact that the Supplier has obtained the insurance required by this MSA or any Service Contract shall in no way reduce or otherwise affect the Supplier's obligations or liabilities under this MSA or any Service Contract, and by requiring insurance the Board does not represent that coverage and limits will necessarily be adequate to protect the Supplier.
- 20.7 The insurance effected or procured by the Supplier will not reduce or limit the Supplier's contractual obligation to indemnify and defend any Indemnitees from Claims or Losses which result from or are connected with the performance of this MSA or any Service Contract.

ARTICLE 21 DESIGNATED SUBSTANCES

- 21.1 In this MSA, the following capitalized terms have the following meanings:
- (a) **"ACM"** means asbestos containing material.
 - (b) **"Designated Substances"** means the substances described as such and listed in Regulation 490/09 made under the Occupational Health and Safety Act (Ontario), as amended.
 - (c) **"Environmental Laws"** means all Applicable Laws relating to the environment and the storage and transportation of goods and hazardous substances.
 - (d) **"Personnel"** means every employee of the Supplier and each Subcontractor assigned to perform any aspect of the Services.
 - (e) **"Report"** has the meaning assigned to it in paragraph 21.4.
- 21.2 The Supplier covenants and agrees that it will at all times comply with all Environmental Laws and the Board's policies and procedures to ensure that any Designated Substances that may be present on any Board property and that may be affected by, involved with, or disturbed by any aspect of the Services are properly addressed, handled and dealt with by the Supplier.
- 21.3 The Supplier shall, prior to commencing any Services:
- (a) deliver to the Board a certificate of "Asbestos Awareness Training" for each of the Personnel; and
 - (b) execute and deliver to the Board a "Consultant Notification and Acknowledgement Form" (which is an appendix to the Board's Asbestos Procedure, under its Health and Safety Policy, and which is found on the Board's website).
- 21.4 Before commencing any Services in any Board facility (including, without limitation, undertaking a site visit), the Supplier shall obtain and review the Asbestos Product Survey and Designated Substances Report (collectively the **"Report"**) for that facility and shall ensure all Personnel are familiarized with the facility and the location of any Designated Substances. A copy of the Report can be found in two locations in each facility: (a) the Main Office; and, (b) the Custodial Office Document Box. The Supplier shall not proceed with any Services until the Report is located and reviewed by each of the Personnel assigned to perform any part of the Services and until each such Personnel signs the Designated Substance Log Book located in the Report to confirm each has received and reviewed the Report.



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- 21.5 If the Supplier identifies ACM in a Report and determines that “Type 1” operations that may disturb ACM are required, such Services shall be performed during school off-hours. Provided that no such Services shall be performed until the Supplier has received verbal approval from the Board Representative for the scheduling of same. If any such Services must occur on an expedited basis during school hours, the Supplier shall contact the Board Representative in order to address the matter and shall not perform any such Services without the express written approval of the Board Representative, and then only in strict compliance with the terms of such written approval. School off-hours means when students or others are not in the facility for instructional purposes or extra-curricular activities. Such Services shall be completed in accordance with all Environmental Laws, Board policies and procedures including, without limitation, the Board’s Health and Safety policies and procedures, and only by Personnel for whom a certificate of Asbestos Awareness Training has been provided to the Board and who has(ve) signed the applicable Designated Substance Log Book, as provided in paragraph 21.4.
- 21.6 No services involving “Type 2” or “Type 3” operations shall be undertaken by the Supplier or any Personnel. To the extent the completion of Services requires “Type 2” or “Type 3” operations, the Supplier shall contact the Board so that the Board can arrange for a qualified asbestos abatement consultant to complete any “Type 2” or “Type 3” operations necessary for the completion of the Services.
- 21.7 In circumstances where any aspect of the Services requires entry above the ceiling, special precautions are required to be taken by the Supplier and Personnel. If spray-on insulation has been applied to the building structure, or if other types of insulation have been applied or affixed to mechanical fixtures, pipes and/or fittings above the ceiling, some ACM may have broken free and fallen onto the surface of the ceiling. Entry above the ceiling could therefore disturb such fallen material, creating an exposure hazard if the material is ACM. Accordingly, the Supplier and Personnel shall follow the following procedures for ceiling entry:
- (a) If the Report indicates that any structures above the ceiling have had ACM spray fireproofing applied to them, or if debris is known to be present on top of any ceiling tiles, the Supplier shall not enter the ceiling space but must contact the Board Representative for direction and approval as to how to proceed. In such case the Supplier shall not proceed with any Services without the Board’s prior written approval.
 - (b) If the Report indicates that any ceiling tiles required to be disturbed contain ACM or that the mechanical fittings above the ceiling are in poor or fair condition, the Supplier shall place a drop sheet of polyethylene or other suitable material beneath the area where the ceiling space is to be entered and shall carefully raise the edge of a ceiling tile and examine the surfaces of adjacent tiles for evidence of fallen debris. If:
 - (i) the surfaces of the adjacent tiles are clean, the raised tile may be removed, by sliding it over an adjacent tile, and the ceiling space entered;
 - (ii) the surfaces of the adjacent tiles contain debris, the Supplier shall stop immediately and shall lower the raised tile and shall contact the Board Representative for direction and approval as to how to proceed, and the Supplier shall not proceed with any further Services without the Board’s prior written approval.Once a ceiling tile has been replaced and/or lowered, the Supplier shall wipe all surfaces below ceiling level that contain debris with a wet cloth and shall dispose of polyethylene sheet and wet cloth as asbestos waste in an approved asbestos waste bag.
 - (c) If the Report indicates ACM are in good condition above non-ACM containing ceiling tiles, the Supplier shall follow the following procedures:



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- (i) carefully raise the edge of a ceiling tile and examine the surfaces of adjacent tiles for evidence of fallen debris;
- (ii) if the surfaces of the adjacent tiles are clean, the raised tile may be removed, by sliding it over an adjacent tile, and the ceiling space entered; and
- (iii) if the surfaces of the adjacent tiles contain debris, the Supplier shall stop immediately and shall lower the raised tile and shall contact the Board Representative for direction and approval as to how to proceed, and the Supplier shall not proceed with any further Services without the Board's prior written approval.

21.8 The Supplier agrees to indemnify, defend and hold harmless the Indemnitees from and against any and all Claims and Losses made, brought against, suffered by or imposed in respect of any failure by the Supplier to comply with the Environmental Laws or as a result of any breach by the Supplier of the terms of this Article. In case of a spill, the Supplier is solely responsible to clean the site to the Board's satisfaction.

ARTICLE 22 INDEMNIFICATION

22.1 The Supplier shall be liable for and shall defend, indemnify and hold harmless the Indemnitees prior to, during, and after the Term, from and against all Claims and Losses by whomsoever made, brought or prosecuted in any manner relating to, in connection with, arising out of, resulting from or attributable, directly or indirectly, to the Supplier's or any Subcontractor's performance or non-performance or breach of this MSA or any Service Contract, regardless of whether or not caused in part by an Indemnitee. It is expressly understood that the Supplier will save the Indemnitees harmless from all Claims and Losses made by any party other than the Supplier itself relating to the Services performed and furnished by the Supplier or by others under this MSA or any Service Contract.

