

Katzie First Nation

Referrals Consultation & Engagement Policy



INTENTION STATEMENT

Katzie First Nation participates in referrals, consultation, and engagement processes that are largely established through Crown and Canadian legal frameworks. These processes commonly use terms such as rights, impacts, mitigation, accommodation, permits, and approvals.

Katzie's participation in these processes is informed by responsibilities carried through Katzie's Legal Order and laws, including responsibilities to Ancestors, lands, waters, community, relations, and future generations. This Policy does not define, explain, or outwardly share Katzie law. Rather, it establishes the referrals and consultation pathway through which Katzie engages with the Crown, proponents, and other parties when activities may affect Katzie territory, community, rights, interests, or responsibilities.

Through this Policy, Katzie seeks to support meaningful consultation and engagement, informed decision-making, respectful relationships, and pathways for Katzie to uphold its responsibilities and exercise its rights within consultation and engagement processes.

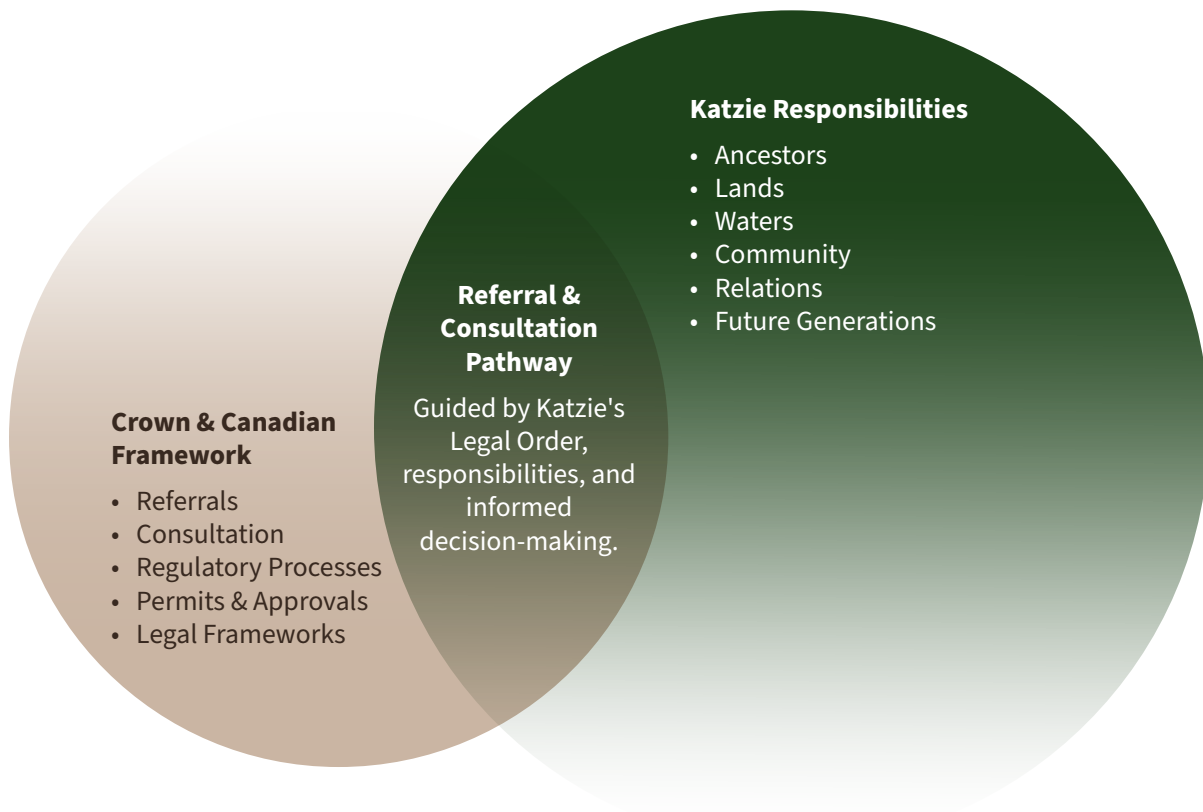




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A large elk with prominent antlers stands in a forest clearing, looking towards the camera. The background is a dense forest with green foliage. The text 'PART 1' is overlaid in large white letters, with 'PART' in a smaller font and '1' in a very large font. Below this, the title 'Policy Framework' is written in a large white font.

PART 1

Policy Framework

1 Introduction

2 Legal Framework

**3 Katzie's Consultation & Engagement
Objectives, Guiding Principles &
Expectations**

**4 Roles & Responsibilities in Referrals,
Consultation & Engagement**



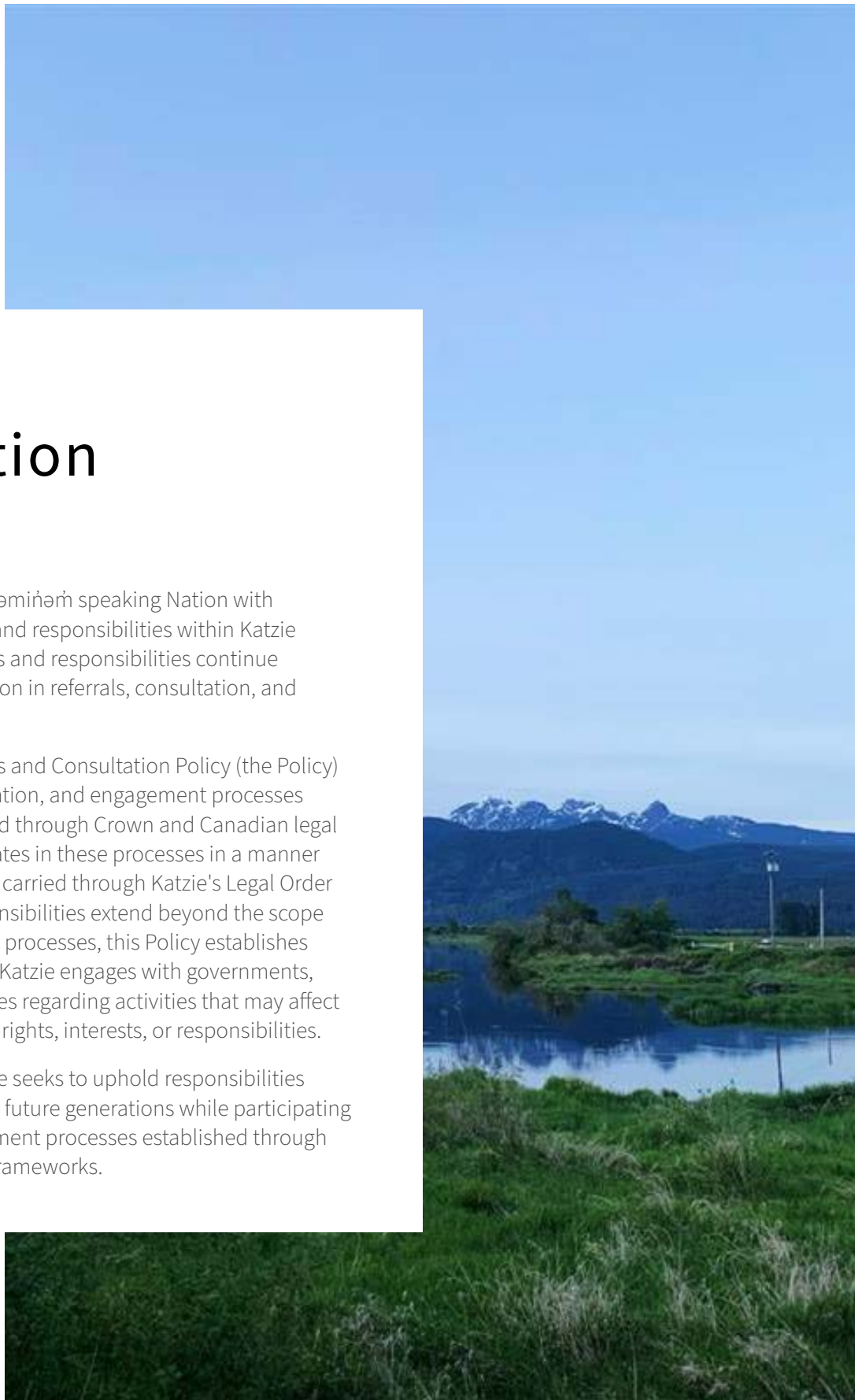
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Introduction

Katzie First Nation is a həŋqəmiŋəŋ speaking Nation with longstanding relationships and responsibilities within Katzie territory. These relationships and responsibilities continue to inform Katzie's participation in referrals, consultation, and engagement processes.

Katzie First Nation's Referrals and Consultation Policy (the Policy) addresses referrals, consultation, and engagement processes that are primarily established through Crown and Canadian legal frameworks. Katzie participates in these processes in a manner informed by responsibilities carried through Katzie's Legal Order and laws. While those responsibilities extend beyond the scope of referrals and consultation processes, this Policy establishes the pathway through which Katzie engages with governments, proponents, and other parties regarding activities that may affect Katzie territory, community, rights, interests, or responsibilities.

Through this pathway, Katzie seeks to uphold responsibilities carried to past, present, and future generations while participating in consultation and engagement processes established through Crown and Canadian legal frameworks.



1.1 Purpose

The Policy establishes Katzie's expectations, processes, and protocols for referrals, consultation, and engagement regarding activities that may affect Katzie territory, community, rights, interests, or responsibilities.

Specifically, the Policy establishes the objectives, principles, expectations, processes, and roles and responsibilities that guide consultation and engagement between Katzie, the Crown, proponents, and other parties, including relationship building, impact avoidance, mitigation, accommodation, and ongoing engagement.

The Policy is also intended to provide guidance to the Crown and proponents regarding Katzie's expectations for consultation and engagement processes, including the fulfillment of the Crown's constitutional obligations, meaningful relationship building, and implementation of the *United Nations Declaration on the Rights of Indigenous Peoples*.

The Policy aims to support consultation and engagement processes that reflect Katzie perspectives, priorities, and decision-making, and that enable informed consideration of potential effects on Katzie rights, territory, community, and interests. Through these processes, Katzie seeks to identify pathways that support the exercise of Katzie rights and the fulfillment of responsibilities carried through Katzie's Legal Order and laws. The Policy also supports respectful relationship-building and consultation processes that contribute to reconciliation and long-term understanding between Katzie, governments, proponents, and other parties.



Reconciliation Requires Meaningful Participation

Reconciliation is a shared responsibility. The Truth and Reconciliation Commission Calls to Action and the United Nations Declaration on the Rights of Indigenous Peoples encourage governments, institutions, and proponents to build relationships based on recognition, respect, and meaningful participation in decisions that affect Indigenous Peoples, lands, and communities. Consultation should be approached as a process that supports informed decision-making, relationship-building, and long-term understanding.

1.2 Key Terms & Definitions

Katzie's Legal Order refers to the values (snáps), principles, laws, and protocols through which responsibilities to past, present, and future generations are understood and carried.

Katzie Guardians refers to a Katzie representative who helps monitor, understand, and respond to activities occurring within Katzie territory and supports Katzie in carrying responsibilities to lands, waters, cultural heritage, Ancestors, and past, present, and future generations.

Activity refers to any legislation, regulation, policy, procedure, plan, tenure, grant, licence, permit, approval, authorization, development, operation, decision, or other action that may affect Katzie rights, territory, community, interests, or responsibilities. This may include Crown-sponsored or Crown-authorized activities, land and resource authorizations, development or infrastructure projects, resource management activities, activities affecting lands, waters, wildlife, fish, plants, habitats, ecosystems, cultural heritage, ancestral belongings, or Katzie's ability to exercise rights or carry responsibilities. It may also include legislation, policies, plans, programs, strategies, decision-making frameworks, land use planning, resource management planning, conservation planning, cumulative effects management, or any other process that may affect Katzie territory, community, rights, interests, or responsibilities.

Accommodation refers to measures taken to avoid, minimize, mitigate, address, or compensate for impacts of a proposed activity on Katzie's rights pursuant to the Crown's constitutional obligations to consult and accommodate.

Consultation refers to a process of engagement and deliberation undertaken in good faith with Katzie to understand the potential impacts of a proposed activity on Katzie rights, and to identify opportunities to avoid, minimize, mitigate, or accommodate those impacts. Consultation provides a pathway for Katzie to communicate concerns, priorities, and information relevant to decision-making regarding activities that may affect Katzie territory, community, and interests. While the Crown may delegate procedural aspects of Consultation to proponents, the Crown remains responsible for ensuring the substantive components of the Crown's duty to consult are fulfilled.

Crown refers to Canada and/or British Columbia and their respective ministries, agencies, departments, boards, commissions, Crown corporations, decision-makers, and delegates.

Katzie's Rights refers to Katzie's inherent and constitutionally protected Aboriginal rights, including title, which have never been ceded, surrendered, or relinquished. Katzie's rights include, but are not limited to, rights relating to hunting, fishing, and gathering; the use, management, and stewardship of lands, waters, and resources within Katzie territory; the protection of places, cultural heritage, and interests associated with the exercise of Katzie rights; and participation in decisions that may affect Katzie rights, title, territory, community, or interests.

Katzie's participation in consultation and engagement processes is informed by responsibilities carried through Katzie's Legal Order and laws, including responsibilities to Ancestors, present and future generations, lands, waters, and relations.

Katzie Territory refers to the lands and waters identified in **Schedule A**, with which Katzie has longstanding relationships and responsibilities, and on which Katzie people have lived, travelled, harvested, cared for, and maintained reciprocal relationships since time immemorial.

Proponent refers to the party initiating the activity and responsible for advancing consultation or engagement regarding that activity. For the purposes of this Policy, the Crown may also be a Proponent.

1.3 Administration

The Policy is administered by Katzie's Territorial Guardianship & Referrals Department (the Department). Katzie Chief & Council approves this Policy and any substantive amendments. The Department may develop, implement, and update supporting procedures, forms, schedules, templates, and agreements, guidance documents, and administrative tools required to administer this Policy. The Department coordinates referrals, consultation, and engagement processes and serves as the primary point of contact for activities that may affect Katzie territory, community, rights, interests, or responsibilities.

