



Climate Ready Infrastructure Service

Submission Guidelines 2025





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Welcome

The Canadian Urban Institute, with funding from Housing, Infrastructure and Communities Canada (HICC) is pleased to invite submissions from experts in climate adaptation or mitigation to be a part of the Climate Ready Infrastructure Service (CRIS), as well as from local jurisdictions seeking expert support. The CRIS is a new capacity-building program that connects local governments and communities with top climate experts to support the integration of low-carbon resilience into local infrastructure projects across Canada. This free-to-access service provides specialized expertise to local governments to integrate climate considerations into their infrastructure projects.

Our Mission: Empower infrastructure decision makers to include low-carbon climate resilience considerations in infrastructure projects across Canada.

Our Vision: Municipalities and communities across Canada are implementing high-value local infrastructure improvements that are enabling the achievement of targets set in Canada's 2030 Emissions Reduction Plan and National Adaptation Strategy and directly building Canada's resilience in the face of current and future climate change.

This guide provides information on how to join the CRIS as a climate expert and how to register your infrastructure project to receive expert support.

The CRIS will provide free expert support for communities with populations of approximately 30,000 and less, and financial compensation for climate and infrastructure experts to integrate climate considerations into infrastructure and housing capital projects.

The Climate Toolkit for Housing and Infrastructure

The Climate Ready Infrastructure Service is one of the three elements of the HICC Climate Toolkit for Housing and Infrastructure (CTHI) which are designed to support Canadian communities to integrate climate considerations into their capital projects. In addition to the CRIS, the CTHI includes two other complementary elements:

- Climate Insight: an online platform that guides communities to understand the climate risks in their area and points them toward regionally specific solutions for them to explore. As a community implements infrastructure and housing projects, the CRIS is designed to support them in gaining access to climate experts.
- Climate Help Desk: an HICC-staffed help desk to direct communities toward climate related resources and provide guidance.

Together, this toolkit of three resources is geared to support Canada's smaller communities in addressing climate change risks and opportunities for emissions reductions in infrastructure and housing projects.





Regional Climate Organizations

The CRIS partners and engages with Regional Climate Organizations and other non-profit organizations — entities with deep expertise and networks as delivery partners. These organizations may play a vital role in several key areas:

- Supporting a common understanding of regional climate challenges and impacts.
- Connecting with local governments to facilitate project submissions.
- Identifying and supporting experts to join the roster, enhancing the capacity for localized expertise.
- Sharing lessons learned and effective practices from roster engagements through knowledge dissemination and the establishment of communities of practice.
- Ensuring that regional climate-related infrastructure services for local communities are complementary and effectively leveraged.

By collaborating with Regional Climate and non-profit organizations, the CRIS will significantly enhance its ability to support local governments in accessing expert guidance and resources as well as build the capacity of mission-based organizations.

The Climate Ready Infrastructure Service Overview

What is it?

The Climate Ready Infrastructure Service (CRIS) is a national initiative connecting local governments serving jurisdictions with populations of approximately 30,000 or less with climate experts to enhance their infrastructure projects' low-carbon resilience.

Who benefits?

- Local Governments: Gain access to specialized expertise for integrating climate resilience into infrastructure projects (water systems, transportation, buildings, etc.). Receive guidance, informed decision-making support, and capacity building opportunities.
- Climate & Infrastructure Experts: Apply their knowledge to impactful projects, expand their professional network, receive financial compensation, gain recognition as a climate expert, and contribute to national climate goals.

How it works:

- 1. **Project Proponents:** Local governments with populations of approximately 30,000 and under submit a registration form detailing their project needs.
- 2. **Expert Matching:** The CRIS matches the project with a qualified expert based on the project's scope and the expert's expertise.
- 3. **Expert Support:** The matched expert provides advice and options to incorporate climate adaptation and mitigation considerations into the project's planning and design.
- 4. **Outcome Reporting:** Projects are expected to provide data-driven metrics and storytelling to showcase the impact of the expert's involvement.





Key Program Features:

- No cost to participate: Access to experts is provided as a free service to local governments.
- Flexible engagement: Experts can commit to varying levels of involvement based on project needs.
- Focus on capacity building: The CRIS supports local governments in developing the knowledge and skills needed for advancing climate-informed infrastructure projects.
- Support for diverse projects: Infrastructure projects in the planning and design stage that are looking to enhance climate mitigation, adaptation, or minimize environmental impacts are welcome.
- Commitment to Indigenous communities: Indigenous Governing Bodies, First Nation, Inuit or Metis government or authorities, and Indigenous development corporations are eligible.

