

Corporate Services

REQUEST FOR PROPOSALS

Asset Management Consulting Services
RFP50475

Release date: May 2, 2022

Proposals will be received up to
3:00:00 pm local time on Wednesday, May 25, 2022

Contact: Michael Hatfield
Procurement Officer
Municipality of East Hants
Telephone: 902-883-6232
Email: mhatfield@easthants.ca



EAST HANTS
We live it!

Contents

1. INSTRUCTIONS TO PROPONENTS	4
1.1. INTRODUCTION	4
1.2. DEFINITIONS	4
1.3. PROPOSAL SUBMISSION	4
1.4. INQUIRIES	4
1.5. WITHDRAWING OR MODIFYING A PROPOSAL	5
1.6. PROPOSAL ACCEPTANCE (PRIVILEGE CLAUSE)	5
1.7. PROPOSAL OPENINGS	7
1.8. PROPOSAL VALIDITY	7
1.9. FEES, EXPENSES AND DISBURSEMENTS	7
1.10. PROPOSAL REQUIREMENTS	8
1.11. PROPOSAL EVALUATION	10
2. SERVICES DESCRIPTION	11
APPENDIX A - COST FORM	30
APPENDIX B - SAFETY QUESTIONNAIRE	33
APPENDIX C - SAMPLE AGREEMENT	34
BACKGROUND	34
DEFINED TERMS	34
CONTRACT DOCUMENTS	34
INTENT	34
TERM	35
PAYMENT	35
INDEPENDENT STATUS	36
SCHEDULE AND DELAY	36
PERSONNEL	37



SUBCONTRACTOR	37
CONFIDENTIALITY	38
INFORMATION COLLECTED	39
INDEMNIFICATION	39
INSURANCE	39
REGULATIONS.....	40
TAXES	41
WORKERS' COMPENSATION.....	41
PERFORMANCE.....	41
CHANGES TO REQUIREMENTS	41
RESPONSIBILITY FOR DAMAGE	42
TERMINATION	42
RECEIVERSHIP	42
ASSIGNMENT	42
ENTIRE AGREEMENT	42
INTERPRETATION.....	43
NOTIFICATION	43
GOVERNING LAW	43
ENUREMENT	43
SEVERABILITY	43
DISPUTE RESOLUTION	44
WAIVER	45



1. INSTRUCTIONS TO PROPONENTS

1.1. INTRODUCTION

- 1.1.1. The Municipality of East Hants ("East Hants") requires the services of a qualified firm to introduce a formal asset management program, including developing an Asset Management Strategy, Asset Management Roadmap, and an Asset Management Plan with a state of the assets review for identified assets. To this end, East Hants is seeking competitive proposals from the marketplace to identify a consultant to possibly provide these Services.

1.2. DEFINITIONS

- 1.2.1. **Proponent:** An individual or company who submits a Proposal.
- 1.2.2. **Successful Proponent:** Proponent whose Proposal is selected for award.
- 1.2.3. **Independent Contractor:** Proponent, successful or otherwise, is considered to be an Independent Contractor, not an employee of East Hants.

1.3. PROPOSAL SUBMISSION

- 1.3.1. Proposals will be received up to 3:00:00 pm local time on May 25, 2022 by upload only using the East Hants online procurement application.
- 1.3.2. The Proponent is responsible for uploading and submitting all documents by closing time. The Proponent must account for the time to upload documents which depends on the size of the document. East Hants shall not be liable for, and Proponent releases East Hants from, any damage or loss of any kind whatsoever related to Proponent's failure to submit documents by closing time for any reason.
- 1.3.3. Remember to sign the Proposal form. Electronic signatures are acceptable.
- 1.3.4. Prior to submitting their Bid, Bidders are to review the Electronic Submission Protocol at: <https://www.easthants.ca/government/procurement/> for the latest information with respect to submissions.

1.4. INQUIRIES

- 1.4.1. All questions or requests for additional information or clarifications regarding this Request for Proposals shall be in writing, **by email only**, to the attention of:

Michael Hatfield
Procurement Officer
Municipality of East Hants
Email: mhatfield@easthants.ca
- 1.4.2. East Hants will provide clarifications and additional information, if required, by way of Addenda.
- 1.4.3. Inquiries and questions will be accepted up to **3:00 pm local time on May 18, 2022**.
- 1.4.4. Proponents are solely responsible to ensure that any such inquiries are received by East Hants as described above. East Hants will not be responsible if a Proponent acts based on information received in any other way than an approved Addendum or communication, in writing, from the representative named in this section.



1.5. WITHDRAWING OR MODIFYING A PROPOSAL

- 1.5.1. Proposals can only be withdrawn by contacting Michael Hatfield by phone at 902-883-6232 or by email at mhatfield@easthants.ca. The Proponent must provide the unique identifying number they received when submitting the Proposal in order to withdraw the Proposal.
- 1.5.2. Once a Proposal has been submitted, it cannot be modified. The Proponent must submit a new Proposal and then contact East Hants as above to withdraw the Proposal which is no longer valid.
- 1.5.3. The request to withdraw a Proposal may occur at any time, but certain competitions may contain bid security or other requirements which may impact a Proponent's legal responsibilities once the competition has closed, so withdrawal of a Proposal, where possible, should occur prior to closing.
- 1.5.4. New or replacement Proposals must be submitted before the Competition Deadline.

1.6. PROPOSAL ACCEPTANCE (PRIVILEGE CLAUSE)

- 1.6.1. This document and Request for Proposal process does not constitute a call for Tenders. This RFP process will not give rise to any Contract A-based tendering law duties or legal obligations.
- 1.6.2. This Request for Proposals neither expresses nor implies any obligation on the part of East Hants to enter into a contract with any party submitting a response or responses.
- 1.6.3. All Proposals become the property of East Hants once submitted.
- 1.6.4. Late Proposals will be rejected and will be returned unopened. Incomplete Proposals may be rejected.
- 1.6.5. Any Proposal that does not include all of the information required in this RFP may be considered incomplete and may be rejected. East Hants will, in their sole discretion, determine if the missing information is material to their ability to evaluate a response; if East Hants believes they have sufficient information to evaluate, it may proceed to do so.
- 1.6.6. Proponents undertake any expenditure related to the submission of a Proposal at their own risk. The Proponent is responsible for all costs associated with preparing and submitting this Proposal. This includes, without limitation, any and all costs, fees, expenses (travel, accommodations or meals) or other incidentals related to preparing, printing, binding, transporting, presenting, defending, or clarifying the Proposal.
- 1.6.7. East Hants may include evaluation criteria within this Request for Proposal document to be used as a guideline for Proponents. East Hants reserves the right to deviate from the evaluation criteria where it is in the best interests of the Municipality. Without limiting the generality of the foregoing, decisions to deviate from the evaluation criteria may be made based on budgetary and/or service delivery considerations having regard to all of the Proposals received and the needs of East Hants.
- 1.6.8. East Hants does not bind itself to accept any Proposal, but may accept any Proposal, in whole or in part, or discuss with any Proponent different or additional terms to those described in this RFP or in such Proponent's Proposal. East Hants may:
 - reject any or all of the Proposals;
 - accept any Proposal;
 - if only one Proposal is received, choose to accept or reject it;
 - choose not to accept the lowest bid price;
 - alter the schedule, RFP process, or any other aspect of the RFP, as it may determine in its sole and absolute discretion.

- 1.6.9. Without limiting the preceding in any way, East Hants may accept any Proposal or any portion of any Proposal that may be considered to be in the best interests of East Hants. East Hants reserves the right to reject any and all Proposals that, in its sole discretion, are not in the best interests of East Hants.
- 1.6.10. East Hants reserves the right to waive formality, informality or technicality in any Proposal. This includes the right to accept a Proposal that is not compliant with the instructions in the Request for Proposals document.
- 1.6.11. East Hants reserves the right to amend this Request for Proposal document at any time before the Request for Proposal's closing date and will issue an addendum in the event of a change.
- 1.6.12. East Hants reserves the right to negotiate, after the Request for Proposal's Proposal Deadline, with any Proponent and to finalize service arrangements in the best interests of East Hants.
- 1.6.13. In applying this privilege clause, East Hants shall not be bound by trade or custom in dealing with and/or evaluating the responses to the Request for Proposals.
- 1.6.14. East Hants reserves the right to interpret any and all aspects of this Request for Proposals as may be most favourable to East Hants.
- 1.6.15. Should a Proponent find any discrepancies, errors, or omissions in this RFP, or if a Proponent is unsure as to the meaning of anything in this RFP, they are to advise East Hants in writing; East Hants may, in its sole discretion, respond to such written inquiry, to all Proponents, in an addendum.
- 1.6.16. It is the responsibility of the Proponent to be sure they understand the requirements prior to submitting a Proposal and before the deadline for questions has passed. Insurance requirements, if any, should be reviewed by the Proponent's insurer.
- 1.6.17. East Hants may cancel the RFP process at any time, for any reason, in its sole discretion. In the event that an RFP process is cancelled, East Hants will not be obligated to pay any costs, damages, or claims of any type to any Proponent or potential Vendor or Proponent.
- 1.6.18. Suppliers who have been disqualified from bidding on contracts with East Hants may not respond to this RFP and any RFP which features a subcontractor who is disqualified from bidding may also be rejected.
- 1.6.19. In providing a Proposal, the Proponent warrants that their Proposal is in all respects fair and is provided without collusion or fraud. No representative of the company from which a Proposal is to be provided may discuss the subject matter of a competition with any East Hants' staff member, Councilor, consultant, or any person involved in the procurement process, evaluation, or award, other than the designated contact or their designate. Under no circumstances may a Proponent extend entertainment, gifts, gratuities, discounts, or special services, regardless of value, to any employee of East Hants in connection with this or any other procurement of goods, services, or construction.
- 1.6.20. Proponents must advise East Hants of any potential conflict of interest that may affect, or appear to affect, the RFP process, including the influence of award. East Hants may disqualify a Proponent, rescind an invitation to negotiate, or terminate a contract subsequently entered into if East Hants determines that the Proponent has engaged in any conduct prohibited by this RFP.
- 1.6.21. Proponents shall indemnify and save harmless East Hants, its officers and its employees from and against all claims, demands, losses, damages and costs of any kind based upon injury or death of a person or damage to or loss of property arising from any willful or negligent act, omission or delay on the part of the Proponent or their servants in the preparation of their Proposal and/or in the course of delivering Services.



