Operationalizing AM

This initiative is offered through the Municipal Asset Management Program, which is delivered by the Federation of Canadian Municipalities and funded by the Government of Canada.

Canada FCM

2021

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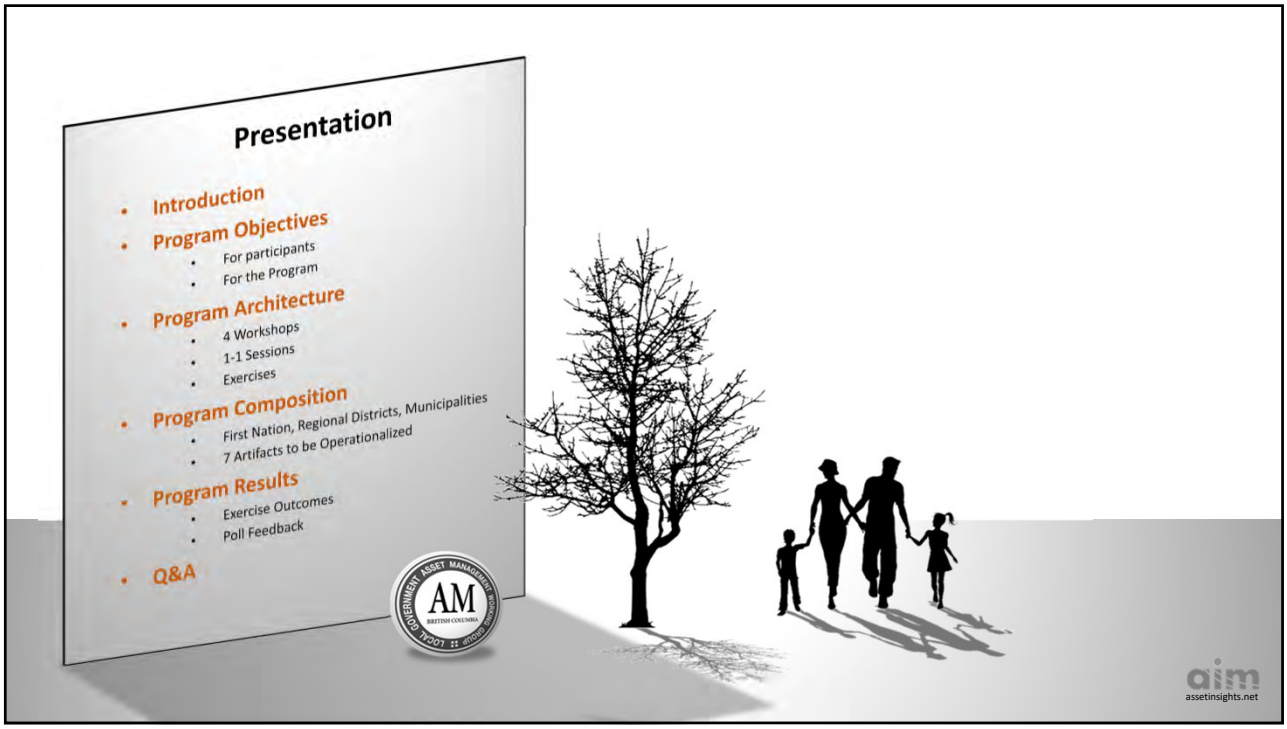
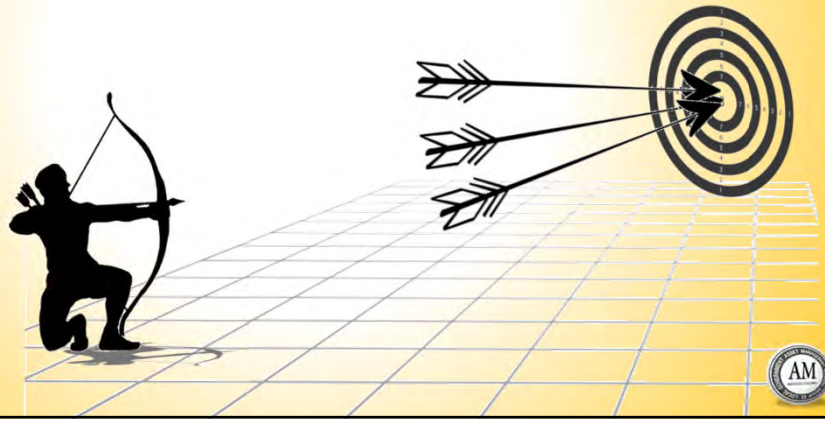
1



2

Operationalizing Asset Management:

Program Objectives



3

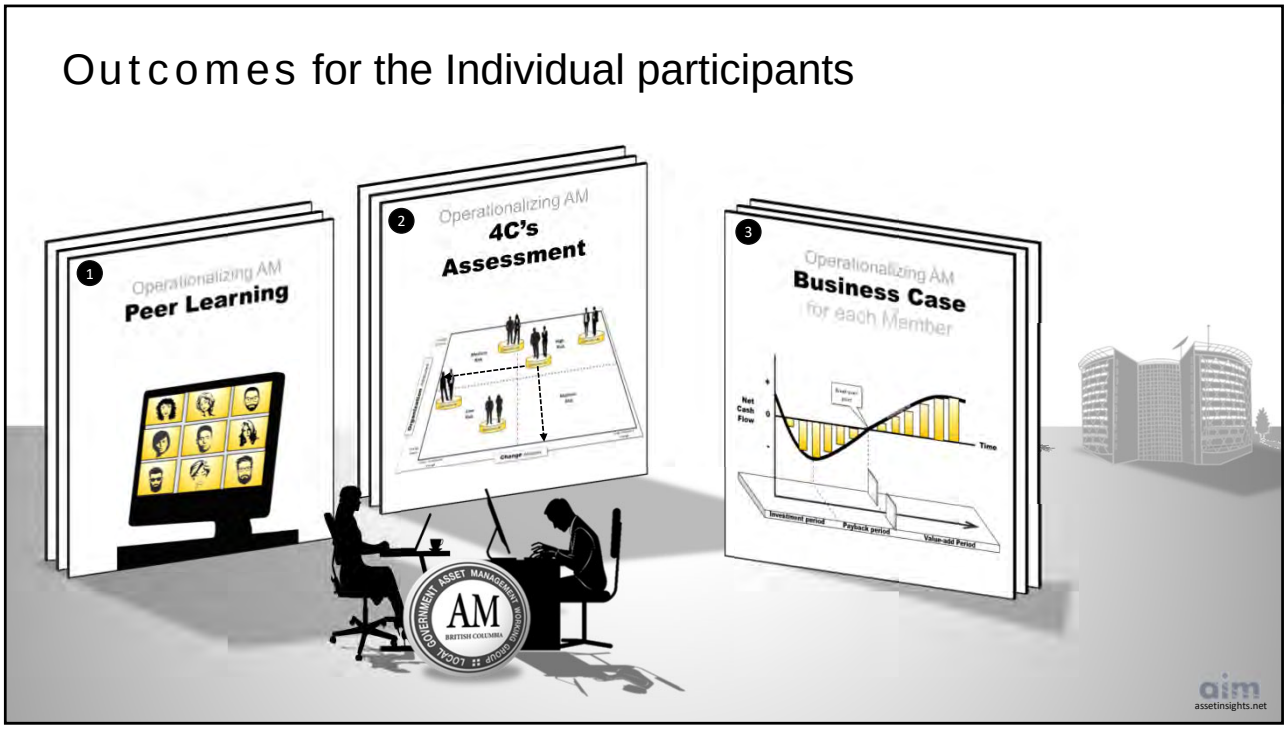
Program Objectives Fall into Two Categories