ARTICLE 23 LIMIT OF LIABILITY

23.1 Subject to paragraph 23.2, neither party shall be liable for any special, indirect, incidental, consequential or punitive damages.

23.2 Paragraph 23.1 will not apply to limit:

- (a) the liability of the Supplier for a breach of Article 26 (Confidentiality);
- (b) the Supplier's liability or obligations under Article 22 (Indemnification) or any other obligations to indemnify set out elsewhere in this MSA or a Service Contract; or
- (c) Losses suffered by the Board due to any deliberate and sustained cessation of a material portion of the Services under any Service Contract without a bona fide attempt to remedy such portion of the Services or to remedy the cause of such cessation.

23.3 Notwithstanding anything to the contrary, the Supplier shall not be entitled to Claim for loss of opportunity or for consequential, indirect, special or punitive damages, including damages for loss of revenue, loss of profit or anticipated profit, or any other commercial loss of any kind, or any other Losses flowing from any delay, change in the Services, Change Request, Change Order, or the Board's breach of this MSA or any Service Contract.



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ARTICLE 24 WAIVER OF CLAIMS

- 24.1 As of the date of the Supplier's final invoice or application for final payment relating to a Service Contract, the Supplier expressly waives and releases the Board from all Claims relating to such Service Contract which the Supplier has or reasonably ought to have knowledge of that could be advanced against the Board including, without limitation, those Claims that might arise from the negligence or breach of contract by the Board, except those made in writing prior to the Supplier's final invoice or application for final payment in relation to such Service Contract and still unsettled.

ARTICLE 25 CONSTRUCTION LIENS AND ACTIONS

- 25.1 The Supplier shall save and keep the Board and any lands where the Services are performed free from all construction liens and all other liens whatsoever arising out of the Services. If any lien is claimed, filed or registered or any written notice of a lien is received by reason of labour, services, equipment, materials or any Services supplied or claimed to have been supplied by or through a Subcontractor, the Supplier shall, at its own expense, within ten (10) business days of being notified of the lien or written notice of a lien, secure the discharge, release, vacating or withdrawal of such lien or written notice of a lien by payment or by giving security or in such other manner as is or may be required or permitted by law, failing which the Board may, but shall not be required, take such steps as it, in its absolute discretion, may deem necessary to release, vacate or discharge the lien or written notice of lien.
- 25.2 If a lien action or any other action or legal proceeding arising out of the Services is commenced, the Supplier shall take all reasonable steps to remove the Board from such action or legal proceeding, and shall, if requested, undertake the Board's defence of such action or legal proceeding at the Supplier's expense, and shall indemnify the Board and hold it harmless in such action or legal proceeding.
- 25.3 All Claims and Losses, including interest, borrowing and premium or other bonding costs and/or charges incurred by the Board in releasing, vacating, discharging or otherwise dealing with a lien, written notice of lien and/or defending or otherwise dealing with an action or legal proceeding, shall be charged to the Supplier and shall be set off and deducted from any amount owing to the Supplier and any security or other funds held by the Board. If there is no amount owing by the Board to the Supplier at that time, then the Supplier shall reimburse the Board for all of the said Claims and Losses.

ARTICLE 26 CONFIDENTIALITY

- 26.1 Each party agrees that it shall not disclose, either during the Term or after the expiration or termination of this MSA or any Service Contract, to any third party any proprietary information of the other party including, without limitation, information concerning trade secrets, methods, processes or procedures or any other business or technical information including, for the avoidance of doubt, Personal Information (collectively the "**Confidential Information**"), which it receives at any time after signing this MSA, without the prior written consent of the other party, except to the extent that such Confidential Information: (a) is in the public domain; (b) is independently developed by the receiving party; (c) is already in the possession of such party prior to disclosure by the other party; (d) is rightfully received from a third party not under a confidentiality obligation to the other party; or (e) is legally required to be disclosed by the receiving party. Either party may disclose Confidential Information to its Subcontractors, agents or advisors and affiliates on a need-to-know basis, provided it first obtains an appropriate non-disclosure agreement therefrom.



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- 26.2 The Board shall retain control over and use of all Board Confidential Information which at all times shall remain the property of the Board. The Supplier agrees that Board Confidential Information will only be used by the Supplier for the purposes of performing the Services and otherwise fulfilling its obligations under this MSA and any Service Contracts. The Supplier shall not collect, create, handle, use, copy, disclose, dispose of or destroy any Board Confidential Information except as necessary to perform its obligations under this MSA and any Service Contracts. The Supplier shall use, without limitation, physical, organizational and technological measures to safeguard Board Confidential Information and so as to protect Board Confidential Information from loss, theft, unauthorized use, access, disclosure, copying, alteration or destruction. Specific safeguarding methods include, but are not limited to, physical access controls and safeguards, encryption or other suitable means as agreed upon by the Board.
- 26.3 The Supplier shall return to the Board all Board Confidential Information in whatever form (or at the Board's request, destroy such Board Confidential Information) which has been made or obtained in relation to this MSA or any Service Contract, upon the expiration or termination of this MSA or at such other time as the Board may require.
- 26.4 Notwithstanding anything else in this MSA, the Supplier understands, acknowledges and agrees that the Board may be required to disclose parts or all of this MSA or a Service Contract, including Supplier Confidential Information, pursuant to applicable law including the *Municipal Freedom of Information and Protection of Privacy Act* (Ontario). Subject to the provisions of such legislation, the Board will use reasonable efforts to safeguard the confidentiality of any Supplier Confidential Information, however, the Board shall not be liable in any way whatsoever if such information is disclosed pursuant to an order, decision or obligation under such applicable law. By signing this MSA the Supplier agrees to such disclosure and releases the Board from any liability for the same.

ARTICLE 27 RECORDS PROTECTION

- 27.1 In addition to the Supplier's other obligations under this MSA, the Supplier will maintain, enforce, review and update, and will cause all Subcontractors to maintain, enforce, review and update, internal security and back-up procedures sufficient to ensure compliance by the Supplier with the applicable Board policies and to protect the Records and Board Confidential Information for which the Supplier is responsible.
- 27.2 The Supplier represents and warrants that it currently follows and shall, during the Term, continue to follow industry best practices as a means to prevent any compromise of its information systems, computer networks, or data files (collectively "**Systems**") by unauthorized users, viruses, or malicious computer programs which could in turn be propagated via computer networks, e-mail, magnetic media or other means to the Board. In the event any of the Supplier's Systems are breached or compromised in any way which affects or is likely to affect the Board's Systems or the Supplier's ability to timely perform and complete the Service, the Supplier shall give the Board immediate notice of the nature and scope of the breach or compromise.
- 27.3 The Supplier shall apply appropriate internal information security practices including, but not limited to, using appropriate firewall and anti-virus software, maintaining said countermeasures, operating systems, and other applications with up-to-date virus definitions and security patches; installing operation security mechanisms in the manner in which they were intended sufficient to ensure the Board will not be impacted nor operations disrupted; and permitting only authorized users access to the Board Systems.
- 27.4 The Supplier shall use up-to-date anti-virus tools to remove known viruses and malware from any e-mail messages or data transmitted to the Board; prevent the transmission of attacks on the



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Board Systems via network connections with Board; and prevent unauthorized access to Board Systems via the Supplier's network and access codes.

