

Lessons Learned and Tools for Asset Management Programs

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Introduction

- Started at large engineering consulting firm, to small municipality (asset management in engineering), to medium regional district (asset management in finance), to independent consultant (asset management), to small municipality (operations management), to large-medium city (asset management in finance).
- Asset Management Certificate, IAM
- Certified Asset Management Professional, PEMAC
- Certified Asset Management Assessor, WPIAM
- Master of Arts in Leadership
- **Currently: Senior Asset Program Manager at the City of Abbotsford**

Room Check

- Who here has asset management in their title
- Who here is in
 - Finance
 - Operations
 - Engineering
 - Corporate services

Today

Building formalized asset management programs...

- Getting people involved
- Assessing where you're at
- Developing or updating policy
- Building the documents
- Getting the information
- Finding your role
- What now



Getting the Right People Involved

PEOPLE do asset management.

- Spend the first few months introducing myself to everyone. Looking for allies – people who care, who are well-respected, who have a different skillset or perspective than you. You want creative tension.
- Find a way for people to work together and get to the right level of formal.
- USE YOUR NETWORK OF PROFESSIONALS.
- Lesson learned: At the beginning it feels a bit awkward. Let it be awkward and trust the process.

Tools:

AMLT/AMSC/AMWG Terms of Reference, Agendas, Minutes

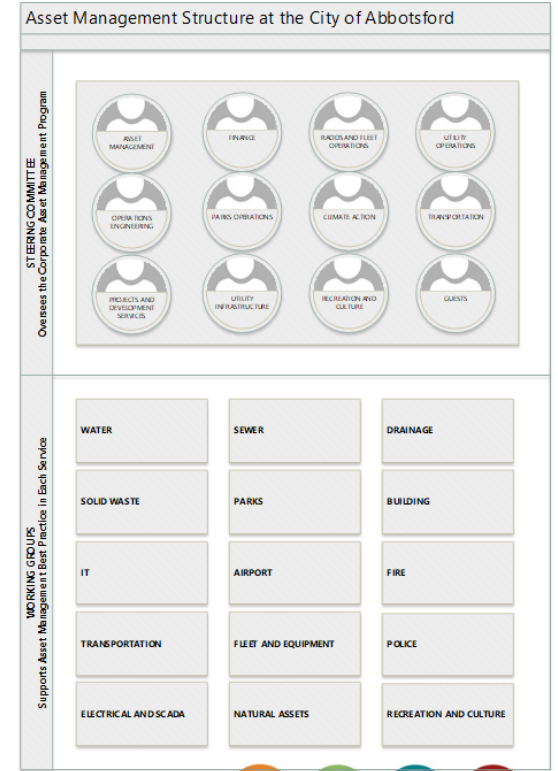
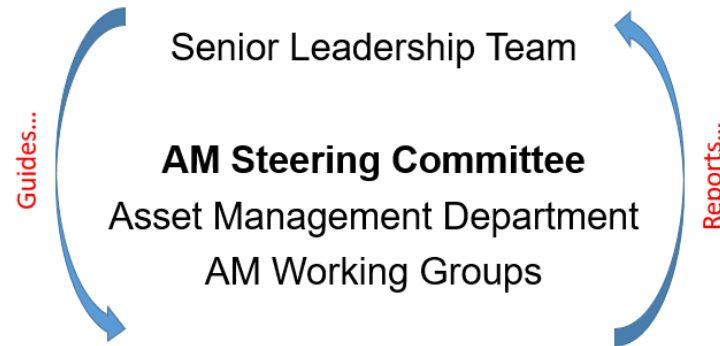
“Asset Management Governance and Accountability Framework”

People (Example)



City of Abbotsford
**ASSET MANAGEMENT GOVERNANCE AND
 ACCOUNTABILITY FRAMEWORK**
 2024 IMPLEMENTATION

Asset Management Governance Structure



Assessing Where You're At

Find your starting point.