Outcomes for the
Individual Participants

Outcomes for
the Program

4

Outcomes for the Individual participants

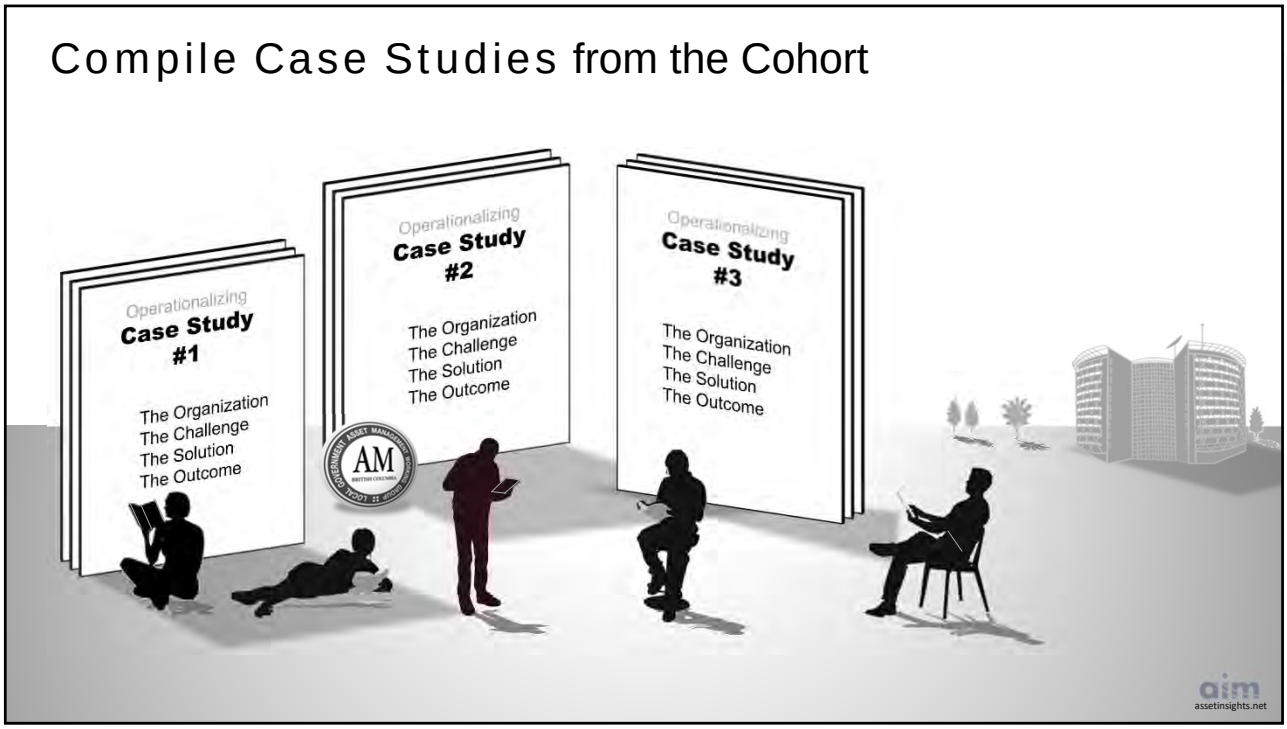


5

Present Your Business Case to Your Council/Board

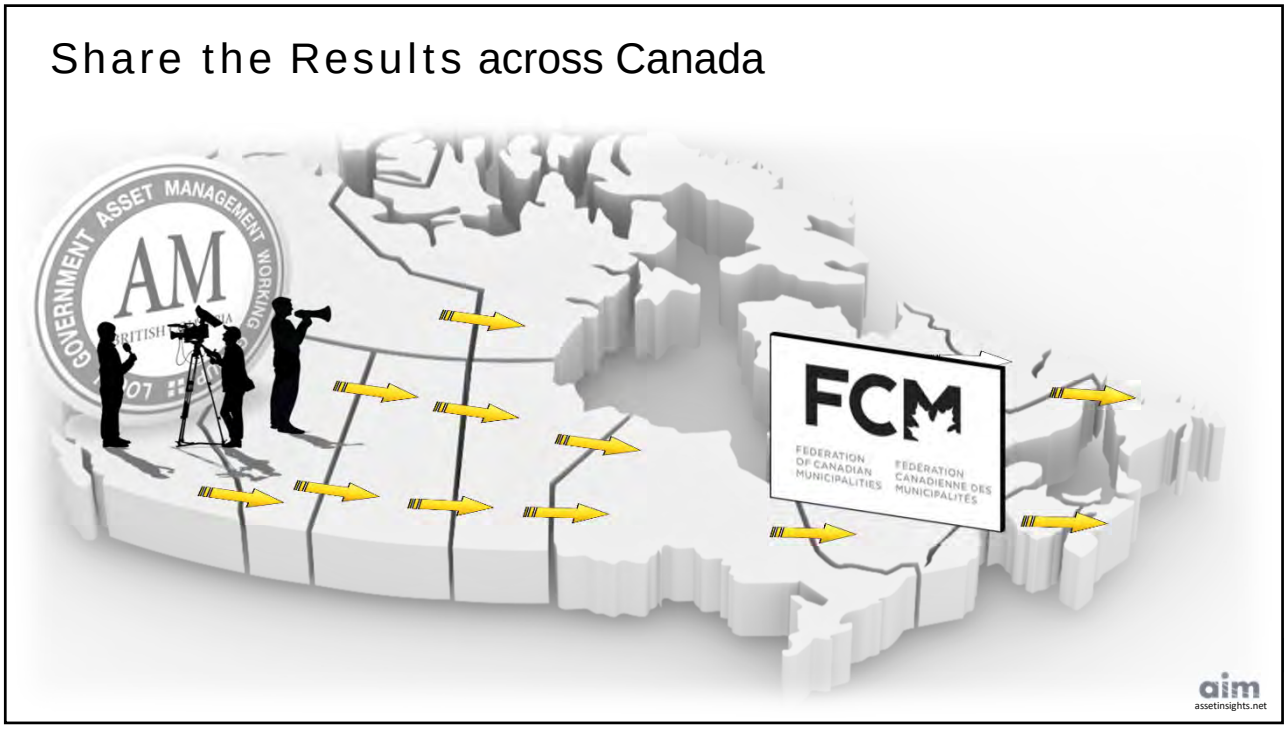
6

Compile Case Studies from the Cohort



7

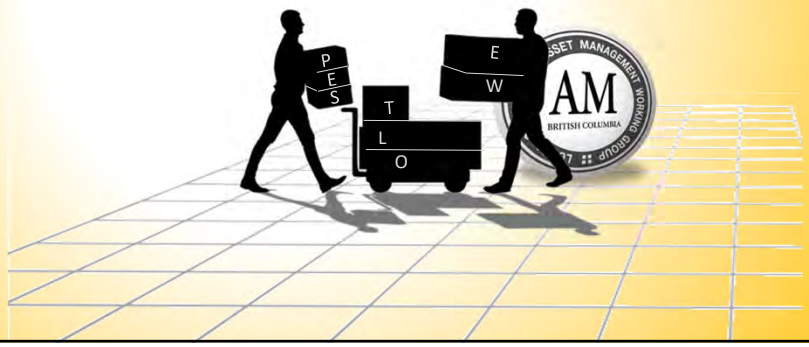
Share the Results across Canada



8

Operationalizing Asset Management:

Program Architecture



9

Operationalizing Asset Management, 2021 MAMP

A cohort of seven local governments, comprising three municipalities, two regional districts and one First Nation have come together in British Columbia to focus on two key things:

- **Uncovering and analyzing the barriers** that have caused the AM efforts to fall short in their respective organizations.
- **Exploring the application of a framework** to dismantling these barriers. The framework is known as the 4 C's: collaboration, capacity, culture and council. Detailed information on each of the 4Cs framework can be found on the asset management BC website.

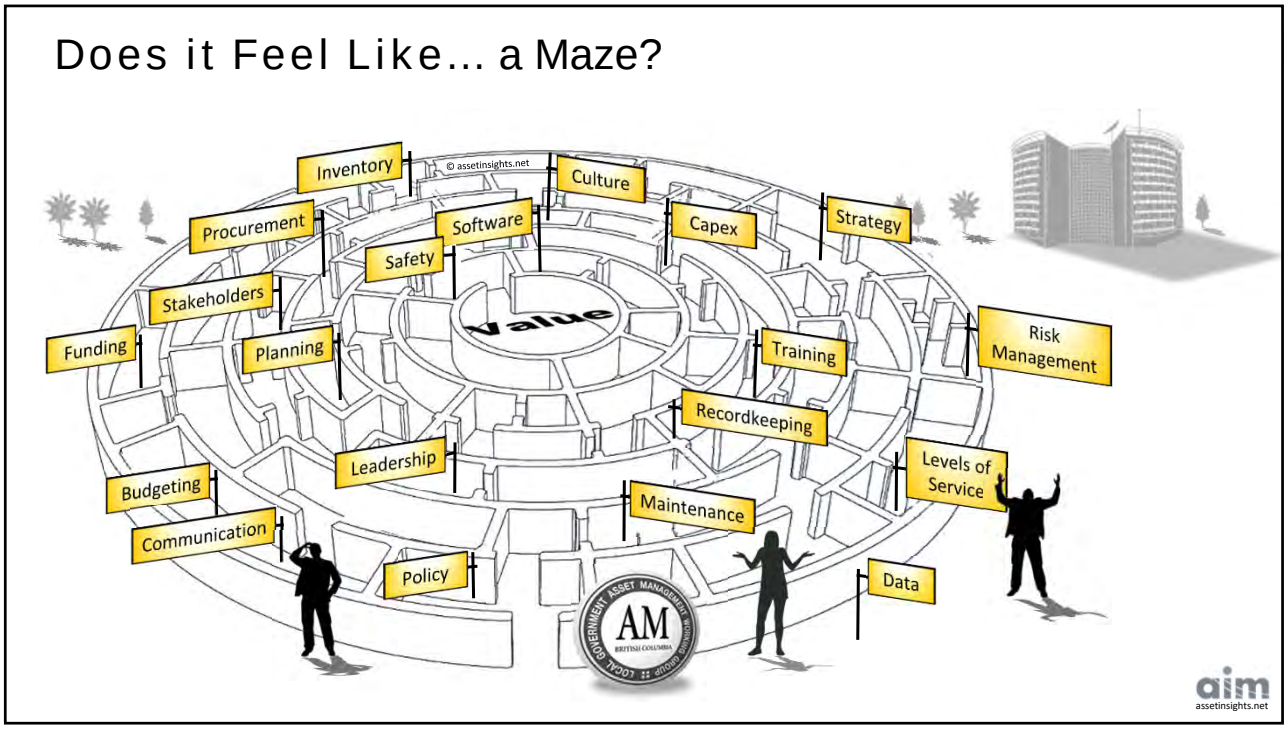
There are two primary outcomes of the operationalizing program:

- **For the cohort participants -** This will be captured in a business case that uses the 4C's to help the cohort member on their respective journeys. The business case to help set the parameters to "push and to pull" the AM initiative through their organization.
- **For the AM Community of Practice -** This will include a suite of case studies that share compelling stories from local governments and how they addressed their operationalizing challenges and the principles will be condensed into a primer that can be used to help local governments

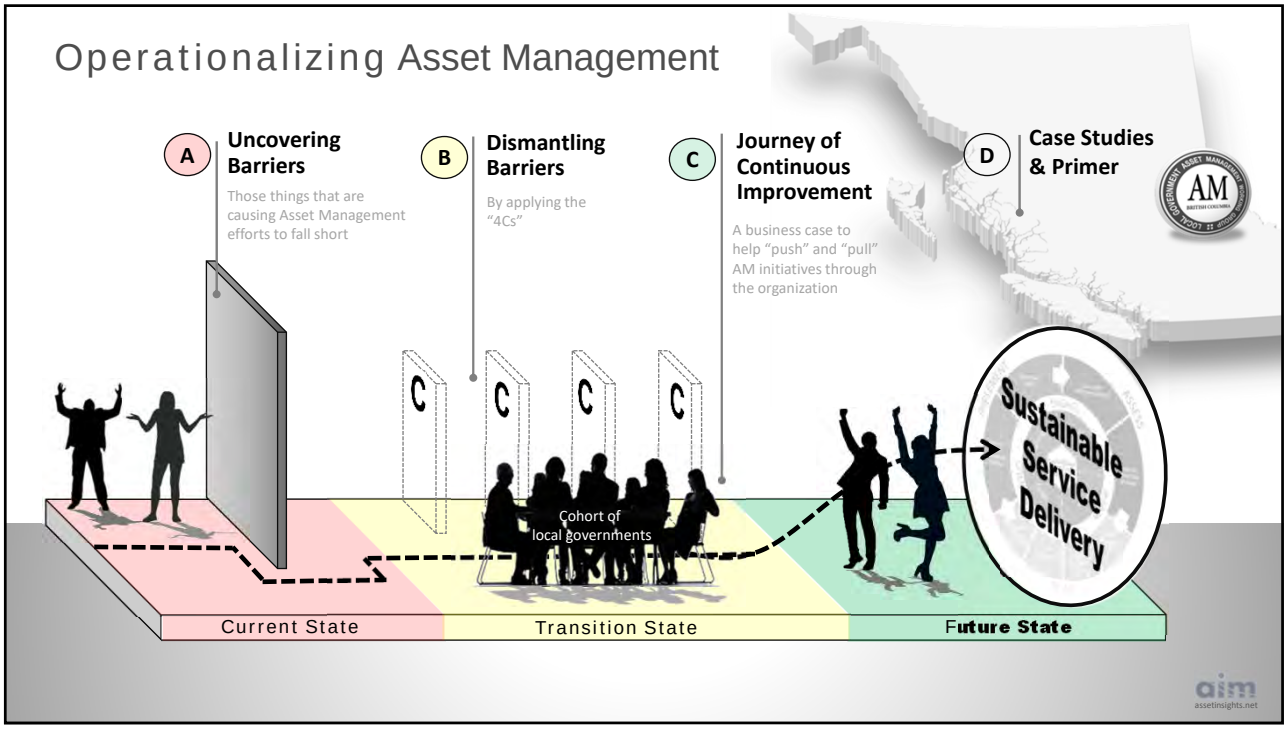
Why do we want to operationalize our AM program? There are many good reasons why, but these can best be grouped into two categories: Efficiency and Effectiveness.