- 27.5 Without limiting the foregoing, the Supplier will protect all Board Confidential Information, Work Product and all Records using security measures appropriate to the sensitivity of such records and information while preserving their integrity and availability as required to perform the Services. Depending on the nature of the records and information and the circumstances, these measures may include physical controls (for example, keeping Confidential Information in locked cabinets), password protection of electronic files, encryption of data, or other measures such as firewalls, anti-virus software and other means to protect the security of systems or file storage areas.
- 27.6 The Supplier will keep all Board Confidential Information, all Work Product and all Records that are stored by the Supplier in tangible form physically segregated from other tangible forms of information, and will keep all Board Confidential Information, all Work Product and all Records that are stored by the Supplier in electronic form logically segregated from any other information of the Supplier, Subcontractors or their respective customers or clients.
- 27.7 The Supplier shall not, and shall not permit the transfer outside of Canada, of any Records, Work Product or Board Confidential Information without the prior written consent of the Board, which consent may not be unreasonably withheld.
- 27.8 When requested by the Board, the Supplier shall provide a copy of its or any Subcontractor's privacy policy, security policy or other similar documents.
- 27.9 Upon the occurrence of any actual or suspected security breach the Supplier will do the following:
- (a) immediately notify the Board by telephone and in writing;
 - (b) take all steps necessary to enforce against any person that is or may be engaging in such unauthorized handling of Confidential Information, Work Product and/or Records any rights that the Supplier has to require such person to comply with any obligation of confidence to the Supplier and to cease such unauthorized activities;
 - (c) do all things, sign all documents, and give all assistance reasonably required by the Board to enable the Board to enforce against any person that is or may be engaging in such unauthorized handling of Confidential Information any rights that the Board has to require such person to comply with any obligation of confidence to the Board and to cease such unauthorized activities; and
 - (d) if the security breach involves Board Personal Information, then, if requested by the Board, communicate with the media and affected persons (by press release, telephone, letter, call centre, website or any other method of communication) to explain the occurrence of the security breach and the remedial efforts being undertaken. The content and method of any such communications will be determined by the Board.
- 27.10 The Supplier acknowledges that any violation of the provisions of this Article may cause irreparable damage or injury to the Board, the exact amount of which may be impossible to ascertain, and that, for such reason, in addition to any other remedies available to the Board, the Board is entitled to proceed immediately to court in order to obtain, and the Supplier will consent to, interim, interlocutory, and final injunctive relief restraining the Supplier from breaching and requiring the Supplier to comply with its obligations under this Article without a requirement that a finding of irreparable harm or other criteria for the awarding of injunctive relief be made. The Supplier acknowledges the importance to the Board of the Supplier's strict compliance with the terms of this Article and acknowledges that the Board's interest in the strict enforcement of this Article will outweigh the balance of convenience or harm that the Supplier may suffer as a result



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of the strict enforcement of this Article. Nothing in this paragraph will be construed to limit the right of a party to obtain injunctive relief in any other circumstance in which it may be otherwise entitled to such relief.

ARTICLE 28 DISPUTE RESOLUTION

- 28.1 If a dispute arises between the parties concerning this MSA or any Service Contract (each a **"Dispute"**), the parties agree:
- (a) to first make good faith efforts to resolve the Dispute by amicable negotiations conducted by senior representatives of the parties for a period of up to 30 days, having such written and oral communications and meetings as appropriate;
 - (b) if the Dispute is not resolved through negotiations, the parties may jointly agree to refer the Dispute to mediation; provided that there shall be no mediation unless both parties jointly agree to mediate and agree on a mediator. The fees and expenses of the mediator and the venue shall be shared equally by the parties;
 - (c) if the Dispute has not been resolved through negotiations or mediation, either party may commence proceedings in the Ontario Superior Court of Justice, and both parties agree to attorn to the exclusive jurisdiction of the courts of the Province of Ontario.

ARTICLE 29 WARRANTY

- 29.1 The Supplier expressly warrants that the Services completed under each Service Contract will conform to the standards, descriptions or requirements specified in each Work Order.

ARTICLE 30 AUDIT RIGHTS

- 30.1 The Supplier will maintain, and will cause all Subcontractors to maintain, data, records, reports, documentation and other information relating to all aspects of the Supplier's performance of its obligations under this MSA and the Supplier's and each Subcontractor's performance of their respective obligations under each Service Contract (collectively **"Records"**).
- 30.2 During the Term and for seven (7) years after the end of the Term or earlier termination of this MSA, the Board and its representatives will have the right to audit the Supplier's Records and processes and to request verification of the Supplier's compliance with the terms of this MSA and each Service Contract. The Supplier shall, upon receipt of the Board's written request, provide the Board and its representatives with reasonable access to the Supplier's Records, personnel and facilities, and shall arrange for reasonable access to the Subcontractors' Records, personnel and facilities, for the purpose of reviewing the Supplier's processes and determining the Supplier's compliance with the terms of this MSA and any Service Contract. Such access will occur within five (5) days of the Supplier's receipt of the Board's request, during the Supplier's or Subcontractor's normal hours of operation, and in such a manner as to minimize disruption to the Supplier or its Subcontractors and to protect the Confidential Information of the Supplier. As part of the foregoing audit, the Board:
- (a) reserves the right to request from the Supplier Records which are specific to a particular Service Contract (including all software and hardware), as well as the Services supplied or to be supplied under this MSA and/or any Service Contract;
 - (b) shall have the right to examine and take copies of all or part of the Records which the Board reasonably deems pertinent, including such as may be necessary to verify (i) the quantities and time charged by the Supplier and the accuracy of the Supplier's recording



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system(s); and (ii) all charges and payments made under a Service Contract and/or this MSA.

30.3 If an audit reveals:

- (a) an overpayment by the Board during the period covered by such audit; or
- (b) a deficiency, failure to comply with Applicable Laws, or any other material breach of a Service Contract or this MSA,

the Supplier will immediately reimburse the Board for:

- (c) such overpayment with added interest at the prime rate established by the Bank of Canada from the date of such overpayment to the date such amounts are reimbursed;
- (d) all documented internal and external costs and expenses reasonably incurred by the Board in connection with such audit; and
- (e) any Losses incurred by the Board as a result of such deficiency, non-compliance or material breach.