The Department reviews referral information, coordinates technical review and engagement activities as required, and provides information, analysis, and recommendations to support consultation, engagement, and decision-making processes.

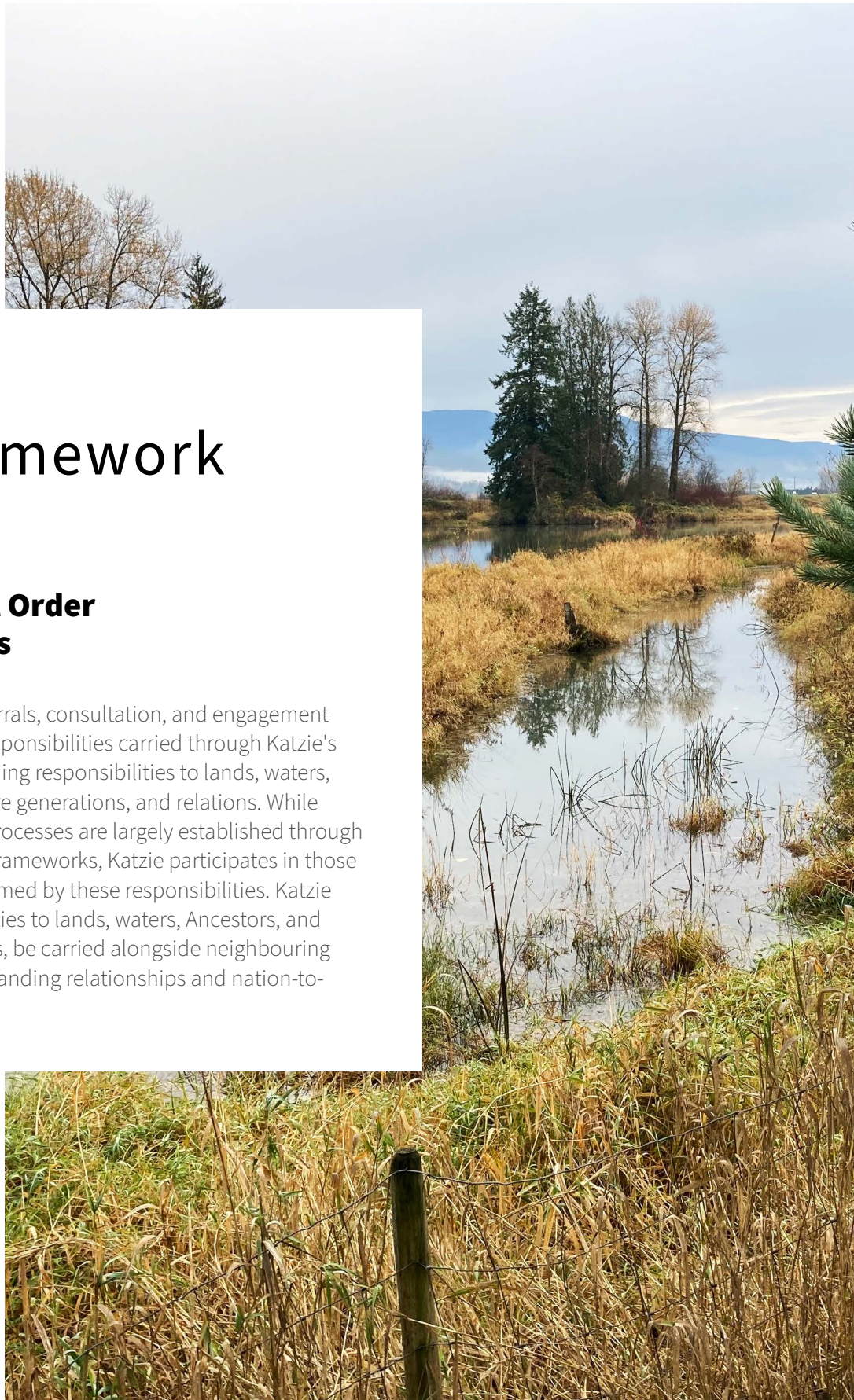
This Policy will be reviewed periodically by Katzie Chief and Council to ensure it continues to reflect Katzie priorities, legal developments, governance objectives, and operational requirements.



2 Legal Framework

2.1 Katzie's Legal Order & Responsibilities

Katzie's participation in referrals, consultation, and engagement processes is informed by responsibilities carried through Katzie's Legal Order and laws, including responsibilities to lands, waters, Ancestors, present and future generations, and relations. While referrals and consultation processes are largely established through Crown and Canadian legal frameworks, Katzie participates in those processes in a manner informed by these responsibilities. Katzie recognizes that responsibilities to lands, waters, Ancestors, and relations may, in some areas, be carried alongside neighbouring First Nations through longstanding relationships and nation-to-nation protocols.



2.2 Katzie Incremental Self-Governance

Katzie is currently working with the provincial and federal governments to develop a Katzie-specific incremental approach to self-government. Incremental self-governance agreements are being negotiated to support the recognition and implementation of Katzie's decision-making authority, management, and co-management of lands and resources within Katzie territory. The territory shown in **Schedule A** reflects the territory currently used for referrals, consultation, engagement, and Katzie's Incremental Self-Governance processes. Our Incremental Self-Government Department continues to work towards government-to-government agreements with the Province and Canada, which may affect parts of this Policy over time. The Policy will be revised, as appropriate or required, as new agreements are developed and implemented.



UNDRIP and Free, Prior and Informed Consent

UNDRIP recognizes the rights of Indigenous Peoples to determine priorities for the use and development of their lands and resources. Consultation and cooperation should occur in good faith through Indigenous representative institutions before decisions are made that may affect Indigenous lands, territories, or resources.

2.3 Canada's Legal Framework

Section 35 of the Constitution Act, 1982 recognizes and affirms existing Aboriginal and treaty rights in Canada. Canadian courts have further defined the scope and content of Aboriginal rights and title, including the Crown's obligations when decisions may affect those rights. For the purposes of this Policy, Aboriginal rights and Aboriginal title are summarized below:

Aboriginal rights: practices, customs, and traditions integral to the distinctive culture of the First Nations group claiming the right prior to European contact. This includes modern exercises of practices, customs, and traditions where they are connected to and reasonably regarded as a continuation of the pre-contact integral practice. Canadian courts have recognized Aboriginal rights for particular First Nations to include subsistence-based rights, including hunting, trapping, and fishing; the right to harvest and trade particular species on a commercial basis; social and ceremonial rights; and, in some circumstances, rights relating to self-governance.

Aboriginal title: Aboriginal title is a subset of Aboriginal rights that represents a right to the land itself. Aboriginal title includes the right to exclusive use and occupation of lands, including for non-traditional purposes; the right to decide how the lands will be used and managed; and the right to the economic benefits of the lands.

United Nations Declaration on the Rights of Indigenous Peoples (UNDRIP)

Endorsed by Canada in 2016, UNDRIP affirms the rights of Indigenous Peoples to maintain and strengthen their enduring relationships with their lands, including their responsibilities to care for, use, and sustain those lands. Article 32 of UNDRIP establishes the standard for seeking Free, Prior and Informed Consent, as follows:

1. *Indigenous peoples have the right to determine and develop priorities and strategies for the development or use of their lands or territories and other resources.*
2. *States shall consult and cooperate in good faith with the indigenous peoples concerned through their own representative institutions in order to obtain their free and informed consent prior to the approval of any project affecting their lands or territories and other resources, particularly in connection with the development, utilization or exploitation of mineral, water, or other resources.*

The province of British Columbia passed the *Declaration on the Rights of Indigenous Peoples Act* (DRIPA) on November 28, 2019. DRIPA affirms the application of UNDRIP in British Columbia and establishes a framework for aligning provincial laws with UNDRIP in consultation and cooperation with Indigenous Peoples.

On June 21st, 2021, the federal *United Nations Declaration on the Rights of Indigenous Peoples Act* received Royal Assent and came into force. Similar to DRIPA, the federal *United Nations Declaration on the Rights of Indigenous Peoples Act* provides a framework for implementing UNDRIP at the federal level in cooperation with Indigenous Peoples.

Duty to Consult

Canadian courts have recognized a constitutional obligation on the Crown to consult and, where appropriate, accommodate Indigenous Peoples when section 35 rights may be affected by a decision or activity. The Duty to Consult stems from the Crown's special fiduciary-like relationship with Aboriginal Peoples and is grounded in the Honour of the Crown. The Duty to Consult is a constitutional obligation, and legislation or policy that interferes with its fulfillment may be found unconstitutional.

While the Duty to Consult rests with the Crown, the Crown may delegate procedural aspects of the duties to third parties (i.e., proponents). When assisting in carrying out procedural aspects of the Crown's duty to consult, third parties are encouraged to engage with Indigenous Peoples early in the planning process in support of information sharing and relationship building.

The Federal Court has also recently determined that the duty to consult and accommodate must be informed by UNDRIP, including the principles of free, prior and informed consent, and consultation must be informed by and tailored to consider Indigenous perspectives, laws, knowledge, and practices.



3

Katzie's Consultation & Engagement Objectives, Guiding Principles & Expectations



3.1 Objectives

1. Support meaningful referrals, consultation, and engagement processes regarding activities that may affect Katzie rights, territory, community, interests, and responsibilities.
2. Establish and maintain respectful relationships with the Crown, proponents, and other parties based on trust, transparency, accountability, and reciprocity.
3. Identify, understand, avoid, minimize, and mitigate potential impacts to Katzie rights, territory, community, interests, and responsibilities, and identify appropriate accommodation measures where required.
4. Support informed decision-making by ensuring Katzie perspectives, priorities, and concerns are meaningfully considered throughout consultation and engagement processes.
5. Identify opportunities for economic participation, community benefits, and shared benefits that are consistent with Katzie priorities and interests.
6. Provide opportunities for Katzie Guardians to participate in monitoring, oversight, information gathering, and care of lands, waters, cultural heritage, and relations.
7. Work in good faith to support consultation and engagement processes and seek free, prior, and informed consent for activities and decisions that may affect Katzie rights, territory, community, or interests.
8. Support land, water, and resource-related decisions and identify pathways through consultation and engagement processes that reflect Katzie perspectives, priorities, responsibilities, and long-term interests, including responsibilities to past, present, and future generations.



Capacity Funding Does Not Equal Consent

Capacity funding supports Katzie's ability to meaningfully participate in consultation and engagement processes. It should not be interpreted as approval of, support for, or consent to a proposed activity.

3.2 Consultation and Engagement Guiding Principles and Expectations

Guiding Principles

1		Guiding Principle 1: Consultation and Engagement in Good Faith
2		Guiding Principle 2: Consensus-Based Process
3		Guiding Principle 3: Comprehensive Information
4		Guiding Principle 4: Holistic and Cumulative Effects Perspective in Assessments
5		Guiding Principle 5: Broader Context for Consultation and Decision-Making
6		Guiding Principle 6: Capacity for Meaningful Consultation
7		Guiding Principle 7: Reasonable Timelines and Flexibility
8		Guiding Principle 8: Involvement of Katzie Guardians
9		Guiding Principle 9: Responsible Development & Shared Benefits
10		Guiding Principle 10: Responsibility of the Crown
11		Guiding Principle 11: Impact Avoidance, Mitigation & Accommodation
12		Guiding Principle 12: Land-Based Solutions
13		Guiding Principle 13: No Prejudice

Guiding Principle Expectations

Guiding Principle 1: Consultation and Engagement in Good Faith



Katzie expects all consultation and engagement to be undertaken in good faith, with honesty, transparency, and respect for all parties involved. Katzie must be

involved in determining the consultation and engagement process, and all consultation and engagement must proceed through the appropriate channels identified in this Policy.

Unless otherwise directed by Katzie, informal discussions or discussions with anyone other than the Katzie Territorial Guardianship & Referrals Department and outside of the process set out in this Policy must not be construed by the Crown as fulfillment of its duty to consult. Referrals and inquiries must not be sent directly to Katzie Chief and Council.

Katzie expects the Crown and proponents to approach consultation and engagement with an open mind. Decision-making outcomes must not be predetermined; consultation and engagement must occur before decisions are made, and Katzie must be able to meaningfully inform and influence decision-making processes.

Guiding Principle 2: Consensus-Based Process



Katzie has an interest in participating meaningfully in decisions that may affect Katzie rights, territory, community, interests, and responsibilities.

Katzie expects consultation and engagement processes to be, at a minimum, consensus-seeking and undertaken in a manner consistent with the principles of Free, Prior, and Informed Consent.

Where appropriate, Katzie and the Crown should explore opportunities for collaborative or shared approaches to decision-making.

Guiding Principle 3: Comprehensive Information



Katzie requires timely, accurate, relevant information about proposed activities to meaningfully participate in consultation and engagement

processes and assess potential impacts to Katzie rights, territory, community, interests, and responsibilities.

Information provided must be relevant to Katzie, disclose known information regarding the activity, potential effects, uncertainties, risks, alternatives, and proposed mitigation measures, and be provided in a manner and format that is accessible and useful to Katzie. Information should be made available as early as possible to support meaningful review and participation.

Katzie expects technical, regulatory, and scientific information to be presented in plain and accessible language, supported by technical documentation where appropriate.

The inability of Katzie to engage, participate, or respond due to insufficient, incomplete, inaccurate, or unclear information shall not be interpreted as consent to an activity.

Guiding Principle 4: Holistic and Cumulative Effects Perspective in Assessments



Katzie expects assessments related to a proposed activity, including environmental, cultural heritage, socioeconomic, health, or other assessments, to incorporate Katzie perspectives and consider potential impacts to Katzie rights, territory, community, interests, and responsibilities through a holistic and cumulative effects lens.

Katzie recognizes that lands, waters, cultural heritage, community wellbeing, future generations, and relations are interconnected. Potential impacts may therefore extend beyond the specific environmental, cultural, social, economic, or regulatory categories commonly used in assessment processes and cannot be considered in isolation.

Katzie's review and consideration of proposed activities may be informed by a holistic understanding of how effects interact and influence one another over time, including past, present, and future conditions and what is needed to support future generations.

Katzie expects to have an opportunity to participate meaningfully in the design, scope, review, and assessment of potential impacts, including contributing to assessment scope, methodologies, terms of reference, study design, review of studies and supporting information, and studies or assessments needed to support a comprehensive understanding of potential impacts.