We want to be efficient in the implementation of asset management plans and we want to be effective in how we realize value through our asset management strategy. Its about pulling together our policy, our strategy and our plans in alignment with our local govt objectives and our journey to sustainable service delivery.

10


Does it Feel Like... a Maze?
Inventory
© assetinsights.net
Culture
Procurement
Software
Capex
Strategy
Safety
Stakeholders
Value
Funding
Planning
Training
Risk Management
Recordkeeping
Leadership
Levels of Service
Budgeting
Maintenance
Communication
Policy
Data
AM
aim
assetinsights.net

11


Operationalizing Asset Management
A
Uncovering Barriers
Those things that are causing Asset Management efforts to fall short
B
Dismantling Barriers
By applying the "4Cs"
C
Journey of Continuous Improvement
A business case to help "push" and "pull" AM initiatives through the organization
D
Case Studies & Primer
AM
C
C
C
C
Cohort of local governments
Sustainable Service Delivery
Current State
Transition State
Future State
aim
assetinsights.net

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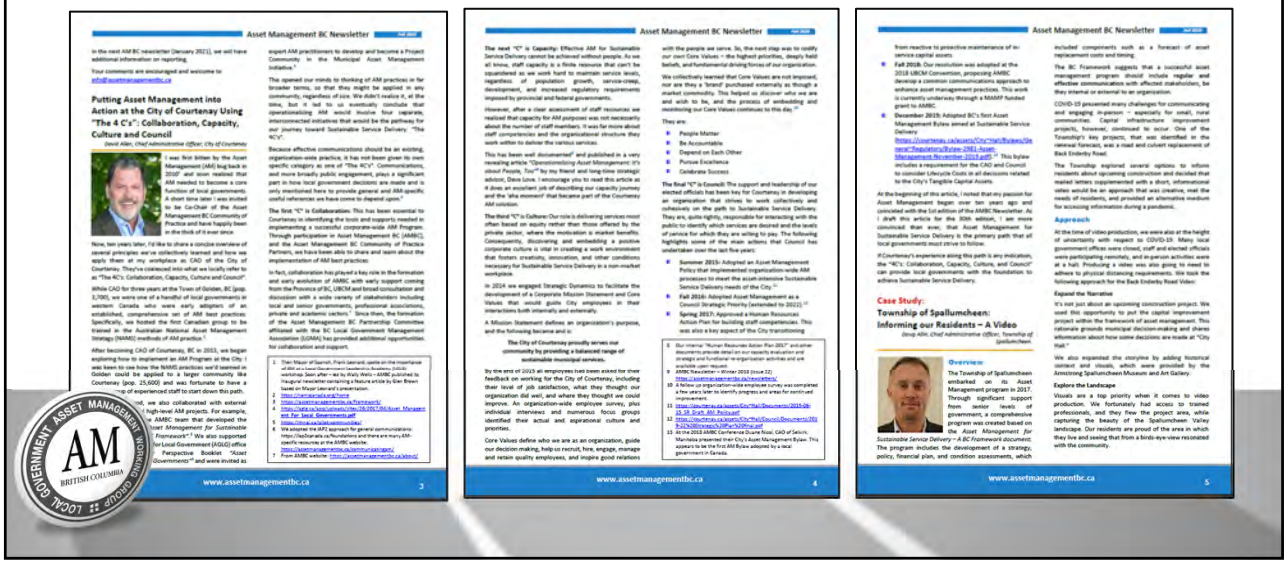
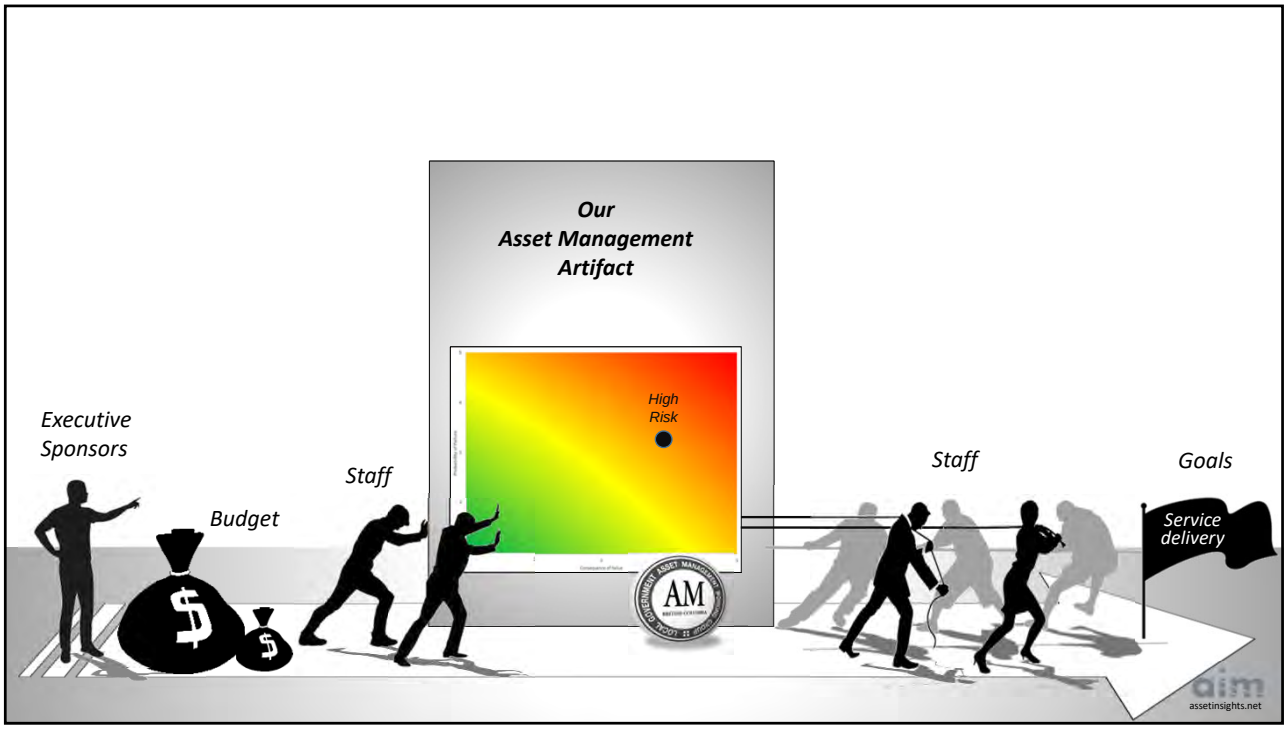
The 4Cs Approach Article by David Allen, Fall 2020



13

Operationalizing AM Article by David Love, Winter 2018

14


Our
Asset Management
Artifact
High
Risk
Executive
Sponsors
Budget
Staff
Staff
Goals
Service
delivery
AM
aim
assetinsights.net

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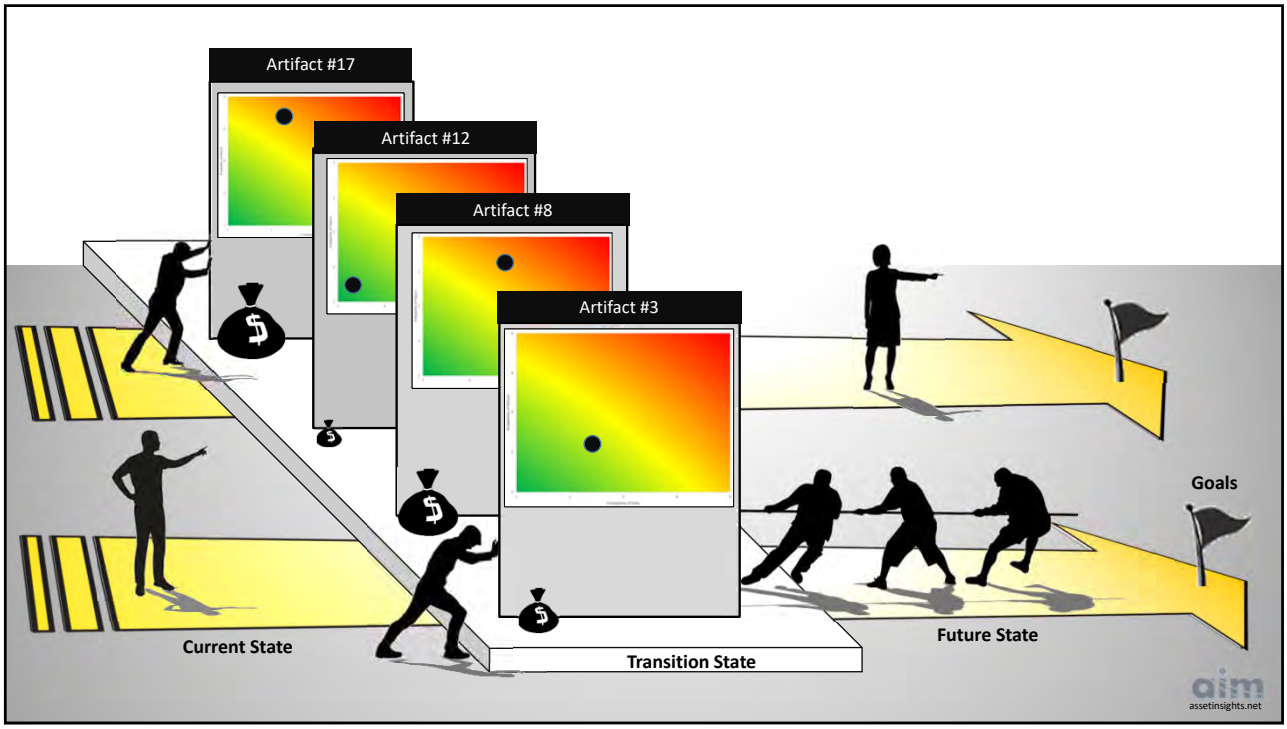
Artifact #17
Artifact #12
Artifact #8
Artifact #3
Goals
Current State
Transition State
Future State
aim
assetinsights.net