CRIS is a valuable tool for communities seeking to build a more sustainable and resilient future. Through the CRIS, communities:

- Enhance local capacity: Develop internal expertise and skills for climate-resilient infrastructure projects.
- Access specialized knowledge: Gain access to cutting-edge knowledge and best practices for climate adaptation and mitigation.
- Align with national goals: Contribute to achieving Canada's 2030 emissions reduction targets.

Local Jurisdictions Overview

This section of the submission guide provides information on the eligibility criteria and intake process for local governments. The criteria outlined below serve as a guideline and are subject to change. If you have areas of support that fall outside of these criteria, please reach out to us to discuss how the CRIS might support your community.

Through the CRIS, local governments can gain access to experts to help integrate climate considerations into housing and infrastructure projects. Here's how we'll help:

- <u>Project Scoping:</u> The CRIS team can help with submission scoping and refinement, and help you review your capital project to prepare the scope of work for the expert.
- Finding the Right Experts: Once it is clear what expert support is needed and a submission has been completed, the CRIS team will review experts in our roster and will make a match for you. You will have a chance to interview the expert that we are recommending before we finalize the match. If you already have an expert in mind, please let us know and we will work to sign them up for the roster so that we can work with them for this and other projects.
- <u>Support During the Engagement:</u> The CRIS team will be available to connect with the local jurisdiction and the expert during the engagement to ensure that the objectives outlined in the scope are being achieved. The project lead or team will also be provided with an opportunity to join a cohort of other project teams that are working on similar project types, and to participate in cohort sharing and learning sessions.





<u>Contracting and Payments:</u> The CRIS will hold the contract with the expert and manage
payments. Larger sums may be considered on a case-by-case basis for more complex projects.
This approach aims to save time for your community by managing the procurement and holding
the standing contracts with the experts.

What Kind of Projects Are Eligible?

This service aims to support local jurisdictions to ensure that climate issues are taken into account in housing and infrastructure projects. Three types of support are appropriate for this service:

- 1. <u>Climate Adaptation:</u> If your community has plans to construct or retrofit housing or infrastructure, CRIS experts can help bring leading science to ensure that the project is resilient to climate change impacts. For example, if a community plans to replace a seawall or riverside bike/pedestrian path, experts from the roster can help to evaluate the conditions and offer options to reduce the likelihood that the new path is destroyed by future high tides or flooding.
- 2. <u>Climate Mitigation:</u> If your community is building a new community facility, experts from the service can help to ensure it is being designed to be energy efficient, utilize renewable energy sources, or be a low-carbon facility in other ways.
- 3. <u>Combination Low-Carbon and Climate Resilience:</u> Projects may offer opportunities to both address climate-related risks and to use renewable energy and low-carbon materials. For instance, a low-carbon new community facility may also be located and designed to serve as a 'resilience hub' or refuge during instances of wildfire or community flooding, or periods of extreme heat.

Eligibility Criteria

- Local communities with a population approximately 30,000 or less are eligible, including an Indigenous Governing Body or authority, or unincorporated communities within a regional district.
- The registered project is a public infrastructure or housing project in an eligible asset class.
- The project either has Council approval and/or is included in a multi-year capital plan.
- The submitting local government has gone through the Climate Insight tool or has established current and projected climate risks.

Eligible Indigenous Communities include:

- An Indigenous Governing Body, including but not limited to a band council within the meaning of section 2 of the Indian Act.
- A First Nation, Inuit or Métis government or authority established pursuant to a Self-Government
 Agreement or a Comprehensive Land Claim Agreement between His Majesty the King in right of
 Canada and an Indigenous people of Canada, that has been approved, given effect and declared
 valid by federal legislation.
- A First Nation, Inuit or Métis government established by or under legislation whether federal or provincial or territorial that incorporates a governance structure.
- A not-for-profit organization whose central mandate is to improve Indigenous outcomes; and an Indigenous development corporation.





Housing and Infrastructure Project Criteria

- The proposed project that the local jurisdiction is seeking support for has been mandated or otherwise officially endorsed by a local government and/or governing body (e.g., in a capital budget, multi-year official plan, or workplan).
- The project has a clearly defined project manager/owner who has been formally assigned by the applicant to oversee project preparation.
- The submitting local government has used the Climate Insight tool or has identified current and projected climate risks.
- The applicant can provide details regarding the project purpose and outcomes, intended impacts and/or benefits, location/site, affected assets, intended end users, and project stakeholders.
- The applicant can provide information regarding the expertise they currently or already have available to support project preparation and the additional expertise they seek from the expert.