Guiding Principle 5: Broader Context for Consultation and Decision-Making



Consultation and engagement processes should recognize that individual activities are not considered in isolation. Proposed activities are assessed within a broader context that includes existing and anticipated activities, cumulative effects, community priorities, ongoing responsibilities, and the wellbeing of past, present, and future generations.

As a result, potential impacts may be considered beyond the immediate footprint, timeline, or scope of a proposed activity to understand how they interact with broader territorial, cultural, environmental, social, and community considerations.

Guiding Principle 6: Capacity for Meaningful Consultation



Meaningful consultation and engagement requires Katzie to have sufficient capacity and resources to review and assess relevant information, participate in consultation and engagement activities, undertake community engagement as needed, and prepare responses.

Where external technical, legal, scientific, cultural, or other support is required, capacity funding must be provided to enable Katzie to obtain that support. Katzie must also be provided with the resources necessary to participate meaningfully in consultation and engagement processes.

Katzie's standard capacity agreement will apply. Any amendments to this agreement will require the proponent to bear the legal costs associated with negotiating those amendments, subject to mutually agreed terms.

Where additional studies or assessments are required to address Katzie concerns, information needs, or potential impacts, including Katzie-led studies, those studies will be undertaken at the expense of the Crown or proponent.

The inability of Katzie to engage or respond due to a lack of capacity or resources shall not be interpreted as consent to an activity.

Similarly, the provision of capacity funding shall not be interpreted as Katzie approval of, support for, or consent to an activity. Capacity funding supports meaningful participation in consultation and engagement processes and enables informed consideration of activities that may affect Katzie rights, territory, community, interests, or responsibilities.

Guiding Principle 7: Reasonable Timelines and Flexibility



Katzie receives a high volume of referrals, consultation requests, and engagement requests and must review a wide range of technical, environmental, cultural

heritage, socioeconomic, regulatory, and planning information. Meaningful participation often requires technical review, impact assessment, community engagement, internal coordination, site visits, and the preparation of informed responses and recommendations.

Meaningful consultation requires sufficient time and flexibility for Katzie to review information, assess potential impacts, seek additional support where needed, complete internal and community engagement processes, and participate effectively in decision-making processes.

Consultation and engagement should begin as early as possible in project planning and decision-making processes. The Katzie Territorial Guardianship & Referrals Department should be contacted early to avoid situations where responses are required on short notice. Timelines may need to be adjusted to support meaningful consultation, engagement, mitigation, accommodation, and community participation.

Proponents are expected to work collaboratively with Katzie to identify reasonable timelines and practical solutions that support meaningful participation. Katzie will work with the Crown and proponents to identify mutually agreeable and reasonable timelines.

The inability of Katzie to engage or respond due to insufficient timelines, inadequate capacity, or a lack of flexibility shall not be interpreted as consent to an activity.

Guiding Principle 8: Involvement of Katzie Guardians



Katzie Guardians are Katzie representatives who help Katzie understand, monitor, and respond to activities occurring within Katzie territory. They serve as Katzie's

eyes and ears on the land and support Katzie in carrying responsibilities and relationships associated with land, waters, cultural heritage, and relations.

Katzie Guardians may participate in consultation and engagement processes, monitoring activities, information gathering, site visits, oversight activities, and other activities associated with a proposed activity.

Depending on the nature of an activity and the potential for impacts, Katzie Guardians may participate in physical works, including ground disturbance activities, to support monitoring, information gathering, and the identification and management of potential impacts.



Meaningful Consultation Requires More Than Notification

Meaningful consultation requires early engagement, sufficient information, appropriate capacity, reasonable timelines, and genuine consideration of concerns, recommendations, and potential impacts before decisions are made.

Guiding Principle 9: Responsible Development & Shared Benefits



Katzie recognizes the importance of new and appropriate development to address the needs of communities and guests within our territory. Katzie is prepared to

support responsible development that reflects Katzie priorities and interests and contributes to the long-term wellbeing of Katzie people, lands, waters, and community.

Katzie expects that activities occurring within Katzie territory provide opportunities for Katzie people to share in the social, economic, cultural, and environmental benefits associated with those activities. Benefits may include monetary and non-monetary measures such as business development opportunities, contracting and procurement opportunities, revenue sharing, equity, scholarships, investments in community infrastructure, land-based solutions, conservation measures, restoration and enhancement activities, remediation measures, and training and employment opportunities.

This may also include partnership opportunities that support long-term economic participation and shared prosperity. Consistent with the principles of reconciliation, Katzie should have opportunities to share in the benefits associated with activities in our territory and should not bear a disproportionate share of the impacts associated with those activities.

Guiding Principle 10: Responsibility of the Crown



While the Crown may delegate procedural aspects of consultation to proponents, the Crown remains responsible for the substantive fulfillment of its consultation

obligations and for ensuring that consultation and engagement processes are meaningful.

Where consultation or engagement undertaken by a proponent is not sufficient to address potential impacts to Katzie rights, territory, community, interests, or responsibilities, Katzie expects the Crown to take the steps necessary to ensure its consultation obligations are meaningfully fulfilled before decisions are made.

Guiding Principle 11: Impact Avoidance, Mitigation & Accommodation



Katzie expects that the Crown and proponents will meaningfully consider and address concerns raised through consultation and engagement processes, including

through avoidance, minimization, mitigation, or accommodation of potential impacts to Katzie rights, territory, community, interests, and responsibilities. Avoidance of impacts is the preferred outcome wherever possible.

Where impacts cannot be avoided, Katzie expects that reasonable measures will be taken to minimize and mitigate impacts before accommodation measures are considered. Where potential impacts cannot be avoided, minimized, or effectively mitigated, Katzie may seek accommodation measures that are appropriate to the nature of the activity, the potential impacts, and the circumstances of the consultation process.

Depending on the nature of the activity and the potential for impacts, accommodation measures may include additional studies or assessments, changes to scope, timing, design, methods, or location, legally binding conditions, monetary or non-monetary benefits, business development opportunities, contracting and procurement opportunities, revenue sharing, equity, scholarships, community infrastructure investment, land restitution, conservation, restoration, remediation, training and employment opportunities, Guardian participation, enhanced monitoring programs, oversight committees, liaison roles, or other collaborative governance and oversight arrangements.

Guiding Principle 12: Land-Based Solutions



Katzie recognizes that the loss and alienation of lands within Katzie territory has had significant and ongoing impacts on Katzie people, community wellbeing,

governance, culture, and the exercise of rights and responsibilities.

Consistent with the principles of reconciliation and self-determination, Katzie supports opportunities that strengthen Katzie's relationship with lands and waters and contribute to the long-term wellbeing of Katzie people and community.

When considering activities in Katzie territory and associated accommodation measures, the Crown and proponents should consider whether land-based solutions may be appropriate.

This may include land transfers, conservation and stewardship initiatives, co-management arrangements, land access opportunities, restoration projects, land acquisition opportunities, or other measures that support Katzie's relationship with and responsibilities to the land.

Land-based solutions may not be appropriate in every circumstance. Where they are not feasible or appropriate, other fair and reasonable accommodation measures should be explored.

Guiding Principle 13: No Prejudice



Participation in consultation, engagement, and negotiation processes does not imply Katzie's agreement, support, approval, or free, prior, and informed consent

for an activity.

Nothing in this Policy limits or diminishes the Crown's constitutional obligations to consult and, where appropriate, accommodate Katzie.

This Policy is without prejudice to Katzie rights, title, responsibilities, interests, governance authorities, or any existing or future claims, agreements, negotiations, or settlements involving Katzie.

4

Roles & Responsibilities in Referrals, Consultation & Engagement



Katzie



Katzie is responsible for participating in consultation and engagement processes and providing information regarding potential impacts on Katzie rights, territory, community, interests, and responsibilities. This may include concerns, interests, and priorities identified through Katzie review and engagement processes.

Katzie will participate in consultation and engagement processes in good faith and will strive to provide timely responses based on available capacity, resources, and information.

Katzie will make reasonable efforts to ensure Katzie people participating in consultation and engagement processes are provided with sufficient information and time to share comments, concerns, knowledge, and perspectives.

Katzie expects that adherence to this Policy and associated expectations by all parties will support timely, meaningful, and informed consultation and engagement processes.



The Duty to Consult Remains a Crown Responsibility

While procedural aspects of consultation may be delegated to proponents, the Crown remains responsible for ensuring its consultation obligations are meaningfully fulfilled.

The Crown



The provincial and federal governments are responsible and accountable for respecting and upholding Aboriginal rights and title and managing and implementing the duty to consult and accommodate. Procedural aspects of consultation may be delegated to proponents, including Crown corporations, but the Crown remains responsible for the substantive aspects of consultation and accommodation.

Katzie expects the provincial and federal governments to engage with Katzie on a government-to-government basis and to work in good faith to obtain Katzie's free, prior, and informed consent before making decisions that have the potential to affect Katzie rights, territory, community, interests, and responsibilities.

Where a Proponent has failed to meaningfully engage with Katzie, Katzie expects the Crown to reclaim responsibility for procedural aspects of consultation and engage directly with Katzie. Where the Crown undertakes roles or engagement activities identified for proponents under this Policy, the Crown will adhere to the relevant requirements identified in this Policy.

Katzie expects the Crown to engage in a manner that is consensus-seeking, informed by good faith dialogue, information sharing, meaningful consideration of Katzie input, collaborative problem-solving, and coordinated consultation where there is overlap in provincial and federal jurisdiction.

Proponents



Proponents are responsible for working with the Crown and Katzie in accordance with this Policy. This includes engaging as early as possible to support relationship building with Katzie, developing and implementing consultation and engagement plans and activities where required, providing sufficient capacity funding and support, providing sufficient, accessible, and timely information, meaningfully considering Katzie input, and clearly communicating how Katzie comments, recommendations, concerns, information requests, and technical review findings have been considered and addressed.

Proponents are expected to engage with Katzie in good faith and in a manner that is consensus-seeking, informed by information sharing, meaningful dialogue, and consideration of Katzie input throughout project planning and decision-making processes.

Where the scale of the activity and its potential impacts warrant accommodation measures, including benefit sharing, economic participation, community investment, stewardship commitments, or Relationship Agreements, proponents are expected to work collaboratively and creatively with Katzie to identify appropriate approaches. These discussions should be initiated early in the engagement process to enable a broad range of opportunities and options to be considered.

Where there is potential for adverse impacts on Katzie rights, territory, community, interests, and responsibilities, proponents are responsible for identifying and implementing measures to avoid, minimize, mitigate, and, where appropriate, accommodate such impacts.

Local and Regional Government



Local and regional governments may have roles in referrals, consultation, engagement, land use planning, and decision-making processes that have the potential to affect Katzie rights, territory, community, interests, and responsibilities. These may include Official Community Plans, Regional Growth Strategies, zoning and land use decisions, servicing and infrastructure planning, parks planning, boundary changes, development approvals, and other planning or regulatory decisions that may affect Katzie interests or areas of importance to Katzie.

Katzie encourages local and regional governments to engage early and proactively with Katzie and to support ongoing neighbour-to-neighbour relationship building.

Where consultation obligations may be engaged, local and regional governments are expected to work collaboratively with the Crown to understand respective roles and responsibilities and to ensure engagement processes are coordinated and respectful of Katzie rights, territory, community, interests, and responsibilities. Local and regional governments are also encouraged to work with Katzie to identify opportunities for collaboration, information sharing, reconciliation, stewardship, land use planning, and shared decision-making where appropriate.