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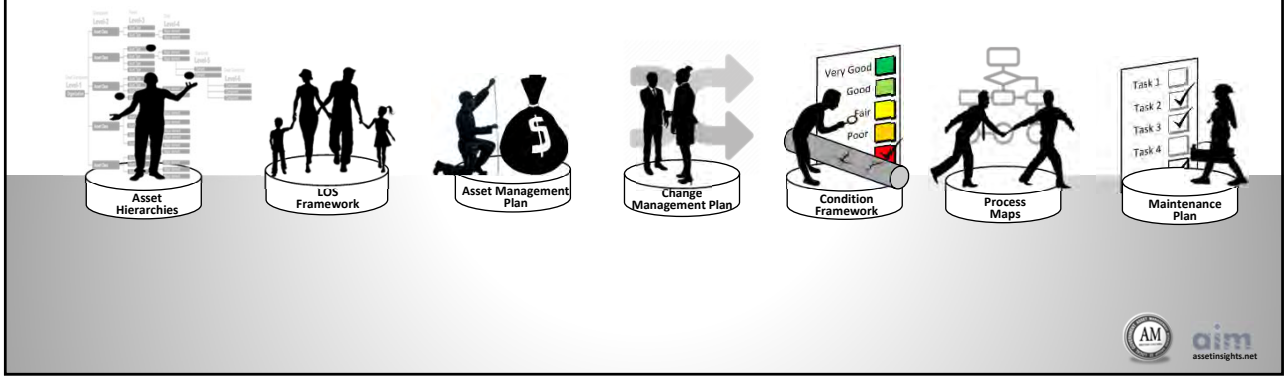
The 7 Artifacts Selected by the 2020 Cohort Participants



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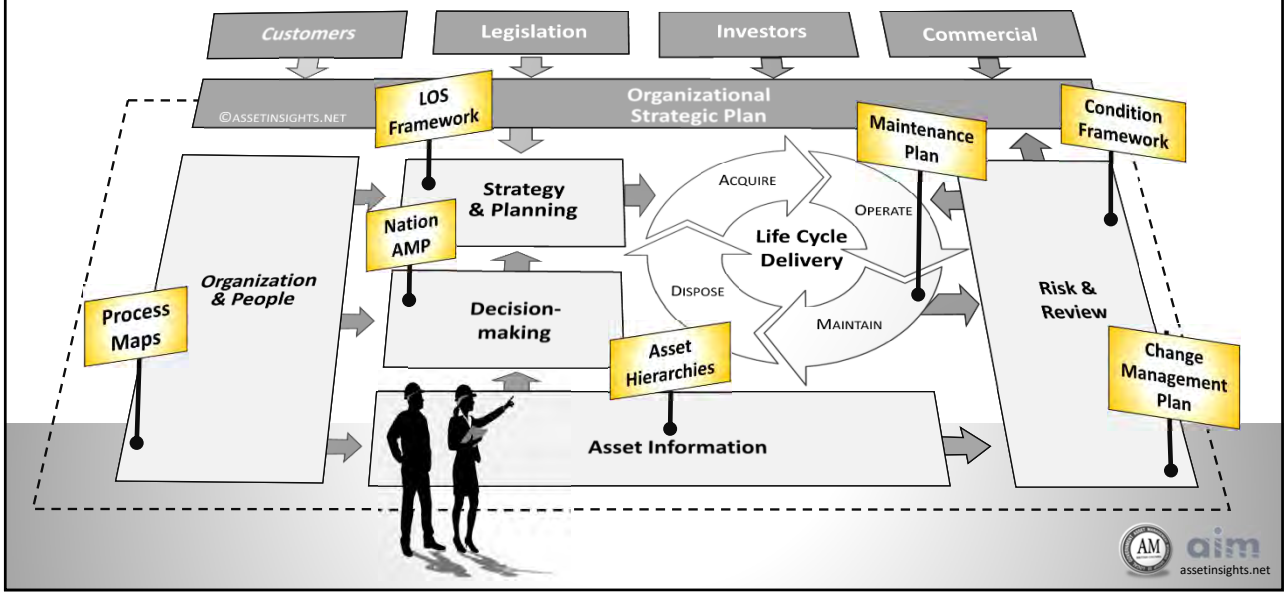
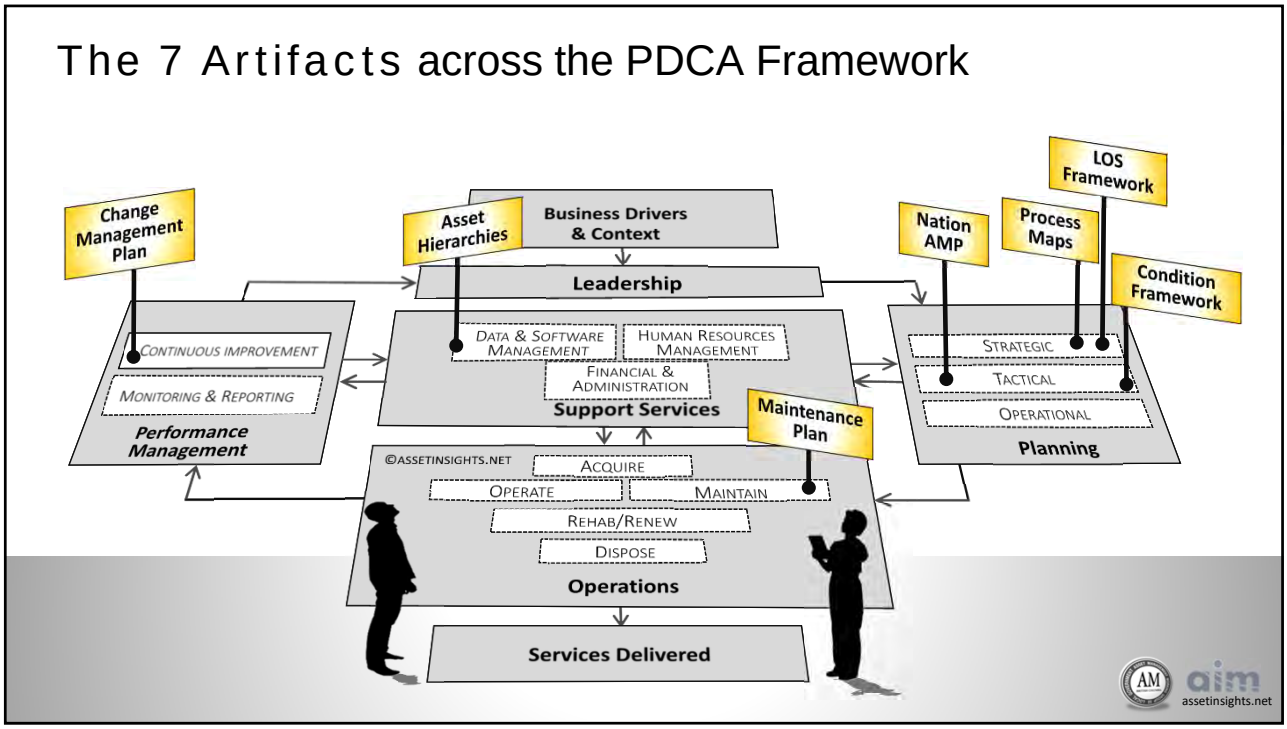
The 7 Artifacts across the IAM's Anatomy Framework