- 1.6.22. Proponents are advised that no commitment to purchase Goods or Services shall exist until the successful Proponent is advised by East Hants, in writing, of an award. If an award is made, the method of procurement may be, at East Hants's discretion, Procurement Card, Purchase Order, or other method of contract East Hants may identify.
- 1.6.23. The procurement of goods and services, if any, resulting from this RFP will require a written agreement between the parties. Unless otherwise agreed to in writing by East Hants, the terms and conditions of the attached sample agreement shall be the basis for such agreement. Any objections to such terms and conditions must be clearly set out in Proponents' Proposals. In the absence of such objections, East Hants will assume that the Proponent accepts such terms. The extent to which a Proponent accepts, rejects, or proposes modifications to such terms will be taken into account in evaluating Proposals. Any Proposal may, in the sole discretion of East Hants, be rejected at any time on the basis of proposed contract terms and conditions that are unacceptable to East Hants.
- 1.6.24. Proponents are advised that East Hants is governed by Nova Scotia's *Freedom of Information and Protection of Privacy Act (FOIPOP)* and any information submitted to East Hants in response to this RFP may be subject to disclosure under *FOIPOP*. Proponents may identify any confidential information in their Proposals or any accompanying documentation and are advised to consult with their own legal advisors regarding the appropriate way to identify such information. East Hants will make reasonable efforts to safeguard confidential information, subject to its disclosure requirements under *FOIPOP* or any disclosure requirements imposed by law or by order of a court or tribunal. Proponents are advised that their Proposals will, as necessary, be disclosed, on a confidential basis, to advisers retained by East Hants to advise or assist with the RFP process, including the evaluation of Proposals. Proponents are further advised that East Hants may make public the names of any or all Proponents and intends to publish the name of the successful Proponent and the total value of any contract entered into with the successful Proponent. If a Proponent has any questions about the collection and use of information pursuant to this RFP, questions are to be submitted to the RFP Contact.
- 1.6.25. In submitting a Proposal, the Proponent has accepted the reservation of rights (privilege clause) as set out herein and agrees to be bound by same. In addition, the Proponent confirms that it has, and will, comply with all policies of East Hants, including the *Procurement Policy* and *Supplier Disqualification Policy*. No Proponent shall have any claim for compensation of any kind whatsoever as a result of participating in this RFP and by submitting a Proposal each Proponent shall be deemed to have agreed that it has no claim.
- 1.6.26. Submitting a Proposal shall be deemed proof that the Proponent was aware of and understood the requirements, the terms and conditions, and all other provisions of the RFP. East Hants will not be liable for claims made by a Proponent that they were uninformed or unaware of the requirements, terms or conditions of this RFP.

1.7. PROPOSAL OPENINGS

- 1.7.1 East Hants will proceed with private openings for this RFP. Proponents will be advised of their status in the RFP once a determination of award has been made.

1.8. PROPOSAL VALIDITY

- 1.8.1. All responses to this RFP should be held firm for a period of sixty (60) days from the Proposal Deadline or such additional time as may be mutually agreed upon in writing.

1.9. FEES, EXPENSES AND DISBURSEMENTS

- 1.9.1. The Proponent is responsible to ensure that their Proposal clearly describes Total Cost which will be charged to provide the Services. The Proponent must supply a detailed breakdown of the Total Cost including all fees, expenses, and disbursements for which the Proponent expects to be paid.

1.10. PROPOSAL REQUIREMENTS

- 1.10.1. The background, nature of the required Services, and other details which the Proposal must address are described in Section 2, Service Description. East Hants has tried to clearly describe what it wants to achieve in requesting these Services, its service expectations, and the level of support we may expect from the Successful Proponent during the term of the Service delivery.
- 1.10.2. The Proponent must clearly and concisely describe in their Proposal how they propose to deliver the Services.
 - 1.10.2.1. Proponent to clearly indicate in their workplan time/resources required from East Hants staff.
 - 1.10.2.2. Proponent to clearly indicate in their workplan if they require any physical workspace in East Hants' office or if they will be conducting work virtually.
 - 1.10.2.3. Proponent must explain their methodology for asset valuations, facility valuation, and repair/replacement cost recommendations.
 - 1.10.2.4. Proponent to provide sample reports (can be redacted as necessary) to illustrate experience and ability to complete Asset Management Strategy, Asset Management Roadmap, and Asset Management Plan, and Facility Condition Assessment.
 - 1.10.2.5. Proponents should demonstrate how the team they are proposing are qualified to complete the Services. The Proponent must supply the résumés of the Primary Team Members listed in their Proposal.
 - 1.10.2.6. Proponents must provide realistic cost and level of effort figures as part of their Proposal. The Proponent must include a schedule of fees and expenses detailing the planned hours and associated hourly rates for project team members which make up their lump sum Total Cost. If awarded, the lump sum Total Cost may not be exceeded.
 - 1.10.2.7. The Proposal must include a schedule indicating any stages proposed for the Services, together with the time required to complete each stage. The schedule shall indicate milestone dates and dates that items are to be delivered to East Hants.
 - 1.10.2.8. Proponents must provide descriptions and references for three similar projects that they have completed, ideally where the same team members were involved and their roles similar to that proposed. Include the name, phone number, and email address for a representative of the client in case East Hants wishes to contact them.
- 1.10.3. Overall, the intent of the proposal is as follows:
 - 1.10.3.1. East Hants wishes to understand how the Proponent will approach this project if successful. It is up to the Proponent to create compelling argument as to why their firm should be selected, in accordance with the scoring parameters East Hants provides.
 - 1.10.3.2. While there is no maximum page limit, Proponents should only include information which they believe is relevant to the Services being requested and which demonstrates the Proponent's capability and capacity to complete the Services, in accordance with these instructions and being mindful of the Evaluation Criteria.
 - 1.10.3.3. Proponents should avoid relying on assumptions. If a Proponent is unsure of something which is material to their Proposal, they are encouraged to ask questions within the specified period in which to do so.
 - 1.10.3.4. Proponents should not rely on assistance from East Hants as part of their Work Plan unless such assistance can only be obtained from East Hants. East Hants will meet their reasonable obligations to supply information, access, and, where solely within their responsibility to do so, such assistance as is required to facilitate the Services, but the

Proponent must plan to supply all other information and labour as part of the Services and included in their Total Cost.

- 1.10.4. Proponents must complete and submit with their Proposal Appendix A, the Proposal Form, and Appendix B, the Safety Questionnaire.
- 1.10.5. The Proponent may include any tables or attachments it feels will help clarify their Proposals above the minimums identified in the RFP document.
- 1.10.6. Proponents must indicate whether they are the sole undertakers of the work or whether sub-consultants will be used. Proposed sub-consultants shall be subject to approval by East Hants.
- 1.10.7. If a sub-consultant is to be used, the Proponent must include a list of the sub-consultant's staff, their organizational chart and the resumes of Primary Team Members. The role of any sub-consultant must be clearly defined and outlined in the Proposal.
- 1.10.8. East Hants may, without creating an obligation to any Proponent, request clarifications, additional information, supporting documentation not otherwise supplied, up to including a request for a meeting or presentation, for any Proposal or from any Proponent, prior to award.
- 1.10.9. It is the responsibility of the Proponent to be sure they understand the requirements prior to submitting a Proposal and before the deadline for questions has passed.
- 1.10.10. To qualify for award, a Proponent be registered with the Workers' Compensation Board of Nova Scotia (WCBNS), regardless of the size of the company or its usual status with WCBNS. The Proponent is required to provide a Clearance Letter with their Proposal, except where:
 - 1.10.10.1. A Proponent is not currently registered, but intends to register as a condition to providing the Services; and
 - 1.10.10.2. The Proponent confirms in Appendix A that they have inquired with WCBNS and have determined they will be able to obtain such coverage.
- 1.10.11. The successful Proponent will be expected to deliver the Services specified in Section 2, Services Description. The Sample Agreement included as Appendix C represents the terms and conditions which East Hants expects will govern the performance of the Services; while some negotiation may be acceptable, if a Proponent has objection to a specific clause, in particular indemnification or insurance requirements, they must raise them during the competition and East Hants, in their sole discretion, may choose to alter the clause or not.



1.11. PROPOSAL EVALUATION

1.11.1. East Hants will evaluate each Proposal using the criteria specified below.

Criteria	Available Points
Proposal Document	
Comprehension (<i>demonstrated understanding of the requirements and objectives in performing the Services</i>)	/ 15
Work Plan/Schedule (<i>detailed and reasonable approach to the requirements and objectives</i>)	/ 20
Completeness, Value, & Presentation (<i>degree to which Proposal addresses submission requirements and appearance of proposal as indicative of firm's work</i>)	/ 5
Example Projects of a Similar Nature (3)	/ 10
Firm Rating (<i>relevant experience on similar projects, adequate number and type of resources, references</i>)	/ 15
Staff Rating (<i>relevant training and experience</i>)	/ 15
Sub-Total	/ 80
Cost Rating	/ 20
Total	/ 100

1.11.2. When evaluating the Proposals, East Hants will assign points for Cost based on the following formula:

(Lowest Total Proposal Cost divided by Proponent's Total Proposal Cost) multiplied by the Available Points

1.11.3. Rejected proposals will not be considered when evaluating Cost.

1.11.4. In the case of a tie, East Hants may flip a coin to determine which Proponent to consider for award.

1.11.5. Award is subject to approval by Council or the CAO.



2. SERVICES DESCRIPTION

2.1. GENERAL

- 2.1.1. The Municipality of East Hants (“East Hants”) is proud of its reputation for delivering and ensuring quality services and programs to our residents. East Hants is committed to building a strong, thriving municipality, and recognizes that sustainable infrastructure is the foundation of any community. Establishing an Asset Management Program that effectively manages municipal assets over their full life cycle and plans for the long-term funding of the infrastructure needs of the community has been identified as a key strategic priority. More information on the strategic direction of the Municipality is available here:

<https://www.easthants.ca/government/council/reports/strategic-plan/>

- 2.1.2. East Hants will rely on the services of the Consultant to provide asset management consulting services to help introduce and advance the capabilities of asset management at the municipality, through supporting East Hants in the roll out of a formal asset management program. The Services will include data review activities such as analyzing asset data and information practices and implementing a corporate asset inventory, developing an Asset Management Strategy, Asset Management Roadmap, with implementation plan, and Asset Management Governance Structure. The Consultant will further develop East Hants’ first Asset Management Plan (AMP), by way of activities including state of the assets review, levels of service & performance measures, risk framework, lifecycle management strategy, and financial management strategy, based on East Hants’ needs and industry best practice. The Services are expected to lay the foundation for East Hants to move forward with asset management as an internal function.
- 2.1.3. The Services will also include a facility condition assessment for the East Hants Sportsplex. This facility condition assessment is intended to satisfy requirements under a Facility Management Agreement and further act as a pilot condition assessment that aligns with the asset management data frameworks being developed as part of the formal asset management program.
- 2.1.4. The Consultant will complete the activities specified in this document, and any other activities necessary, to achieve the Asset Management Maturity Level Targets identified in this section, per the Federation of Canadian Municipalities (“FCM”) Asset Management Readiness Scale.
- 2.1.5. The governing structure of East Hants consists of a Council, which sets the strategic vision, and six (6) departments: CAO’s Office, Planning & Development, Infrastructure & Operations, Parks Recreation & Culture, Finance, and Corporate Services. Asset management is currently an informal practice across the organization. East Hants’ existing asset information is contained within the departments, in various spreadsheets, documents, reports, and staff knowledge. The Municipality uses SAP as its financial software and Esri ArcGIS as a mapping software. Interactive East Hants open data is available here:

<https://easthants.maps.arcgis.com/home/index.html>

- 2.1.6. In 2021, East Hants established an ‘Asset Management Office’ in the Corporate Services Department to champion Asset Management as an internal function. The AM Office is under the direction of the Director, Corporate Services; the Manager, Real Estate and Corporate Projects has been identified as the primary contact for facilitating and project managing East Hants’ AM Program. An Asset Management Steering Committee has been identified, consisting of the CAO and Director of each Department. Additionally, East Hants is in the beginning stages of forming cross-functional working groups to ensure asset management involves collaborative work that is informed by all levels of the

organization. To-date, East Hants has conducted the following activities as part of formalizing and advancing an Asset Management Program:

- 2.1.6.1. Maturity Assessment: The AM Steering Committee completed FCM's Asset Management Readiness Scale Assessment tool, included in Reference Materials. For Policy and Governance, East Hants has currently completed Level 1. For People and Leadership, East Hants is currently working on Level 1. For Data and Information, East Hants has currently completed Level 1. For Planning and Decision-Making, East Hants has currently completed Level 1. For Contributions to Asset Management Practices, East Hants has currently completed Level 1.
- 2.1.6.2. Asset Management Maturity Level Targets: The Consultant will complete the activities specified in this document, and any others necessary, to support East Hants in reaching their desired maturity level targets ("Expected State" in tool) as identified in FCM's Asset Management Readiness Scale Assessment tool.
- 2.1.6.3. Preliminary Asset Management Roadmap: As reflected in the scope of Services, East Hants has identified that governance framework, data and information framework, and understanding the current state of assets are key initial stops from a roadmap perspective. East Hants is looking to the Consultant to support building out a roadmap with actionable and meaningful deliverables.
- 2.1.6.4. Preliminary Asset Management Network framework: East Hants is considering organizing the East Hants Asset Management Network by people and decision streams, rather than by municipal department. The rationale behind this is to provide resiliency in structure, as departments may undergo realignments or changes in names, but delivery streams (core businesses/services) are less likely to have significant changes. This also allows East Hants to align asset management fundamentals and practices across departments and management systems, and capture where asset management activities may fall under more than one municipal department (for example, both Parks Recreation & Culture and Infrastructure & Operations provide operations and maintenance services). East Hants is looking to the Consultant to provide Governance Structure support, including formation of the Asset Management Network, developing terms of reference, etc. as part of asset management consulting services.