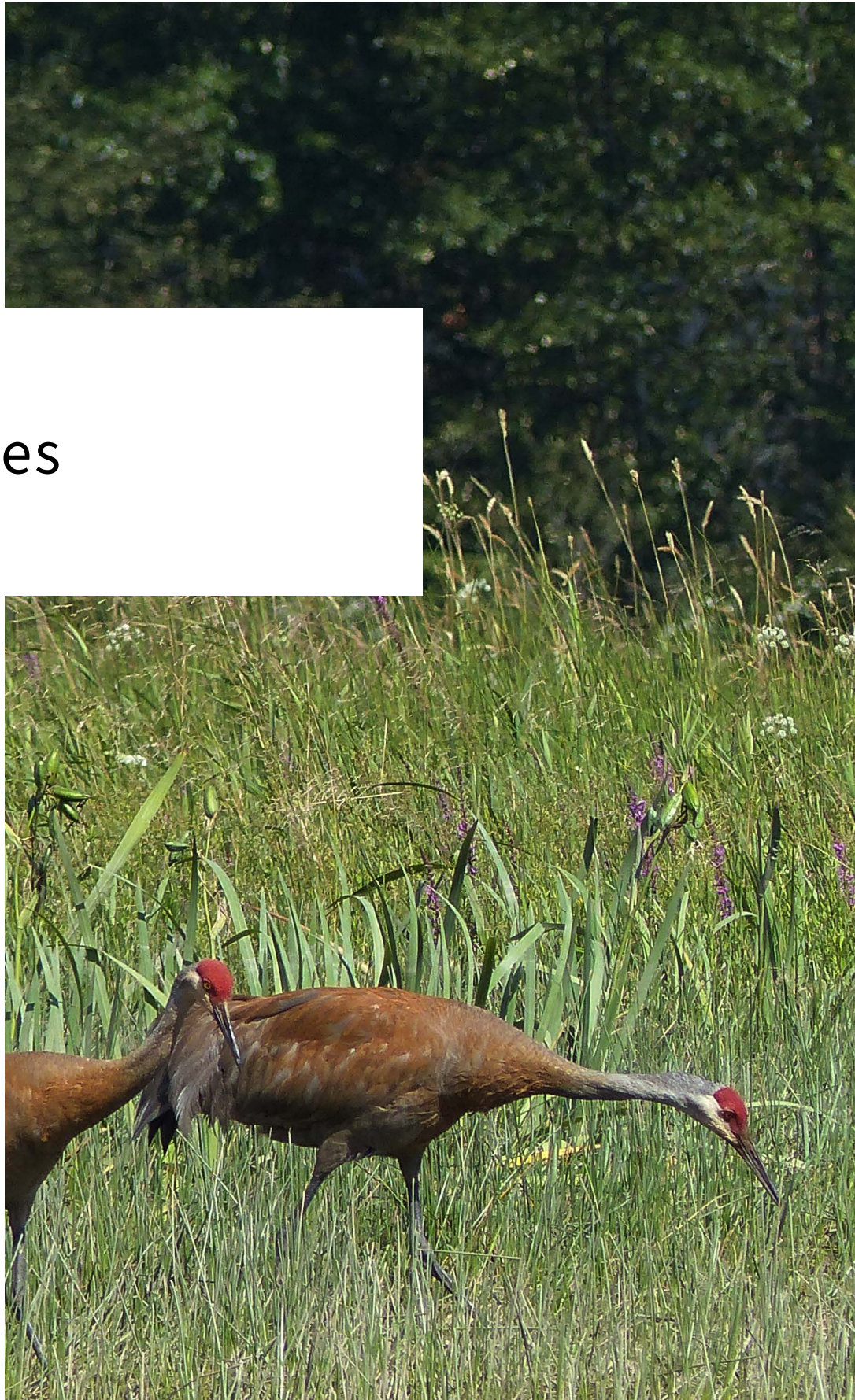
PART 2

Consultation & Engagement Procedures

5 Procedures

5

Procedures



KATZIE CONSULTATION AND ENGAGEMENT PROCESS

1 Referral Submission Proponent submits referral with project information and supporting materials.	 Referral Intake Form Schedule C Schedule D
2 Katzie Screening & Review Katzie reviews the referral to understand the project and assess potential impacts and information needs.	 10-business days to respond to Referral Intake Form
3 Basket Assignment Referral is assigned to the appropriate consultation basket based on project type, location, and impacts.	 Baskets 1-4 See Basket System
4 Consultation and Engagement Engagement planned and carried out., and Katzie determines if Guardian participation is required.	 Katie Guardian Schedule F
5 Mitigation, Accommodation, and Relationship Agreement Opportunities Collaborate to address potential impacts through appropriate measures and agreements.	
6 Project Implementation Project proceeds in accordance with agreements and mitigation/accommodation measures.	
7 Guardian Monitoring and Follow-Up Katie Guardians monitor project activities and follow up to ensure commitments are met and relationships are maintained.	 Katie Guardian

5.1 Submit a Referral Request

A referral begins when the Proponent completes the *Referral Intake Form* through Katzie's Trailmark referrals management system. All referral requests must be submitted through Trailmark.

Proponents who do not yet have a Trailmark account must request one through the account request portal. A *Proponent's Guide Using the Trailmark Referrals Management System* is provided in **Schedule C**. Once an account has been established, proponents may sign in and complete the Referral Intake Form. The form can be saved and returned to later if additional information is required before submission.

Trailmark serves as Katzie's official record for referral information, supporting documents, and project updates. Proponents must use Trailmark to submit new referrals, provide supporting documentation, respond to information requests, and maintain referral files throughout the consultation and engagement process. Where

project information changes after submission, including changes to project scope, location, timing, methods, authorizations, studies, plans, schedules, permits, or supporting documentation, the applicable Trailmark referral file must be updated as soon as practicable. Consultation correspondence may also occur through email, meetings, letters, or other engagement processes where appropriate.

Preliminary information about the nature of the activity, proposed location, anticipated timelines, and potential impacts or benefits should be provided at intake. A summary of information required to initiate a referral is provided in **Schedule D** for reference. All other inquiries must be sent to Katzie's Referrals Office.

A new referral request is required where a new activity, decision, authorization, or materially changed activity is proposed and that activity has the potential to affect Katzie's rights, territory, community, interests, or responsibilities. Where there is uncertainty about whether a new referral is required, proponents are encouraged to contact the Katzie Referrals Office for guidance.



5.2 Katzie Screens the Referral and Assigns a Basket



The basket system is intended to help Katzie, the Crown, proponents, and other parties understand the anticipated level of review, engagement, capacity, and follow-up that may be required for a proposed activity. Basket assignments are administrative tools intended to guide review and engagement requirements and do not limit Katzie's ability to request additional information, review, engagement, mitigation, monitoring, accommodation, or other measures as new information becomes available. Basket assignment is based on the information available at intake and may be adjusted if new information, changed circumstances, or additional potential impacts are identified.

Katzie will complete a preliminary review of the information provided to confirm whether sufficient information has been submitted, identify the nature and location of the activity, assess the potential for impacts to Katzie rights, territory, community, interests, and responsibilities, and determine the appropriate referral basket and consultation pathway.



Basket Assignment May Change

Basket assignments are based on information available at intake and may be adjusted if new information, changed circumstances, or additional potential impacts are identified.

In assigning a referral basket, Katzie may consider the location, nature, scope, complexity, and potential impacts of the activity, including potential effects on lands, waters, cultural heritage, community wellbeing, cumulative effects, and the anticipated level of review, engagement, monitoring, and mitigation required.

Katzie will assign the referral to one of four baskets.

- **Basket 1** applies where the activity has low potential for impacts and can generally be addressed through standard mitigation measures, best management practices, and ongoing notifications.
- **Basket 2** applies where project-specific review and input from Katzie may be required, including additional engagement, monitoring, site visits, or mitigation measures.
- **Basket 3** applies where the activity may result in moderate impacts and requires a more detailed review process, capacity funding, and additional support.
- **Basket 4** applies where the activity is complex, strategic, or large in scale and requires a tailored consultation and engagement process, including community engagement, technical review, impact avoidance, mitigation, accommodation, and possible long-term relationship arrangements.

If insufficient information has been provided, Katzie will request additional information before assigning the referral to a basket and initiating the appropriate pathway. Referral screening timelines do not commence until Katzie determines that sufficient information has been provided to complete screening. Katzie requires a minimum of 10 business days to complete screening and provide an initial response to a completed Referral Intake Form. Screening timelines may be affected by referral volume, complexity, staff capacity, or the need for additional review. Where additional time is required, Katzie will provide notice of an updated response timeline as soon as reasonably practicable.

5.3 Plan Capacity, Fees, and Engagement Requirements

After assigning a referral basket, Katzie will identify the anticipated capacity, fee, and engagement requirements for the referral. Meaningful consultation and engagement may require capacity to review information, assess potential impacts, undertake community engagement, obtain technical or other support, and prepare informed responses. Capacity requirements will depend on the assigned basket, the nature of the activity, and the level of review or engagement required.

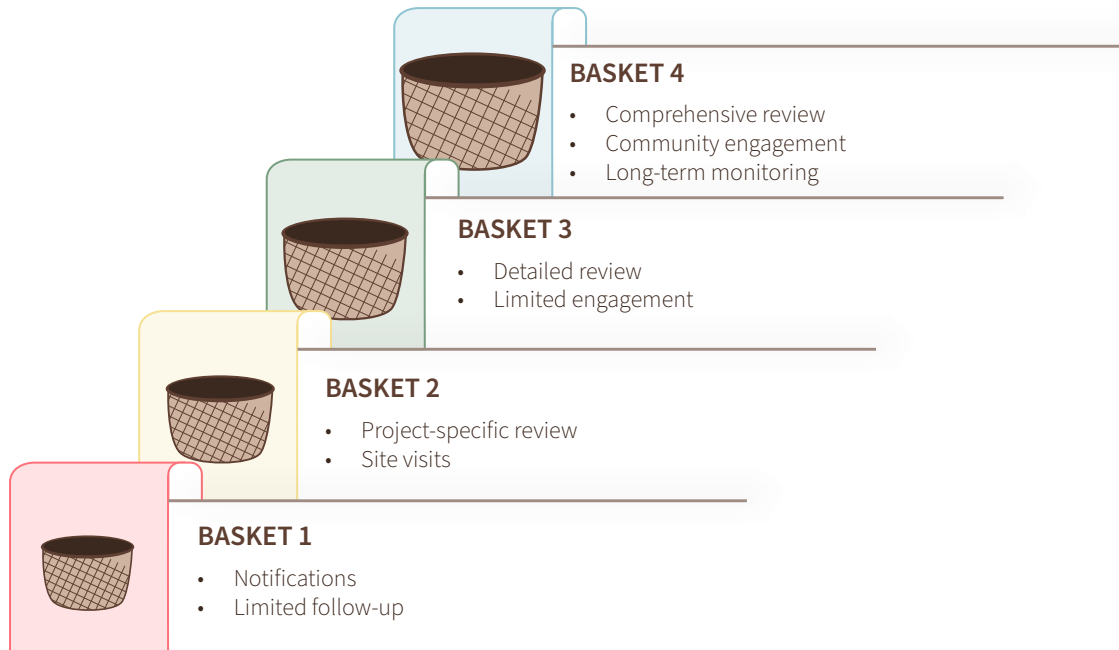
For Basket 1, consultation and engagement is generally limited to continued notifications, although Katzie may request a site visit where needed to confirm potential impacts or identify mitigation measures. A Proponent may also request a site visit where it would assist with understanding the activity, the site context, potential impacts, or possible mitigation measures. Site visits requested by Katzie or by a Proponent will be charged in accordance with the applicable rates in **Schedule E**.

For Basket 2, a referral intake fee applies, and additional site visit, Guardian monitoring, or Repository/Caretaking fees may apply where required. Applicable fees are provided in **Schedule E**.

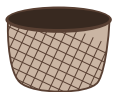
For Basket 3, a referral intake fee applies and may be invoiced directly or incorporated into a capacity agreement. Basket 3 activities require a more detailed review process. Katzie may develop an engagement plan and provide its standard capacity agreement to establish the scope of engagement activities, associated budget, invoicing requirements, payment terms, and timelines.

For Basket 4, a referral intake fee applies and may be invoiced directly or incorporated into a capacity agreement. Basket 4 activities are more complex, strategic, or large in scale and require the highest level of consultation and engagement. The engagement plan, capacity requirements, and associated budget may include information dissemination and collection; technical, cultural, legal, scientific, or other support; agreement negotiation and implementation; community engagement activities and associated costs; meetings and travel; and Katzie-led studies and assessments, including cultural, knowledge, use, or other studies identified as necessary. Once the engagement plan and associated budget have been agreed upon, the capacity agreement will establish the scope of funded activities and associated terms, including invoicing requirements and payment terms.

5.4 Follow the Basket-Based Consultation Pathway



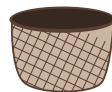
5.4.1 Basket 1: Notification and Limited Follow-Up



For Basket 1 referrals, consultation and engagement requirements are generally limited to notifications as work progresses. Katzie may request a site visit to confirm the potential for impacts, verify the basket assignment, or identify mitigation measures. A Proponent may also request a site visit where it would assist with understanding the activity, the site context, potential impacts, or possible mitigation measures. Site visits requested by Katzie or by a Proponent will be charged in accordance with the applicable rates in **Schedule E**.

Following a site visit, Katzie may confirm the existing basket assignment, identify additional mitigation measures, or determine that the activity requires a different consultation and engagement pathway. If the location, scope, timing, methods, or nature of the activity changes in a way that increases potential impacts, Katzie must be notified immediately.

5.4.2 Basket 2: Project-Specific Review and Site Visit



For Basket 2 referrals, Katzie may request a site visit to confirm potential impacts, verify the basket assignment, and identify mitigation measures. A Proponent may also request a site visit where it would assist with understanding the activity, the site context, potential impacts, or possible mitigation measures. Site visits requested by Katzie or by a Proponent will be charged in accordance with the applicable rates in **Schedule E**. Following the site visit, Katzie will advise whether additional consultation, engagement, monitoring, or mitigation measures are required.

Katzie will also advise whether Guardian participation may be required during physical works if the activity receives the necessary approvals. Guardian participation may support monitoring, information gathering, and verification of impact avoidance and mitigation measures. Where appropriate, Katzie may provide written comments, recommendations, monitoring requirements, or mitigation measures arising from its review.

5.4.3 Basket 3: Detailed Review and Engagement



For Basket 3 referrals, Katzie may request a site visit to confirm potential impacts, verify the basket assignment, and identify mitigation measures. Katzie will then engage in a more detailed review of information relevant to the activity, including technical studies, reports, and other materials needed to understand potential impacts on Katzie rights, territory, community, interests, and responsibilities. Technical information must be provided in both original form and plain language summaries.

Basket 3 reviews generally require a minimum of 45 days after intake, basket assignment, and any required engagement plan or capacity agreement are in place. Timelines may vary depending on the nature, complexity, and scope of the activity, the extent of review required, available capacity, and any technical or other support retained by Katzie.

The Basket 3 process may include meetings with the Crown or Proponent, review of project information, preparation of comments or recommendations, information requests, technical review findings, and follow-up responses. Consultation and engagement may involve more than one round of information sharing, review, feedback, and response. Where additional information, studies, meetings, or engagement activities are required, the engagement plan, budget, timelines, and capacity requirements may need to be revised.

The purpose of the Basket 3 process is to support a shared understanding of potential impacts and identify opportunities to avoid, minimize, mitigate, or otherwise address concerns. Katzie will also provide notice of whether Guardian participation may be required during physical works if the activity receives the necessary approvals.