18


The 7 Artifacts across the PDCA Framework
Change Management Plan
Asset Hierarchies
Business Drivers & Context
Leadership
LOS Framework
Nation AMP
Process Maps
Condition Framework
Continuous Improvement
Monitoring & Reporting
Performance Management
Data & Software Management
Human Resources Management
Financial & Administration
Support Services
Strategic
Tactical
Operational
Planning
Maintenance Plan
©assetinsights.net
Acquire
Operate
Maintain
Rehab/Renew
Dispose
Operations
Services Delivered
aim
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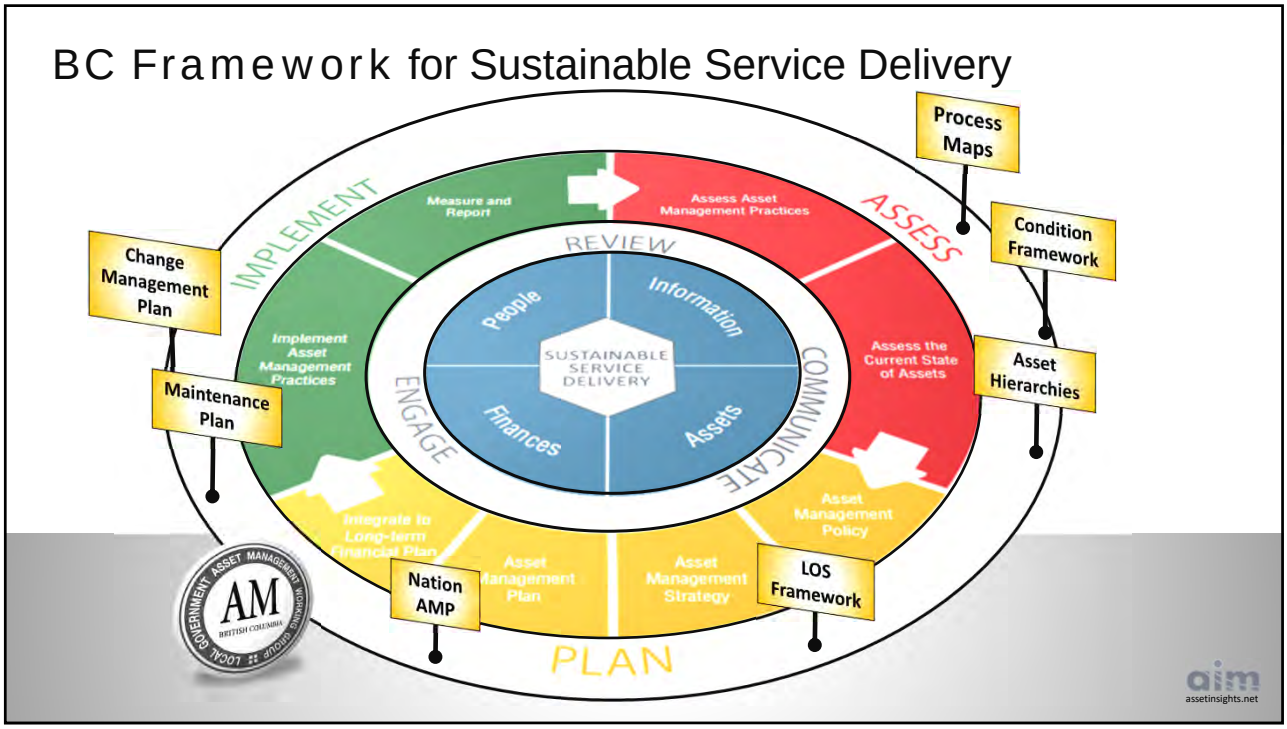
BC Framework for Sustainable Service Delivery
Process Maps
Condition Framework
Asset Hierarchies
Change Management Plan
Maintenance Plan
IMPLEMENT
ASSESS
REVIEW
COMMUNICATE
ENGAGE
PLAN
Measure and Report
Assess Asset Management Practices
Implement Asset Management Practices
Assess the Current State of Assets
Integrate to Long-term Financial Plan
Asset Management Plan
Asset Management Strategy
Asset Management Policy
People
Information
Finances
Assets
SUSTAINABLE SERVICE DELIVERY
Nation AMP
LOS Framework
AM
aim
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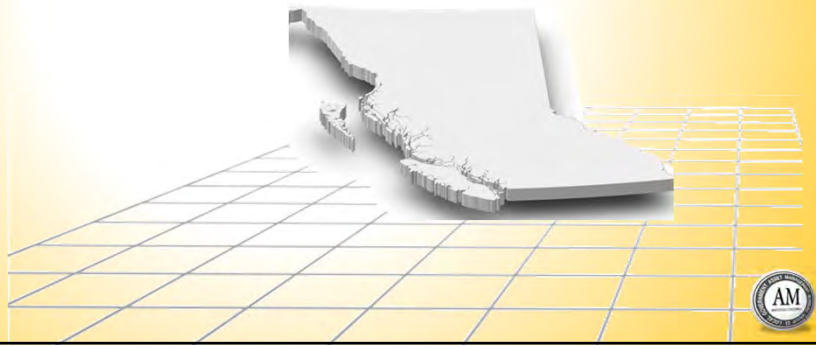
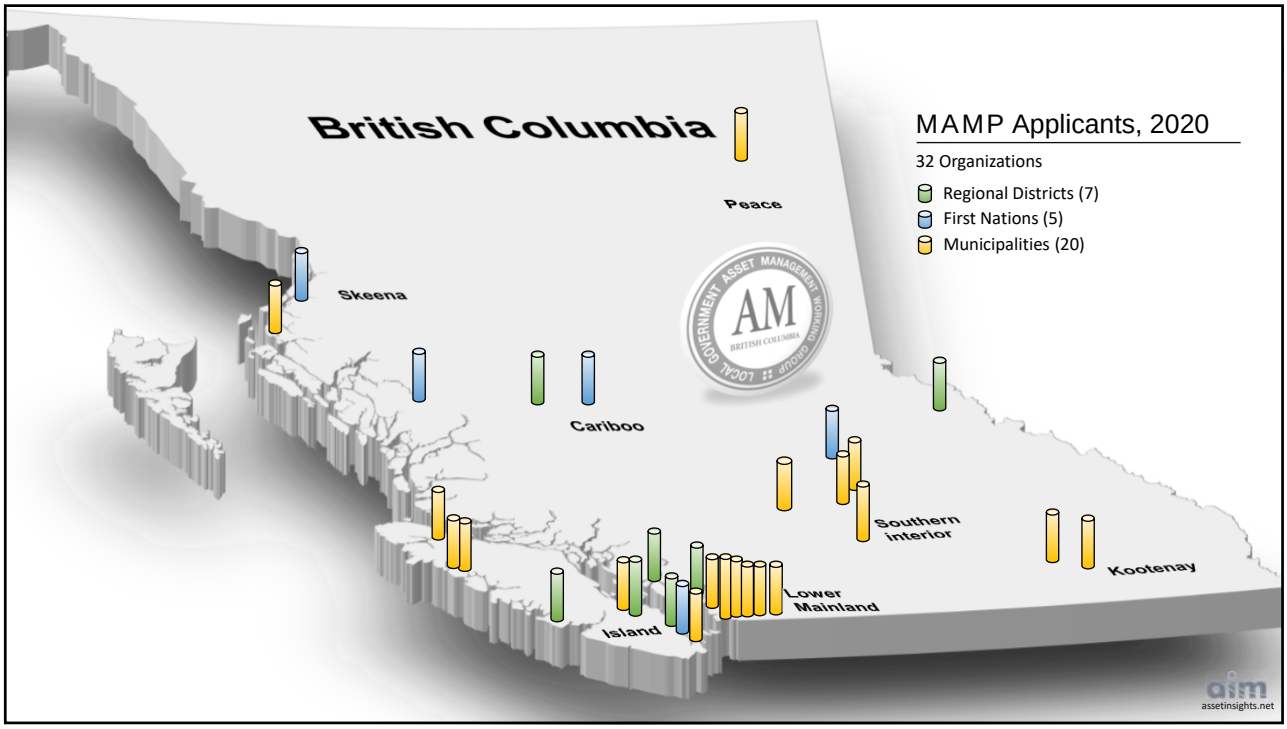
Operationalizing Asset Management:

Program Composition



21



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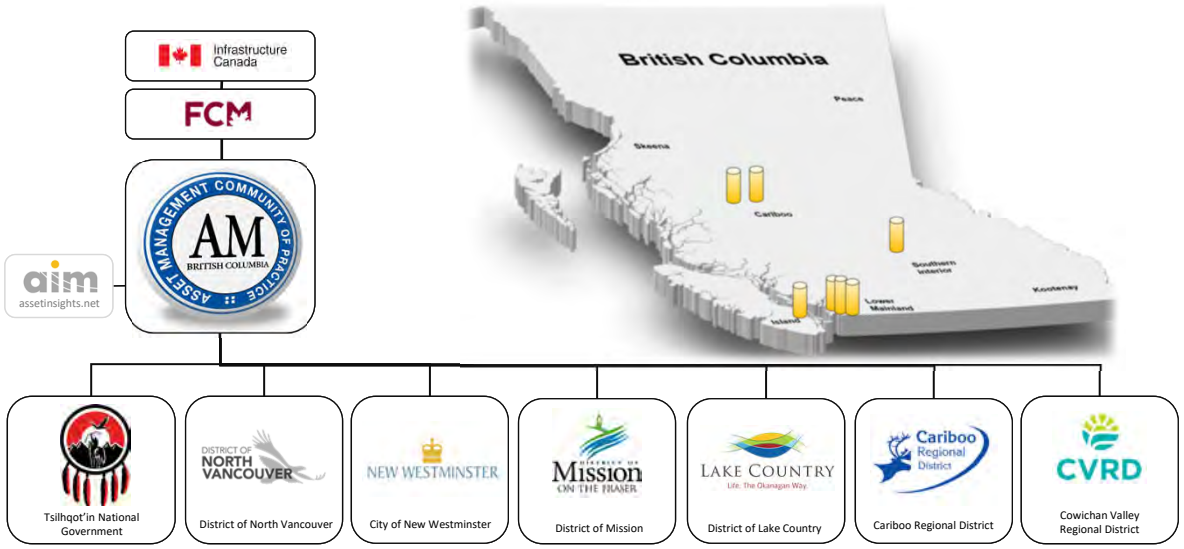
1st Cohort on Operationalizating Asset Management



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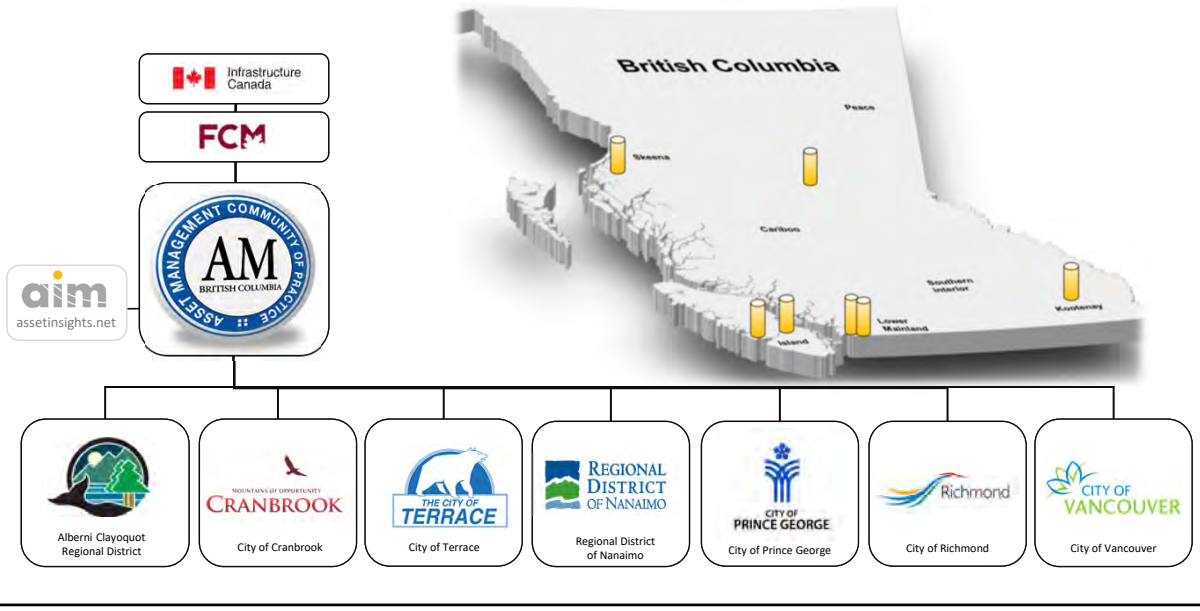
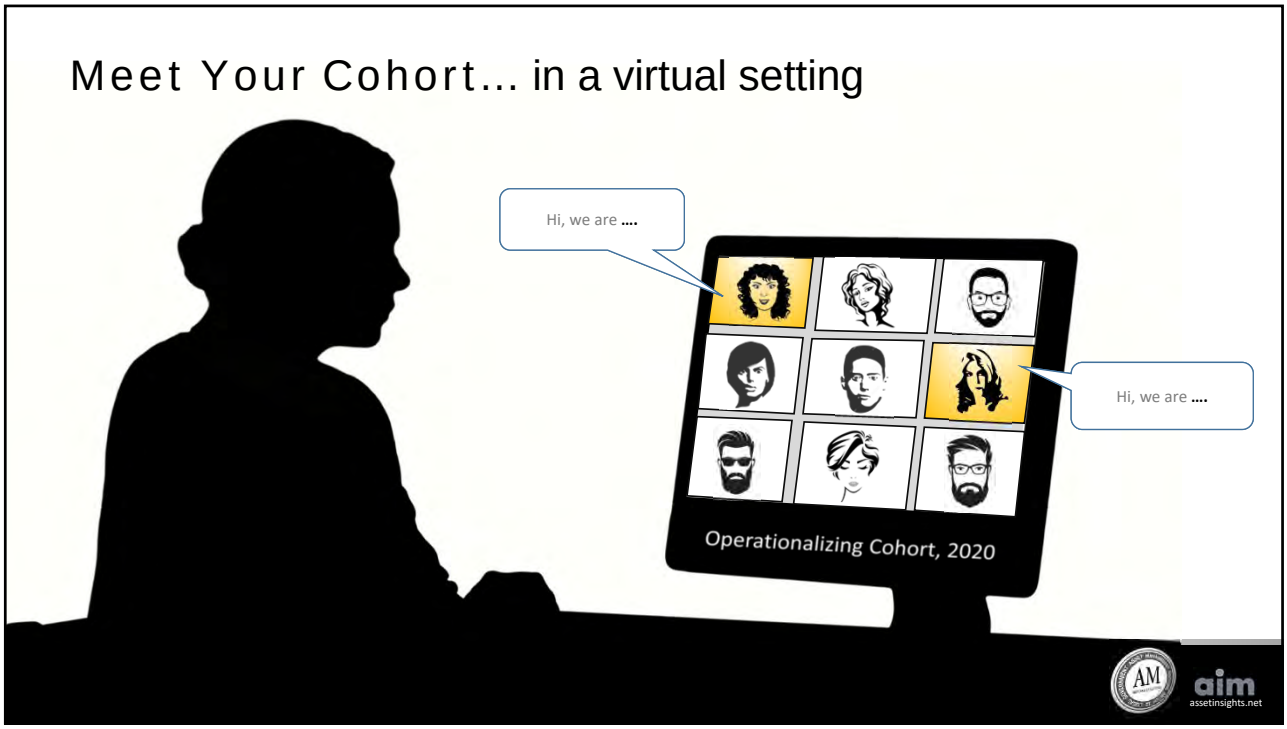
2nd Cohort on Operationalizing Asset Management