Ineligible Submissions:

The CRIS is not intended to support the following:

- Capital works or equipment purchases. The CRIS will assist with the design process; however, it will not be involved in detailed cost estimation or the procurement of equipment.
- Community wide climate adaptation, climate risk, or climate mitigation plans. Communities are encouraged to find other resources for community wide planning. The CRIS experts are available to provide support for specific infrastructure or housing projects, but will not be involved in community-wide planning efforts.

How to Apply

• Submit a service request at <u>climatereadycanada.ca</u> and a CRIS team member will follow up with you directly.

Roster of Climate and Infrastructure Experts Overview

This section of the submission guide provides information for experts interested in participating in the CRIS including the eligibility criteria and the process for joining the Roster of Climate and Infrastructure Experts. The criteria outlined below are a guide. If you are an expert in an area that we've overlooked, please reach out to us to discuss how we might work together.

What is a climate expert?

The Climate Ready Infrastructure Service is actively seeking professionals who are experienced and currently practicing in a defined asset, infrastructure and/or climate field for which they have a combination of domain specific qualifications and experience (e.g., degree background and professional certification, standards certification).





A fully qualified Roster Expert has demonstrated professional experience in integrating climate mitigation and/or risk management into their practice, and ideally has certifications related to their area of climate expertise (e.g. LEED accreditation, ISI Envision certification).

What are the minimum qualifications for Climate and Infrastructure Experts?

We welcome Climate and Infrastructure Experts with a range of expertise to register to join the roster. Minimum qualifications include:

- A minimum of five years of professional experience on infrastructure projects that incorporate climate adaptation or mitigation considerations.
- Experience in a senior role on climate-related infrastructure or housing projects.
- Preferred: possession of a relevant professional designation (e.g., P.Eng., RPP, RA, etc.); and
- Preferred: experience working with local government(s) on one or more asset classes (i.e. Buildings, Stormwater, Nature Based solutions etc.).
- Live and work in Canada.
- Climate and Infrastructure experts have experience in one or more of these or other asset classes:
 - Water Systems
 - o Storm Water Management
 - Waste Water
 - o Bridges & Major Culverts
 - o Buildings & Facilities
 - o Affordable Housing (under management by the local government)
 - o Fire & Emergency Facilities
 - o Solid Waste
 - o Roads, Sidewalks, and Active Transportation
 - o Transit (including buses)
 - o Fleets
 - Heavy Equipment
 - o Parks & Trails
 - o Green Infrastructure & Nature Based Solutions

Benefits of Joining the CRIS

- Gain new business opportunities through paid projects and enjoy flexible engagement opportunities based on availability.
- **Expand your networks** with municipal leaders and fellow professionals.
- Enhance professional development by working on diverse, impactful projects.
- Access advanced resources and tools for sustainable infrastructure to support emissions reduction and adaptation.
- **Build recognition and credibility** in the climate resilience field and contribute to meaningful climate action while advancing your career.





Joining the CRIS

Independent & Small Firms

Joining the CRIS as an independent expert or small firm is an easy and quick process. To join the Roster of Climate and Infrastructure Experts, complete the <u>CRIS Expert Submission form</u>, which includes:

- Curriculum vitae
- Documentation of professional certifications
- Examples of relevant completed project work
- Professional references
- Information regarding availability (e.g., hours/month, geographic area)

Upon review of an application by a member of the CRIS Team, an online interview or follow-up questions may be conducted.

Mid-Sized Firms and Large Firms (100+ Employees)

Joining the CRIS as a mid-size or large firm is a straightforward process. To register for the Roster of Climate and Infrastructure Experts, fill out the <u>CRIS Expert Submission form</u>, which includes:

- Information about the identified experts
- Documentation of professional certifications
- Examples of relevant completed project work
- References
- Specialties and areas of expertise

Following your organization's submission, a CRIS Team member will follow up to discuss the next steps.

Approved Climate and Infrastructure Experts

Approved experts are provided with pre-approved areas of project engagement (i.e., types of project assignments, types of services provided).

Experts enter a standing contract with the CRIS. Upon signing of the standing contract with the CRIS, the Expert is added to the public Roster of Climate and Infrastructure Experts, including on the CRIS website, and is ready to be considered for matching to approved projects. New Roster Experts are expected to participate in a Roster onboarding session. An annual Roster member review will be conducted to ensure experts remain in good standing. During the matching process, roster experts are interviewed by the local jurisdiction seeking expert support, with a CRIS portfolio manager.