5.4.4 Basket 4: Comprehensive Review and Community Engagement



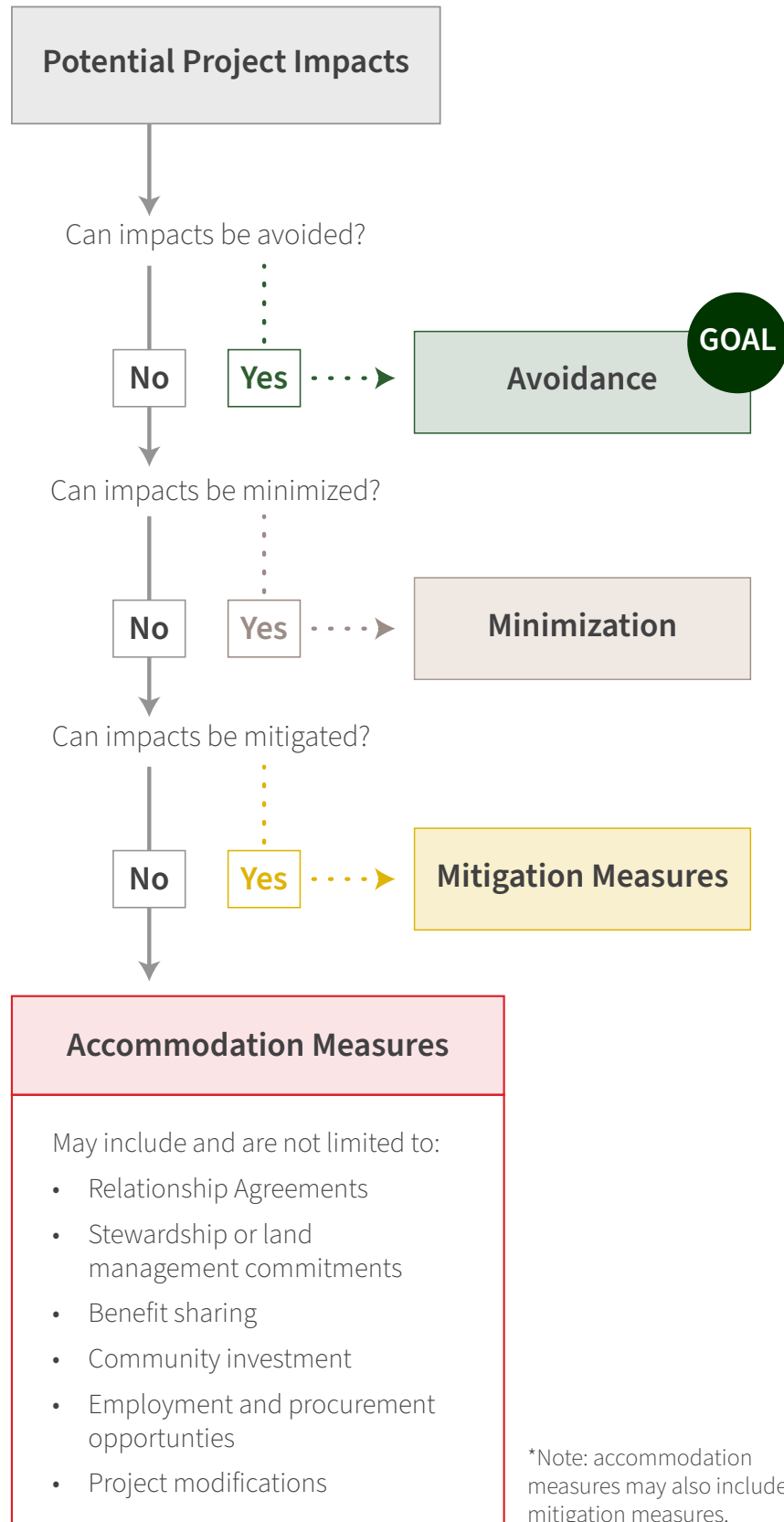
For Basket 4 referrals, Katzie will engage in a comprehensive review of information relevant to the proposed activity, including technical studies, reports, assessment materials, and other information needed to understand potential impacts on Katzie rights, territory, community, interests, and responsibilities. Technical information must be provided in both original form and plain language summaries.

Basket 4 consultation and engagement may include meetings, technical review, community engagement, Katzie-led studies, review of proponent responses, and multiple rounds of information sharing, feedback, and follow-up. Community engagement should be factored into the consultation and engagement plan and may be undertaken by Katzie directly or jointly with the Proponent, depending on the nature, scope, and location of the activity.

Katzie may require additional studies or supplements to existing studies to support a meaningful assessment of potential impacts. Katzie will document information shared by Katzie people, consider that information alongside other studies or review findings, and share non-confidential findings, concerns, recommendations, information requests, and potential impact avoidance, mitigation, accommodation, monitoring, or benefit-sharing measures with the Proponent. A confidentiality agreement may be established where sensitive information needs to be shared.

The purpose of the Basket 4 process is to support a comprehensive understanding of potential impacts and identify opportunities to avoid, minimize, mitigate, accommodate, or otherwise address concerns. The process is intended to support informed decision-making, good faith dialogue, meaningful consideration of Katzie input, and community engagement.

5.4.5 Identify Accommodation Measures and Relationship Agreements



For Basket 3 and Basket 4 activities, Katzie may work with the Proponent to identify appropriate accommodation measures where impacts on Katzie rights, territory, community, interests, or responsibilities cannot be avoided, minimized, or mitigated. Accommodation measures will depend on the nature of the activity, the potential impacts, and the outcomes of the consultation and engagement process.

Accommodation may include:

- Project modifications;
- Impact avoidance or mitigation measures;
- Stewardship or land management commitments;
- Benefit sharing;
- Employment and procurement opportunities;
- Community investment;
- Land-based solutions;
- Relationship Agreements;
- Impact Benefit Agreements;
- Participation agreements;
- Stewardship agreements;
- Implementation agreements; or
- Other mutually agreed measures.

Relationship Agreements are one form of accommodation that may be used to establish commitments between Katzie and a Proponent and support an ongoing relationship. Depending on the activity, a Relationship Agreement may address ongoing engagement, communication, community engagement, monitoring, reporting, stewardship commitments, employment, training, procurement, benefit sharing, community investment, implementation of mitigation or accommodation measures, dispute resolution, and other mutually agreed commitments.

Accommodation measures and any associated agreements will be tailored to the nature of the activity, the extent of potential impacts, and the outcomes of the consultation and engagement process. Where accommodation discussions or agreement negotiations are pursued, Katzie and the Proponent will develop a mutually agreeable process, schedule, and approach.

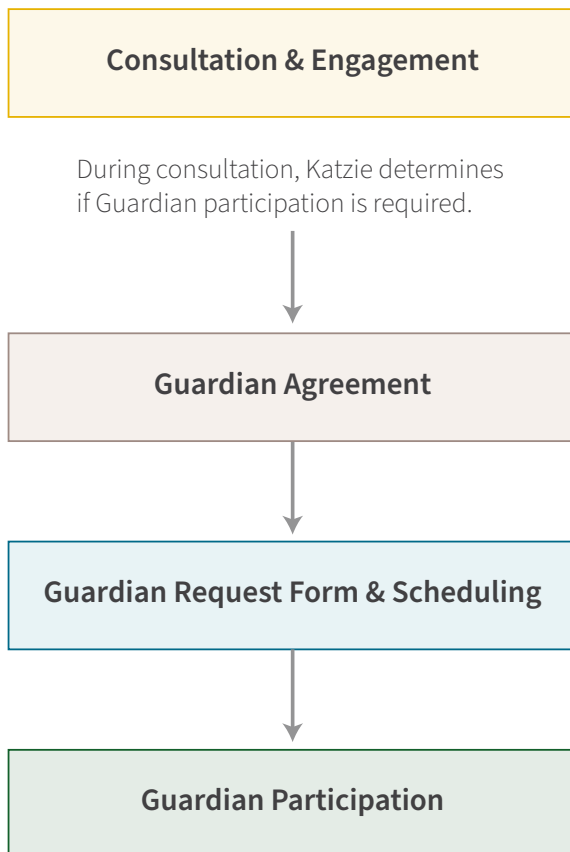


Avoidance Is the Preferred Outcome

Katzie expects potential impacts to be avoided wherever possible. Where impacts cannot be avoided, consultation should focus on minimization, mitigation, accommodation, and long-term relationship commitments.

5.5 Complete Post-Decision Requirements

5.5.1 Arrange Guardian Participation and Monitoring



Depending on the nature, location, and scope of an approved activity, Katzie may require Guardian participation during physical works to support monitoring, information gathering, stewardship, implementation of mitigation or accommodation measures, and the identification of issues that arise during project implementation. Guardian participation requirements will be identified by Katzie during the consultation and engagement process and communicated to the Proponent.

Where Guardian participation is required, a Guardian Agreement must be executed before Guardian participation is scheduled. Guardian Agreements generally only need to be signed once per Proponent or contractor. Once an agreement is in place, a Guardian Request Form, provided in **Schedule F**, must be submitted to schedule Guardian participation.

Katzie requests as much advance notice as possible to support scheduling and operational planning. A minimum of two weeks' notice is required, although additional notice may be needed depending on the number of Guardians requested, the nature and duration of the work, seasonal demands, and Guardian availability. Where advance notice cannot be provided due to emergency situations, Katzie will make reasonable efforts to accommodate requests.

A Guardian Request Form may only be submitted after the consultation and engagement process has been completed and any Guardian participation requirements have been identified by Katzie. A valid Katzie referral file must already exist in Trailmark, and all applicable consultation and engagement requirements must be complete before Guardian participation is requested.



Guardian Participation

Katzie Guardians help Katzie understand, monitor, and respond to activities occurring within Katzie territory. As part of the consultation and engagement process, Katzie and proponents will identify whether Guardian participation, monitoring, information gathering, site visits, or other activities are appropriate to support Katzie's responsibilities to lands, waters, cultural heritage, Ancestors, and past, present, and future generations.

5.5.2 Ancestral Belongings and Caretaking

Where physical works have the potential to encounter ancestral remains, activities must be undertaken in accordance with the Katzie Ancestral Remains Policy in **Schedule B**. If ancestral remains are encountered, all work in the immediate area must stop and Katzie must be notified immediately. Questions about the policy or the discovery of ancestral remains should be directed to Mike Leon.

If ancestral belongings are encountered, the Proponent must work with Katzie to identify options for avoiding impacts wherever possible. Where avoidance is not possible, Katzie will work with the Proponent to identify appropriate management, protection, and caretaking measures. Questions about transfer, care, storage, and management requirements should be directed to the Caretaking Manager, Roma Leon. Repository/Caretaking fees are included in **Schedule E**.

5.5.3 Provide Implementation Updates and Follow-Up

The Crown and/or Proponent must keep Katzie informed of implementation activities and provide timely notice of any material updates, changes, issues, or developments related to the activity. Unless otherwise directed by Katzie, project updates, revised project information, monitoring reports, permit updates, and other implementation-related information should be submitted through the applicable Trailmark referral file.

The Crown and/or Proponent must notify and, where appropriate, engage with Katzie regarding any changes to the scope, location, timing, methods, or operation of an activity, or where new information indicates that the activity may result in greater, different, or additional impacts than previously identified or considered.

Katzie may undertake follow-up activities, request updates, review monitoring information, or seek additional engagement where required to understand ongoing impacts, confirm implementation of agreed measures, or respond to issues identified during project implementation.





PART 3

Schedules

Schedule A: Katzie Territory

Schedule B: Katzie Ancestral Remains Policy

**Schedule C: Proponent's Guide to Using the
Trailmark Management System**

**Schedule D: Referral Intake Information
Requirements**

**Schedule E: Consultation & Engagement Fee
& Rate Schedule**

**Schedule F: Katzie First Nation Guardian
Request Form**

SCHEDULE A
Katzie Territory



Katzie First Nation Traditional Territory



20 mi

SCHEDULE B

Katzie Ancestral Remains Policy



KATZIE FIRST NATION ANCESTRAL REMAINS POLICY AND PROCEDURES

The ancestral remains of the Katzie people deserve the utmost respect and the objective of this policy is to outline the procedures to follow in the event that ancestral remains are found during ground disturbing activities. Avoidance is the preferred option for burial sites, where avoidance is not possible the following procedures should be followed.

Sites of a Special Nature

Shell middens and sites where ancestral remains have previously been found are of special concern for the Katzie First Nation. It is required that during any ground disturbance in these areas that a Senior Katzie Representative and an ancestral remains handling kit be on site. Ancestral Remains handling kits are available for purchase from the Katzie First Nation (kits include: cedar box, cedar boughs, red cloth).

It is the responsibility of the archaeologist working on these sites to specifically request a Senior Representative and an Ancestral Remains handling kit. The kit will only need to be purchased if it is used.

Procedure

If ancestral remains are found during ground alteration the following procedure shall apply:

- Cease ground altering activities within 50 meters of the individual, or as determined by the Cultural Advisor and mark the area as a “No Work Zone”.
- Where ancestral remains are exposed to the elements they are to be covered at all times with a blanket (or a tarp if a blanket is not available).
- Contact the Katzie First Nation immediately (**Contact: Mike Leon, Lead Guardian 778-808-9511**). Lead Guardian will notify the Chief of Katzie First Nation and their Cultural Advisors.
Note: remains are not to be disturbed.
- Secure the area until a Cultural Advisor arrives on site.
- Ancestor remains are to stay on site and in situ, covered at all times.
- All work on site must conclude by 3:00 p.m.

The following activities are restricted in vicinity of find until the appointed Katzie Advisor gives permission:

- Touching or removing any remains, associated burial items or soils in and around the remains;
- Illustrating the remains or associated burial items; Absolutely no photographing.
- Eating, smoking or drinking within the vicinity of the remains;
- Speaking about the specific contents or location of the burial to the press, other personnel or members of the public and;
- Any type of analysis.

If ancestral remains are found during lab analysis:

- The Katzie First Nation should be contacted immediately;
- Ancestral remains are to be stored in a cedar box with cedar boughs, placed in paper bags which are labeled with the site number and locational information and wrapped in red cloth;

When ancestral remains are found directly in our territory, under no circumstances are the Ancestral Remains to be taken anywhere other than Katzie (e.g. lab or office).

If ancestral remains must be removed from the site, it is the archaeologist's responsibility to contact Mike Leon, Lead Guardian (778-808-9511) in a timely matter so that he can make the appropriate arrangements to have them brought to Katzie.

The Katzie First Nation requests that ancestral remains, and all affiliated artifacts remain on site where they are found and have minimal interference. If ancestral remains must be removed from site, they must be stored in an appropriate box at Katzie until they can be reinterred. Archaeologists and developers are advised that if ancestral remains are found there will be additional costs related to reintering the remains on site and if that is not possible at another location that will be determined by Katzie. Ancestral remains are not permitted to go to a museum and no unnecessary handling/analysis is allowed. It is the responsibility of those disturbing ancestral remains to inquire about the costs for re-interment prior to removal or disturbance.

SCHEDULE C

Proponent's Guide to Using the Trailmark Management System

PROPONENT'S GUIDE TO USING THE TRAILMARK MANAGEMENT SYSTEM

**Step-by-step instructions for using Katzie First Nation's
Trailmark Referrals Management System**





WELCOME!

