

# Forest & Meadow Villages, Inc.



Forest & Meadow Villages, Inc. acknowledges that we live and work in Mi'kma'ki and the Wabanaki Confederacy, the ancestral and unceded territory of the Mi'kmaq People.

## Services List & Description

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## List of Services

Forest & Meadow Villages is still a seedling organization, and as such our list of services is somewhat limited. As we grow, so will our services, and our ability to provide those services in an expert and timely manner.

In the table to the right “Days” refers to the total billable days, “Hrs” refers to the included communications time.

These services are paid for by the grants that FMV will apply for on behalf of your organization.

The Days listed are ESTIMATES. They are all +/- 30%.

Up to a difference of 30% is free of charge, anything past the 30% mark will be due to Client requests or specific needs and will require additional negotiations.

Please contact us for pricing.

Deliverables		Days	Hrs
Communications Time		Variable	
Organizational Liaison		Variable	
Funding Plan		5	8
Culture Tree	Roots – Culture Handbook	2	8
	Trunk – By-Laws	3	8
	Trunk – Policies	15	16
	Branches – Village Scope	5	16
	Branches – Strategic Plan	15	16
	Branches – Project Management Plan	N/A	
	Fruit – KPIs	2	8
	Fruit – Balanced Scorecard	2	8
Assets & Needs Assessments		10	4
PESTLE Analysis		15	8
Housing Need Report		2.5	1/2
Partnership List		5	8
Engagement Planning	Community	4	6
	Stakeholders	3	5
	Members	2	3
Engagement Sessions	Community	4	6
	Stakeholders	3	5
	Members	3	5
Design & Construction Planning	SASA Plan	3	8
	General Design Concepts	5	12
	Utilities Plan	5	8
	Land Use Plan	15	16
	Architect Liaison	Variable	
	Construction Project Aide	Variable	
	Farm & Food Plan	N/A	
Financial Plan (per updated version)		3	6
Funding Applications (per application)		5	8
Funder Project Reports (per ‘project’)		Variable	

Table 1: Prices



## Communications Time

- ❖ The first 8 hours of pre-contract communications are not counted.
- ❖ Every deliverable will require some communications time, and that is included in the pricing, see Table 1: Prices for more details.
- ❖ The communications time will be counted using a timer and billing will include images of the timer as proof.

We want to deliver the best quality in the least time, and that means spending our time on the deliverables that serve you best. Therefore, all phone communication will be scheduled in advance and have a clear agenda.

There will be times that FMV will need clarification on a detail or have questions for the client, these will always be by email only, and this time is not counted.

## Organizational Liaison

There will be times FMV will need to interact with other organizations on behalf of the client. Some of this time is included in some of the deliverables, but beyond that allotted time, this work is charged separately.

These activities will include:

- ❖ Acting as the primary contact point for inbound communications with other organizations, government agencies, contractors, or the public (referred to as “stakeholders”) on behalf of the client,
- ❖ Collaborating and communicating with stakeholders on behalf of the client,
- ❖ Maintaining lists of stakeholders,
- ❖ Facilitating meetings and cooperation between stakeholders and the client, and
- ❖ Identifying problems in communications among stakeholders.

## Funding Plan

This plan will outline:

- ❖ Funding sources (grants, loans, and professional fundraisers),
- ❖ When these funds will be available,
- ❖ The requirements for each fund, and
- ❖ Rough timelines for the fund’s availability.

This does not include the applications to the funds, or any discussion of direct fundraising, as that is a separate deliverable and is not something that FMV does.

This document is required by nearly all the funders.



## Culture Tree

The Culture Tree has multiple parts, and as such it is broken down here. As with tree, you start at the bottom and work your way up, and the higher parts are built on the lower parts.

### Roots - Culture Handbook

The Culture Tree is both a workbook and process FMV goes through with the Client to help define their Purpose, Mission, Vision, and Values statements.

### Trunk - By-Laws

By-Laws are the rules that govern how an organization will operate. The By-Laws will need to reflect the Articles of Incorporation and the culture of the organization. Currently, FMV only provides this service in Nova Scotia. This fee is for FMV to enter the Client’s information into one of our existing templates to fit their specific needs. However, any edits that go beyond this level of editing will be extra.

### Trunk - Policies

While By-Laws are more static, only able to be changed under certain circumstances, Policies are more flexible. Because of the flexibility of Policies vs By-Laws, it is common to limit the By-Laws to the bare minimum and govern by Policy instead. A Policy can be a Goal or Objective of the organization, and how to go about achieving that. Currently, FMV only provides this service in Nova Scotia.