2.1.6.5. Asset Management Policy: The Asset Management Office will develop East Hants' Asset Management Policy. As such, policy development is not included in the Consultant's scope of work.

2.1.7. The Services will assist East Hants in making the best possible decisions regarding building, operating, maintaining, renewing, and financing the assets owned and operated By East Hants, including:

Asset Classification	Comments
Facilities	Including buildings used by tenants, public and/or staff
Water	Including supply, treatment, and distribution systems
Wastewater	Including collection, treatment, and disposition systems
Stormwater	Including collection, disposition, and mitigation systems
Roads and Traffic	Including roads, bridges, sidewalks, streetlights
Fleet	Including vehicle and equipment
Parks & Open Space	Including trails, parks, playgrounds, trees
Technology	Including equipment, software, electronic/digital

2.1.8. To give a context of approximate inventory of the Municipality's owned assets, the following is a non-exhaustive summary of the quantity and types of assets owned and operated by East Hants:

Asset Classification	Comments
Facilities	Municipal Administrative Office: 1 Parks, Recreation & Tourism Buildings: ~24 (include storage buildings, gazebo structures, park washrooms, lighthouses, multipurpose buildings, aquatic centre) Infrastructure & Operations Buildings: ~28 (range from water towers, treatment plants, storage, waste management; does not include lift stations)
Water, Wastewater & Stormwater	Lift Stations: 28 Hydrants: 350+
Roads and Traffic	Roads: 23 km Sidewalks: 20 km Culverts: 160+ Street lights: 1,922
Fleet	Fleet: ~16 (trucks and SUVs) Equipment: ~20 (Range from utility trailers, excavators, front loaders, lawn tractors)
Parks & Open Space	Playgrounds: 7 Trails: 4600 m Docks - 3 floating 1 on posts Vehicle Wooden Bridges -2 Piers and lookoffs -2

2.1.9. The following is a list of documents and other materials which may inform how the Consultant chooses to approach this work and that may be of value for completing the Scope and Deliverables:

- 2.1.9.1. [Strategic Plan 2021-2024](#)
- 2.1.9.2. [Overview of Municipal Departments](#)
- 2.1.9.3. [Annual Report, Treasurer's Report and Financial Statements](#)
- 2.1.9.4. [Business Plan & Operating Budget](#)
- 2.1.9.5. [Capital Budget](#)

- 2.1.9.6. [Water Utility Budget](#)
- 2.1.9.7. [Audited Financial Statements](#)
- 2.1.9.8. [Water Utility Audited Financial Statements](#)
- 2.1.9.9. [Socio-Economic Study](#)
- 2.1.9.10. [Recreation Plans](#)

2.2. SCOPE & DELIVERABLES

2.2.1. Task 1 - General Project Management

- 2.2.1.1. Primary Point of Contact: The Consultant will assign a Project Manager who shall be the primary contact with East Hants for the duration of the contract.
- 2.2.1.2. Project Kick Off: Within one (1) week of project award, the Consultant will convene a kick off meeting (by way of phone or video chat) to review the scope of the project and the schedule. Information that is required by the Consultant to undertake the study is to be identified by the Consultant, including identification of key internal stakeholders and their expected resource dedication, and reviewed by East Hants. The Consultant will be responsible for meeting arrangements, including recording and distributing meeting minutes.
- 2.2.1.3. Communications: The Consultant is expected to provide, at minimum, informal updates every two weeks via email or phone call. At some points in the project, East Hants may request more frequent informal updates. The Consultant is to provide, at a minimum, monthly formal update reports via letterhead report. The Consultant is expected to send meeting minutes and/or action log to East Hants within one (1) week of each meeting or workshop.
- 2.2.1.4. Project Plan: The Consultant is to provide, manage, and maintain the project plan, addressing scope, schedule, risk, communication, stakeholder impact, etc.

2.2.2. Task 2 - Asset Management Strategy, Roadmap & Governance Structure

- 2.2.2.1. The Consultant will support East Hants in formalizing the documents necessary to ensure clear line of sight between municipal objectives and asset management objectives. All municipal assets are to be captured under this section. At a minimum, the Consultant will:
 - 2.2.2.1.1. Asset Management Strategy
 - 2.2.2.1.1.1. The Consultant is to provide a clear Asset Management Strategy for the advancement of asset management for the Municipality, defining how East Hants' context and strategic objectives translate into Asset Management objectives and associated decision-making criteria.
 - 2.2.2.1.1.2. The Asset Management Strategy is to use the gap analysis and maturity level targets to outline strategic priorities and an approach that will be used to develop a focused Asset Management Roadmap with associated implementation plan.
 - 2.2.2.1.1.3. As part of the implementation plan, Consultant to recommend communications strategy and provide guidance on how to build corporate support for Asset



Management, foster a culture that supports and is committed to asset management, and embed Asset Management into decision-making.

2.2.2.1.1.4. The Asset Management Strategy should include, but is not limited to:

- 2.2.2.1.1.4.1. Scope and applicability of the asset management system (i.e. the assets and departments to which it applies);
- 2.2.2.1.1.4.2. Business context, including stakeholder needs and expectations;
- 2.2.2.1.1.4.3. Asset management decision-making approaches;
- 2.2.2.1.1.4.4. Asset management objectives and performance targets, that are specific, measurable, achievable, realistic, and time-bound (SMART);
- 2.2.2.1.1.4.5. Asset management improvement initiatives;
- 2.2.2.1.1.4.6. Asset management roles and responsibilities;
- 2.2.2.1.1.4.7. Risks to the Asset Management Strategy, and monitoring and evaluation.

2.2.2.1.2. Asset Management Roadmap

- 2.2.2.1.2.1. The Consultant is to develop a draft East Hants' Asset Management Roadmap to assist with the implementation of corporate-wide asset management practices, complete with actionable items, and meaningful deliverables with proposed timelines.
- 2.2.2.1.2.2. The Consultant is to develop a draft implementation plan for advancement of asset management in the organization based on the data gap analysis, asset management maturity level targets, the draft Asset Management Strategy, and the proposed Governance Structure, highlighting areas like resource requirements, schedule, risk, critical success factors, etc., that East Hants requires in order to implement the Asset Management Roadmap and future Asset Management Plan.

2.2.2.1.3. Asset Management Governance Structure

- 2.2.2.1.3.1. The Consultant is to develop a draft Governance Structure, including East Hants' Asset Management Network, that ensures the appropriate functions and personnel are involved in the development and implementation of asset management at East Hants.
- 2.2.2.1.3.2. The Consultant is to work with East Hants staff to build upon current Asset Management Network discussions, align efforts with maturity level targets,
- 2.2.2.1.3.3. The Consultant is expected to quantify the anticipated resource requirements across the organization to implement the proposed Asset Management Strategy and Roadmap.
- 2.2.2.1.4. The Consultant is to host an Asset Management Strategy, Roadmap & Governance Structure workshop with the Asset Management Steering Committee to gain approval of the Asset Management Strategy, Roadmap and Governance Structure.

East Hants should receive draft documents a minimum of one (1) week before scheduled workshop.

- 2.2.2.1.5. The Consultant is to provide a final Asset Management Strategy document in both editable MS software and PDF that aligns with industry best standards, East Hants' needs, and captures the above, including any revisions made following the workshop with Asset Management Steering Committee.
- 2.2.2.1.6. The Consultant is to provide a final Asset Management Roadmap, with implementation plan, document in both MS software and PDF that aligns with industry best standards, East Hants' needs, and captures the above, including any revisions made following workshop with Asset Management Steering Committee.
- 2.2.2.1.7. The Consultant is to provide a final Asset Management Governance Structure document in both MS software and PDF that aligns with industry best standards, East Hants' needs, and captures the above, including any revisions made following the workshop with the Asset Management Steering Committee.
- 2.2.2.1.8. Any supporting templates and tools are to be submitted alongside the final Asset Management Strategy and Asset Management Roadmap and submitted in the appropriate format (i.e., MS Excel, MS Word, MS PowerPoint, PDF, etc.).
- 2.2.2.1.9. Asset Management Knowledge
 - 2.2.2.1.9.1. East Hants acknowledges that asset management knowledge and competency is currently an informal practice across the organization. The Consultant is responsible, with support of East Hants' Asset Management Office, for gathering the required information to complete the Services through activities, workshops, and meetings with staff, as necessary.
 - 2.2.2.1.9.2. The Consultant to allocate a minimum of seven (7) task-based workshops to facilitate review and finalization of the Asset Management Strategy and Roadmap and the six (6) mandatory technical memorandums as described throughout. These technical workshops are to be held in-person at East Hants' Municipal Offices, at dates determined per approved workplan. Workshops may be virtual if required under Public Health restrictions.
 - 2.2.2.1.9.3. The Consultant to provide an additional minimum of ten (10) consulting hours East Hants can allocate to educate/train staff and/or Council regarding generic asset management knowledge and/or East Hants' specific asset management program.

2.2.3. Task 3 - Data Gap Analysis, & Asset Inventory

- 2.2.3.1. The Consultant will support East Hants's asset management data activities by identifying, establishing and documenting an organizational understanding on asset data sources, locations, assumptions, limitations, and methodologies, for municipal assets, with the exclusion of:
 - 2.2.3.1.1. Technology assets are not to be considered in the scope of Tasks 3 through 9; they are to be captured under Task 2 per Asset Management Strategy, Asset Management Roadmap and associated implementation plan activities. East Hants staff will capture technology assets in future Asset Management Plan activities.

2.2.3.1.2. Fleet assets are not to be considered in the scope of Tasks 3 through 9; they are to be captured under Task 2 per Asset Management Strategy, Asset Management Roadmap and associated implementation plan activities. East Hants staff will capture fleet assets in future Asset Management Plan activities.

2.2.3.1.3. Water, wastewater, and stormwater assets are not to be considered in the scope of Tasks 3 through 9; they are to be captured under Task 2 per Asset Management Strategy, Asset Management Roadmap and associated implementation plan activities. Under a separate procurement, East Hants has retained the services of a consultant to review East Hants' water, sewer, and stormwater infrastructure pertaining to lifecycle and servicing capacity. East Hants staff will utilize that information to capture water, wastewater, and stormwater assets in future Asset Management Plan activities.