This guide provides proponents with instructions for how to use Trailmark to submit referrals requests, update exiting files, upload supporting information, and maintaining referrals records throughout the consultation and engagement process. The guide includes information on:

- Acquiring an account
- Logging into Trailmark
- Starting, saving, and submitting your referral request
- Managing an existing referrals file
- Troubleshooting account and data issues

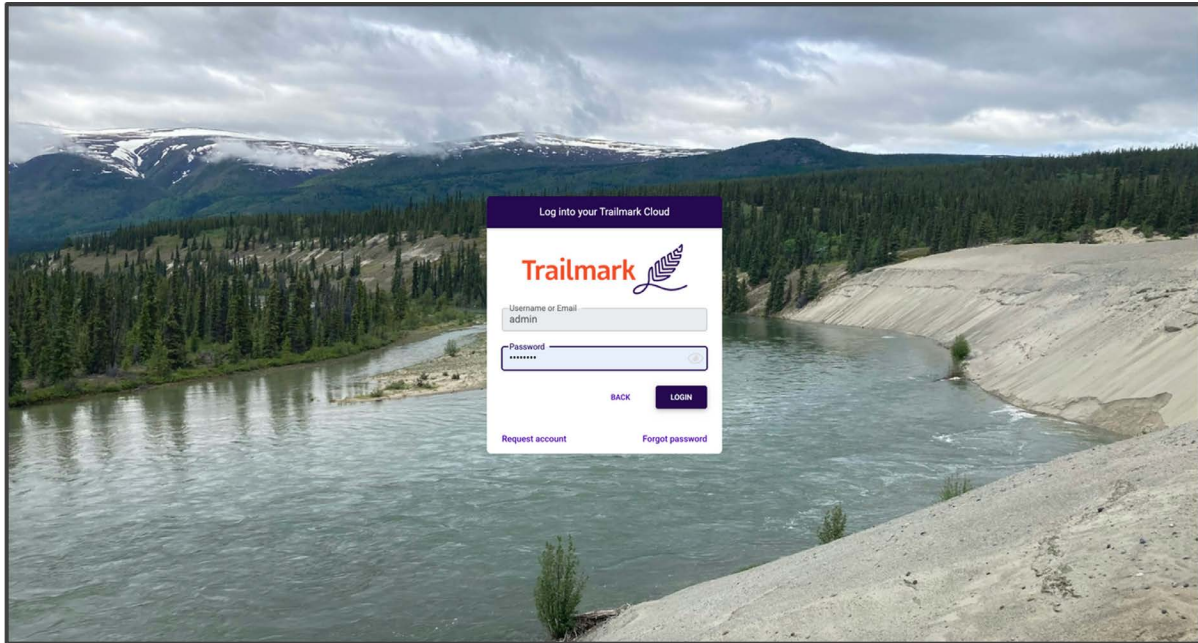
A referral begins when a Proponent submits a completed Referral Intake Form. Katzie uses this information to screen the referral request, confirm whether more information is needed, and determine the appropriate consultation pathway.

Before You Login

- 1** Go to Trailmark and click on Request Account or contact
 - Proponents who do not yet have a Trailmark account must request one before submitting a referral request.
- 2** You will receive an email from **Trailmark Cloud Support** (support@trailmark.cloud) with a link to the database, along with instructions to activate your account and set your password.
 - If you can't find the email, check your spam. If you still can't find it, email support@trailmark.cloud.

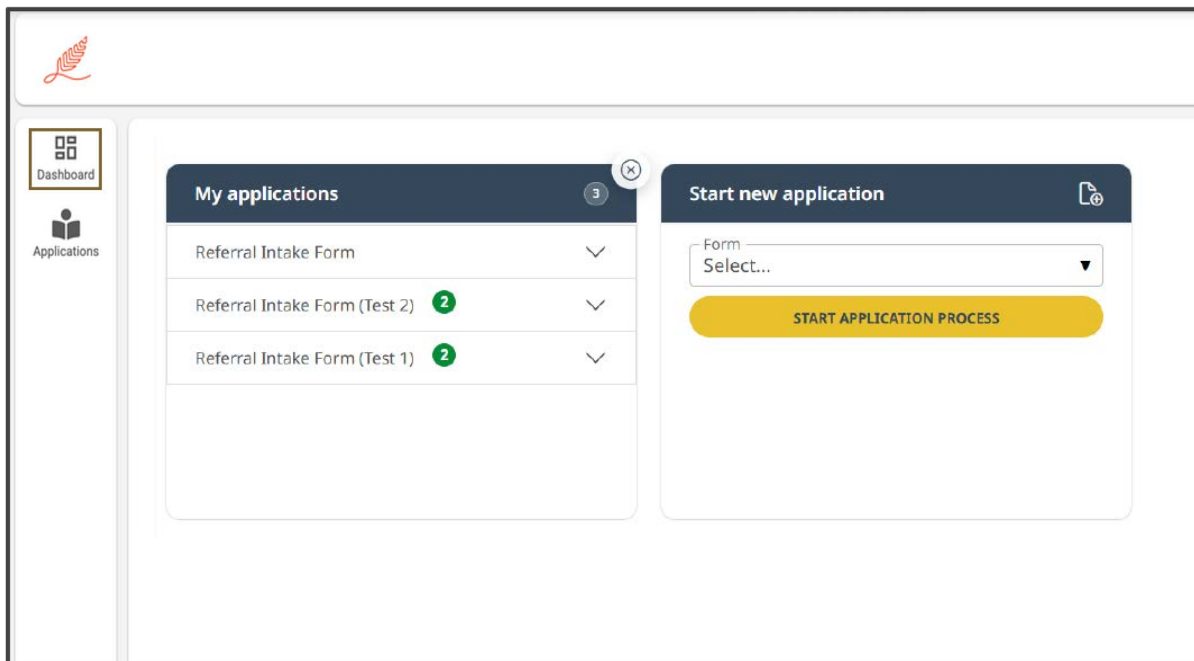
Once you have your login details, you will be able to log in.

LOGIN



- 1 Go to the login page found in your email.
- 2 Enter your **username** from the email.
- 3 Click **Next**.
- 4 Enter your **password** from the email.
- 5 Click **Login**.
- 6 If prompted, choose a new password.

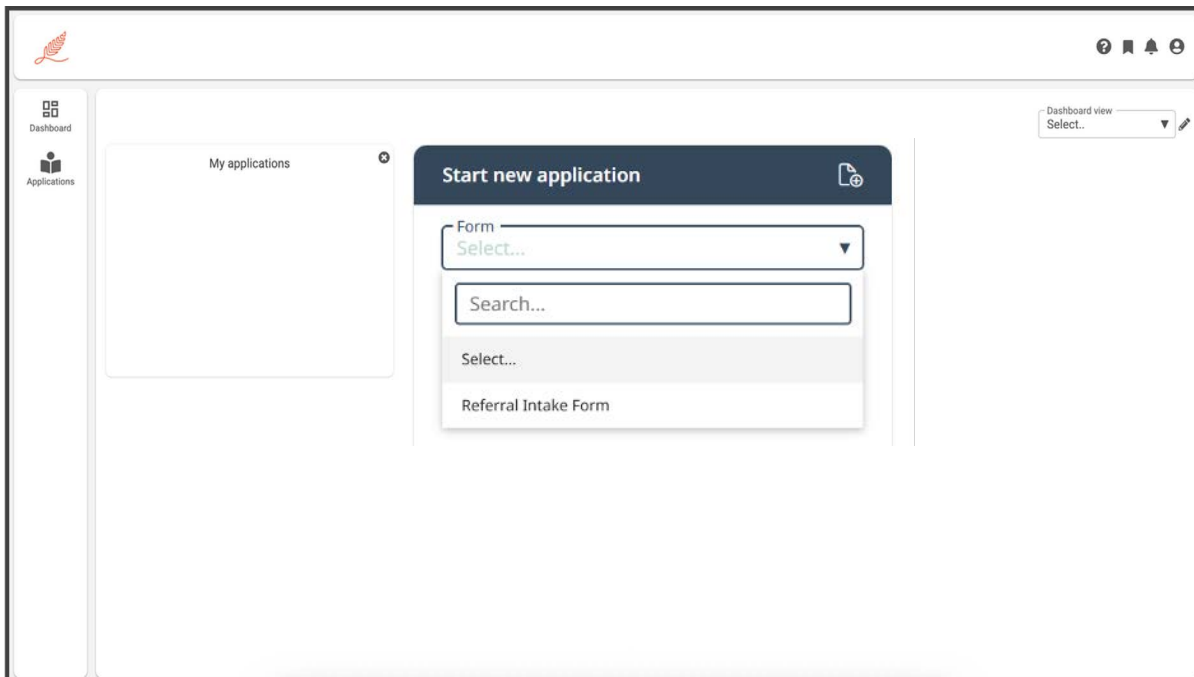
DASHBOARD



- When you log in, you will be taken to your **Dashboard**.
- The Dashboard is customizable, but by default it displays two main options:
 - **Start a New Application (i.e., referral request)** – Begin a new Referral Intake Form.
 - **See your Applications (i.e., referral requests)** – View, edit, or check the status of your existing referral requests.

CREATE A NEW REFERRAL REQUEST (START A NEW APPLICATION):

Select Form & Start

A screenshot of a web dashboard interface. On the left is a sidebar with a logo at the top and two menu items: 'Dashboard' and 'Applications'. The main area contains a 'My applications' widget on the left and a 'Start new application' widget on the right. The 'Start new application' widget has a dark blue header with a plus icon. Below the header is a 'Form' dropdown menu with 'Select...' as the current selection. Underneath the dropdown is a 'Search...' input field. Below the search field is a list of options, with 'Referral Intake Form' selected and highlighted. In the top right corner of the dashboard, there are icons for help, notifications, and user profile, along with a 'Dashboard view' dropdown menu set to 'Select...'.

- 1 In your **Dashboard**, go to the **Start New Application** widget and select the **Referrals Intake Form** drop-down menu.
- 2 Once the form is selected, click **Start Application Process**. In this guide, Trailmark's "application" wording means the Referral Intake Form used to start a referral request.
- 3 When prompted, click **Yes** to proceed.

CREATE A NEW REFERRAL REQUEST:

Complete the Form

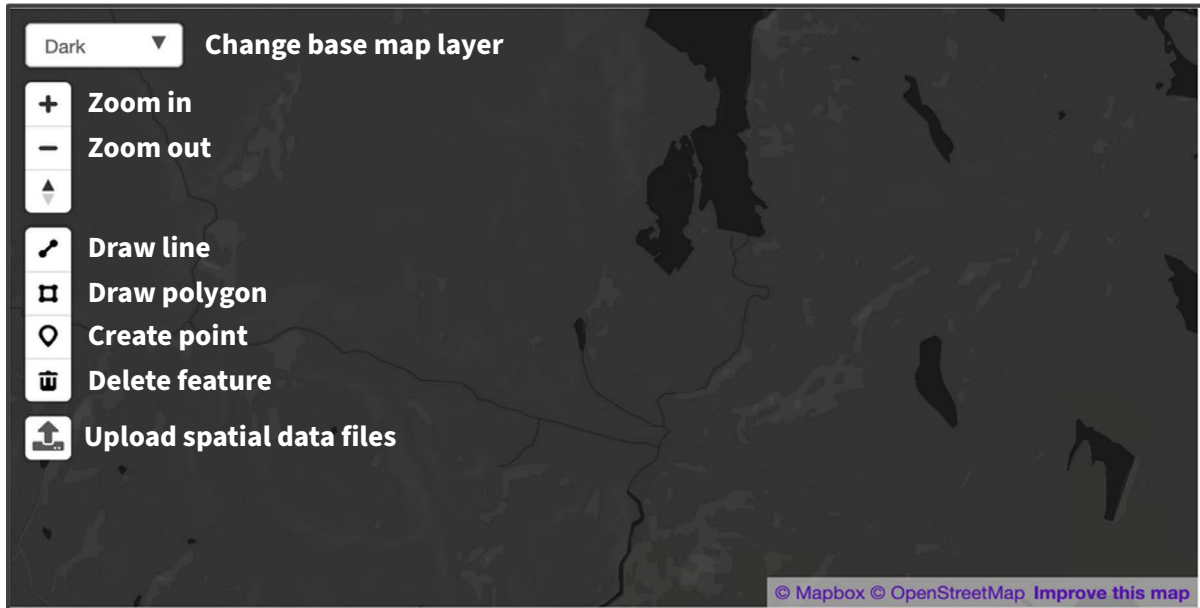
The screenshot shows a web application interface for creating a new referral request. The top navigation bar includes a logo and the text 'Applications > Edit'. A sidebar on the left contains a 'Dashboard' icon and an 'Applications' icon. The main content area is titled 'Form' and 'General Proponent Referral Form'. It contains several input fields: 'Date of application' with a calendar icon, 'Response requested by (date)' with a calendar icon, and 'Project description'. Below these is a map section titled 'Project location. Upload spatial data files (GeoJSON, KML, Shapefile) using the map page upload button (up arrow). If no file is available, draw the location with the polygon tool.' The map shows a dark area with a label 'CFB Esquimaux Power Boat Club' and a 'Dark' theme selector. At the bottom, there is a section for 'Supporting project documents (PDF, Word, Excel)' with a 'Choose Files' button, a 'No file chosen' status, and an 'Upload' button. At the very bottom are two buttons: 'SAVE AS DRAFT' and 'SUBMIT'.

**This is an example form. Fields may vary depending on your referral request.*

- 1 Fill out all fields, as appropriate. Fields marked with an **asterisk (*)** are required.
- 2 If unsure about a field, refer to the guidance provided (move your cursor over ? icon).
- 3 Be prepared to provide the activity purpose, location, scope, timelines, regulatory information, anticipated studies, potential impacts or benefits, applicant and proponent contact information, and supporting documents.
 - You can contact Referrals@katzie.ca if you are still uncertain.
- 4 You can either **save as draft** and submit later or **submit now** when the Referral Intake Form is complete.