## Branches

Each of the branches narrow the focus and get increasingly specific about what the Village will be doing and how. An illustration of what is included in which document is below:

Document	What	Why	How	Where	When	Who
Village Scope	Yes	Yes				
Strategic Plan	Yes	Yes	Yes	Yes		
Project Management Plan	Yes	Yes	Yes	Yes	Yes	Yes

Table 2: Branches

### Village Scope

This looks at the “Scope” and “Goals” of the Client in two ways. The first is through the lens of the Developmental Stages: Capacity Building, Planning, Study, Pilot, Capital, and Post Construction. The second is through the lens of the village itself. Because a community is not a project, it does not have a defined “end” or “completion”, so where will the community be in 20 years, 30 years, or even 50 years. This document will feed into the “Strategic Plan”.



## Strategic Plan

The Strategic Plan maps out all the things that the Client wants to achieve and all the different paths for making that happen. It can include timelines, a SWOT analysis (Strengths, Weaknesses, Opportunities, and Threats), and other details for how the Client will get from where they are to where they want to be. This is what will be required to create a Project Management Plan (PMP).

## Project Management Plan

*FMV does not currently provide this service. We recommend you contact Murray Tate at Tate Engineering for Project Management services.*

## Fruits - Balanced Scorecard

The Balanced Scorecard is a document that combines information from a number of sources and references a variety of topics. It makes it easier to see problems before they happen. Topics included in the scorecard are different for each organization, and even for each project being monitored.

## Fruits - Key Performance Indicators (KPIs)

These could be anything you want to measure; clicks on your website, number of sales, calls made in a day, literally anything that can be counted or measured can go here. The “Key” in Key Performance Indicators comes from the fact that these things that are being measured are crucial to your organization’s success in meeting their goals as outlined in the Strategic Plan.



## Assets & Needs Assessment

The asset maps will use the concept of the Seven Capitals (Beaulieu, 2014) which explores more than just the financial assets of a community. These diverse forms of are woven together to create a holistic image of what the community can be and what it can do. The report will include the situation as it is, and the situation as it can be after the construction phases are complete.

This document is required by some funders.

## PESTLE Analysis

“PESTLE” is an acronym for the Political, Economic, Social, Technological, Legal, and Environmental factors that could impact the long- and short-term development of the village. The FMV version of this analysis also looks at how the Client will impact those factors in return.

## Housing Need Report

This document is used specifically to speak to the need for affordable housing in your region.

This document is required by nearly all the funders.

## Partnership List

This will detail all the potential partnerships the Client will need to become fully functional. This list will be used to guide stakeholder engagement. This will be more of a brainstorm with contact lists, no contact will be made with these potential partners at this time. It will include government agencies, non-profit entities, consultants, contractors, and other professionals who will be involved in the development of the village in one way or another.

This document is required by some funders.



## Engagement Planning

Because one plan can feed into the next, slowly narrowing the focus, the prices reflect this. However, if the Client chooses to use an Engagement Plan that they do themselves or have done by another agency, the price will reflect that too. This difference in communications time and billable days reflects the work needed to answer questions that are normally answered in the Engagement Plans that come before it.

## Engagement Sessions

Each type of engagement will be different, require different amounts of work and collaboration, and will be targeted to a different group. FMV can take on as much or as little of the duties as the Client chooses, and that will reflect the price of these sessions. For example, if the Client wishes to handle some of these duties, then that would reduce the billable hours resulting in a smaller bill. These prices do not include the cost of the venue, any printing, or other expenses associated with these events.

Included in each session is:

- ❖ Before Event:
  - Coordinate with the Client about how best to enact the Engagement Plan
  - Engaging the target participants.
  - Arranging the venue for the event.
  - Marketing / announcing the event.
- ❖ Day of Event:
  - Acting as the Moderator / Host for the event.
  - Speaking on relevant issues as discussed with the Client.
  - Preparing the venue (putting out snacks, printouts, etc.)
  - Cleaning up the venue after the event.
- ❖ Post Event:
  - An Engagement Session Report will be created for each event.



## Design & Construction Planning

### SASA Plan

SASA stands for Sustainability, Affordability, Services, and Accessibility. This document is required by most funders. It will outline, in broad strokes, the physical features that will lend themselves to sustainability, the definitions of affordability the village plans to use, what services the village hopes to be able to provide their members, and what level of accessibility is planned for.

This document is required by nearly all the funders.