ARTICLE 31 SUPPLIER'S REPRESENTATIONS AND WARRANTIES

31.1 The Supplier represents and warrants to and covenants with the Board as follows, and acknowledges that the Board has relied on such representations, warranties and covenants in entering into this MSA and each Service Contract:

- (a) the Supplier is a legal entity validly subsisting under the laws under which it was formed and has the legal power to enter into this MSA and each Service Contract and to perform its obligations thereunder;
- (b) the Services to be performed, the use by the Board of any of the Services, and the processes and techniques to be employed in the performance of the Services under each Service Contract will not infringe any Intellectual Property Rights of any third party;
- (c) the Supplier has and will have and will maintain throughout the Term all skills, qualifications, technology, personnel, systems, resources, equipment, expertise and experience necessary to perform the Services in an efficient and cost-effective manner with a high degree of quality and responsiveness, at all times consistent with Good Industry Practice and otherwise in accordance with this MSA and each Service Contract;
- (d) the Work Product does not infringe, and is not a misappropriation of, any third party Intellectual Property Rights;
- (e) the Service to be performed and the processes, techniques and equipment to be employed in the performance of the Services will not infringe any Intellectual Property Rights of any third party;
- (f) the Supplier will comply with all Applicable Laws in its dealings with the Board and in performing its obligations under this MSA and each Service Contract;
- (g) the Supplier is in good standing with respect to all permits, licenses and approvals of any governmental or regulatory authority required for the performance of the Services and each Service Contract;
- (h) the Supplier and all Supplier personnel are in good standing with their respective professional association(s) or governing body(ies), and all required dues and insurance levies have been paid.



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- 31.2 The Supplier represents and warrants to and covenants with the Board that the prices and rates charged to the Board under every Service Contract are at the very least as favourable as the fees charged by the Supplier to any other school board in the Province of Ontario for the same or substantially similar services in substantially similar volumes as the Services. The Supplier acknowledges that:
- (a) the Board may request, at its sole discretion, a certificate from a senior officer of the Supplier attesting to Supplier's compliance with this paragraph; and
 - (b) if it is determined that the Supplier has charged lower costs, charges and/or fees to any other school board in the Province of Ontario for the same or substantially similar services in substantially similar volumes as the Services, the prices and rates paid or payable by the Board under any Service Contract will be reduced to the amount payable by such other school board, and any overpayment resulting from such reduction will be refunded to, or credited against, the Board's payment obligations to the Supplier under any Service Contract.
- 31.3 If required, the Supplier represents and warrants to and covenants with the Board that it has arranged for a national criminal record check to be conducted by a nationally or provincially recognized third party in respect of employees and staff employed by the Supplier and every Subcontractor in connection with the supply of Services. In the event that any criminal record check discloses that an employee or staff of the Supplier or any Subcontractor has a criminal record, such employee or staff member shall be removed from and shall not perform any of the Services. The Supplier shall ensure that each employee or staff member of the Supplier and every Subcontractor completes the criminal record check process prior to such employee or staff member performing any Services.

ARTICLE 32 NOTICES

- 32.1 Any notice or other communication required or permitted to be given under this MSA and any Service Contract shall be in writing and shall be delivered in person or sent by e-mail or first class mail, charges prepaid, addressed as follows:
- (a) if to the Board: Thames Valley District School Board
1250 Dundas Street
London, ON N5W 5P2
 - (b) if to the Supplier: **contact information, including e-mail]**
- 32.2 Notices or other communications shall be deemed to have been received:
- (a) if sent by e-mail, on the date of transmission, provided that where the communication is received after 4:00pm (as recorded by the recipient) or on a day that is not a business day, such communication shall be deemed to have been received at 9:00am on the next business day;
 - (b) if sent by personal delivery, on the date of receipt;
 - (c) if mailed, on the third business day following the date of mailing; provided, however, that if at the time of mailing or within three business days thereafter there is or occurs a labour dispute or other event that might reasonably be expected to disrupt the delivery of



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documents by mail, any notice or other communication shall be delivered or transmitted by e-mail or personal delivery.

- 32.3 Either party may at any time change its address for service from time to time by giving notice to the other party in accordance with this Article 32.

ARTICLE 33 MISCELLANEOUS

33.1 Independent Contractor

- (a) Nothing contained in this MSA or any Service Contract shall constitute or be deemed to create a partnership, joint venture or principal and agent relationship between the Board and the Supplier, and each is an independent contractor for the purposes of this MSA and any Service Contract.
- (b) The employees, officers, agents and Subcontractors of the Supplier, in the performance of this MSA and any Service Contract, shall act only in the capacity of representatives of the Supplier and not as employees, officers, agents or subcontractors of the Board and will not be deemed for any purpose to be employees of the Board. The Supplier assumes full responsibility for the actions of its employees, officers, agents and Subcontractors with respect to the obligations under this MSA and any Service Contract and shall be solely responsible for their supervision, daily direction and control, payment of invoices, payment of salary (including withholding of income taxes and Canada Pension Plan, employment insurance and any other employment related deductions, withholdings or remittances) workers' compensation, disability benefits and the like.

33.2 Assignment

- (a) The Supplier may not assign, transfer, convey, or otherwise dispose of this MSA or any Service Contract or its right, title or interest in this MSA or any Service Contract without the Board's prior written consent, which consent may be unreasonably withheld. In the event of the Supplier's assignment the Supplier acknowledges and agrees that at all times it shall be jointly and severally liable, as principal obligor and not as a surety, with its assignee.
- (b) The Board may without consent of the Supplier assign this MSA or any Service Contract, in whole or in part, with notice to the Supplier, which notice may be given after the assignment.

33.3 Third Party Beneficiary Rights

No provision of this MSA or any Service Contract shall in any way inure to the benefit of any third person (including the public at large) so as to constitute any such person a third-party beneficiary of this MSA or any Service Contract or any of the terms thereof, or otherwise give rise to any cause of action in any person not a party to this MSA or any Service Contract, except to the extent as may be specifically and expressly provided for in this MSA or in a Service Contract.

33.4 Number, Gender and Persons

Words importing the singular number only shall include the plural and vice versa; words importing gender shall include all genders; and words importing persons shall include individuals, corporations, partnerships, associations, trusts, unincorporated organizations, governmental bodies and other legal or business entities of any kind whatsoever.



MASTER SERVICES AGREEMENT

33.5 Entire Agreement

This MSA and, for each Work Order that is signed by the parties, this MSA together with the terms of such signed Work Order, constitutes the entire agreement between the parties with respect to the subject matter thereof and supersedes all prior agreements, understandings, negotiations and discussions, whether written or oral. There are no conditions, covenants, agreements, representations, warranties or other provisions, express or implied, collateral, statutory or otherwise, relating to the subject matter thereof except as provided in this MSA and such signed Work Order.

33.6 Further Assurances

Each party shall at all times sign and deliver all such further documents and instruments and shall do such further acts and things as may be reasonably required to give full effect to this MSA and any Service Contract.

33.7 Amendments

No alteration or amendment to this MSA or any Service Contract shall be binding unless it is in writing and signed by each party.

33.8 No Waiver by Conduct

- (a) No waiver by or on behalf of a party of any breach of a provision of this MSA or any Service Contract shall be binding upon the party unless it is expressed in writing and duly signed by the party or signed by its fully authorized representatives, and such a waiver shall not operate as a waiver of any subsequent breach, whether of a like or different character. No waiver shall be inferred from or implied by the conduct of either party.
- (b) Failure to enforce any right or remedy available under this MSA or any Service Contract will not be construed to be a waiver of the right or remedy.

