



# North Peace Housing Foundation

6780 – 103<sup>rd</sup> Avenue, Peace River, Alberta T8S 0B6

Tel: (780) 624-2055 Fax: (780) 624-2065

Email: [tammy.menssa@nphf.ca](mailto:tammy.menssa@nphf.ca)

To: The Board of Directors

From: Tammy Menssa, Executive Director

Re: Insight Facility Advisors – Enhancing Facility Management

Date: April 24, 2024

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The Foundation was recently presented with an opportunity to enhance our facility management practices through a partnership with Insight Facility Advisors. With over 20 years of experience in the mechanical industry, Insight Facility Advisors brings a wealth of expertise and insight to the table.

## Client Advocacy and Unbiased Assessment

One common theme observed by Insight Facility Advisors is the strong need for client advocacy. They provide unbiased assessment of facility systems and contractor oversight to ensure the most effective, efficient, and reliable solutions are implemented. This ensures that our organization receives the best possible outcomes for our facility management needs.

## Skills Development and Training

Managing mechanical equipment requires specific skills and qualified personnel. Insight Facility Advisors offers training programs to improve the skills of our maintenance department, empowering them to effectively manage key components of our equipment and take control of maintenance processes.

## Financial Transparency and Oversight

Insight Facility Advisors can assist us in managing our mechanical systems' information by translating contractor invoices and work orders, providing a clear financial picture of the work required to keep our facilities running. This transparency ensures that maintenance costs are clear and manageable.

## Services Offered:

1. **Lifecycle Analysis:** Insight Facility Advisors will assess the current state of all mechanical and HVAC equipment, providing a detailed report on the life cycle of our equipment. This will enable us to strategize and plan for preventative maintenance, replacement costs, and Capital Maintenance and Renewal budget requests effectively.
2. **Asset Management:** By creating a list of specific checks to record after every preventative maintenance visit, Insight Facility Advisors will provide comprehensive reports clarifying and standardizing how our equipment is functioning. This will assist us in making informed decisions according to our budgetary reality, while maintaining acceptable standards and focusing on rejuvenation of assets when possible.

Yardi assistance in the maintenance and asset modules will provide us the opportunity to effectively digitize our information, allowing for better data analysis.

3. **Third Party Review:** Insight Facility Advisors will review the situation comprehensively, ranging from craftsmanship to invoicing, providing us with all the information required to make the right decisions and achieve contractor accountability.
4. **Customized Design Solutions:** By creating design concepts tailored to our individual needs, Insight Facility Advisors will avoid standardized solutions and provide efficient models of maintenance, adding value to our facilities and ensuring the best fit for every scenario.
5. **Training and Tasking:** Insight Facility Advisors will provide customized insight and training to our operators, assessing their current skill set and providing them with hands-on guidance to perform work efficiently and safely.

Insight Facility Advisors offers a comprehensive suite of services aimed at optimizing our facility management practices, ensuring efficiency, reliability, and cost-effectiveness. By partnering with them, we believe we can enhance our operations and achieve long-term success in managing our facilities.

Attached you will find details regarding the following options for consideration:

**Packaged Option 1**

- Building Equipment Condition Assessment (all units across all programs)
- Staff Assessments
- Operational Review and Evolution
- Task Sheets
- Field Staff Technical Training
- Staff Assessments
- Yardi Assistance **\$50,000.00 plus GST**

*Option 1 is a turn-key proposal – all equipment and data collection activities, as well as the preparation of information for Yardi upload would be included in this option.*

**Packaged Option 2**

- Facility assessments for Lodge and Seniors apartment buildings only
- Staff Assessments
- Operational Review and Evolution
- Task Sheets
- Field Staff Technical Training
- Staff Assessments
- Yardi Assistance **\$40,000.00 plus GST**

You will note that individual rates have been presented at the end of the proposal at our request, as we hope to apply for grant funding for the Field Staff Technical Training portion of the project.

You will also note that there is significant savings when the work is done as a packaged option rather than separate projects.

Recommendation:

Direct Administration to enter into a contract with Insight Facility Advisors for Packaged Option 1, for the quoted price of \$50,000.00 plus GST.

Thank you for your consideration,

A handwritten signature in blue ink, appearing to read 'Tammy Menssa', with a stylized flourish at the end.

Tammy Menssa  
Executive Director

January 18, 2024

Tammy Menssa

6780 103 Ave

Peace River, Alberta, T8S 0B6

Proposal No.: 2024-04001-1

via email: [tammy.menssa@nphf.ca](mailto:tammy.menssa@nphf.ca)

Subject: North Peace Housing Foundation

Dear Tammy:

Insight Facility Advisors propose the following options for your consideration.

### **Building Equipment Condition Assessment**

- We will review the available documents and drawings provided by the owner, including but not limited to building drawings, records of past capital replacements and maintenance practices, financial information, service agreements and associated reports, and previous technical reports.
- We will review all historical documents such as warranty documents, service contracts and maintenance manuals forwarded by the client.
  - Insight will conduct a nonintrusive visual review of all building mechanical components
  - Inspection and reporting will comply with ASHRAE standards.
  - Insight will determine the estimated remaining life of each building mechanical component and provide a condition rating of the same. Based on the estimated life expectancy of component and past repair/maintenance practices and provide quantities and unit costs.