### General Design Concepts

This will be similar to the SASA, but the General Design Concepts (GDC) will go into more detail and specifically for the physical elements. Some examples include:

- ❖ **Sustainability:** if the SASA Plan says that the village wished to be “passive solar”, the GDC reviews building angles, window heights, glazing percentages, and thermal mass types.
- ❖ **Affordability:** While it is not a physical element, the GDC will take the definitions of “affordable” decided on in the SASA Plan and show what kind of rents revenue that could generate.
- ❖ **Services:** if the SASA Plan says that the village will provide health services, the GDC will outline what structures or equipment may be needed to fulfil that service.
- ❖ **Accessibility:** if the SASA Plan says that the village will be “fully accessible”, the GDC will detail the hallway requirements, cupboard modifications, and walking path sizes that will be needed to meet the goal of being “fully accessible”.

This document will be used by the Architects when creating the designs. It will be a guide to what the Client needs and wants in relation to the SASA.

### Utilities Plan

This document will go into detail about the various utilities. It will look at the Power, Water, and Wastewater Treatment (WWT) elements of the village.

POWER	WATER	Wastewater
Generation	Collection & Purification	Rough Filtration
Transmission	Transmission	Primary (Filtration)
Storage	Storage	Secondary (Bioreactor)
Use / Conservation	Use / Conservation	Tertiary (Purification)

Table 3: Utilities Plan





## Land Use Plan

This document will align the local, regional, provincial, and federal Land Use By-Laws (LUB) and Building Codes with the high standards of ecologically responsible and socially responsive development. This will also review land use by-laws used in other regions that are more in line with the goals and standards of the ecovillage. These imported LUBs can be used to discuss options with a local municipal government who may be opposed to the specific types of construction methods or building types that the ecovillage is planning to use.

For example, if a municipality is opposed to (or has never considered) using Earthships for housing, this process will review other regions that do allow Earthships and use that to show the local municipality that it is possible.

## Architect Liaison

Some Clients are not comfortable with the jargon, planning, concepts, or ideas that goes along with this industry. Some Clients do not have the time to spend on this process. The Architect Liaison work is where FMV will take care of that process for you. By going through the other processes earlier in this Services List FMV will know exactly what it is that the Client is hoping to achieve. This means that FMV can answer most of the questions on design, features, placement, etc. without needing to involve the Client any more than they wish to be involved.

## Construction Project Aide

Similar to the work of the Architect Liaison, the Construction Project Aide will work with the chosen Construction Manager to answer any questions that might come up through the build process. The Construction Project Aide will also be on-site as often as the Client needs, within reason, to be the Client's eyes and ears. FMV staff have a good deal of experience on construction sites, working with contractors, and working through the build process.

## Farm & Food Plan

*This service will not be available until the end of 2025.*

This will require a topographic map of the property, local weather data, and the architect's plan for the placement of the entire built environment. This will also require extensive consultation with the Client around topics of diet, plant and animal preferences, amount of work the Client is willing / able to put into the farm work, and any businesses or industries the Client hopes to engage in (see "Financial Plan"). With this data FMV can create a layout map of the different permaculture zones and how best to use them to achieve the Client's goals.



## Financial Plan

This document will need to be updated and expanded upon with each Developmental Phase.

The documents or information needed to complete the Financial Plan for each phase are:

Phase	Capacity	Planning	Study	Pilot	Capital
Funding Plan	YES	YES	YES	YES	YES
Village Scope	YES	YES	YES	YES	YES
Financial Documents		YES	YES	YES	YES
Q: Income sources planned	YES	YES	YES	YES	YES
Q: Contractor Quotes		Initial	Updated	Updated	Updated
Q: Any other financial info		Initial	Updated	Updated	Updated

With this information FMV can provide the Client and the funders with an estimate of the financial viability of the project, and specific Financial KPIs. This is required by funders after the Capacity Building Phase.

## Funding Applications

FMV will perform exactly ONE funding application for free, because most funders do not fund actions take prior to funding approval.

This includes the entire process; initial communication with the funder, profile creation, filling out the applications, and any revisions needed. This also includes any discussions had with the funders throughout the project process regarding the funding itself, but it does not include the reporting.

## Funder Project Reports

Every funder will require a report, either in the middle and end, or just at the end of the project. All the reports are included in this fee. For example, if a funder only needs one report at the end of the project, that will be the same as if the funder requires 3 updates plus the final report. These reports can be complicated and technical in some cases, and almost easy in others, depending on the funder, the project, and the deliverables.