2.2.3.2. At a minimum, the Consultant will:

2.2.3.2.1. The Consultant is to perform all activities and meetings necessary to identify, review, analyze, and understand the current inventory of municipal assets, with the exception of assets listed under Section 2.2.3.1.1, 2.2.3.1.2 and 2.2.3.1.3. It is anticipated that the Consultant will need to conduct a mix of a desktop review of electronic asset data records collected from meetings and discussion with East Hants staff, and may need to factor in-person data collection activities at the East Hants office for any paper records, and potential visits to specific asset locations to collect and/or verify data. The Consultant is not expected to complete full condition assessment activities, with the exception of those outlined in Task 10 for the East Hants Sportsplex Facility Condition Assessment. If the Consultant is to rely on East Hants staff for paper records scanning and site-specific data verification, the Consultant must make that clear in their submission, and must consider up to one (1) week turnaround for East Hants to gather any requested data.

2.2.3.2.2. The Consultant is to work with appropriate East Hants staff, as identified in the Governance Structure, to identify data gaps and data objectives, and provide data collection priorities, including:

2.2.3.2.2.1. Identify improvements that can be reasonably made immediately to data management activities to support the development of the first East Hants Asset Management Plan;

2.2.3.2.2.2. For data gaps that cannot reasonably be addressed for the current project, recommend other solutions/assumptions that can be made to achieve current project objectives;

2.2.3.2.2.3. Identify further improvements that are recommended for East Hants to undertake in the medium-long term to support future improvements to the East Hants asset management program.

2.2.3.2.3. The Consultant is to analyze and provide recommendations on corporate-wide asset inventory records management. This is to include a meeting with East Hants' Information Management Clerk to understand East Hants' current records management system and processes.

- 2.2.3.2.4. The Consultant is to support development and implementation of a formal Asset Inventory for each asset classification, including
 - 2.2.3.2.4.1. Review of hierarchies and terminology currently existing within the organization, through review of current data sources, existing inventories, reporting, and staff knowledge.
 - 2.2.3.2.4.2. Identify an asset hierarchy/classification system and data structure suitable for managing each municipal asset classification.
 - 2.2.3.2.4.3. Identify the key asset attributes to be captured in the Asset Inventory for each asset classification.
 - 2.2.3.2.4.4. Develop a condition rating system for each asset classification based on East Hants' needs and industry best practice.
 - 2.2.3.2.4.5. Develop a risk and criticality framework and rating system in order to provide a methodology for objectively calculating the risk and criticality of each asset classification. The methodology is to be based on proven industry best practices and with the intention to bring consistency and standardization across the municipality.
 - 2.2.3.2.4.6. Develop a priority rating system to bring consistency across asset classifications when considering operational and capital repair/replacement plans.
- 2.2.3.2.5. The Consultant is to provide direction on incorporation of data and the Asset Inventory into East Hants' current GIS system, and identify geospatial mapping priorities as applicable. Consultant to meet with East Hants' GIS Coordinator as part of forming this direction.
- 2.2.3.2.6. The Consultant is to provide advice on and share templates for data collection techniques and tools.
- 2.2.3.2.7. The Consultant is to draft a data gap analysis and recommendations technical memorandum and a draft Asset Inventory for each asset classification for review by East Hants. The Consultant to host a workshop with the Asset Management Steering Committee, and any other identified staff and/or Working Group(s), to gain approval of said draft technical memorandum and to finalize an East Hants asset hierarchy/classification system and data structure for East Hants' Asset Inventory. East Hants should receive the draft documents a minimum of one (1) week before scheduled workshop.
- 2.2.3.2.8. The Consultant is to provide a final data gap analysis and recommendations technical memorandum in PDF that summarizes the above, provides recommendations for improvement and data collection priorities, and captures any revisions made to the draft following the workshop with the Asset Management Steering Committee. Any supporting templates and tools are to be submitted alongside the final technical memorandum and submitted in the appropriate format (i.e., MS Excel, MS Word, MS PowerPoint, PDF, etc.).
- 2.2.3.2.9. The Consultant is to provide final Asset Inventories for each asset classification in MS Excel; the final documents should capture any revisions made to the asset



hierarchy/classification system and data structure following the workshop with the Asset Management Steering Committee. The MS Excel Spreadsheets are to be unlocked and editable for ongoing management by East Hants.

2.2.4. Task 4 - State of the Assets Review

- 2.2.4.1. Based on the Data Gap Analysis activities and the agreed upon methodologies from Task 3, the Consultant will conduct a State of the Assets review and prepare a technical memorandum that provides a clear and concise understanding of the current 'as-is' state of East Hants' assets, with the exception of assets listed under Section 2.2.3.1.1, 2.2.3.1.2 and 2.2.3.1.3. At a minimum, the Consultant will:
 - 2.2.4.1.1. For each asset category, document the following information per the defined and agreed-upon asset hierarchy/classification system:
 - 2.2.4.1.1.1. Summaries of the assets in each category;
 - 2.2.4.1.1.2. Current replacement values of the assets in each category, based on current industry pricing;
 - 2.2.4.1.1.3. Average age of the assets in each category, determined by assessing the average age of the components of the assets (based on available information);
 - 2.2.4.1.1.4. The information available on the condition of the assets in each category, including known condition based on existing condition assessment reports, or estimated condition based on other available data (such as age, estimated service life, usage data, work history) that can serve as a proxy for condition for those that have not had a condition assessment. Condition rating to be based on rating system identified and approved by East Hants in Task 3.
 - 2.2.4.1.2. The above shall be communicated clearly and concisely and make effective use of graphs, tables, or other visual aids as appropriate and in consultation with East Hants.
 - 2.2.4.1.3. The Consultant is to identify potential gaps in condition information and assess the need for and recommend any future condition assessments or investigations that may be beneficial.
 - 2.2.4.1.4. The Consultant is to draft a State of the Assets technical memorandum for review by East Hants. The Consultant is to host a workshop with the Asset Management Steering Committee, and any other identified staff and/or Working Group(s), to gain approval of said draft technical memorandum. East Hants should receive the draft technical memorandum a minimum of one (1) week before scheduled workshop.
 - 2.2.4.1.5. The Consultant is to provide a final State of the Assets technical memorandum in PDF that summarizes the above, provides recommendations for improvement and data collection priorities, and captures any revisions made to the draft following workshop with Asset Management Steering Committee. Any supporting templates and tools are to be submitted alongside the final technical memorandum and submitted in the appropriate format (i.e., MS Excel, MS Word, MS PowerPoint, PDF, etc.).

2.2.5. Task 5 - Levels of Service (LOS) and Performance Measures

- 2.2.5.1. The Consultant will conduct a LOS and performance review and prepare a technical memorandum that provides a clear and concise understanding of the current service and performance of municipal assets, with the exception of assets listed under Section 2.2.3.1.1, 2.2.3.1.2 and 2.2.3.1.3. At a minimum, the Consultant will:
- 2.2.5.1.1. The Consultant is to review existing LOS and performance measures by means of any documentation available (ex. strategic plans, master plans, business plans, budget documents) and through conversations with identified East Hants staff.
 - 2.2.5.1.2. Based on review and review of best practices for municipalities of similar size and assets, the Consultant is to identify any modifications to target LOS for each asset class that are appropriate for East Hants and determine potential timelines of achieving these targets in consultation with staff.
 - 2.2.5.1.3. The Consultant is to develop, in consultation with East Hants staff, appropriate key performance measures for each category.
 - 2.2.5.1.4. The Consultant is to develop a recommended LOS and performance framework including community and technical LOS and performance measures.
 - 2.2.5.1.5. The Consultant is to draft a LOS and performance technical memorandum for review by East Hants. The Consultant is to host a workshop with the Asset Management Steering Committee, and any other identified staff and/or Working Group(s), to gain approval of said draft technical memorandum, recommended frameworks, and to identify any further data needed to support LOS and performance reporting. East Hants should receive the draft technical memorandum a minimum of one (1) week before scheduled workshop.
 - 2.2.5.1.6. The Consultant is to provide a final LOS and performance strategies technical memorandum in PDF that summarizes the above, provides recommendations that balance the performance and lifecycle costs of assets while considering the risks, and captures any revisions made to the draft following workshop with Asset Management Steering Committee. Any supporting templates and tools are to be submitted alongside the final technical memorandum and submitted in the appropriate format (i.e., MS Excel, MS Word, MS PowerPoint, PDF, etc.).

2.2.6. Task 6 - Risk Framework

- 2.2.6.1. The Consultant will review and define a risk framework for each asset classifications, with the exception of assets listed under Section 2.2.3.1.1, 2.2.3.1.2 and 2.2.3.1.3., that can be used to communicate risk profiles, including a summary and discussion of the highest risk assets in each classification. At a minimum, the Consultant will:
- 2.2.6.1.1. The Consultant is to conduct a background review of East Hants' existing risk practices, as well as any data or additional risk information contained within existing reports.
 - 2.2.6.1.2. The Consultant is to develop a risk framework and complete a risk analysis for each asset classification.

- 2.2.6.1.3. The Consultant is to document the draft risk framework and analysis in a technical memorandum for review by East Hants. Consultant to host a workshop with the Asset Management Steering Committee, and any other identified staff and/or Working Group(s), to gain approval of said framework. East Hants should receive the draft technical memorandum a minimum of one (1) week before scheduled workshop.
- 2.2.6.1.4. The Consultant is to provide a final risk framework and analysis technical memorandum in PDF that will inform risk management, operational and maintenance planning and capital planning, summarizes the above, and captures any revisions made to the draft following the workshop with the Asset Management Steering Committee. Any supporting templates, tools, and data used in the development of the risk assessment are to be submitted alongside the final report and in the appropriate format (i.e., MS Excel, MS Word, MS PowerPoint, PDF, etc.).

2.2.7. Task 7 - Lifecycle Management Strategy

- 2.2.7.1. The Consultant is to provide East Hants with a rational assessment of current, planned, and recommended lifecycle activities needed in order to maintain current LOS for each year of a twenty-five (25) year horizon for each asset classification, with the exception of assets listed under Section 2.2.3.1.1, 2.2.3.1.2 and 2.2.3.1.3. Lifecycle activities shall include operation and maintenance activities, renewal including capital renewal, rehabilitation, and end-of-life replacement, as well as expansion and upgrade projects needed to support population growth, planned service level changes, or regulatory requirements. This information will be the basis for recommended investment levels, gaps, and risks in the financial analysis of asset management plan activities. At a minimum, the Consultant will:
 - 2.2.7.1.1. The Consultant is to conduct a review of relevant documents and data, including:
 - 2.2.7.1.1.1. Current and forecasted operating budgets and capital plan;
 - 2.2.7.1.1.2. Condition assessment reports and associated data, as available;
 - 2.2.7.1.1.3. Growth planning documents.
 - 2.2.7.1.2. The Consultant is to conduct any meetings necessary with East Hants staff to gain a detailed understanding of East Hants' current programs, budgets, processes, and growth plans to ensure that they will be accurately reflected in the Asset Management Plan.
 - 2.2.7.1.3. For each asset category, Consultant to describe the recommended lifecycle activities that would need to be undertaken to maintain current LOS for each year of a twenty-five-year planning period, and the costs of providing these activities based on an assessment of the following:
 - 2.2.7.1.3.1. The full lifecycle of the assets;
 - 2.2.7.1.3.2. The options for which lifecycle activities could potentially be undertaken to maintain the current LOS;
 - 2.2.7.1.3.3. The risks associated with the options referred to above;

- 2.2.7.1.3.4. The lifecycle activities referred to above that can be undertaken for the lowest cost to maintain the current LOS.
- 2.2.7.1.4. In addition to the operation, maintenance, and renewal of East Hants' current asset portfolio, the Consultant should include any new, upgraded, or expanded assets that are required to address population growth, LOS changes, or regulatory requirements over a twenty-five-year planning period.
- 2.2.7.1.5. The Consultant is to document the draft lifecycle management strategy in a technical memorandum for review by East Hants. Consultant to host a workshop with the Asset Management Steering Committee, and any other identified staff and/or Working Group(s), to gain approval of said technical memorandum. East Hants should receive the draft technical memorandum a minimum of one (1) week before scheduled workshop.
- 2.2.7.1.6. The Consultant is to provide a final lifecycle management technical memorandum in PDF that summarizes the above, and captures any revisions made to the draft following the workshop with the Asset Management Steering Committee. Any supporting templates, tools, and data used in the development of the risk assessment are to be submitted alongside the final report and in the appropriate format (i.e., MS Excel, MS Word, MS PowerPoint, PDF, etc.).