33.9 No Contra Proferentem

This MSA has been negotiated and approved by the parties with the assistance of their legal counsel and/or the parties confirm they have had reasonable opportunity to consult with legal counsel. Notwithstanding any rule or maxim of law or construction to the contrary, any ambiguity or uncertainty will not be construed against a party by reason of the authorship of any of the provisions of this MSA.

33.10 Publicity and Use of the Board's Name Prohibited

- (a) This MSA and any Service Contract does not and shall not be construed to be a license for the Supplier to use the Board name, logos, trademarks, trade names, service marks or other marks of the Board. The Supplier agrees that it shall not make any use of the Board name or marks including, without limitation, in connection with any product, promotion, advertising, statement, blog, web page, press release, client list or other publication, electronic or otherwise, without the Board's prior written consent, which consent shall be at the Board's absolute discretion.
- (b) The Supplier shall not publish, issue or make any statements or news release, electronic or otherwise, concerning this MSA or any Service Contract without the Board's express written consent, which consent shall be at the Board's absolute discretion.

33.11 Survival

The provisions of this MSA requiring performance or fulfillment after the expiration of the Term or earlier termination of this MSA, including Article 15 (Ownership of Work Product and Intellectual Property Rights), Article 20 (Insurance), Article 22 (Environmental Liability), Article 22



MASTER SERVICES AGREEMENT

(Indemnification) and any other obligations to indemnify set out elsewhere in this MSA, Article 23 (Limit of Liability), Article 24 (Waiver of Claims), Article 25 (Construction Liens and Actions), Article 26 (Confidentiality), Article 27 (Records Protection), Article 28 (Dispute Resolution), Article 29 (Warranty), Article 30 (Audit Rights), Article 31 (Supplier's Representations and Warranties), paragraph 33.10 (Publicity and Use of the Board's Name Prohibited), and this paragraph shall survive the expiration or earlier termination of this MSA and any Service Contract, along with:

- (a) such other provisions as are necessary for the interpretation thereof; and
- (b) any other provisions of this MSA, the nature and intent of which is to survive the expiration or termination of this MSA.

33.12 Severability

Should any provision of this MSA or any Service Contract be held to be void or unenforceable, the remaining provisions shall remain in full force and effect, to be read and construed as if the void or unenforceable provisions were originally deleted.

33.13 Governing Law

This MSA and each Service Contract shall be construed, interpreted and enforced in accordance with, and the respective rights and obligations of the parties shall be governed by, the laws of the Province of Ontario and the federal laws of Canada applicable therein, and each party irrevocably and unconditionally submits to the exclusive jurisdiction of the courts of the Province of Ontario and all courts competent to hear appeals therefrom.

33.14 Successors and Assigns

All covenants, promises, undertakings, conditions, representations, agreements, rights and obligations given to or imposed upon the parties under this MSA and each Service Contract shall extend to and shall bind, apply and inure to the benefit of the respective successors and permitted assigns of each of the parties.

33.15 Counterparts

This MSA may be signed in counterparts, each of which shall be deemed to be an original and each of which when taken together shall be deemed to constitute one and the same instrument. This MSA or counterparts may be signed and delivered by fax or in a pdf or other common electronic format by e-mail, and the parties adopt any signatures provided or received by such transmission as original signatures of the applicable party or parties.

IN WITNESS WHEREOF the parties hereto have signed this MSA as of the Effective Date.

) **THAMES VALLEY DISTRICT SCHOOL BOARD**
)
)
)
) Per: _____
) Name:
) Title:
) I have the authority to bind the corporation
)



MASTER SERVICES AGREEMENT

) **[Supplier]**
)
)
)
) Per: _____
) Name:
) Title:
) I have the authority to bind the corporation
)



MASTER SERVICES AGREEMENT

APPENDIX A – Statement of Work

[NTD: Insert Appendix A – Statement of Work]



MASTER SERVICES AGREEMENT

APPENDIX B – Supplier's Submission

[NTD: Attach copy of Supplier's Submission, including price list]

Appendix A – Sustainability Framework

Draft 6

Thames Valley District School Board

SUSTAINABILITY FRAMEWORK



Introduction

As global climate changes, more extreme weather events occur each year, reinforcing the need for future-ready infrastructure, education, and communities.

Thames Valley District School Board (TVDSB) recognizes the importance of preparing our buildings and students for the future. We constantly look for ways to reduce our environmental impact through infrastructure projects, education, and behavioural adjustments.

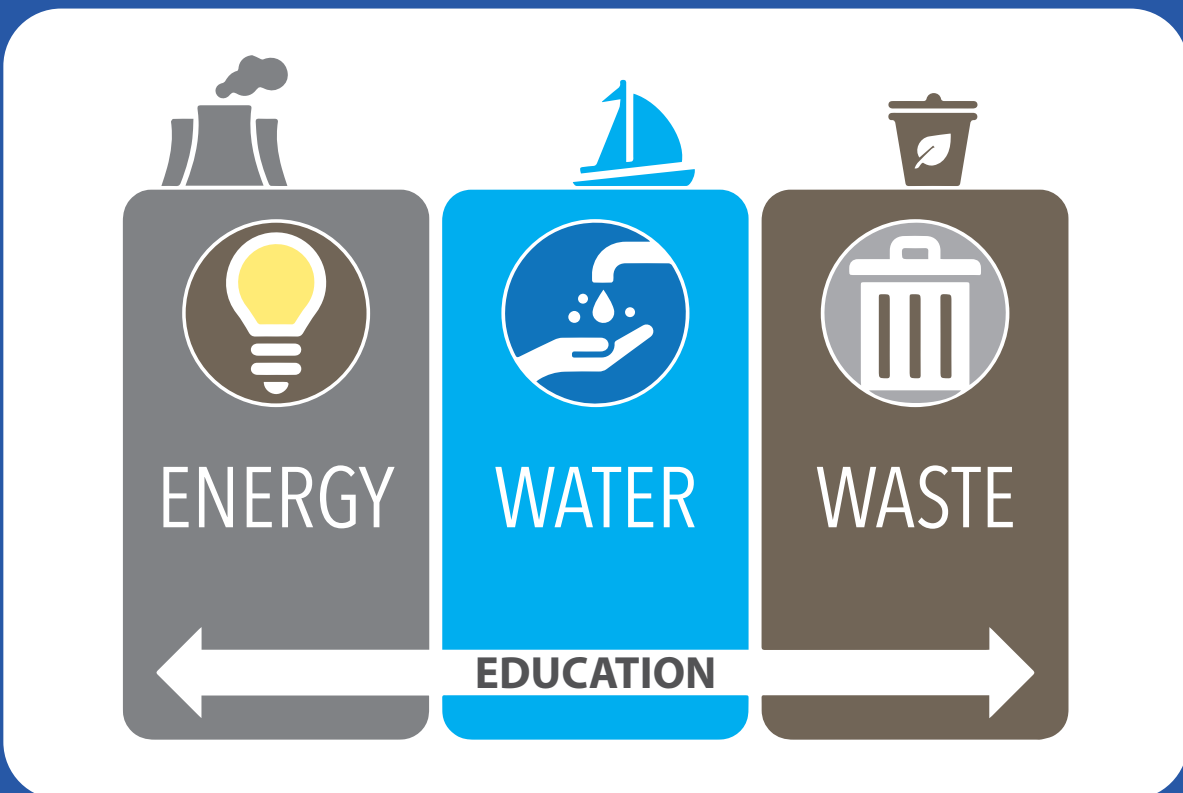
With communities of all sizes and landscapes within TVDSB, we face the impacts of climate change from many different environmental perspectives. We understand a one size fits all sustainability plan is not the solution, so we continuously research best practices to ensure students have a safe and sustainable learning environment.