CREATE A NEW REFERRAL REQUEST:

Map Tools



**This is an example form. Fields may vary depending on your referral request.*

- Supported file types for upload: **GeoJSON (preferred), zipped SHP, or KML.**
- Provide the most accurate activity location or spatial footprint available. If the location, scope, timing, methods, or nature of the activity changes after submission, Katzie must be notified.
- **To create a line or a polygon:**
 - Click the **Line** or **Polygon** button, then click anywhere on the map to start adding points. Keep adding points as needed. **Double-click** or **Shift-click** the last point to complete the feature.
- To delete a feature: **Click on the feature first**, then click **Delete** icon button.

CREATE A NEW REFERRAL REQUEST:

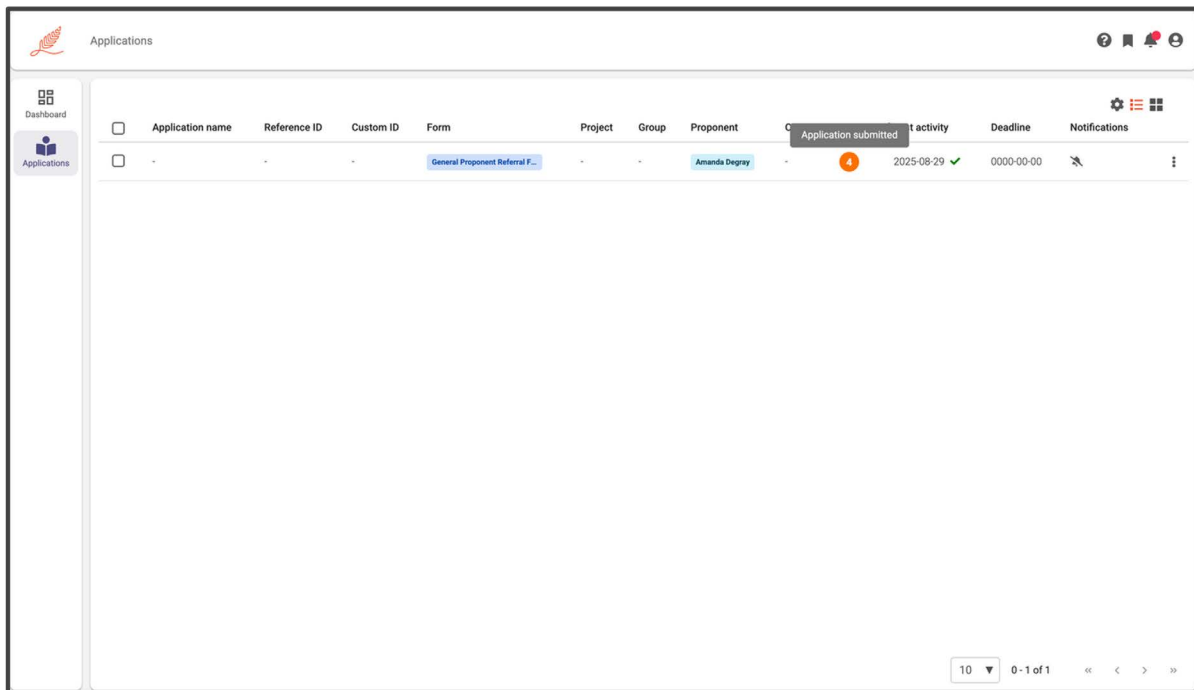
Uploading Files

The screenshot shows a web application interface for editing a referral request. The top navigation bar includes a logo and the text 'Applications > Edit'. On the left, there is a sidebar with 'Dashboard' and 'Applications' links. The main content area is titled 'Project description *' and contains a text input field. Below this, a section for 'Project location' includes a map of Berens Island with a label for 'CFB Esquimalt Power Boat Club'. A legend on the left of the map shows a dark grey area. Below the map, there is a section for 'Supporting project documents (PDF, Word, Excel)' with a 'Choose Files' button, a 'No file chosen' status, and an 'Upload' button. At the bottom, there are 'SAVE AS DRAFT' and 'SUBMIT' buttons.

**This is an example form. Fields may vary depending on your referral request.*

- 1 Click **Choose Files** to select a file from your computer.
- 2 **Filenames** can be a maximum of **100 characters** and cannot contain special characters.
- 3 Supported file types: **PDF, Word, and Excel.**
- 4 Upload all available supporting documents needed for Katzie's initial review, such as a project description, maps, site plans, regulatory materials, technical studies, archaeological information, environmental reports, or other relevant documents.
- 5 Click **Upload** to add your file to the referral request.
- 6 You may upload more than one file if required.

CREATE A NEW REFERRAL REQUEST: Submission



The screenshot shows a web application interface titled 'Applications'. On the left is a sidebar with 'Dashboard' and 'Applications' (selected). The main area contains a table with the following columns: Application name, Reference ID, Custom ID, Form, Project, Group, Proponent, Application submitted, Activity, Deadline, and Notifications. A tooltip 'Application submitted' is visible over the 'Application submitted' column. The table has one row with the following data: Application name (checkbox), Reference ID (-), Custom ID (-), Form (General Proponent Referral F...), Project (-), Group (-), Proponent (Amanda Degray), Application submitted (orange circle with '4'), Activity (2025-08-29), Deadline (0000-00-00), and Notifications (magnifying glass icon). At the bottom right, there is a pagination control showing '10' and '0 - 1 of 1'.

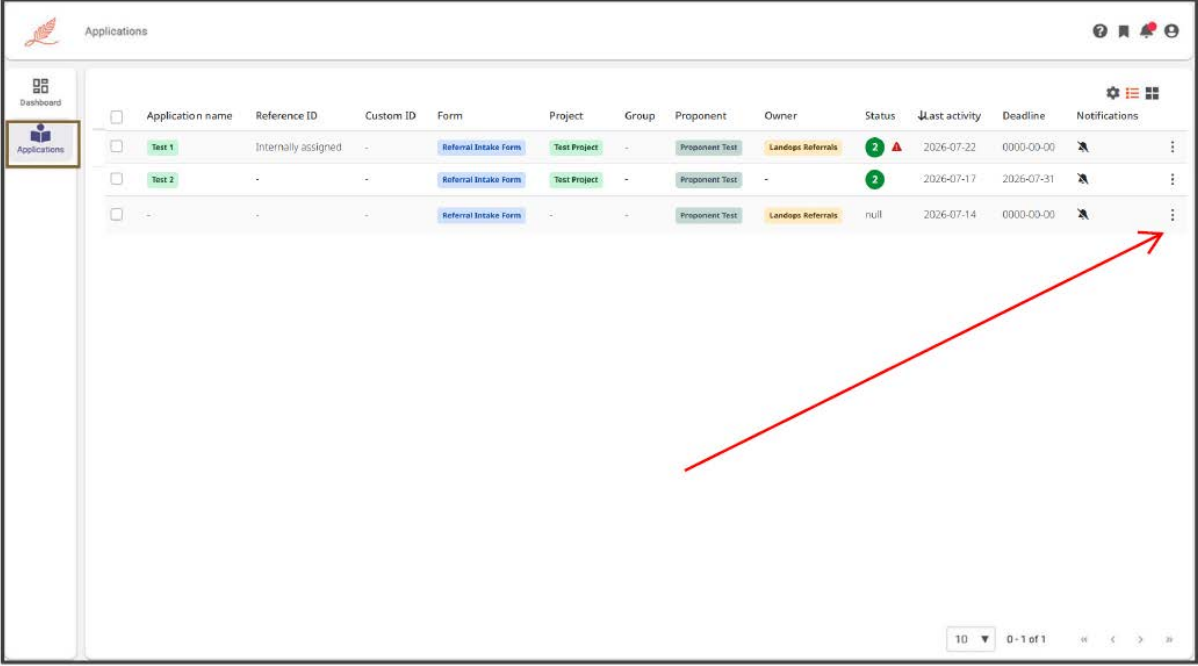
☐	Application name	Reference ID	Custom ID	Form	Project	Group	Proponent	Application submitted	Activity	Deadline	Notifications
☐	-	-	-	General Proponent Referral F...	-	-	Amanda Degray	4	2025-08-29	0000-00-00	

- Once submitted, you will receive an **email notification** confirming your submission.
- Katzie will review the Referral Intake Form to confirm whether sufficient information has been provided. Katzie may request additional information before assigning the referral to a basket (consultation pathway) – refer to *Katzie's Referrals, Consultation & Engagement Policy*, **available on Katzie's website**, for more information on this process.
- Once the referral is complete, Katzie requires a minimum of 10 business days to complete screening and provide an initial response. Timelines may vary depending on referral volume, complexity, staff capacity, or the need for additional review.
- Submission of a referral request does not mean approval, consent, or completion of consultation.

WHAT HAPPENS AFTER SUBMISSION

- After submission, Katzie will process the referral in accordance with *Katzie's Referrals Consultation and Engagement Policy* (**available on Katzie's website**) and supporting procedures.
- The policy and procedures set out how referrals are screened, how basket assignments are made, and when additional information, engagement, capacity funding, technical review, site visits, Guardian monitoring, community engagement, or studies may be required.
- Katzie may contact the proponent if more information is needed before the referral can proceed through the appropriate pathway.
- Guardian monitoring, where required, will be identified by Katzie through the consultation and engagement process and managed through the applicable Guardian Agreement and Guardian Request Form process.

SEE AND MANAGE YOUR APPLICATIONS



☐	Application name	Reference ID	Custom ID	Form	Project	Group	Proponent	Owner	Status	Last activity	Deadline	Notifications
☐	Test 1	Internally assigned	-	Referral Intake Form	Test Project	-	Proponent Test	Landops Referrals	2	2026-07-22	0000-00-00	
☐	Test 2	-	-	Referral Intake Form	Test Project	-	Proponent Test	-	2	2026-07-17	2026-07-31	
☐	-	-	-	Referral Intake Form	-	-	Proponent Test	Landops Referrals	null	2026-07-14	0000-00-00	

- In the **Applications** page, you will see a detailed list of all your referrals requests, including their current status in terms of Katzie's referrals, consultation and engagement process.
- To **view or edit** an application form, click the **three dots (:)** on the right-hand side of the row.

Katzie may notify you that more information is needed before the referral can be reviewed and assigned to basket (refer to Katzie's *Referrals, Consultation & Engagement Policy* for more information on this process) and request that the application be resubmitted with more information. This can be done by selecting **Request to Edit**, accessed by clicking on the three dots on the right-hand side of the row.

Proponents can also communicate with Katzie Referrals through Trailmark by selecting **Send Message**, accessed by clicking on the three dots on the right-hand side of the row.

MANAGING AN EXISTING REFERRAL FILE

Trailmark should be used throughout the life of a referral file.

Existing referral files can be accessed through the **Applications page**.

Use Trailmark to:

- Upload revised studies, plans, reports, and supporting documents;
- Respond to Katzie information requests;
- Submit updated mapping and spatial information;
- Notify Katzie of project changes;
- Provide updated schedules, regulatory information, and permit status updates; and
- Maintain an accurate referral record.

Use email (referrals@katzie.ca) for:

- Consultation questions;
- Meeting requests and coordination;
- Capacity funding discussions;
- Draft agreement discussions;
- Accommodation discussions;
- Relationship agreements; and
- General consultation and engagement correspondence.

If the project scope, location, timing, methods, authorizations, or other material project information changes, proponents should update the referral file as soon as possible.

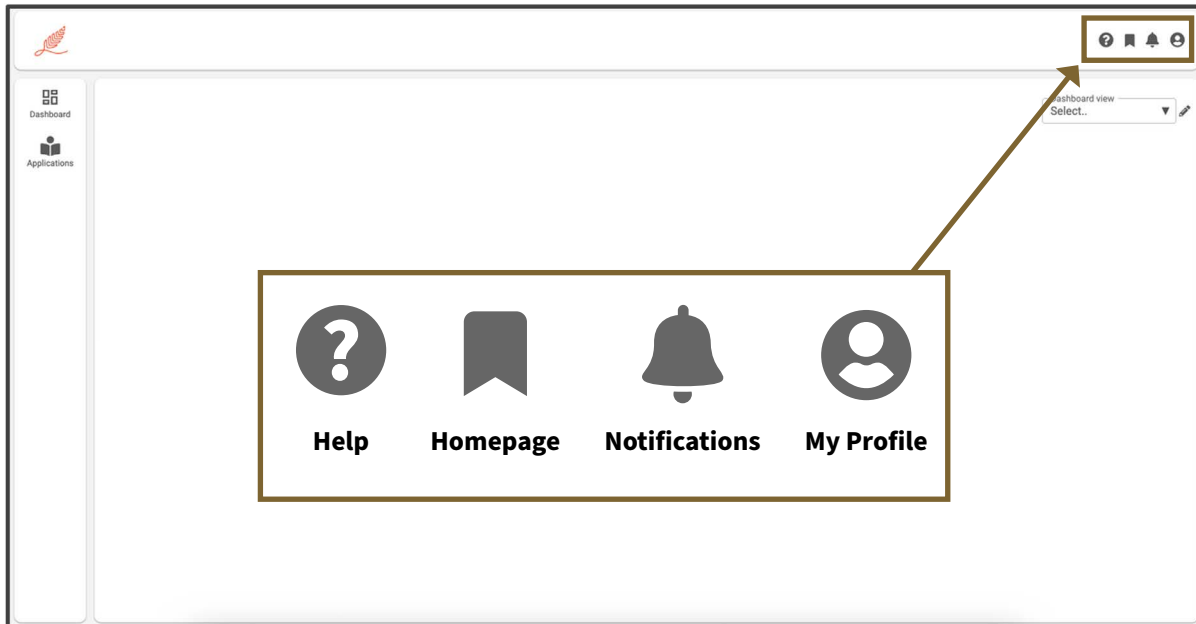
Simple Rule

If it is project information, upload it to Trailmark.

If it is a conversation about consultation, engagement, coordination, or relationship-building, use email or schedule a meeting.

Trailmark serves as Katzie's official record for referral information, supporting documents, and project updates. Email and meetings support consultation, engagement, coordination, and relationship-building activities.

USER TOOLS



- **Help:** Training videos, change log (system updates), mobile app link.
- **Homepage:** Customize your default homepage.
- **Notifications:** View alerts and reminders.
- **My profile:** View and update your account details.