2.2.8. Task 8 - Asset Management Financial Strategy

- 2.2.8.1. Note: the Consultant is not to consider or analyze funding sources, revenue streams, reserve balances, or the overall financial condition of East Hants.
- 2.2.8.2. The Consultant will develop and communicate a clear understanding of the financial investment needed to implement the proposed lifecycle strategy to maintain the current Level of Service for each year of the twenty-five (25) year planning horizon, as well as comparison to the currently planned lifecycle activities and budgets for each asset classification, with the exception of assets listed under Section 2.2.3.1.1, 2.2.3.1.2 and 2.2.3.1.3. At a minimum, the Consultant will:
 - 2.2.8.2.1. The Consultant is to review current financial policies and statements and consult with the Asset Management Financial Planning Working Group, and any other Finance or East Hants staff, as necessary.
 - 2.2.8.2.2. The Consultant is to analyze planned budgets and compare to the total needed expenditures for the recommended lifecycle activities in the categories of operation and maintenance, renewal, and expansion and upgrade for the twenty-five-year planning period.
 - 2.2.8.2.3. For lifecycle activities that are not currently planned or budgeted for, the Consultant is to evaluate the impacts to asset condition, risk, Level of Service, and financial sustainability over the ten-year planning period, and provide recommendations for risk management.
 - 2.2.8.2.4. The Consultant is to develop recommendations regarding any changes to planned lifecycle activities or budgets that may be implemented to optimize Level of Service, risk, and cost.

- 2.2.8.2.5. The Consultant is to develop a summary of the estimated twenty-five (25) year horizon renewal funding needs, based on the current asset portfolio, for each asset classification.
- 2.2.8.2.6. The Consultant is to document the draft AM financial management strategy in a technical memorandum for review by East Hants. The Consultant is to host a workshop with the Asset Management Steering Committee, and any other identified staff and/or Working Group(s), to gain approval of said technical memorandum. East Hants should receive the draft technical memorandum a minimum of one (1) week before scheduled workshop.
- 2.2.8.2.7. The Consultant is to provide a final financial management strategy technical memorandum in PDF that summarizes the above, and captures any revisions made to the draft following the workshop with the Asset Management Steering Committee. Any supporting templates, tools, and data used in the development of the financial strategy are to be submitted alongside the final report and in the appropriate format (i.e., MS Excel, MS Word, MS PowerPoint, PDF, etc.).

2.2.9. Task 9 - Asset Management Plan

- 2.2.9.1. The Consultant is to compile all content from the technical memoranda approved in previous tasks into a comprehensive Asset Management Plan that includes the following:
 - 2.2.9.1.1. Executive summary to provide an overview of the project and its findings;
 - 2.2.9.1.2. Background outlining purpose of Asset Management Plan, scope, methodology, and key documents of reference, integration to East Hants strategic priorities/objectives;
 - 2.2.9.1.3. Key findings from asset maturity review and data gap analysis activities;
 - 2.2.9.1.4. Asset Management Strategy, Asset Management Roadmap and Governance Structure progress to-date;
 - 2.2.9.1.5. A portfolio overview, including:
 - 2.2.9.1.5.1. Total replacement cost;
 - 2.2.9.1.5.2. Historical investments summary;
 - 2.2.9.1.5.3. Condition analysis (based on scale proposed in Phase 1 and as approved by East Hants);
 - 2.2.9.1.5.4. Projected capital replacement needs;
 - 2.2.9.1.5.5. Infrastructure backlog notes;
 - 2.2.9.1.5.6. Average annual requirements over next five (5) years
 - 2.2.9.1.5.7. Average annual requirements over next twenty-five (25) years;
 - 2.2.9.1.6. Summary of each asset classification, including:



- 2.2.9.1.6.1. Category overview;
- 2.2.9.1.6.2. Condition analysis (based on scale proposed in Phase 1 and as approved by East Hants), and recommended approach to condition assessments moving forward;
- 2.2.9.1.6.3. Age profile, including projected remaining life;
- 2.2.9.1.6.4. Projected capital replacement needs, including identification of the assets assessed to be critical;
- 2.2.9.1.6.5. Lifecycle analysis;
- 2.2.9.1.6.6. Comment on LOS and performance of assets;
- 2.2.9.1.7. Risk and criticality methodology, framework and analysis;
- 2.2.9.1.8. Level of service analysis;
- 2.2.9.1.9. Asset Management financial analysis, including annual capital requirements, annual infrastructure funding deficits, grant funding opportunities;
- 2.2.9.1.10. Strategic priorities and recommendations, such as immediate and long-term actions, building asset management culture and capacity, enhancing data quality, etc.
- 2.2.9.1.11. Consultant to provide East Hants with a draft Asset Management Plan in PDF format for East Hants review.
- 2.2.9.1.12. Consultant to finalize Asset Management Plan in PDF format based on East Hants' review and feedback.
- 2.2.9.1.13. Consultant to provide electronic copies of Asset Management Plan schedules and detailed information so that East Hants may take ownership of the on-going updating and/or revising over time, as needs, objectives, and assets change. The spreadsheets are to be formatted in such a fashion as to protect modelling aspects of the database and have appropriate input cells for changes in policy or outcomes. The Consultant may be required to provide East Hants training on the set up, editing, and use of the spreadsheets.

2.2.10. Task 10 - East Hants Sportsplex Facility Condition Assessment

- 2.2.10.1. In July 2021, East Hants established a partnership with the East Hants Arena Association (EHAA) whereas East Hants took over ownership of the East Hants Sportsplex with the EHAA continuing the daily operation through a Facility Management Agreement. Located at 1076 Highway 2, Lantz, NS, the original facility was built in 1993 consisting of one ice surface, the Keith Miller Arena. Demand and growth warranted further expansion by the late 2000s, and in 2011 the current facility opened with two full-size ice surfaces and an indoor field house (Dome) complete with artificial turf and an indoor walking track. Drawings for the East Hants Sportsplex are included in Reference Documents. Annual financial statements can be shared with the successful Consultant. East Hants requires a Facility Condition Assessment to assist in understanding and managing the asset lifecycle.

- 2.2.10.2. The Facility Condition Assessment is intended to satisfy requirements of the Facility Management Agreement. It further intends to develop a comprehensive picture of the physical condition and functional performance of the facility, using the asset management processes and frameworks developed in the previous tasks alongside industry standard condition assessment methodology.
- 2.2.10.3. The Facility Condition Assessment is to be completed based on industry standard methodology and in compliance with local, regional, and national health and safety acts and building codes. At a minimum, the consultant will complete the following:
- 2.2.11. Task 10-A - Site Inspections
 - 2.2.11.1. The Consultant is to review all available drawings and reports to become familiar with the facility.
 - 2.2.11.2. The Consultant must provide East Hants a minimum of 5 business-days notice prior to attending the facility for a site visit, to ensure East Hants is in compliance with the Facility Management Agreement. East Hants staff will assist with coordinating access to the Facility.
 - 2.2.11.3. The Consultant is responsible for providing all inspection equipment necessary to perform the condition assessment, including PPE, flashlights, ladders, etc.
 - 2.2.11.4. The Consultant is to conduct a visual condition assessment, with no invasive or destructive testing; based on findings of visual inspection, any further recommended testing is to be included in the final condition assessment report.
 - 2.2.11.5. The Consultant is to conduct informal interviews with key facility staff to gain understanding of facility-specific matters, component and system intricacies, maintenance habits, etc.
 - 2.2.11.6. The Consultant is to inventory, as further described in Section 1.3, measure, and report conditions in accordance with Uniformat II Classification, at a minimum up to Level 3. The use of 'other' to describe a system category is unacceptable.
 - 2.2.11.7. Consideration must be given to the seasonal nature of the facility and the expectation is that the Consultant will collect data for the various facility assets at peak use, as well as off-peak use (i.e. assess the condition of the arena assets during peak use and also assess the rink surface once the ice is removed).
 - 2.2.11.8. Any and all observations that are considered an emergency or require immediate attention due to health and safety concerns must be identified and reported to East Hants immediately.
 - 2.2.11.9. The Consultant is to take photographs of any all deficiencies noted during inspections, and link them to the Detailed Facility Inventory.
- 2.2.12. Task 10-B - Detailed Facility Inventory
 - 2.2.12.1. The Consultant is to conduct a detailed inventory and analysis of the facility and its components, including replacement costs, in accordance with Uniformat II

Classification, at a minimum up to Level 3. Professional engineering expertise and judgement is to be used.

- 2.2.12.2. All inventory collected should include specific location descriptions that align with floor plans, and/or unique identifies on-site. Leaving the location blank will not be accepted.
- 2.2.12.3. A unique identifier must be recorded, where available. Provide reference to the model number, asset number, serial number, or any other additional unique identifying device(s) when identifying a component.
- 2.2.12.4. The Consultant is to estimate remaining life expectancy of each system. The year of installation to be recorded, or noted if it is an estimated year.
- 2.2.12.5. The Consultant is to record the general physical condition of each asset and identify any visible deficiencies; where required and/or possible, record the cause of failure, potential cause of failure, or excessive deterioration. For every deficiency, one or more means of mitigation must be developed.
- 2.2.12.6. A condition rating for each asset is to be based on the scale proposed in Task 3 and as approved by East Hants.
- 2.2.12.7. Criticality or consequence of failure rating is to be applied based on the scale proposed in Task 3 and as approved by East Hants.

2.2.13. Task 10-C - Analysis & Recommendations

- 2.2.13.1. The Consultant shall describe details of the present condition of facility assets and components and outline deficiencies with recommendations for remedial work for immediate and long-term repairs, replacement, or modernization. A table shall be included in the Facility Condition Report that outlines the projected useful life of major components with anticipated repair/replacement costs.
- 2.2.13.2. Based on the capital needs identified in the condition assessment, all recommendations should include a priority rating to develop a list of improvements required in the next five (5) years for immediate needs and next twenty-five (25) years for future planning, to inform East Hants' capital/operating plans. This priority rating is to be based on the scale and time frames proposed in Task 3 and as approved by East Hants.
- 2.2.13.3. Corrective projects must be recommended for each deficient condition identified and include cost estimates for labour and materials and details of the work required for the repair. The data must be updatable. The estimates are to be based on recognized construction estimating data adjusted for the Atlantic region.
- 2.2.13.4. The Consultant is to provide a set of prioritized recommendations for changes to the preventative maintenance program for the facility that will prolong its operability, suitability, and value given the age of its construction and the age of any major components renewed subsequently.
- 2.2.13.5. The Consultant is to identify likely liabilities associated with the ongoing use and repair of the facility.