24


Meet Your Cohort... in a virtual setting
Hi, we are ....
Hi, we are ....
Operationalizing Cohort, 2020
AM
aim
assetinsights.net

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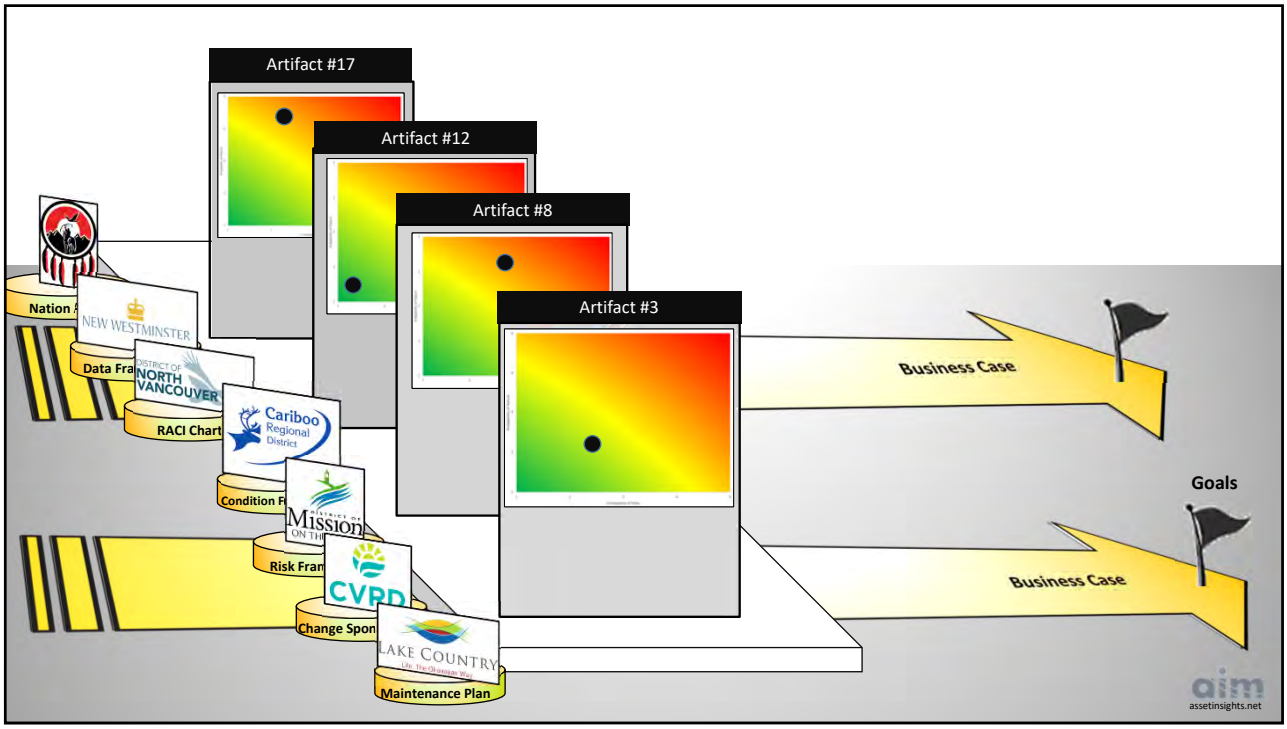
Artifact #17
Artifact #12
Artifact #8
Artifact #3
Nation
NEW WESTMINSTER
Data Fra
DISTRICT OF NORTH VANCOUVER
RACI Chart
Cariboo Regional District
Condition F
Mission
Risk Fram
CVRD
Change Spon
LAKE COUNTRY
Maintenance Plan
Business Case
Goals
Business Case
aim
assetinsights.net

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Operationalizing Asset Management:
Program Results
Policy
Council/Board
Asset Management Plan
Collaboration
Organizational Culture
Teamwork
Decision Framework
Process Maps
Capacity
AM
aim
assetinsights.net

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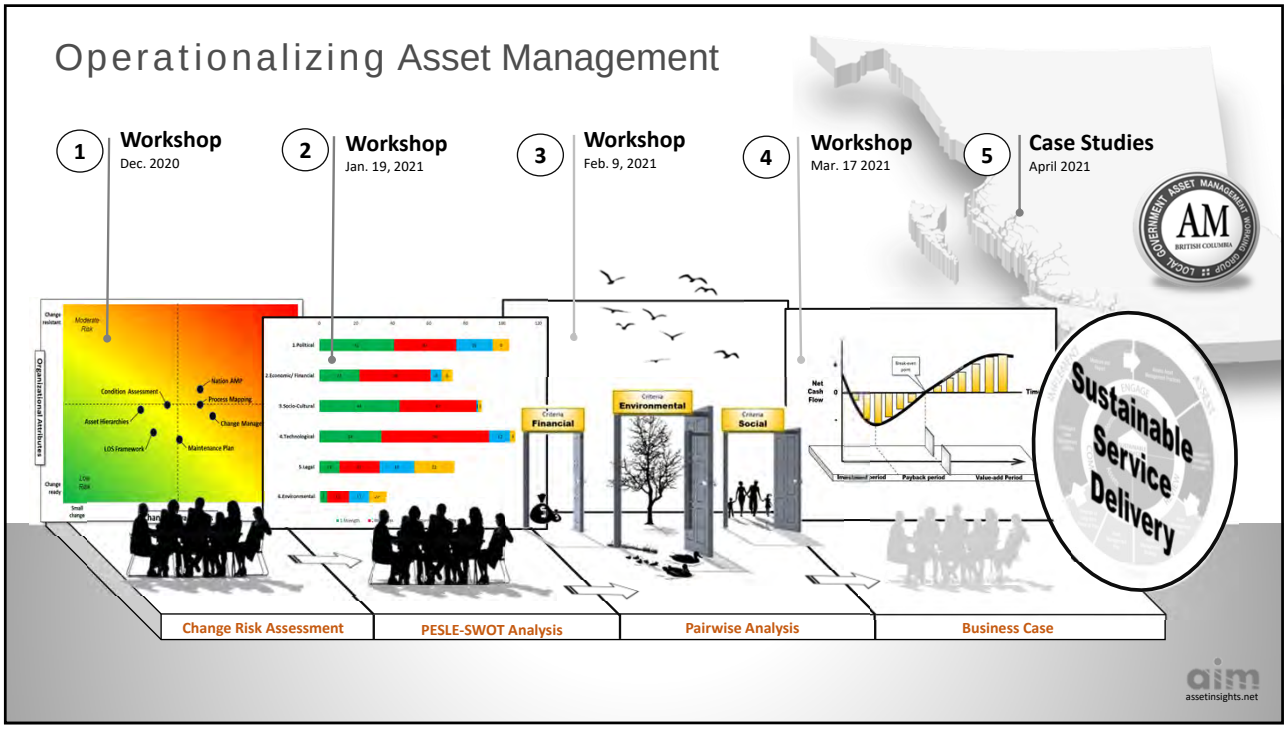
Operationalizing Asset Management
1 Workshop Dec. 2020
2 Workshop Jan. 19, 2021
3 Workshop Feb. 9, 2021
4 Workshop Mar. 17 2021
5 Case Studies April 2021
AM
Criteria Financial
Criteria Environmental
Criteria Social
Sustainable Service Delivery
Change Risk Assessment
PESLE-SWOT Analysis
Pairwise Analysis
Business Case
aim
assetinsights.net

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When you think of operationalizing, what comes to mind?
Cohort #1,
Nov. 18, 2020
Cohort #2,
June 10, 2021
practice
framework
budgets
happen
efficiency
put
staffing
processes
risk
work
change
budget
organizing
make
process
porcess
making
rationalizing
procedures
business
implementation
remove
work
go
field
planning
practice
staff
action
theory
place
new
development
department
hats
plan
putting
rolling
put
ideas
use
implementing
processes
information
procedures
motion
barriers
coveralls
hard
AM
assetinsights.net

