

## **SCOPE OF WORK (SOW): THIRD-PARTY REVIEW OF CALGARY'S CORPORATE ASSET MANAGEMENT PLAN (CAMP) & ASSET MANAGEMENT POLICY**

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### **Introduction:**

Audit Committee is seeking a third-party consultant to conduct a comprehensive review of its Corporate Asset Management Plan (CAMP) and Asset Management Policy, with a focus on municipally mandated critical infrastructure identification and asset re-investment decision-making processes. The goal is to assess current methodologies, processes, and frameworks, provide recommendations for improvement, and ensure alignment with the City's long-term infrastructure and risk management objectives.

### **Objectives:**

The third-party consultant will deliver a report with two main areas of focus:

1. **Critical Infrastructure Identification:** Evaluation of how the City identifies and ranks municipally mandated critical infrastructure, analyzing the relationship between asset criticality, condition thresholds and funding source.
2. **Asset Re-Investment Decision Making:** Review of the City's processes for determining asset re-investment priorities and funding decisions, including integration with current Principal Corporate Risks (PCR) reporting.

These reports will utilize the Bearspaw South Feedermain Break as a key example to contextualize findings and recommendations as set out in the objectives of this report.

### **Scope of Work**

The consultant will:

#### **Phase 1: Review of Critical Infrastructure Identification**

- a. Review the City's current methodologies for identifying and ranking municipally mandated critical infrastructure based on criticality and condition.
- b. Assess how these methodologies have evolved since the Infrastructure Status Report of 2020.
- c. Conduct interviews with key internal stakeholders and departments responsible for asset management.
- d. Provide a gap analysis and recommendations for enhancing the City's critical infrastructure identification and ranking processes.

#### **Phase 2: Review of Asset Re-Investment Decision Making**

- a. Analyze The City's current methodology for determining which assets require re-investment.
- b. Evaluate how, what and when information from this decision-making process is communicated to the Executive Leadership Team and City Council for funding decisions.
- c. Assess the integration of asset management decisions with The City's PCR reporting.
- d. Provide recommendations for improving asset re-investment prioritization and its alignment with risk management.

**Deliverables:**

**Interim Report:** Initial findings and preliminary recommendations based on Phases 1 and 2. Due Q1 2025.

**Final Report:** Comprehensive review of findings and actionable recommendations for both critical infrastructure identification and asset re-investment decision-making processes. Due end of Q2 2025.

**Presentation:** Presentation of both reports to Audit Committee with the interim being in-person at a monthly meeting.

**Budget**

The total budget for this review is **\$130,000**, covering all activities including stakeholder interviews, document analysis, report writing, and presentations.

**Timeline**

**Project Start: Q4 2024**

**Interim Report Due: Q1 2025**

**Final Report Due: End of Q2 2025**

**Consultant Qualifications**

The consultant should demonstrate expertise in:

- Municipal asset management and infrastructure planning.
- Critical infrastructure identification and risk management.
- Decision-making processes within public sector asset management.

Have experience working with local governments, particularly in the context of large cities with complex infrastructure networks.

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**1. Executive Summary**

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- Key findings and recommendations

**2. Introduction**

- Purpose of the review
- Background on the Corporate Asset Management Plan (CAMP) and Asset Management Policy

**3. Review of Critical Infrastructure Identification**

- Current Process for Identifying Critical Infrastructure
- Analysis of Criticality-to-Condition Relationship and Thresholds
- Evolution of Methodologies Since the 2020 Infrastructure Status Report
- Gap Analysis and Recommendations for Improvement

**4. Review of Asset Re-Investment Decision-Making Process**

- Current Process for Prioritizing Asset Re-Investment
- Communication of Asset Priorities to the Executive Leadership Team and City Council

- Integration with Enterprise Risk Management and Principal Corporate Risks
- Recommendations for Enhancing the Decision-Making Process

**5. Conclusions**

- Summary of Key Findings
- Strategic Recommendations for The City

**6. Appendices**

- List of Stakeholders Interviewed
- Relevant Documentation Reviewed
- Methodologies Used in the Review

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