2.2.13.6. The Consultant is to provide an estimated replacement value for the facility.

2.2.14. Task 10-D - Facility Condition Reporting

2.2.14.1. The Consultant is to prepare a Facility Condition Assessment report for the facility. The report shall include the following, at a minimum, unless otherwise agreed to by East Hants:

2.2.14.1.1. Introduction, describing the following:

2.2.14.1.1.1. Description of the facility;

2.2.14.1.1.2. Address and nearest major intersection;

2.2.14.1.1.3. Lot area, building footprint, total building area;

2.2.14.1.1.4. Inspection date;

2.2.14.1.1.5. Colour photograph of the building;

2.2.14.1.2. Methodology, describing Consultant's approach to the Facility Condition Assessment.

2.2.14.1.3. Detailed Facility Inventory, presented per Task 10-B, in MS Excel Spreadsheet format that contains, but is not limited to, the following attribute fields:

2.2.14.1.3.1. Asset ID/Unique Identifier

2.2.14.1.3.2. Location/Description

2.2.14.1.3.3. Unifomat Reference(s)

2.2.14.1.3.4. Asset Description

2.2.14.1.3.5. Installation Year

2.2.14.1.3.6. Estimated Service Life Remaining

2.2.14.1.3.7. Useful Life

2.2.14.1.3.8. Overall Condition Rating

2.2.14.1.3.9. Consequence of Failure

2.2.14.1.3.10. Code Violation (Y/N)

2.2.14.1.3.11. Code Violation Description (if applicable)

2.2.14.1.3.12. Recommended Activity (Repair/Replacement/Rehabilitation)

2.2.14.1.3.13. Activity Priority Rating

2.2.14.1.3.14. Estimated Repair Cost



2.2.14.1.3.15. Estimated Replacement Cost

2.2.14.1.3.16. Accessibility Related Works Required

2.2.14.1.3.17. Photo Reference

2.2.14.1.3.18. Comments

2.2.14.1.4. Findings, with all relevant numerical or quantitative results should be presented in tabular and/or graphical formats as deemed appropriate.

2.2.14.1.5. Recommendations, as per Task 10-C.

2.2.14.1.6. Consultant to provide a draft Facility Condition Assessment report for review and comment. The standard review and comment period by East Hants is one (1) week, unless otherwise communicated.

2.2.14.1.7. Following receipt of East Hants' comments, the Consultant is to issue the final Facility Condition Assessment report within two (2) weeks. The final report is to be signed and submitted in PDF format with Detailed Facility Inventory provided for in unlocked MS Excel Spreadsheet format.

2.3. TEAM

2.3.1. Consultant team must include:

2.3.1.1. Asset Management professionals;

2.3.1.2. Engineer(s) licensed to practice in NS; and

2.3.1.3. Quantity Surveyor to support costing estimates (or equivalent acceptable to East Hants).

2.4. EAST HANTS REPRESENTATIVE

2.4.1. The East Hants Representative for these Services is Amy Pyne, Manager, Real Estate and Corporate Projects. East Hants may, through the Representative or their designate, supply either verbal or written instructions to a Contractor with respect to the Services to be completed.

2.5. REFERENCE DOCUMENTS

2.5.1. List of Reference documents available:

2.5.1.1. FCM Asset Management Readiness Scale Assessment Tool

2.5.1.2. East Hants Sportsplex Drawings

2.6. PROJECT SCHEDULE

2.6.1. The following schedule is preliminary and somewhat flexible. Consultants may complete tasks earlier than what is noted below as long as they are meeting overall objectives and deliverables, but no later than end of 2023. Proposals are to capture the following timeline requirements in project workplans:

Description of Task	Timeline Comments
Award of RFP	Anticipated on or before June 15, 2022
Kick Off Meeting	Within 1 week of project award
Task 1 - General Project Management	Duration of contract
Task 2 - Asset Management Strategy, Roadmap, Governance Structure	Strategy and Roadmap to be submitted to East Hants no later than October 31, 2022
Task 3 - Data Gap Analysis & Asset Inventory	Components of Task 3 are anticipated to be ongoing for duration of contract
Tasks 4 through 7	Consultant may schedule as needed to meet deliverables and objectives
Task 8 - Asset Management Financial Strategy	Consultant to factor into schedule to avoid significant resource requirements from East Hants' Finance Department during their peak operations between November and April annually
Task 9 - Asset Management Plan	Draft report to be submitted to East Hants no later than August 16, 2023. Note: East Hants staff are scheduled to report to Council in Fall 2023. Final report to be submitted no later than December 1, 2023.
Task 10 - East Hants Sportsplex Facility Condition Assessment	Minimum two (2) site inspections to be conducted, one (1) during low utilization (anticipated August 2022) and one during high utilization (anticipated October 2022). Final report to be submitted no later than November 28, 2022.

APPENDIX A - COST FORM

1. Contact information for Proponent:

Name of Primary Proponent Firm	
Address	
Phone Number (office)	
Primary Project Contact Name	
Email Address for Primary Contact	
Cell Phone Number for Primary Contact	

2. Sub-consultant List (if any):

Name of Sub-consultant Firm	
Address	
Phone Number (office)	
Project Contact Name	
Name of Sub-consultant Firm	
Address	
Phone Number (office)	
Project Contact Name	
Name of Sub-consultant Firm	
Address	
Phone Number (office)	
Project Contact Name	



3. COST

The Proponent must complete the following table to be submitted with their Proposal. While the intent is to complete all Work Elements, budget considerations, findings from the analysis, Schedule or, without limitation, other considerations may impact East Hants's ability or desire to complete Elements. By providing a price for a Work Element, the Proponent acknowledges that East Hants may, at its sole discretion, award or not award any Work Element.

Work Element	Total Fee	Total Expenses	Total Cost per Element
Task 2 - Asset Management Strategy, Roadmap, Governance Structure			
Task 1 General Project Management, and Tasks 3 through 8			
Task 9 - Asset Management Plan			
Task 10 - East Hants Sportsplex Facility Condition Assessment East Hants Sportsplex Facility Condition Assessment			
Column Totals			
Total Proposed Cost (less HST)			

All fees shown will be exclusive of Harmonized Sales Tax (HST).

4. BY SIGNING BELOW THE BIDDER AGREES THAT:

- a. The Proponent has read and understands the requirement of this RFP and agrees to abide by the terms and conditions.
- b. The Proponent has read and understands the following addenda: Addendum _____ to _____ (if any). Failure to acknowledge an addendum containing information pertinent to the Services may be cause to reject a Proponent's Proposal.
- c. The Proponent has read, understands and will, if awarded the work, comply with insurance requirements specified in the Sample Agreement.
- d. The Proponent will, if awarded the work, obtain and will maintain for the duration of the contract Workers' Compensation Board of Nova Scotia workplace insurance coverage (attach Letter of Good Standing if available).



- e. The Proponent hereby agrees that the work proposed in the table will be completed by the dates stated in the Schedule for the Total Cost indicated in the table above, inclusive of, without limitation, all fees, expenses or costs for which the Proponent may wish to be reimbursed, except HST.

Authorized Signature

Name (Printed)

Title (Printed)

Date



APPENDIX B - SAFETY QUESTIONNAIRE

Provided as a separate document



APPENDIX C - SAMPLE AGREEMENT

THIS AGREEMENT is effective <<date>>, 2022 (“Effective Date”)

Between

THE MUNICIPALITY OF THE DISTRICT OF EAST HANTS, a body corporate pursuant to the *Municipal Government Act* (SNS 1998, c. 18), having its chief place of business at Elmsdale, in the District of East Hants, Nova Scotia, hereinafter called “East Hants”

-and-

<<LEGAL NAME>>, a body corporate under the laws of <<jurisdiction>> (the “Consultant”)

BACKGROUND

East Hants wishes to retain the Consultant to provide asset management consulting services (the “Services”), more fully explained in Section 2, Services Description.

IN CONSIDERATION of mutual obligations and agreements specified herein, the parties agree as follows:

DEFINED TERMS

- 1 **Services** means the services supplied by the Consultant as specified within this agreement.
- 2 **East Hants Representative** means the employee of the Municipality of East Hants, or their designate, assigned by East Hants to be responsible for managing this agreement.
- 3 **Schedule** means the timeline, including deadlines, review dates and any other milestones or dates established by East Hants for the delivery of the Services. The Schedule may only be modified with written permission from East Hants.

CONTRACT DOCUMENTS

- 4 This agreement consists of the following documents: **(NTD: These are the documents that define the agreement. If accepting a proposal, be sure the proposal is included. If the requirements were modified by addenda, remember to include these.)**
 - a. This agreement;
 - b. Section 2, Services Description;
 - c. <<insert proposals, confidentiality agreements, etc. as applicable>>; and
 - d. <<insert additional documents as applicable>>.

INTENT

- 5 East Hants hereby engages the Consultant to supply the Services described herein and the Consultant agrees to provide these Services.
- 6 East Hants expects that any Consultant capable to perform the Services will perform the Services in a manner consistent with the degree of care, skill, and diligence normally provided by members of the same profession performing the same or comparable services in respect of projects of a similar nature in similar circumstances. East Hants expects the Consultant to act with good faith and in the interests of East Hants.
- 7 The Consultant warrants that it has the necessary resources to complete the Services in a competent and professional manner. Such resources shall include, without limitation, qualified, skilled, and sufficient personnel, adequate financial resources, and any other unique or general resources necessary to complete the Services.

TERM

- 8 This agreement shall commence on the Effective Date and shall end on the earlier of the following:
- a. Full completion of the Services to the satisfaction of East Hants; or
 - b. Termination in accordance with the terms of this agreement (see TERMINATION).
- 9 Unless amended by East Hants in writing, the Consultant agrees to complete Services to the satisfaction of East Hants on or before <<DATE>>.

PAYMENT

- 10 East Hants shall remunerate the Consultant as follows: **NTD: Update as necessary.**
- a. The maximum amount payable under this agreement, including fees, expenses and disbursements, shall not exceed the aggregate sum specified below, exclusive of Harmonized Sales Tax (HST).

Total Cost, less Harmonized Sales Tax (HST): \$_____
 - b. The following fees, expenses and disbursements are included in the Total Cost and are deemed to be included in the Services. The Consultant is responsible to complete the Services for the stated Total Cost.

[Insert table from proposal where fees, expenses, and disbursements are itemised, if applicable]
 - c. The following rates will apply should East Hants wish the Consultant to provide any additional Services using such personnel as described in the table:

[Insert table from proposal showing personnel and associated rates per hours, if applicable]
 - d. Costs, or part thereof, are only payable when the Consultant, as determined by East Hants, has satisfactorily delivered the Services or part thereof. Payment for any part of the Services shall not be deemed a waiver of East Hants' rights of set-off at law or under contract for costs or expenses arising from default or negligence of the Consultant.
 - e. All invoices submitted by email must be sent to vendors@easthants.ca. Invoices submitted by mail or hand-delivered must be to the attention of the Payables Administrator. When a Purchase Order is specified by East Hants, the invoice must reference this Purchase Order in order to be processed for payment. Include the name of the East Hants Representative on the invoice.
 - f. Invoices must be submitted in accordance with the schedule established by East Hants at the beginning of the contract, typically monthly. Invoices must be supported in such detail as East Hants may request.
 - g. East Hants will review each invoice for completeness in a timely manner and, if acceptable, will approve such invoice for payment. Where there is a discrepancy, error, or other anomaly, East Hants may reject an invoice, request clarification or additional information, or otherwise require the invoice to be made acceptable prior to approval or payment.
 - h. No payments will be made by East Hants to the Consultant unless their invoice is accompanied by a valid Clearance Letter confirming they are in good standing with WCBNS.
 - i. East Hants may reject an invoice on the basis that the Services are not in accordance with the requirements of the agreement. In the case where the Services are deemed unsatisfactory, the Consultant will be required to make changes to the Services that are acceptable to East Hants at no additional cost. If the Services cannot be made satisfactory, in East Hants' sole opinion, East Hants may terminate the agreement.