TVDSB is committed to protecting the environment around our students, staff, and schools. This document includes **three Pillars of Sustainability – Energy, Water and Waste** - that identify how the school board will support that commitment.

Each pillar has **guiding principles**, which will help define and refine the individual plans. In addition, the pillars will identify specific goals and actions to be regularly reviewed and updated.

To reflect our mission statement, **“We build each student’s tomorrow, every day”**, educational tactics will cross all three pillars. Educational tactics will focus on making direct connections to sustainability and encouraging behavioural changes to support the principles set out in the Pillars of Sustainability. TVDSB recognizes that the board is at the beginning of its sustainability journey, and that additional Pillars may need to be added over time.

Pillars of Sustainability



The Journey to Net Zero

Canada and Ontario have committed to being **net zero or Carbon neutral** by 2050. The first checkpoint along this road is 2030, where the Federal government has committed to reducing greenhouse gas emissions by 40-45%. The Provincial government has committed to a 30% reduction in GHG emissions.

TVDSB will also need to meet or exceed the Provincial goals with intentions of meeting the Federal goals. This commitment requires significant long-term planning and will follow the **Roadmap to 2050: A Net Zero Thames Valley District School Board** illustration below. The roadmap broadly defines where our research shows us we must move. As the research and planning continue, the map will become more detailed.

The **Three Pillars of Sustainability** in the next section and their principles will help guide the journey to Net Zero, while allowing for course corrections to accommodate new technologies, funding, and any updates to the Pillars.



Roadmap to 2050: A Net Zero Thames Valley District School Board

2020's
ENERGY
OPTIMIZATION

2030's
DECARBONIZATION

2040's
SUSTAINABLE
ENERGY

2050's
NET ZERO TVDSB

Framework Goals

THE SUSTAINABILITY FRAMEWORK has been developed with three pillars in mind: **Energy, Water, and Waste**. Each pillar has targets that will reduce TVDSB's impact on the environment, increase environmental education, and create an overall safer and more welcoming spaces for students and staff.

To implement projects and learning opportunities, one major element of the plan that needs to operate efficiently is communication. To do this, we have created an overarching target for establishing environmental communications with staff, to ensure all schools and board buildings are represented within the sustainability plan.

Communication with environmental leads will be crucial for the success of our sustainability framework. The framework is supported by our ongoing targets that are used to direct efforts on major improvements in our sustainability journey.

Overall

Goal 1:

Create sustainability onboarding training/documentation for staff to review

One of the most identified gaps in our current **Energy Management Plan** is the lack of information on what we are currently doing and our plans moving forward. This goal is to provide a simple onboarding document on what sustainability means to TVDSB, what we have done, what we are currently working on, and what we are planning to do moving forward. This will allow new staff to understand how they can make improvements in their role or educate our students in a more informed way with regards to sustainability as it pertains to TVDSB.

Tasks

- Identify topics for inclusion in onboarding documents
- Determine how to best communicate this onboarding document (written, video, website, or combination)
- Work with Communications Department to develop onboarding documentation

Key Indicators

- Onboarding Program written
- Onboarding Program reviewed
- Onboarding Training Program implemented

Overall

Goal 2:

Establish an Environmental Lead at every building and school within TVDSB

A key component of a sustainability framework is ongoing, two-way communication. To ensure all schools are aware of different initiatives, information, and projects, we will establish an **Environmental Lead** at every building and school. The Environmental Lead will receive regular updates on our sustainability journey and will be able to direct information to and from staff and students.

Tasks

- Identify pathways that will create an engaged environmental stewardship team within TVDSB
- Identify current staff that engage in environmental programs such as environmental clubs, EcoSchools program and curriculum
- Engage with schools to coordinate Environmental Leads and provide support
- Develop Environmental Lead expectations
- Organize release time for Environmental Leads to meet

Key Indicators

- TVDSB Senior Management support of Environmental Lead initiative
- Support is communicated through multiple channels to obtain buy-in from schools
- Identifying Environmental Leads at schools
- Defining communication plan to Environmental Leads

Overall

Goal 3:

Provide educational opportunities for all pillars of sustainability

TVDSB is responsible for **educating students** of today and tomorrow. We must provide students the tools needed to understand their impacts on the environment, and what they can do to mitigate their effects to create a sustainable future.

Tasks

- Develop curriculum ties
- Develop engagement strategy to increase and maintain connections
- Identify opportunities to use existing data
- Students have more frequent and consistent contact with energy data
- Students have more frequent and consistent contact with waste data
- Identify data requirements for more meaningful engagement
- Plan for increased sustainability data and reporting.

Key Indicators

- Increased data requests
- Requests for improved data
- More hours per year of engagement with Students with respect to the three pillars.
- Yearly curriculum-based ties to the three pillars

Overall

Goal 4:

Establish timelines and objectives for the Road to 2050

TVDSB has always been working towards a more efficient operation to reduce operating costs as well as responsible corporate citizenship.

The Road to 2050 is a plan that leverages this decades long commitment in a more documented and communicated manner within TVDSB as well as externally.

Tasks

- Review the timelines and breakdown objectives into more concrete, measurable steps within each decade
- Gather input from staff, students, and community to ensure support for the plan
- Identify what Net-zero/ Carbon Neutral needs to be within TVDSB (i.e., scope 1-3 emissions)
- Gain support from Senior Management and Board as a whole
- Determine what internal and external supports may be required to achieve a Net Zero TVDSB in 2050

Key Indicators

- TVDSB Senior Management support of Environmental Lead initiative
- Adoption of the Road to 2050
- Engagement of internal and external resources where required to meet or exceed goals
- Meeting the initial goals set out in Roadmap for the upcoming decade (2023-2030)

TVDSB continues to **manage energy consumption** to ensure reduced costs and GHG emissions while planning to transition to lower carbon-emitting sources. The energy consumption for the school board will vary based on many factors such as weather, occupancy, square footage, and many others. Optimizing our energy consumption is imperative to ensure we are working towards minimizing our environmental impact related to energy. Students will have the ability to explore sustainability locally with the help of our growing energy data repository. Through the sustainability framework, students will interact with the goals to understand the different energy consumption values from a local and board-wide context.