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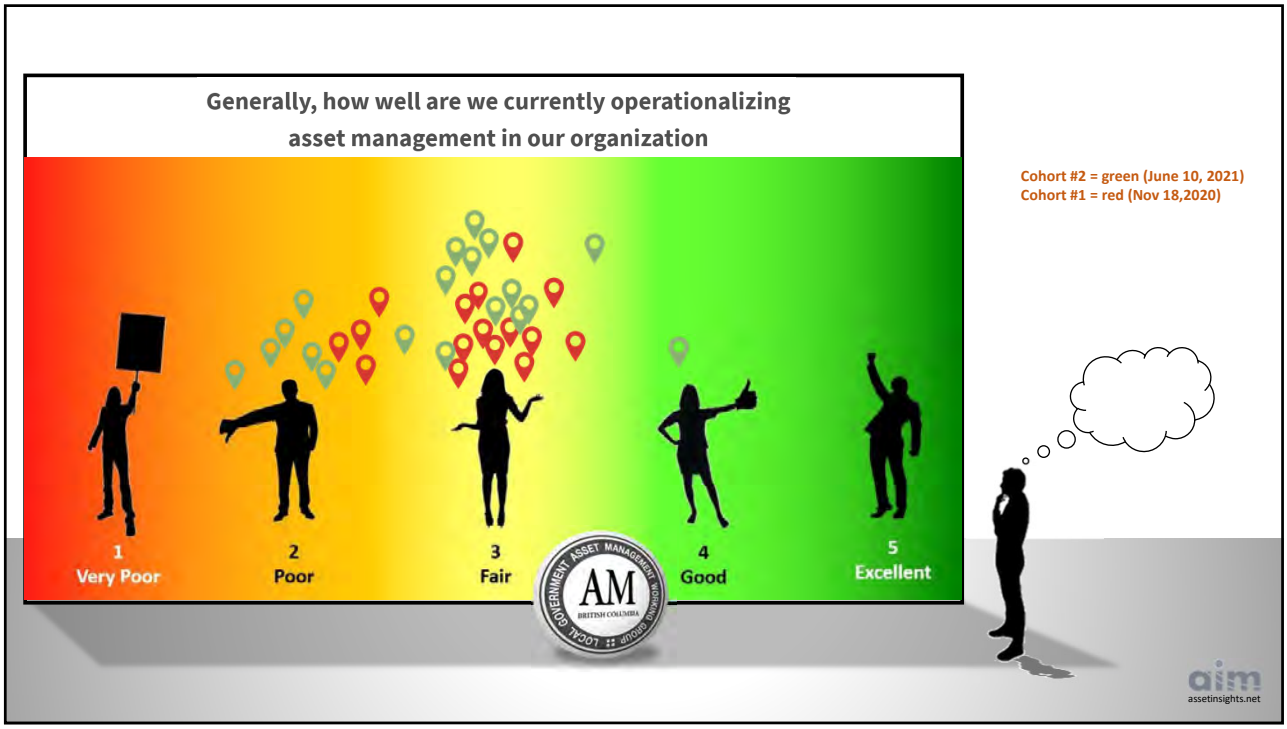
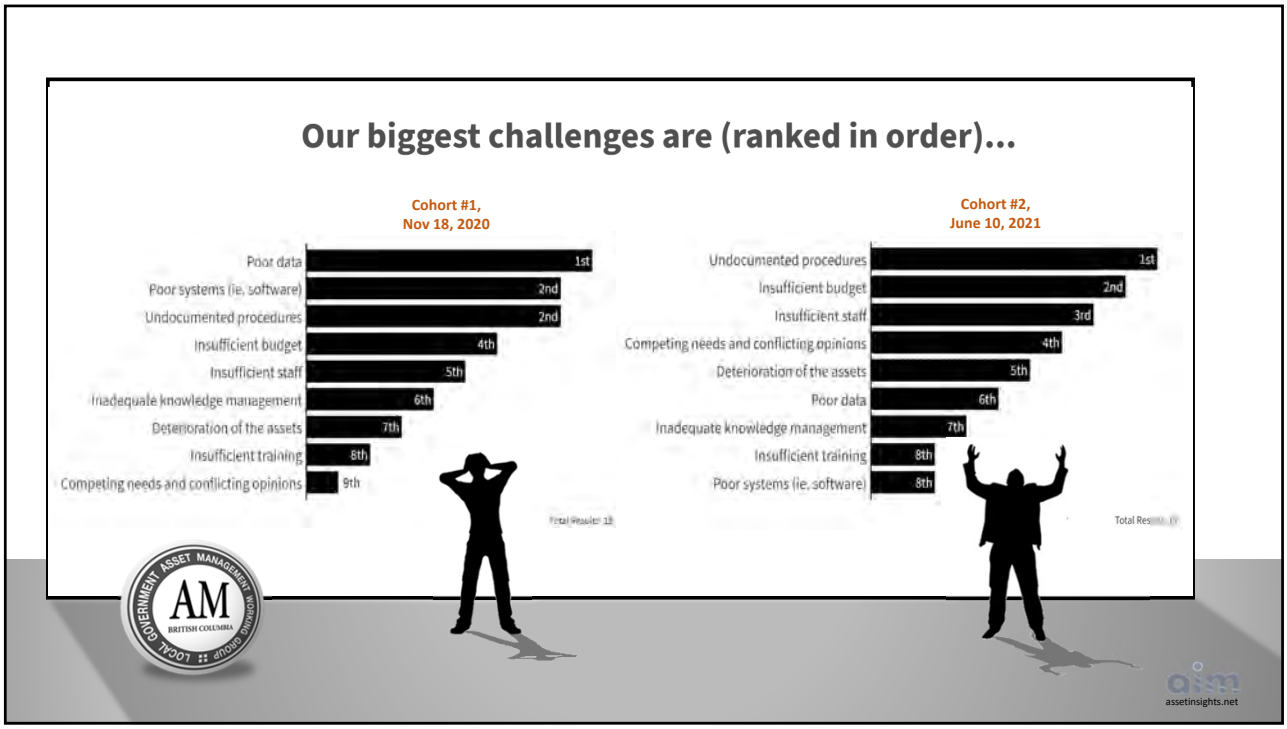

Generally, how well are we currently operationalizing
asset management in our organization
Cohort #2 = green (June 10, 2021)
Cohort #1 = red (Nov 18,2020)
1
Very Poor
2
Poor
3
Fair
4
Good
5
Excellent
AM
assetinsights.net

30


Our biggest challenges are (ranked in order)...
Cohort #1,
Nov 18, 2020
Poor data 1st
Poor systems (ie. software) 2nd
Undocumented procedures 2nd
Insufficient budget 4th
Insufficient staff 5th
Inadequate knowledge management 6th
Deterioration of the assets 7th
Insufficient training 8th
Competing needs and conflicting opinions 9th
Cohort #2,
June 10, 2021
Undocumented procedures 1st
Insufficient budget 2nd
Insufficient staff 3rd
Competing needs and conflicting opinions 4th
Deterioration of the assets 5th
Poor data 6th
Inadequate knowledge management 7th
Insufficient training 8th
Poor systems (ie. software) 8th
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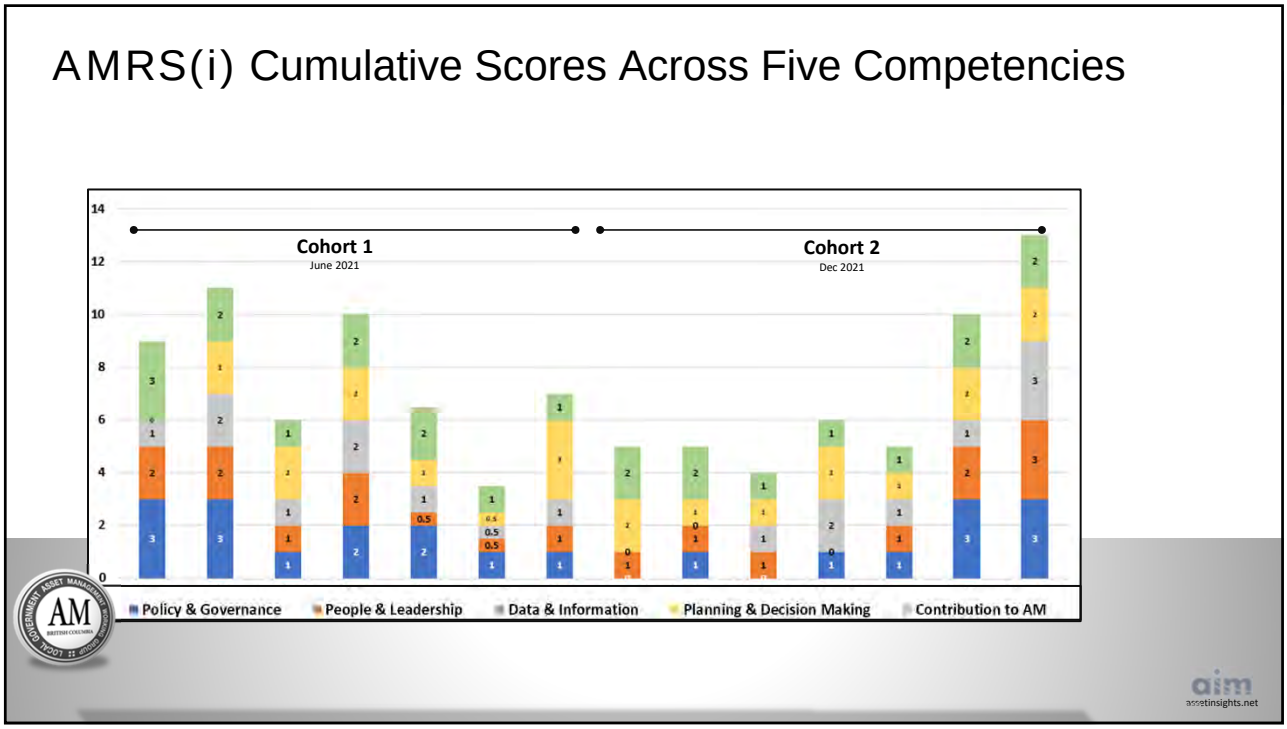
AMRS(i) Cumulative Scores Across Five Competencies
Cohort 1
June 2021
Cohort 2
Dec 2021
Policy & Governance
People & Leadership
Data & Information
Planning & Decision Making
Contribution to AM
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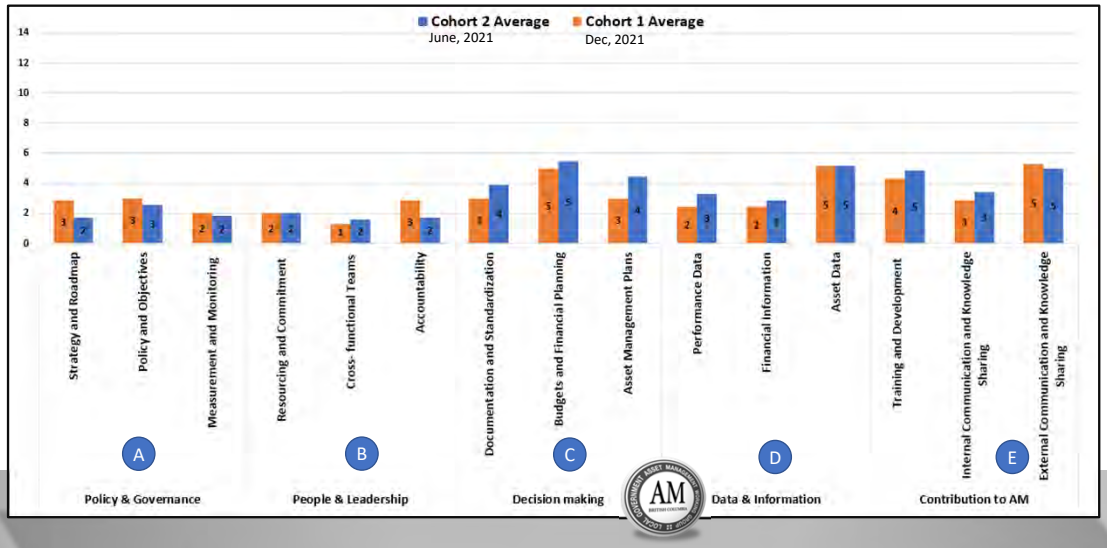
AMRS(i) Benchmarked Scores Across 15 Outcome Areas