- j. Payment will be made on a net thirty (30) days basis from approval of an invoice in accordance with this section.
- k. No payment made by East Hants under this Contract shall constitute acceptance of work or products that are not in accordance with the requirements of the agreement.
- l. The Consultant shall not be entitled to payment in respect of costs incurred by the Consultant in remedying errors and omissions in the Services that are attributable to the Consultant, the Consultant's employees, or persons for whom the Consultant had assumed responsibility in performing the Services.
- m. If, and to the extent that, the time for completion of the Services is exceeded or extended through no fault of the Consultant, payment for the Services required for such extended period of this agreement shall be subject to review and equitable adjustment.
- n. In the event the agreement is terminated before the satisfactory completion of the Services, East Hants shall only be liable to pay, and the Consultant shall accept in full settlement, an amount for Services satisfactorily performed up to the date of termination. Upon payment for services completed in accordance with this agreement to the date of termination, the Consultant will have no further claim against East Hants for any damages related to termination of this agreement.
- o. All expenses and disbursements are considered to be included in the Total Cost unless authorized, in writing, by East Hants to be reimbursed separately. Disbursements and expenses so authorized shall be reimbursed to the Consultant at actual cost plus a nominal mark-up to cover the administrative cost associated with the disbursement or expense.
- p. The Consultant shall be solely responsible to pay for all costs and expenses arising out of this agreement, whether or not they may qualify for reimbursement.
- q. The Consultant is responsible to maintain a thorough cumulative record of all fees, expenses and disbursements over the term of the Contract. The Consultant must provide East Hants with an electronic copy of such record upon request.

INDEPENDENT STATUS

- 11 The Consultant will provide the Services to East Hants as an Independent Contractor and not as an employee. The Consultant agrees that East Hants shall have no liability or responsibility for the withholding, collection, or payment of any payroll taxes, employment insurance premiums, or Canada Pension Plan contributions, or any other relevant payroll deductions on any amounts paid by East Hants to the Consultant or amounts paid by the Consultant to its employees or contractors.
- 12 The Consultant shall not have any power to accept an obligation, incur any liability, promise any performance, and/or request or obtain any credit on behalf of East Hants.
- 13 The Consultant is free to provide services to other clients, so long so long as there is no interference with the Consultant's contractual obligations to East Hants.

SCHEDULE AND DELAY

- 14 The Consultant shall contact the East Hants Representative weekly, or on such other frequency acceptable to East Hants, to provide an update on the progress of the Services. An updated Schedule indicating progress of the Services shall be provided to East Hants monthly, or more frequently if so requested.
- 15 Any circumstances that will result in changes to the agreed Schedule or delay in performance of the Services must be brought to attention of the East Hants Representative by the Consultant within 24 hours of the change or delay being identified. Changes to the Schedule must be approved by East Hants in writing.



- 16 In identifying a period of delay, the Consultant must make reasonable effort to quantify the expected period of delay and to minimize such delay.
- 17 Except in the case of an excusable delay, the Consultant will be liable to pay for any expenses East Hants may incur which are a result of the delay in performance. This may, without limitation, include additional contract management fees (if any), additional fees claimed by a contractor as a result of the delay, and any costs which can be reasonably attributed to the delay.
- 18 Provided that the Consultant identifies the delay as specified herein and makes reasonable effort to quantify and minimize the delay, the Consultant shall be excused of any delay (“excusable delay”) that:
 - a. Is beyond the reasonable control of the Consultant;
 - b. Is not avoidable by the exercise of reasonable foresight; and
 - c. Occurred without the fault or neglect of the Consultant.
- 19 For greater clarity, any delay caused by the lack of financial resources, labour disputes/strikes, insolvency, any event that is a ground for termination provided for in this agreement, or any delay in the Consultant fulfilling an obligation to deliver a bond, guarantee, letter of credit, insurance, WCB certificate or other security relating to the performance or the payment of money, shall not qualify as an excusable delay.
- 20 In the event of an excusable delay, any delivery date, schedule, or other date that is directly affected by the delay shall be postponed for a reasonable time not to exceed the duration of the excusable delay.
- 21 Where an excusable delay continues for 30 days or more, East Hants may, in East Hants’s absolute discretion, choose to terminate this agreement. In such a case, the parties agree that neither party will make any claim against the other for damages, costs, expected profits or any other loss arising as a result of the termination or the event that gave rise to the excusable delay.
- 22 Except to the extent that East Hants is responsible for the delay for reasons of failure to meet an obligation under the agreement, East Hants shall not be liable for any costs or charges of any nature incurred by the Consultant or any of its sub-contractors as a result of an excusable delay.

PERSONNEL

- 23 East Hants expects the personnel listed in the Consultant’s duly signed proposal to perform the Services indicated. The Consultant must obtain written permission from East Hants before changing any member of the work team. In the case of personnel being changed, the new personnel being assigned must have a similar length and breadth of experience relevant to the matter of this contract as the personnel being replaced and they must be acceptable to East Hants.

SUBCONTRACTOR

NTD: Remove subsequent clauses if no subcontractors are proposed and replace with “Subcontractors will not be used to complete the Services. In the event that the Contractor wishes to use subcontractors for some or all of the Services, they must make such a request in accordance with the CHANGE provisions of the agreement and additional conditions may apply.”

- 24 The Consultant is advised that the subcontractor listed in the Consultant’s proposal and their work scope cannot be changed without the written permission of East Hants. Failure to comply with this provision will be considered a breach of contract and may result in termination of the agreement.
- 25 If the Consultant finds that a subcontractor named in this agreement cannot perform some or all of the Services for which they were named, the Consultant may request permission from East Hants to engage an alternative subcontractor for such Services. In making such a request, the Consultant must:



- a. Identify the reasons why the named subcontractor cannot complete the Services;
 - b. Provide the name, qualifications and experience of the proposed replacement subcontractor;
 - c. Make such request in writing; and
 - d. Must select a replacement who is in all respects equal to the subcontractor being replaced.
- 26 Permission to replace a subcontractor will not be unreasonably withheld. However, East Hants reserves the right to, in its sole discretion, reject any proposed replacement subcontractor the Consultant may name. The rejection of a replacement subcontractor shall not relieve the Consultant of their obligation to perform the Services under this agreement.

CONFIDENTIALITY

- 27 In the course of discharging its duties under this agreement, the Consultant, its subcontractors, its agents, and/or employees will hear, see and/or otherwise come to know, possess or have access to confidential information about and/or belonging to East Hants, its clients and/or third parties interacting with East Hants or the Consultant, including but not limited to contact lists, personal information about identifiable individuals, security information, and information about East Hants' clients, methods and processes (the "Confidential Information").
- 28 The Consultant agrees not use, disclose, reproduce or otherwise make available, Confidential Information to any person, firm or enterprise (other than to the Consultant's subcontractors, employees, or agents who have a need to know such information for the purposes of this Agreement) unless specifically authorized in writing to do so by East Hants. The Consultant agrees that if a subcontractor, employee, or agent will receive Confidential Information as contemplated in this section, it will obtain a confidentiality agreement from such subcontractor, employee, or agent which provides equal or greater protection to the Confidential Information than set out in this section and that they will provide proof of same to East Hants upon obtaining a fully executed agreement.
- 29 The Consultant agrees to exercise all due care and diligence and take all reasonable precautions to prevent any unauthorized collection, use, disclosure, retention, destruction or disposal of Confidential Information.
- 30 Upon termination of the Agreement for any reason, the Consultant will return to East Hants any and all documents in its possession, electronic or otherwise, containing Confidential Information, except for Confidential Information the Consultant may be required to retain for its professional files and records.
- 31 The Consultant recognizes that if any of the provisions of this section are violated, East Hants is entitled to an injunction to prevent it from disclosing Confidential Information and/or using Confidential Information for any purpose. The Consultant further recognizes that East Hants would be entitled to other legal remedies, including legal fees and costs in the event of such a violation.
- 32 The use and disclosure of the confidential information shall not apply to information which
- a. Was known to the Consultant before receipt of same from East Hants; or
 - b. Becomes publicly known other than through the Consultant; or
 - c. Is disclosed pursuant to the requirements of a governmental authority or judicial order.

INFORMATION COLLECTED

- 33 All information and material produced by the Consultant in the course of the Services, including, but not limited to, calculations, design notes, criteria, graphs, figures, maps, reports, drawings, analysis, profiles, and plans, will become the property of East Hants and an electronic copy of such information must be turned over to East Hants upon completion or termination of the Services.
- a. The Consultant understands that East Hants intends to use such collected information to perform the business of the Municipality of East Hants; to that end, the Consultant agrees that East Hants may, without limitation, use, distribute, reproduce, modify, and/or publish such information without penalty or exclusion; and
 - b. East Hants reserves the right to amend such collected information whenever and for whatever purposes it chooses to do so.

INDEMNIFICATION

- 34 The Consultant shall defend, indemnify and save harmless the Municipality of the District of East Hants, its elected officials, officers, and employees from and against claims, actions, causes of action, losses, expenses, fines, costs (including reasonable legal defence costs), interest or damages, including but not limited to bodily injury, sickness, disease or death or to damage to or destruction of tangible property including loss of revenue or incurred expense resulting from disruption of service, to the extent reasonably attributable to the negligent acts, errors, or omissions, fraud or willful misconduct of the Consultant, its directors, officers, employees, agents, contractors and subcontractors, or any of them, in connection with or in any way related to the delivery or performance of this agreement. This indemnity shall be in addition to and not in lieu of any insurance to be provided by the Consultant in accordance with this agreement, and shall survive this agreement.

INSURANCE

- 35 The Consultant shall, without limiting its obligations or liabilities, maintain Commercial General Liability insurance on an occurrence basis with a minimum limit of \$5,000,000.00 for bodily injury including death, personal injury and property damage including loss of use, and shall include provisions for: Blanket contractual liability; Owners' and contractors' protective liability; Broad form property damage; Hostile fire; Tenant's legal liability; Non-owned automobile liability; Contingent employer's liability; and Products and completed operations liability.
- 36 The Consultant must provide a certificate of insurance (COI) from their insurer for this coverage. The COI, at a minimum, must:
- a. List the Municipality of the District of East Hants as an additional insured and contain both cross-liability and severability of interest clauses;
 - b. The Consultant's insurance must provide for bodily injury or property damage that may result from the Consultant's performance of the Services; and
 - c. Excess or umbrella insurance may be used to achieve the required insurance limits noted in this section.
- 37 The Consultant must have and must maintain automobile insurance in the amount of \$2,000,000.00 for the duration of the agreement and must provide a certificate of insurance confirming this coverage. If attached machinery is to be used in the performance of the Services, this insurance shall not contain any endorsement that excludes the operation of attached machinery;
- 38 The COI for Commercial General Liability insurance must provide for 30 days' written notice of cancellation. The Consultant must provide a new certificate of insurance each time the insurance is

renewed for the duration of this contract and including any warranty period. The COI must identify any exclusions which apply to the Policy with respect to the Services.