- Know your organization's vision, mission, and strategic goals.
- Assess your starting point, celebrate current strengths.
- **Lesson Learned: Do this early. Track, SHARE, and CELEBRATE progress.**

Tools

- FCM Readiness Assessment (recommend corporate level assessment)
- AssetSMART2.0 (recommend by department)
- AMBC Roadmap (recommend by asset class or type)

Assessment (Examples)

Asset Management Maturity Mapping Exercise

The City of Abbotsford has adapted this tool from Asset Management BC's AssetSMART2.0. It is a tool for assessing asset management practices, resource and work planning, and eventually will be used to measure our progress over time.

The survey is organized into 4 main categories of asset management practices:

1. Assets
2. Information
3. Finances
4. People

Please pick the responses that best describe where you feel your service is at. You can pick more than one, and add as many comments at the end of each section as you like.

We will discuss the results in our first Asset Management Working Group meeting.

Section 1 ...

General Information

1. Name *

Enter your answer

2. Title *

Enter your answer

3. Service Area *

- Water
- Sewer
- Drainage

2 Roadmap Diagram

The following 'building block' diagram shows all of the Asset Management Practice Modules that are currently included in the Roadmap:



Developing or Updating Policy

Develop a corporate Asset Management Policy.

- What are the goals and roles for asset management at your municipality.
- Great tool for discussions and engagement.
- **Lesson learned: Keep it simple.**

Tools

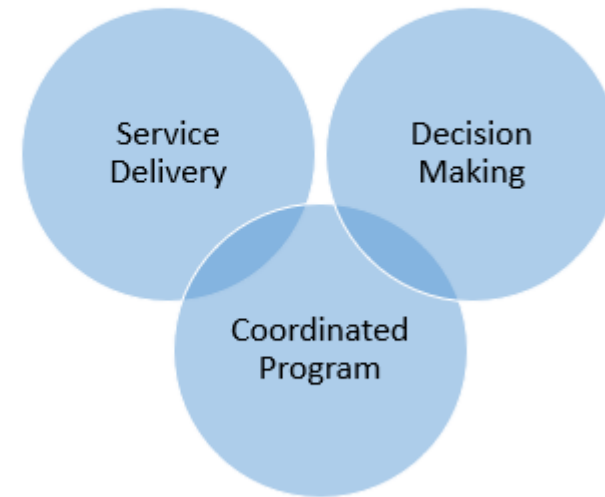
- Examples from other municipalities

Policy (Example)

Asset Management Policy Overview

Proposed policy has 3 overarching commitments from the City:

- 1. Good Services**
Provide sustainable, quality services to the public.
- 2. Good Decisions**
Support well-informed decision making across the organization.
- 3. Good Program**
Develop a coordinated asset management program.



Building the Documents

We need a way forward, which can be called a Strategic Plan, a Strategy, or a Plan. Which one you go for will depend on where your municipality is at.

- Ideally, should identify where you're at, where you want to be, how you're going to get there.
- Recommend to do after asset management policy, before asset management plans.
- **Lesson Learned: Don't get stuck on what it's called, think about what you need it to do.**

Tools

- Examples, such as Cowichan Valley RD's Strategic Asset Management Plan (more mature and in-depth), Town of Gibsons Asset Management Program Overview (high-level), City of Abbotsford Asset Management Strategy (launch plan)

Building the Documents (Example)

“Strategy” – Steps with Goals.
 NAMS Strategy looks differently.



Roadmap Timeline

| | Stage 1 | Stage 2 | Stage 3 | Stage 4 | Stage 5 | Sustain & Maintain |
|-------------------------|---------|---------|---------|---------|---------|--------------------|
| AM Governance Framework | █ | | | | | |
| Data Framework | | █ | | | | |
| CMMS | | █ | █ | █ | █ | |
| DSS | | | █ | █ | █ | |
| AM Plans (AMPs) | | | █ | █ | █ | |

Step #1

Implement an Asset Management Governance Framework

Formalize AM governance within the City to cascade a unified AM vision, vocabulary and associated activities from Council through SLT to Operations.

Objective

To put necessary Asset Management building blocks in place to enable assets held by distinct departments to be managed in a consistent fashion. This will allow for greater stability in financial and capital planning, more informed decision-making regarding investment in assets, and enhanced interdepartmental and municipal collaboration on projects that involve AM.