Core Principles

1. **REDUCE** energy consumption through building systems, partnerships, and education opportunities
2. **RENEW** schools with high efficiency equipment
3. **INVEST** in schools and education to create better environments for students
4. **RESEARCH** innovative sustainable technologies and initiatives

Pillars of Sustainability: Energy



Electricity is an essential utility TVDSB uses to properly educate students. It powers students' learning tools and provides welcoming learning environments. Along with associated cost savings that come from reduced electricity use, the greenhouse gas emission factors for electricity are on the rise in Ontario, making it increasingly important to reduce consumption. Considering the extensive portfolio of buildings that TVDSB has, we will work to reduce the amount of energy we consume through building upgrades, educational initiatives, and much more.

Tasks

- Continue upgrade buildings to LED Lighting
- Continue to improve efficiency of HVAC systems as they are renewed
- Utilize Building Automation Systems (BAS) to optimize equipment schedules, setpoints and operational characteristics
- Engage in student initiatives:
 - "Lights Out" campaign
 - Reduce air conditioning demand by raising room thermostat setpoints
 - Meet with students to help them define and develop their own student-lead initiatives

Key Indicators

Electricity consumption reduction reviewed via the following methods:

- Total consumption
- Weather Normalized consumption
- Electrical Energy Intensity (kilowatt-hour per square metre)
- Electrical Energy Intensity (kilowatt hour per student)

Energy

Goal 1:

Reduce electricity consumption by 7.7%



Thermal energy (natural gas and propane) is used to heat our buildings, water, and more.

Because thermal energy is created through the combustion of gases, thermal energy has much higher Greenhouse Gas (GHG) emission factors. These emissions can be reduced through maintenance of equipment, upgrading buildings, and building automation systems.

Tasks

- Upgrade HVAC systems to more efficient equipment
- Investigate systems that use alternative heat sources such as heat pumps - Install where feasible
- Utilize Building Automation Systems (BAS) to optimize equipment schedules, setpoints and operational characteristics
- Meet with students to help them define and develop their own student-lead initiatives

Key Indicators

Thermal Energy consumption reduction reviewed via the following methods:

- Weather/GFA/Student normalized consumption
- Weather Normalized Energy intensity (cubic metres per square metres)
- Weather Normalized Energy intensity (cubic metres per student)
- Total consumption

Energy

Goal 2:

Reduce Thermal Energy consumption by 1.5%



Greenhouse Gas (GHG) emissions have heavy impacts on the environment. As a critical consideration of sustainable development, we will work to reduce TVDSB's emissions through the reduction of electricity and thermal energy consumption.

Low/zero emission energy sources supplying Ontario's electricity grid are currently producing less green energy due to planned and unplanned maintenance. Our GHG reduction target reflects these changes in generation.

Tasks

- Install and evaluate pilot projects that remove fuel burning emissions
- Partner with municipalities and transportation providers to advocate for better walking communities and alternative fuel transportation pilot projects
- Review Fleet Management for right-sized vehicles
- Continue with low emission natural gas vehicle fleet while piloting alternative fuel fleet vehicles
- Complete a GHG inventory for TVDSB
- Identify no cost/low-cost pathways to reduce emissions directly created by TVDSB facilities
- Evaluate electric vehicle charging stations within TVDSB. Develop plan if feasible. Parking lot limitations **MUST** be considered.

Key Indicators

- Energy consumption reduction
- GHG emissions from electricity and thermal energy
- Reduced fleet operation costs

Energy

Goal 3:

Reduce Greenhouse Gas Emissions by 2.2%



While this goal directly ties to **electricity and thermal energy consumption** reduction targets, it is important to set separate targets to highlight some of the incredible initiatives taken to improve the learning environments for students.

Tasks

- Identify how school communities can actively participate in reducing energy consumption
- Create contests to increase school community engagement and participation
- Communicate benefits of projects as they are occurring at each facility
- Collect examples of best practices and success stories from projects implemented at schools

Key Indicators

- Increased inquiries coming from schools with respect to energy and saving energy
- Increased participation in initiatives/contests etc.
- Increased volume of suggested actions and contests

Energy

Goal 4:

Promote and implement energy conservation initiatives and technologies



TVDSB has a history of **measuring energy** with the goal of using this data to manage our resources. The next step in our sustainability journey is to share energy measurements with school communities, so they can help with energy management.

Tasks

- Continue to distribute quarterly Energy report
 - Obtain feedback from staff to make it more tangible to them
- Communicate Energy consumption to a larger audience more frequently
- Determine pathways to create a “live” data stream for Energy at TVDSB
- Expand Energy Dashboard usage at school level
- Obtain feedback from staff to make data more tangible

Key Indicators

- Increase in requests for more background energy data
- Higher participation in energy events (Sweater Day, Lights Out campaigns, etc.)

Energy

Goal 5:

Develop and share energy reporting



With a large portfolio of buildings within TVDSB, there are often many opportunities for improvements. To understand these opportunities, **energy audits** can be utilized. These audits will help identify areas of improvement or efficiency to ensure we are getting the most out of our equipment and buildings.

Tasks

- Develop plan to regularly audit schools
- Identify audit triggers for out of schedule audits
- Streamline audit process and report writing
- Create reports for staff that can act upon audit findings
- Identify opportunities that can be repeated across the school board

Key Indicators

- Continuous progress made on audits
- Post audit energy consumption reductions
- Facility Services staff request audits at schools

Energy

Goal 6:

Conduct energy audits across the school board



Pillars of Sustainability: Water



The two main areas that TVDSB focuses on concerning water are **water consumption and stormwater management**.

Minimizing water consumption can reduce costs. However, the most significant benefit is preserving a natural resource by drawing less from the source and reducing the volume of waste water created.

Stormwater Management is essential to TVDSB as we are located within the Lake Huron and Lake Erie drainage basins, one of North America's largest fresh water supplies. Therefore, we will research and implement responsible stormwater management practices to mitigate the potential environmental impacts of runoff.

Students have numerous opportunities to understand their water consumption and environmental impacts better. Through programs with multiple Conservation Authorities, students learn about the ecological effects of water consumption and what they can do to reduce their impacts on delicate ecosystems.

Core Principles

1. **REDUCE** our water consumption through education and action
2. **PROTECT** our water sources through effective stormwater management and collaboration



Water

Goal 1:

Reduce Water consumption by 5%

Water consumption is essential for the health and well-being of all students and staff. While we ensure that everyone has equal access to clean drinking water, we also look for ways to reduce our water consumption across the board. Different equipment, irrigation systems, and washroom fixtures consume water, so TVDSB constantly seeks solutions for reducing our water consumption.

With climate variability in the future, we need to ensure our school grounds are resilient to drought and flooding, which will also reduce the need for excess irrigation.

Tasks

- Install efficient fixtures in washrooms
- Install efficient HVAC to reduce water consumption
- Investigate and optimize irrigation systems at schools and facilities
- Drought and flood resistant landscaping
- Increase community partnerships with Conservation Authorities (Kettle Creek, Catfish Creek, UTRCA, etc.)
- Develop water leak detection program
- Provide educational opportunities for students and staff to understand water waste

Key Indicators

- Water consumption reduction by:
 - Total consumption
 - Cubic metres per square metre
 - Cubic metres per student



Water

Goal 2:

Implement stormwater management projects at schools

Low Impact Developments (LIDs) are systems and practices that mimic natural processes to increase infiltration which naturally filter stormwater and minimize impermeable surfaces. These developments reduce the number of contaminants entering surface and ground water and increase the quality of the environment surrounding schools and neighbourhoods.