THANK YOU!

Thank you for using Katzie First Nation's Trailmark referrals management system to submit your referral requests.

If you need help or have questions, please contact:

Referrals@katzie.ca or **support@trailmark.cloud**



SCHEDULE D
Referral Intake
Information Requirements



REFERRAL INTAKE INFORMATION REQUIREMENTS

The following information should be provided through Katzie's Referral Intake Form to support referral screening, basket assignment, and identification of the appropriate consultation and engagement pathway. Additional information may be requested by Katzie where required to complete screening or support consultation and engagement activities

Referral Information

- Purpose of the referral
- Sector or topic area
- Whether the referral relates to a new activity, decision, authorization, amendment, update, continuation, or other matter
- Any other information necessary to understand the nature of the referral at intake

Proponent Information

Where the referral contact is not the Proponent:

- Proponent name
- Proponent title/position
- Proponent organization
- Proponent email
- Proponent phone number

Referral Contact Information

- Referral contact type (e.g., Proponent, Consultant/Agent, Crown Ministry/Agency, Other)
- Referral contact organization
- Referral contact name
- Title/position
- Email address
- Phone number
- Mailing address
- Confirmation whether the referral contact is also the Proponent

Activity Information

- Activity or project name
- Project number or internal reference number (if available)
- Purpose, nature, and scope of the activity
- Current activity stage
- General location of the activity
- Available mapping or spatial information
- Activity timeline
- Key dates or timing constraints
- Decision or process the referral is intended to inform

Physical Works and Site Activity Information (Where Applicable)

- Type of physical activity proposed
- Spatial information or project footprint files
- Plans, drawings, or design information
- Regulatory application materials
- Technical studies or supporting reports
- Plain-language summaries
- Photographs

Supporting Documentation (Where Available)

- Location maps
- Spatial information or project footprint files
- Project descriptions
- Plans, drawings, or design information
- Regulatory application materials
- Technical studies or supporting reports
- Plain-language summaries
- Photographs

Regulatory Processes, Authorizations & Studies (Where Applicable)

- Description of any applicable Crown, regulatory, permitting, planning, or decision-making processes
- Regulatory contact information, if known
- Authorizations required, applied for, received, or amended
- Studies and assessments completed
- Studies and assessments anticipated or underway

Amendment Information (Where Applicable)

For amendments, updates, continuations, or changes to previously reviewed activities:

- Previous project, permit, authorization, or referral reference
- Description of the proposed change, including any changes to:
 - Location
 - Scope
 - Design
 - Timing
 - Methods
 - Effects
 - Authorizations
 - Supporting information

Engagement & Consultation Information

- Capacity funding status
- Information regarding available capacity funding
- Potential environmental or socio-economic effects
- Potential impacts on Katzie rights, responsibilities, governance, or use of lands and waters
- Potential benefits or opportunities identified by the referral contact or Proponent
- Key dates relevant to consultation, engagement, review, or decision-making process

SCHEDULE E

Consultation & Engagement Fee & Rate Schedule



CONSULTATION & ENGAGEMENT FEE & RATE SCHEDULE

Katzie uses standard template agreements for consultation and engagement capacity funding and Guardian monitoring where required under this fee schedule.

Capacity costs are established through Katzie's standard capacity agreement. The agreement includes an appendix setting out the project-specific engagement plan, agreed tasks, timelines, budget, invoicing requirements, and payment terms. Tasks may include reviewing project information and technical materials, attending meetings, preparing comments or recommendations, identifying information needs, coordinating internal review, supporting community engagement, participating in site visits, reviewing responses from the Crown or proponent, and coordinating external support where required. If a proponent requests changes to Katzie's standard capacity agreement, the proponent will be responsible for Katzie's legal costs associated with reviewing and negotiating those changes.

Guardian monitoring costs are charged through Katzie's standard Guardian Agreement.

The Guardian Agreement is generally signed once by a proponent or contractor, and Guardian Request Forms are used to confirm specific monitoring requests and act as change orders under that agreement. If a proponent requests changes to the standard Guardian Agreement, the proponent will be responsible for Katzie's legal costs associated with reviewing and negotiating those changes.

Katzie will provide the applicable template agreement or request form when required.

Referral Intake Fees & Capacity Engagement Costs

Referral intake fees support Katzie's initial intake and screening of a referral. This includes receiving and logging the referral, reviewing the information provided, confirming whether additional information is needed, identifying the nature and location of the activity, completing preliminary screening, assigning the referral to the appropriate basket, and preparing the initial response or next steps. The intake fee does not include additional consultation, engagement, technical review, site visits, Guardian monitoring, community engagement, Repository/Caretaking fees, or other capacity costs that may be required after screening.

Capacity engagement fees may apply where a referral requires work beyond initial intake and screening. These fees support Katzie's participation in consultation and engagement, including meetings, technical review, site visits, community engagement, internal coordination, external support, and preparation of comments, recommendations, or other responses. Where applicable, capacity engagement costs are charged by invoice or through an approved engagement plan and capacity agreement. Guardian monitoring costs are charged separately through Katzie's Guardian Agreement and Guardian Request Form process. Repository/Caretaking fees may also apply where ancestral belongings or related materials require care through Katzie's Caretaking Place. Payment terms will be set out in the applicable invoice or agreement.

Basket	Intake Fee	Capacity and Guardian Monitoring Costs
Basket 1 	No intake fee	No standard intake fee applies. Additional costs may apply where Katzie requests a site visit, where a Proponent requests a site visit, where Guardian monitoring is required, or where Repository/Caretaking fees are required. Where applicable, fees will be invoiced directly in accordance with the fee schedule below.
Basket 2 	\$100	Intake fee applies. Additional costs may include site visit costs requested by Katzie or by a Proponent, Guardian monitoring costs under Katzie's Guardian Agreement and Guardian Request Form process, and Repository/Caretaking fees where required. Where applicable, fees will be invoiced directly in accordance with the fee schedule below, the Guardian Agreement, and the applicable Guardian Request Form.
Basket 3 	\$150	Intake fee applies and may be invoiced directly or included in a capacity agreement. Additional costs may include capacity engagement costs under a capacity agreement and engagement plan, Guardian monitoring costs under Katzie's Guardian Agreement and Guardian Request Form process, and Repository/Caretaking fees where required.
Basket 4 	\$200	Intake fee applies and may be invoiced directly or included in a capacity agreement. Additional costs may include capacity engagement costs under a capacity agreement and engagement plan, Guardian monitoring costs under Katzie's Guardian Agreement and Guardian Request Form process, and Repository/Caretaking fees where required.

Department Rates, Supports & Expenses

The rates below apply to department staff time, Katzie participation, external supports, and expenses required to support referral review, consultation, engagement, capacity planning, and related activities.

Rate Category / Role	Hourly Rate	Daily Rate	Expense / Cost Basis
Department Staff & Coordination Rates			
Director	\$250	N/A	N/A
Referrals Manager	\$180	N/A	N/A
Referrals Coordinator	\$100	N/A	N/A
Referrals Administrator	\$75	N/A	N/A
Guardian Manager	\$180	N/A	N/A
Lead Guardian	\$150	N/A	N/A
Guardian Coordinator	\$100	N/A	N/A
Guardian Administrator	\$75	N/A	N/A

Rate Category / Role	Hourly Rate	Daily Rate	Expense / Cost Basis
Katzie People			
Honorarium ¹	\$50-\$85	\$350-\$500	N/A
External Supports²			
Senior Support		At cost	
Intermediate Support		At cost	
Junior Support		At cost	
Legal Support		At cost	
GIS Support		At cost	
Expenses³			
Small community meeting (food, refreshments, space rental, and supplies, up to 10 people)	N/A	N/A	\$350
Medium community meeting (food, refreshments, space rental, and supplies, up to 50 people)	N/A	N/A	\$1,750-\$2,250
Large community meeting (food, refreshments, space rental, and supplies, up to 75 people)	N/A	N/A	\$6,800-\$8,000
Travel distance	N/A	N/A	\$0.75/km
Other expenses (e.g., hotel, air travel, etc.)	N/A	N/A	Market rate
Administrative fee		15%	

External supports are charged at cost and may include technical, cultural, legal, scientific, GIS, planning, archaeological, environmental, or other support required to assist Katzie's review and participation. External support costs will generally be identified through the engagement plan, budget, or capacity agreement where applicable.

* Rates and expenses do not include applicable taxes.

- 1 Honoraria depend on the nature, duration, and extent of Katzie knowledge, participation, or preparation requested.
- 2 External support costs depend on the organization, role, type of support, and scope of work required.
- 3 Meeting and event expenses depend on location, venue availability, catering availability, attendance, and supplies required.

Guardian Monitoring Rates

Guardian monitoring costs are charged through Katzie’s standard Guardian Agreement and Guardian Request Form process. The rates below apply where Guardian participation is required for monitoring, site attendance, field support, or related activities.

Provision of Guardian Services		Rate Per Day (per Guardian)
Regular Business Day	Full Day (between 4 and 8 hours)	\$750.00
	Half Day (up to a maximum of 4 hours)	\$400.00
Overtime	Between 8 and 12 hours	\$140.63 for each additional hour
	For over 12 hours or over a 40-hour week	\$187.50 for each additional hour
Additional Fees		Applicable Rate
Truck Rental (day rate including mileage)		\$175
Mileage Rate (where Guardian is required to get to site in their own vehicle) <i>Calculated from Katzie to Site and Return</i>		\$0.72 per kilometre
Boat rental (day rate includes mileage)		\$1,000
Administrative fee		15%

* Rates and fees do not include applicable taxes.

Caretaking Place Fees

Caretaking Place fees may apply where ancestral belongings or related materials are transferred to Katzie's care. These fees are separate from referral intake fees, consultation and engagement capacity costs, and Guardian monitoring costs.

Description	Fee
Base Fee	
Accession fee	\$50/request
Administration fee	15%
Storage Processing & Long-Term Storage Fees	
Boxed Ancestral belongings/documents – Banker's box size (24x12x10in/50L)	\$300/box
Boxed Ancestral belongings/documents – Medium box (25-49L)	\$225/box
Boxed Ancestral belongings/documents – Small box (below 25L)	\$150/box
Boxed Ancestral belongings/documents – Letter size	\$125/envelope

* Notes:

- *Proponents must provide appropriate boxes unless otherwise agreed by Katzie.*
- *Katzie does not accept soils at the Caretaking Place.*
- *Oversized items may be subject to additional costs depending on size, handling, storage, and care requirements.*
- *Questions about the Caretaking fees or transfer requirements for ancestral belongings should be directed to the Caretaking Manager, Roma Leon, at roma@katzie.ca.*

SCHEDULE F

Katzie First Nation Guardian Request Form



KATZIE FIRST NATION GUARDIAN REQUEST FORM

Guardian Request Information

Request Date:	
Katzie Referral File Number (required)	
Project Name	
Company/Organization	

Primary Contact Information

Name	
Email	
Phone	

Invoice Contact Information (if different from primary contact)

Name	
Email	
Phone	

Guardian Services Requested	
Number of Guardians Requested	Final number of Guardians will be determined in consultation with Katzie. Please refer to your consultation record.
Type of Monitoring	☐ Site Visit ☐ Cultural Heritage Monitoring ☐ Construction Monitoring ☐ Environmental Monitoring ☐ Ground Disturbance Monitoring ☐ Watercourse or In-Water Works ☐ Vegetation Clearing ☐ Other: _____
Dates of Work	
Duration of Work	☐ Half Day (up to 4 hours) ☐ Full Day (4–8 hours)
Weekend Work Required	☐ Yes ☐ No
Night Work Required	☐ Yes ☐ No
Do you plan to submit additional Guardian Requests	☐ Yes ☐ No If yes, what is the anticipated end date of this work:

Detailed Description of Work or Project Activity	
Anticipated Equipment and Machinery	
Proposed Ground Disturbance Activities	
Project Phase	
Known Environmental or Cultural Heritage Considerations	
Any Additional Information	

Site Information	
Site Address/Location	
Location Map Attached	☐ Yes ☐ No
Parking Available	☐ Yes ☐ No
Meeting Location/ Staging Area	
Site Access Instructions	
Gate Code (if applicable)	
Any Additional Site Information	

Site Contact	
Name	
Phone	
Email	

Emergency Contact	
Name	
Phone	
Email	

Safety Requirements	
PPE Required	☐ Hard Hat ☐ High-Visibility Vest ☐ Safety Footwear ☐ Safety Glasses ☐ Other: _____
Site Orientation Required	☐ Yes ☐ No
Escort Required	☐ Yes ☐ No
Any Additional Safety Notes	

Notices & Signature	
Important Notice	Guardian requests should be submitted as early as possible. Katzie requests a minimum of two (2) weeks' notice to support scheduling and operational planning. A valid Katzie referral file must already exist prior to requesting Guardian services.
Authorized Signatory	
Name	
Title	
Organization	
Signature	
Date	

Katzie First Nation Guardian Rates		
Provision of Guardian Services		Per Guardian Applicable Rate Per Day
Regular Business Day	Full Day (between 4 and 8 hours)	\$750.00
	Half Day (up to a maximum of 4 hours)	\$400.00
Overtime	Between 8 and 12 hours	For each additional hour — \$140.63
	For over 12 hours or over a 40-hour week	For each additional hour — \$187.50
Additional Fees		Applicable Rate
Truck Rental (day rate): Truck rental includes mileage		\$175.00
Mileage Rate: Where Guardian is required to get to site in own vehicle. Mileage rate calculated from KFN Office to site and return.		\$0.72 per kilometre
Administrative Fee: per day rate		15% of daily fee for Guardian Services
Taxes where applicable		

Cancellations

Cancellation by the Proponent:

Where work is cancelled by the proponent within less than 12 hours from the start date of the work and for reasons other than inclement weather, the proponent shall pay the full fees as per previously scheduled hours.

Where work is cancelled by the proponent between 12 and 24 hours from the start date of the work and for reasons other than inclement weather, the proponent shall pay half fees as per previously scheduled hours.

If cancellations happen after work hours or on weekends, please call the Guardian Coordinator so the Guardian receives the information before arriving at the site location.