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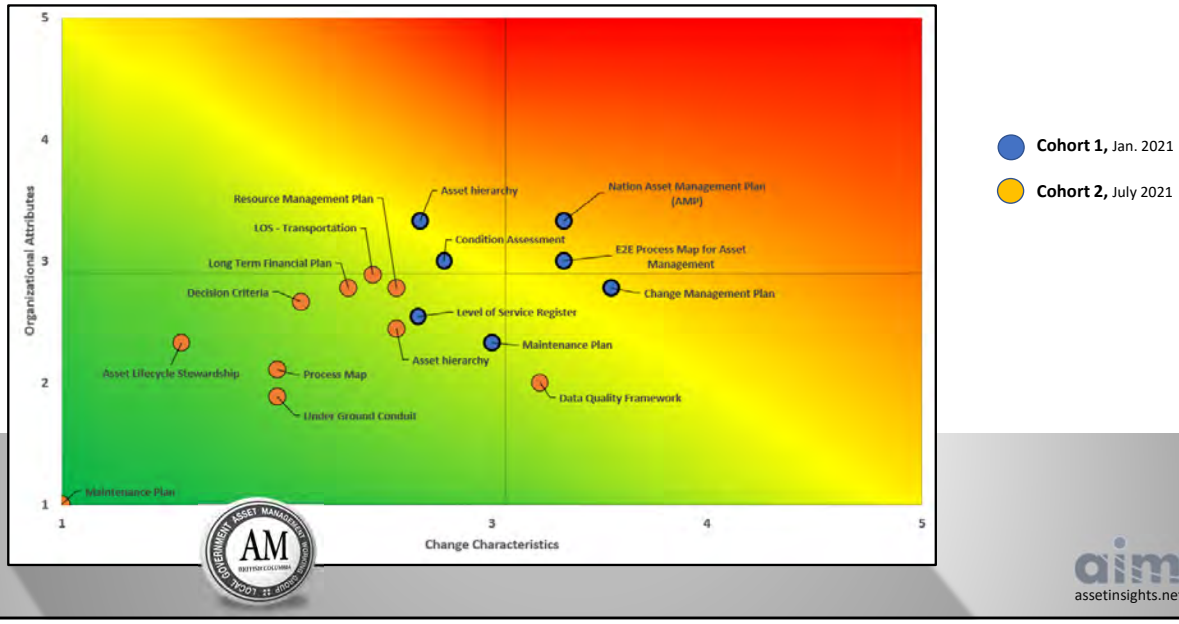
Change Risk Scores by Artifact



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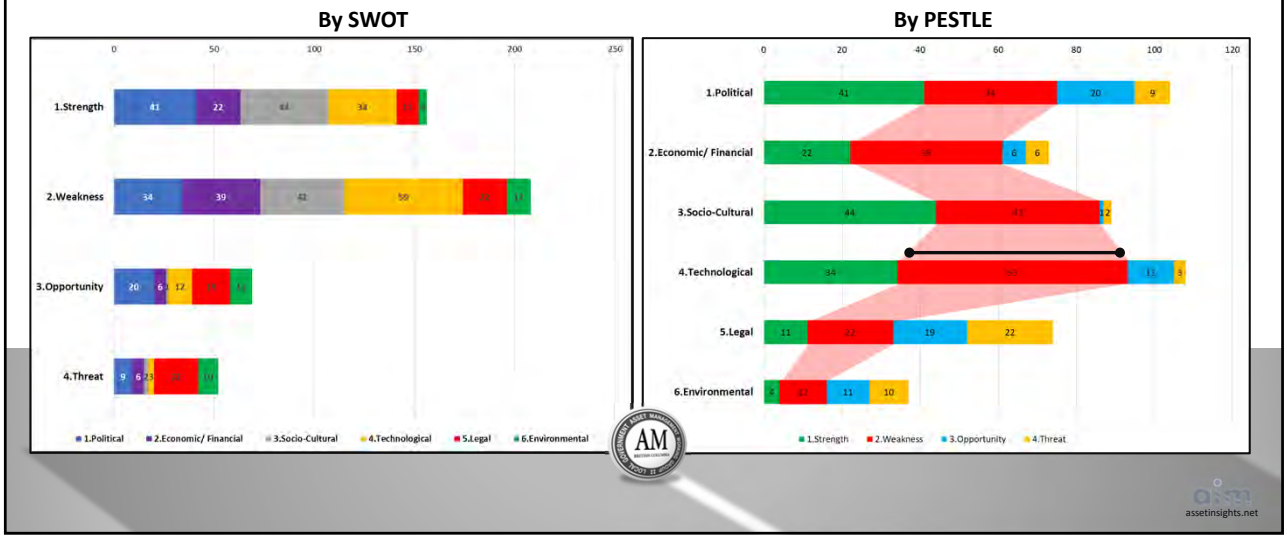
PESTLE-SWOT Highest Density Areas for the Full Cohort



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Operationalizing Asset Management:

Program Feedback

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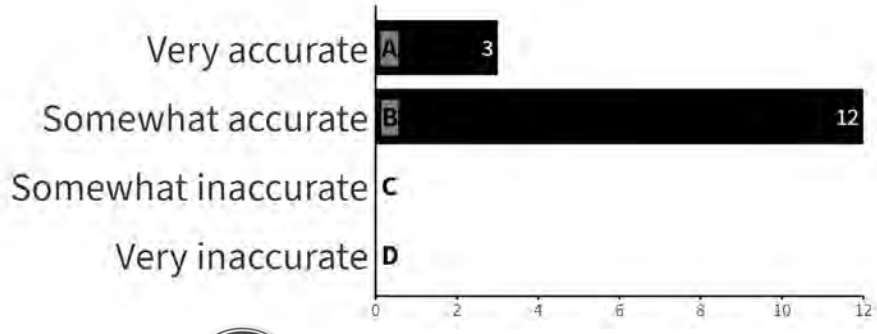
How well do the AMRS results reflect your organization?

February 9, 2021



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What were some of your takeaways from Exercise 1 - Change Risk Assessment?

January 19, 2021

"Great opportunity to discus with senior management"

"Higher risk than I expected"

"Generally good to know we are facing similar challenges."

"Opportunity for discussion"

"It created a good healthy conversation between operations and finance"

"It was good"

"Looking forward to the pairwise comparison workshop"

"Thought provoking" "Expected results"

"Varies across our organization"

"Many responses are grey"

"What I expected"

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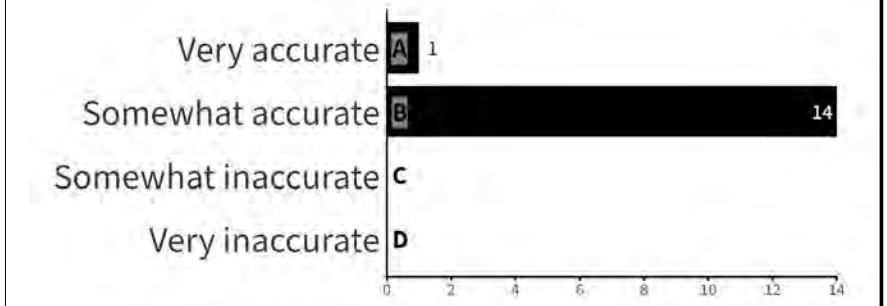
How well did the PESTLE-SWOT results reflect your organization?

February 9, 2021



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What were your takeaways from the PESTLE-SWOT exercise?

February 9, 2021

"Great for brainstorming and mapping the organization"

"Helpful. Outcome generally rang true with gut feel"

"Very subjective" "Lets us know where to focus"

"Needed help to interpret data"

"Helps focus where additional work is required"

"Stimulated discussion" "Complicated"

"How will we use the knowledge?"

"Validated what we are hearing on the ground"

"Helpful in identifying strengths to build on and weaknesses that may be barriers"

"It reflects our status but rather complex. Need to have summary conclusion"

"There are lots of moving parts that All need to work together"

"Quite informative, valuable information for our journey"

"Need to stay focused on particular artifact"

"Helpful - creating focus areas"

"Setting context is important (org wide or dep)"

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What have been your takeaways (so far) in working on the business case tool?

Cohort #1, April 2021

" Compex " " Created good discussion "

" Good tool that coul be applicable in many other analyses "

" Brings multiple inputs to manageable discussion "

" Challenging to evaluate only 5 tasks "

" May not fit our artifact well but good for other situations "

Cohort #2, July 2021

" Positive learning " " Quite involved. "

" Engaging "

" Structured " " Complicated, but good "

" Hard to communicate "

" Considerable amount of data required "

" May not fit our artifact well but good for other situations "

" Positive learning " " Quite involved. "

" Text Heavy " " Repeatable "

" technical " " Intimidating at first glance "

" A lot to take in "

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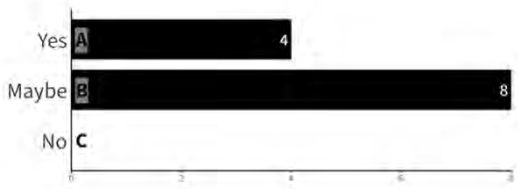
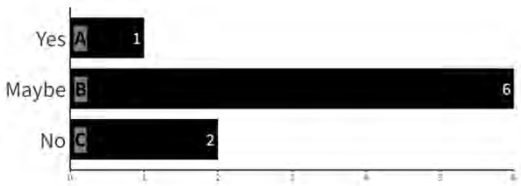
We are interested in writing a case study to share with FCM

Cohort #1, April 2021



Cohort #2, Sep. 2021



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Operationalizing Asset Management:

Program Progress

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Q&A

Wally Wells
wwells@live.ca

David Albrice
david@assetinsights.net

aim
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