Through community partnerships, student-lead initiatives, and school greening projects, we have been able to improve our stormwater management, and will continue to explore unique initiatives to handle rainwater in the Lake Erie drainage basin.

Tasks

- Continue depave programs to remove impermeable surfaces and replace them with gardens and green spaces for students
- Improve school grounds through greening projects such as:
 - Outdoor classrooms
 - Native species gardens
 - Pollinator gardens
 - Drought/flood resistant planting

Key Indicators

- Number of outdoor classes increase
- Development of templates for gardens and drought/flood resistant plantings
- Development of Stormwater Management toolkit on methods for fixing drainage issues in environmentally friendly ways



TVDSB follows the **Three R's Hierarchy** (Reduce, Reuse and Recycle) as the core strategy for our waste reduction plan.

With these core values in place, we aim to eliminate waste before it is created and take action to deal with waste in the most environmentally responsible way possible.

With the Three R's in mind, students interact directly with their waste, so there are many opportunities for students to learn more about types of waste, where it is going, and how they can reduce it. Through the curriculum, students will learn about the life cycle of materials, waste minimization, and the environmental impacts of waste on different ecosystems.

Core Principles

1. **REDUCE** our waste created by educating students and staff
2. **REUSE** waste produced through other creative applications
3. **RECYCLE** sorted and accepted waste to reduce landfill contributions
4. **EDUCATE** students and staff on different waste management practices/programs and accepted waste

Pillars of Sustainability: Waste



Recycling is a critical component for waste management. Contamination can lead to issues that cause the recycling system to fail and create more problems than solutions. We need to ensure that recycling programs are well maintained for all recycling streams at all schools across the school board.

Tasks

- Communicate with staff to ensure recycling programs are properly implemented for all waste streams
- Track areas of improvement and aid in enhancing recycling programs

Key Indicators

- Communications with staff on effectiveness of waste services

Waste

Goal 1:

Ensure recycling programs are properly maintained at all schools and board offices



Contamination in recycling is a major issue that causes stress on the waste management system. When a dirty piece of recycling or waste is placed in the blue bin, all recycling in the bin with it is contaminated, and then considered waste.

Educating students and staff and providing proper signage are great initiatives to approach contamination issues, but many innovative projects can be taken to create change and ensure more items are properly recycled.

Tasks

- Analyze waste contamination data for trends in disposal behaviour
- Conduct waste audits to determine major sources of waste
- Promote and implement waste free lunches
- Create and share educational posters for proper waste sorting

Key Indicators

- Total annual contamination (Tonnes)

Waste

Goal 2:

15% reduction in recycling stream contamination



As a large organization with schools located within several municipalities, there is a wide and differing understanding of **waste management** practices, as municipalities will accept different items in recycle and waste. This creates challenges in schools for proper waste handling and can lead to increased waste levels.

Waste management is a complex system, and to provide a safe and clean environment for students and staff, it is important that we take steps to decrease our waste produced. This can be done by understanding our waste composition with waste audits, educational initiatives, and much more.

Tasks

- Adjust our procurement strategies to reduce packaging waste
- Conduct waste audits to determine major sources of waste
- Promote and implement waste free lunches
- Collaborate with community partners for pilot waste programs
- Understand current waste collection strategies and areas needing improvement
- Promote EcoSchool certification benefits to Environmental Leads
- Continue including curriculum connections for waste
- Create and share educational posters for proper waste sorting
- Identify specific goals for administrative facilities (i.e. lead by example) for all waste related goals.

Key Indicators

Total annual waste (Tonnes)

Waste

Goal 3:

*Reduce Waste
produced by 10%*



Waste reduction and diversion rates are directly connected, as decreasing our waste amounts should increase our diversion to recycling.

Education is extremely important to increasing our diversion rates. TVDSB's waste management practices can differ slightly from municipalities, so educating students and staff is an easy way to increase our diversion.

Tasks

- Adjust our procurement strategies to reduce packaging waste (i.e. sustainable packaging, reduced packaging, reusable packaging)
- Conduct waste audits to determine major sources of waste
- Promote and implement waste free lunches
- Community partnerships for pilot programs (Wormery, UTRCA Green Leaders, London Environment Network)
- Promote EcoSchool certification benefits to Environmental Leads
- Continue including curriculum connections for waste
- Create and share educational posters for proper waste sorting

Key Indicators

- Number of contamination events from waste services
- Total annual recycling (Tonnes)

Waste

Goal 4:

Increase diversion rates to 20%



Sustainable development, technologies, and initiatives are constantly evolving as conversations on the topic continue to grow. To continue reducing our waste levels we constantly look for new initiatives that community partners, schools, and organizations are undertaking.

Tasks

- Continue to work with Upper Thames Conservation Authority (UTRCA) through Green Leaders classes for waste reduction programs
- Establish community partners that specialize in innovative waste management solutions
- Share best practices among schools
- Track success and shortcomings from waste data to determine success rates of initiatives and technologies

Key Indicators

- Waste services data trends indicating reduced waste, increased recycling, or decreased contamination
- Waste audits to determine if waste streams have improved after initiatives or technologies

Waste

Goal 5:

Pilot waste management technologies and initiatives at different schools



To enhance our **waste management practices** we must understand the amount of waste, recycling, and contamination created on a regular basis. This knowledge will help students and staff understand how much waste is created at their schools, leading to actions taken to reduce our environmental impacts.

Tasks

- Coordinate with waste services to obtain monthly data on waste, recycling, and contamination for each individual school
- Work with data to produce meaningful metrics for students and staff to understand
- Share data with students and staff on a regular schedule

Key Indicators

- Monthly contamination and overloaded waste data reviewed from waste services
- Monthly waste and recycling data received from waste services

Waste

Goal 6:

Enhance waste reporting for all TVDSB properties



Glossary of Terms

Sustainability

Sustainability is the ability to meet the needs of the present without compromising the ability of future generations to meet their own needs.

It encompasses social, economic, and environmental aspects and requires action to promote long-term well-being for future generations.

Sustainability aims to reduce negative impacts on the planet and its resources, promote economic growth and social inclusion and create resilient communities.

Sustainability within TVDSB will involve integrating core environment and sustainability concepts into the curriculum, extracurriculars, school design, and much more.

Energy Optimization

Energy Optimization aims to reduce electricity, propane and natural gas consumption through efficient operation of buildings, as well as completing building and equipment renewal with more efficient solutions.

Decarbonization

Decarbonization involves moving away from carbon emitting fuels, like natural gas and propane, to electric or alternative zero carbon energy sources.

Sustainable Energy

Sustainable Energy involves the investigation of different renewable energy sources and emerging technologies. These sources will reduce environmental impacts.

Net Zero TVDSB

Net Zero TVDSB is the end goal is to completely eliminate the impact of Green House Gas (GHG) emissions from TVDSB, aligning with Canada and over 120 other countries.



For more information, contact us at:

Thames Valley District School Board
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www.tvdsb.ca/sustainability