Once a match has been made, a scope of work is finalized which outlines the deliverables and timeline, and a work order is signed to begin the engagement. Upon completion of the assignment, the roster expert, along with the local jurisdiction, are expected to complete a project completion survey.

Options not Recommendations: The CRIS is intended to provide options for local jurisdictions to consider as housing and infrastructure projects are advanced. Experts on the roster are not expected to provide recommendations or signed drawings but will provide options for local jurisdictions to consider.





How the Service Works

CRIS Financial Parameters:

- Standard Project Support: Projects will receive on average \$10,000 \$20,000 of support.
- Requests for Additional Funding: Projects that demonstrate significant potential for organizational capacity building may be eligible for additional funds beyond the standard amount.
- Evaluation of Additional Funding Requests: Additional funding requests will be assessed based on the merit of the project's contribution to organizational capacity building. Requests will be considered by the Portfolio Manager, Project Director, and Climate Expert Co-Leads.

Eligible Expenses

- Professional support delivered by experts is eligible.
- Travel and hospitality are generally ineligible but may be considered on a case-by-case basis.

Ineligible Expenses

The CRIS is not intended to support the following:

- Capital works or equipment purchases. The CRIS will help with the design, but not with construction costs or purchases of equipment.
- Community wide climate adaptation, climate risk, or climate mitigation plans. Communities are encouraged to develop a climate risk assessment using the Climate Insights tool or to reach out to the HICC help desk to find other resources for community wide planning. The CRIS experts are here to help with specific infrastructure or housing projects, not to help with community wide planning.
- Equipment purchases, digital software subscriptions or purchases.

The Matching Process

The matching process for municipalities will focus on key areas of expertise, roster standing, and consideration for comparable projects completed in the region or a similar region. The matching process is designed to support cross-pollination, capacity building, and provide the best quality of expertise to local governments. Rates are considered in the matching process in addition to expertise, geography, and previous performance.





The matching process is split into three phases to ensure accountability throughout the process which are:

- 1. Initial Screening: Initial screening accounting for relevant asset class expertise, climate hazard expertise, current standing in the roster, and quality of previous engagements through the roster. The roster standing screen would account for how many engagements an expert has completed through the roster, with a preference for experts that have completed fewer engagements. It would also account for the quality of previous engagements completed based on a mean score of post-engagement surveys. The quality of engagements screen will be inactive until a number of engagements have been completed through the roster.
- 2. **Secondary Screening:** Once the automated screen is completed, shortlisted candidates will receive a notification that there is potential roster work. Experts would then respond to a short survey accounting for their availability, experience working in the region, and any experience working on comparable projects. Preference would be given to those that have existing knowledge of projects in the region and relationships with the local government.
- 3. **Final Qualification & Review:** Following the responses from shortlisted experts, a final quality check will be completed by a portfolio manager ensuring the needs of the project optimally align with the expert's qualifications. Following a quality check the expert will be assigned to the local government where a scope of work will be developed to begin the engagement.

Fairness and Transparency

In the selection process, firms will be chosen based on their demonstrated experience. A key objective is to foster regional and local capacity building by actively supporting small and mid-sized firms. Large firms will receive a proportionate number of contracts, contingent upon performance as evaluated through the completion of specified scopes of work. Contracts will be awarded as determined by the best possible fit to the local government's project accounting for expertise, geographic location, cost, and performance.

Contracts and Payments

A standing contract is signed between the CUI and the member of the Roster of Climate and Infrastructure Experts. Once a match is made between a local jurisdiction and an expert, a scope of work for the expert with a budget is approved by the CRIS team and the relevant municipal representative. A work order assignment is signed by CRIS and the expert. Upon completion of the assignment, the expert submits an invoice to the CRIS for payment along with the final report from the expert.





Monitoring & Evaluation

In order to effectively evaluate both the specific engagement and the overall effectiveness of the CRIS to advance low carbon, climate resilience projects, the CRIS will develop a profile of the baseline project concept and conditions at time of submission and as documented in the more detailed project definition brief.

At the end of an engagement the participating local jurisdiction and the Roster expert are expected to complete a survey on the identified options for the project and the outcome of the matching service, including how the initiative may influence the infrastructure or housing project moving forward.

Upon completion and review of client input and project deliverables an assessment will be completed by the portfolio manager to ensure good and continued standing on the roster.

Intake Key Dates

- December 5, 2024: First Intake for Experts & Local Governments Opens
- December 29, 2024: First Intake for Climate and Infrastructure Experts Closes
- January 31, 2025: First Intake for Local Governments Closes

Intake Dates are subject to change for any questions regarding eligibility or submissions post-deadline contact climateready@canurb.org