Activities

1. Formalize an Asset Management Steering Committee
2. Staff the City with a dedicated Asset Management Leader and Technicians
3. Develop Asset Management planning documents

Building the Documents (Example 2)

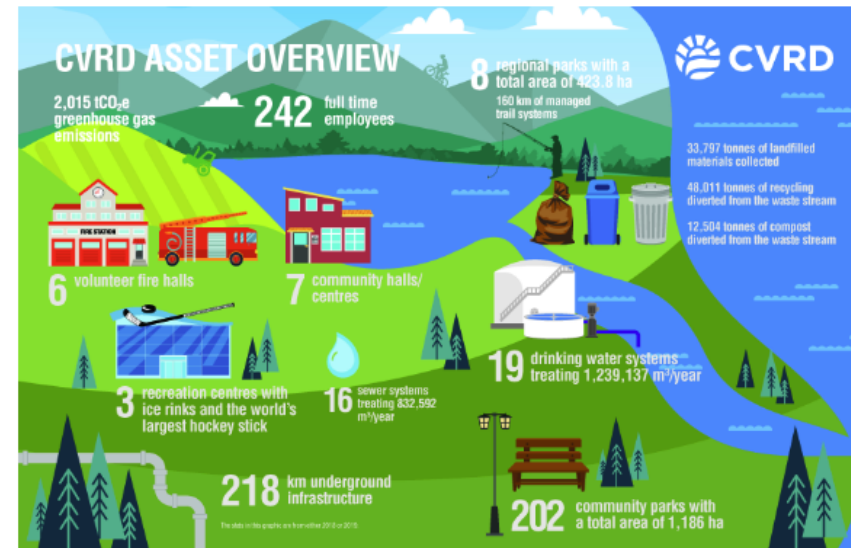
“Strategic Asset Management Plan”

Cowichan Valley Regional District

(Credit to Austin Tokarek)

Aligns with ISO55000+

Asset Management



Asset management (AM) is a business process that the CVRD uses to take care of the infrastructure assets (like pipes, buildings, and parks) that provide important services to the public, such as clean water and recycling.

The goal of AM is to ensure that service delivery is sustainable over the long term and balances social, environmental, and financial costs and benefits of the infrastructure asset over its entire life. In other words, AM is about maximizing the value of infrastructure over the long term and getting the biggest bang for the buck. The CVRD Corporate Strategic Asset Management Plan can be found in its entirety under the related documents banner.

Documents

- [Citizens Document](#)
- [CVRD Corporate Strategic Asset Management Plan](#)
- [Appendix B Asset Management Policy](#)
- [Appendix C FCM Asset Management Readiness Scale](#)
- [Appendix D CVRD 2018 State of Infrastructure](#)
- [Appendix E - Part 1 Introduction](#)
- [Appendix E - Part 2 Facilities](#)
- [Appendix E - Part 3 Public Safety](#)
- [Appendix E - Part 4 Parks Facilities](#)
- [Appendix E - Part 5 Water Systems](#)
- [Appendix E - Part 6 Sewer Systems](#)
- [Appendix E - Part 7 Waste Management](#)
- [Appendix E - Part 8 Parks Bridges and Wooden Structures](#)



Getting the Information

Asset management plans require data. Data takes time and resources.

- If you're going to start with inventory or condition assessments, have a plan for how you're going to use it and how you're going to keep it up to date.
- **Lesson Learned: Starting with recognizing known unknowns can be a good early measurement, especially if you're not ready to full dive into inventory and condition.**

Tools

- Data assessments
- Data governance frameworks
- System mapping (Ontario)

Finding Your Role

Take what works for you, with your skillsets, in your organization.

Move forward what you can.

Better is great.

Overview

Tools and examples are out there. You'll rarely have to start from scratch. But take what works and leave the rest.

You're not alone. If you're not sure or feel like you're spinning your wheels, reach out to a local community of practice, practitioner, or your AMBC executive director.

Better is GREAT.

What Now

Start where you're at.

Pick ONE tool to look at or ONE conversation to have.



Thank You

Please share your questions, comments, and tools with the group.

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