Note: In the event that a hazardous condition is identified that requires immediate action, Insight will notify the Organization immediately.

- We will provide a report for review and comments from Insight.
  - Site Report will include
    - Executive Summary
    - Definitions
    - Theory and examples
    - Rating systems for equipment and operations
    - Individual equipment analysis
      - Model
      - Serial
      - Images
      - Rating
      - Recommendations and observation
    - Site Summary
    - Capital replacement cost budget by year and per piece of equipment
  - Executive Report
    - Includes all of site report information
    - Includes operational recommendations
    - Summarized compilation of capital budget projections

## Staff Assessments

### Operators

- Insight will meet with a representative of each site for an interview during our site visit to understand the history of building mechanical elements, processes, and passive operator skill assessment

### Management and Administration

- Insight will meet with management individually to ascertain the strengths and weaknesses of each individual.

A report is provided afterwards identifying strengths weaknesses, position suitability and training plan if required.

## Operational Review and evolution

- Tasking review
- Operational flow review
  - Staff Operations review
  - Maintenance process review
- Optimization recommendations
  - Guided Staff review and brainstorming sessions
  - To include all pertinent decision-making staff to the maintenance process (e.g., Finance, HR, Managers or Directors, AP/AR)
  - Team works together through a guided process to create workflows for all tasks and paperwork
  - Team works together through a guided process to create deliverable KPIs and standard metrics for maintenance department.
  - Created to measure performance of the department
  - Identify areas for improvement
  - Created to know and identify data points required for Yardi integration
  - Health and Safety documentation requirements
  - Deliverables
    - We will issue a draft report for the organization to review and will incorporate their relevant comments into a final version of the report which will include one electronic PDF format. The report will consist of the following sections:
      - 1. Table of Contents including a list of appendices and supporting materials
      - 2. Executive Summary
      - 3. Section 1 – Introduction
      - 4. Section 2 –Methodology and Approach which will include a description of the process undertaken
      - 5. Section 3 – Discoveries:
        - a) A description, observations and recommendations of the Department Evolution Sessions including but not limited to;
        - KPIs
        - Paperwork

- Health and Safety
- Standards and Process
- Budgets including Capital Planning
- Scheduling
- Job Descriptions
- Contractor expectations
- Workflow diagram and desired flowchart and org chart.

## Task Sheets

Tasking for Internal Staff or Subcontractors (Red Book and weekly Work Orders)

- Tasking is prepared specifically for equipment on your sites
- Tasking will be completed in Excel for upload into Yardi
- Includes frequency of inspection
- Responsibilities per inspection
- Template only
- Completed documents

## Field Staff Technical Training

- Training to include office theory training and HVAC Fundamentals.
  - Includes PowerPoint presentation on HVAC systems, mechanical equipment, system design and applications, as well as maintenance philosophies and strategies.
  - On site physical training on equipment, we would be completing maintenance on equipment and teaching the technicians.
    - How the equipment operates within the system.
    - Sequence of operation.
    - Equipment failure points.
    - How to safely work on the equipment.
    - What they are allowed to do, and what they are not allowed to work on.
    - How to identify issues with the equipment.
- Digital copies of HVAC Fundamentals.
- Digital copies of Equipment workbooks.
- Task Sheet provided to the organization will be utilized to teach the technicians the scope of maintenance.
- **Training would have to occur over 3 days including up to one day of classroom and 2 days of field work.**

## Yardi Assistance

- **Implementation Yardi Quality Assurance Quality Control**
  - Work with implementation team
  - Assign Responsibilities to team members for document and template creation

- Assist with document and template creation
- Work with implementation team to ensure process is correct
- Work with to ensure process is agreed upon and complete
- Work with staff to resolve issues that arrive during process.
- Act as 3<sup>rd</sup> party review on process and implementation.

**Additional Items**

**QA/QC**

**Contractor Document review**

**Installation review**

**Contractor Work Order Review**

**Staff Support (Technical)**

**Packaged Option 1**

- **Building Equipment Condition Assessment**
- **Staff Assessments**
- **Operational Review and Evolution**
- **Task Sheets**
- **Field Staff Technical Training**
- **Staff Assessments**
- **Yardi Assistance** **\$50,000.00 plus GST**

**Packaged Option 2**

- **Facility assessments for Lodge and apartment buildings**
- **Staff Assessments**
- **Operational Review and Evolution**
- **Task Sheets**
- **Field Staff Technical Training**
- **Staff Assessments**
- **Yardi Assistance** **\$40,000.00 plus GST**

**Individual Rates**

**Facility Assessments**

- **Lodges and multi residential** **\$15,000.00 plus GST**
- **Houses, Duplexes, Row Homes** **\$27,900.00 plus GST**

**Operational Review and Evolution** **\$15,000.00 plus GST**

**Yardi Assistance** **\$10,000.00 plus GST**

**Field Staff Technical Training** **\$7,000.00 plus GST**



**Task Sheets**

**\$5,000.00 plus GST**

**Staff Assessments**

**\$5,000.00 plus GST**

**Thank you for your consideration if quote is accepted in principal then contract and payment schedule will be sent out for approval.**

**Sincerely**

**Davin Simmonds**

**President**

**Insight Facility Advisors Inc.**