- 39 The Consultant shall take out and keep in force errors and omissions insurance in the amount of \$2,000,000.00 providing coverage for acts, errors and omissions arising from their services performed under this agreement. The policy SIR/deductible shall not exceed \$50,000 per claim and if the policy has an aggregate limit, the amount of the aggregate shall be double the required per claim limit. The policy shall be underwritten by an insurer licensed to conduct business in the Province of Nova Scotia and acceptable to East Hants. The policy shall be renewed for **3 years** after contract termination. A certificate of insurance evidencing renewal is to be provided each and every year. If the policy is to be cancelled or non-renewed for any reason, 90-day notice of said cancellation or non-renewal must be provided to East Hants. East Hants has the right to request that an Extended Reporting Endorsement be purchased by the Consultant at the Consultant's sole expense.
- 40 The Consultant is responsible to have and to maintain insurance on the equipment and materials used to provide the Services for the duration of the agreement. East Hants will not be responsible in any way for lost, damaged or stolen equipment.
- 41 In addition:
- a. The Consultant's insurance shall be primary coverage and not additional to and shall not seek contribution from any other insurance policies available to East Hants.
 - b. In the case where the Consultant will use subcontractors or third-party suppliers, such subcontractors and third-party suppliers must obtain and provide proof of insurance coverage that is equal to that required of the Consultant under this agreement.
 - c. Failure to maintain the required insurance coverage may be grounds for termination of the agreement;
 - d. If the Consultant no longer is in Good Standing with WCBNS, the Consultant must disclose the change in WCB status immediately. Inability to return to Good Standing before the next performance of the Services may result in the termination of the agreement;
 - e. East Hants will not accept any provisions which seek to limit the liability of the Consultant with respect to these insurance requirements;
 - f. Changes to incorporation information must be disclosed within a reasonable time of the change; and
 - g. Changes to insurance coverage must be disclosed to East Hants within a reasonable period after the change, at least prior to the next performance of any Services under this agreement affected by the change, and the Consultant must provide a revised certificate. The amended coverage must be in accordance with the requirements of this agreement or otherwise acceptable to East Hants.

REGULATIONS

- 42 The Consultant shall comply with all existing Federal, Provincial and Municipal laws and regulations and the regulations of any other authorities that may have jurisdiction. The Consultant shall also comply with any policies or other requirements related to occupational health and safety or security that may be in place or implemented during the course of the agreement.

TAXES

- 43 The Consultant shall pay all Federal and Provincial Taxes as required by the appropriate enactments.

WORKERS' COMPENSATION

- 44 The Consultant must be registered and in good standing with the Workers' Compensation Board of Nova Scotia (WCBNS) regardless of their jurisdiction of incorporation, location of premises, or typical status with WCBNS.

CONFLICT OF INTEREST

- 45 The Consultant must promptly bring to the attention of East Hants, in writing, any possible conflict of interest related to delivering these Services. For greater clarity, any business relationships between East Hants staff and Consultant, either direct or through a third party, which may appear to create an unfair advantage for the Consultant or where it may appear that an employee of East Hants may personally benefit from this agreement, must be identified.

PERFORMANCE

- 46 If any part of the Services is found to be deficient or not in accordance with the terms of this Contract or standards specified herein, East Hants may, at its sole discretion:
- a. Require the Consultant to re-perform the Services or make any required corrections to the work, at its own expense, to comply with the terms of the Contract; or
 - b. If the Consultant cannot or will not make such corrections or re-performance, or if the proposed delay in making such corrections or re-performance may compromise health, safety, or the ability of East Hants to perform the business of the Municipality in any way, East Hants may choose either to engage a third party to correct the work or to perform the Services or to perform such corrections or to perform such Services themselves. The cost of such action will be deducted from any monies owing to the Consultant until the entire amount is offset or, where there is not amount to offset, the Consultant must pay any remaining cost back to East Hants in the form of credits of payments already made; or
 - c. Where the deficiency is embedded in the work or Services, East Hants may deduct an amount from any monies owing, or the Contract value, that is equivalent to the difference between the value of the defective work and what was specified in the Contract. Such amount shall correspond to the costs that would reasonably be incurred to correct the deficiency; and
 - d. East Hants may terminate the Contract in accordance with the Termination clauses herein.

CHANGES TO REQUIREMENTS

- 47 If the instructions provided by East Hants are interpreted by the Consultant as increasing or decreasing the scope of the Services, they must inform East Hants prior to acting on these instructions. At minimum, any change in scope that affects the cost of the Services or the Schedule must be approved by East Hants in writing and the Consultant must provide, at minimum:
- a. A description of the change in Services as a result of the instructions;
 - b. The impact, if any, on the Schedule;
 - c. The amount, exclusive of HST, by which the cost will either be increased or decreased; and
 - d. A summary of the fees, expenses and disbursements which make up the amount of increase or decrease.

RESPONSIBILITY FOR DAMAGE

- 48 The Consultant shall, at their sole expense, repair and restore to its original condition any material or surface damaged by their operations.
- 49 The Consultant shall be solely and entirely responsible for any loss or damage to their materials, supplies, and equipment.

TERMINATION

- 50 East Hants may terminate this agreement at any time, for any reason, by providing thirty days' written notice to the Consultant. This notice period may be increased by written agreement between the parties. Agreement to extend this notice period does not release the Consultant of their duty to remedy and, under no circumstances will East Hants be responsible for interest or other charges or fees related to the process of remedy.
- 51 Notwithstanding the above, East Hants may terminate this agreement without notice if the Consultant makes changes to the approved list of Consultant's personnel tasked to complete the Services or to the subconsultant engaged to complete the Services without first obtaining the written permission of East Hants.
- 52 East Hants may terminate this agreement if the performance of the Services, or portion thereof, is found to be unacceptable or if there is unreasonable delay, other than an excusable delay, in performing the Services. Both East Hants and Consultant agree that each will attempt to remedy the situation and to find a way to make the Services, or portion thereof, acceptable. Under no circumstances may such remedy represent additional cost to East Hants. If no remedy can be found within thirty days of the initial communication to the Consultant by East Hants that the performance of the Services is unacceptable, such notice shall be considered notice to terminate the agreement.
- 53 East Hants reserves the right to terminate this agreement if the Consultant fails to act in accordance with their safety protocols or where, in East Hants' sole opinion, there have been an unreasonable number of safety violations, near misses, or orders/corrective actions issued to the Consultant by government officials.
- 54 East Hants reserves the right to terminate this agreement, without penalty of any kind, if the Consultant is judged to be bankrupt or makes general assignment for the benefits of its creditors.
- 55 Termination of the agreement by East Hants shall not relieve that Consultant of any obligations or liability it may have to East Hants except as provided for herein.

RECEIVERSHIP

- 56 In the event that a Receiver is appointed to manage the affairs of the Consultant, East Hants reserves the right to enter into a contract with another party to perform the Services. Under no circumstances shall East Hants be responsible for any losses suffered by the Consultant.

ASSIGNMENT

- 57 The Consultant may not transfer or assign this agreement without the express prior written permission of East Hants. Assignments or transfers with are attempted to be made to this agreement without such permission will be void.

ENTIRE AGREEMENT

- 58 This agreement, together with the Exhibits, Contract Documents, and the Schedule, form the complete agreement between the parties and shall supersede any and all previous communications, oral or written, express or implied, between the parties. This agreement may only be amended in writing, with such amendment being signed by authorized representatives for each party and clearly indicating this specific agreement.

INTERPRETATION

- 59 The headings introducing each paragraph or section are for reference only and shall not affect the interpretation of the agreement. Any numbers or changes of gender will be interpreted in context.

NOTIFICATION

- 60 Any notifications of a general nature related to this agreement may be provided by any written means, including email. It remains the responsibility of the sender to ensure the notification has been received and acknowledged by the intended recipient. Material notifications such as relate to clauses covering termination or changes to personnel shall be delivered by registered mail, courier requiring the signature of the person specified in this clause, or in person where the person specified in this clause may confirm acceptance in writing.

- 61 The Notifications shall be addressed as follows:

c. By mail, in person, or courier to East Hants:

Municipality of East Hants
RFP50475 - Asset Management Consulting Services
Box 230, Suite 170
15 Commerce Court
Elmsdale, NS B2S 3K5

Attention: Procurement Officer

d. By email to East Hants:

Primary: procurement@easthants.ca
Cc: email address of Project Manager

e. By mail to the Consultant:

<<Company Name>>
RFP50475 - Asset Management Consulting Services
<<Address>>

Attention: <<Name>>

f. By email to Consultant:

Primary: <<email address>>

GOVERNING LAW

- 62 The laws of Nova Scotia shall govern this agreement. If any dispute should arise under the terms of this agreement, the Courts of Nova Scotia shall have exclusive jurisdiction to such dispute.

ENUREMENT

- 63 This agreement shall ensure to the benefit of and be binding upon the parties and their lawful heirs, executors, administrators, successors and assigns.

SEVERABILITY

- 64 If a provision of this agreement is deemed void or invalid by a court of competent jurisdiction, the remaining provisions shall remain in full force and effect.

DISPUTE RESOLUTION

- 65 In the event of a disagreement regarding any aspect of the Services or any instructions given by East Hants to the Consultant under this agreement:
- a. The Consultant must promptly deliver written notice of disagreement to East Hants. Such notice must contain the particulars of the disagreement, any changes in time or amounts claimed, and reference to the applicable provisions of this agreement;
 - b. The Consultant shall continue to deliver the Services in accordance with East Hants' instructions; and
 - c. The Consultant and East Hants shall attempt to resolve the disagreement by negotiation conducted in good faith. The parties shall negotiate firstly at the level of the Consultant's project representative for each party. If such negotiations are unsuccessful, the parties may escalate the negotiations to the level of a principal of the Consultant firm and a Director at East Hants;
 - d. If both parties agree that East Hants gave instructions in error or contrary to this agreement, East Hants shall compensate the Consultant a reasonable fee for any extra work completed due to such instruction, together with those reasonable disbursements arising from the extra work.
 - e. The parties shall calculate those fees in accordance with this agreement;
 - f. If the parties cannot settle the disagreement, the Consultant may ask East Hants for a written decision regarding their dispute and, within 14 days of receiving that request, East Hants must deliver such decision to the Consultant, in which they shall set out the particulars of their response and any applicable clauses of this agreement upon which they base this decision;
 - g. If the Consultant rejects the decision, the parties may refer the matter to arbitration in accordance with *The Commercial Arbitration Act of Nova Scotia*.
 - h. Negotiations conducted under the dispute resolution provisions of this agreement are without prejudice to either party's other rights under this agreement or at law.



WAIVER

- 66 Any failure by East Hants to enforce or require the strict compliance and performance of any of the terms or conditions of this agreement shall not constitute a waiver of such terms or conditions and shall not affect or impair such terms or conditions in any way or the right of East Hants to enforce same and/or to avail itself of such remedies as it may have for any breach or breaches of such terms or conditions.

SIGNED hereunder by representatives of the parties with authority and capacity to do so:

MUNICIPALITY OF THE DISTRICT OF EAST HANTS	<<CONSULTANT LEGAL NAME>>
By: _____	By: _____
Name: _____	Name: _____
Title: _____	Title: _____
By: _____	By: _____
Name: _____	Name: _____
Title: _____	Title: _____

