

**Clearview Township**  
**Asset Management Planning Workplan**

**WORKPLAN**

**2017 – 2019 and onwards**



**CLEARVIEW**

# Primary Goals:

- 1) Improve Clearview's Asset Management Planning Readiness Levels
- 2) Processes, Education, Community Engagement and Capacity in Place to Improve Asset Management Planning
- 3) Prepare Long-term Financial Plans for Capital Asset Replacement
- 4) Use Performance Measurements and Targets to Determine Current Position and Improvements to Future Position
- 5) Present Annual Asset Management Planning Reports Showing Improved Financial Sustainability for Clearview
- 6) Community Engagement
- 7) Continue to Improve

# 1) Improve Clearview's Asset Management Planning Readiness Level

Asset Management Planning Readiness Level - Summary										
Readiness Level		Level 1		Level 2		Level 3		Level 4		Level 5
Policy and Governance	✓	Existing		Oct 31 2017		Feb 28 2018		Nov 30 2018		Nov 30 2019
People and Leadership	✓	Existing		Oct 31 2017		Feb 28 2018		Nov 30 2018		Nov 30 2019
Data and Information	✓	Existing	✓	Existing		Jun 30 2018		Nov 30 2018		Nov 30 2019
Planning and Decision-Making	✓	Existing	✓	Existing		Jun 30 2018		Nov 30 2018		Nov 30 2019
Contribution to Asset Management Practice	✓	Existing	✓	Existing		Jun 30 2018		Nov 30 2018		TBD

## 2) Processes, Education, Community Engagement and Capacity in Place to Improve Asset Management Planning

- Received \$50,000 grant from FCM
  - Installation of Questica (Long-term budgeting software)
    - Entering of prior year data and other set-up
    - Training of Clearview Staff
  - Long-Range Financial Planning Seminar
    - MFOA – Tuesday, September 19
    - Treasurer and Deputy Treasurer
  - Asset Management – Keep Calm and “Reg” On! Seminar
    - MFOA – Wednesday, September 20
    - Treasurer and Deputy Treasurer
  - Clearview Facilities Condition Assessment Report
    - RJ Burnside – by June 30, 2018
  - Clearview Roads and Bridges Needs Study
    - RJ Burnside – by June 30, 2018
  - Create Asset Management Planning Committee
    - Terms of Reference supported by Council
      - October 2017
  - Asset Management Planning Policy Approved by Council
    - October 2017
  - Update Job Descriptions to include responsibility for Asset Management Planning
    - Senior Management Positions and Deputy Treasurer
      - February 2018

### 3) Prepare Long-term Financial Plans for Capital Asset Replacement

- 2018 budget process will include;
  - 5 year capital and operating budget, and a
  - 10 year capital budget for core assets
- 2019 budget process will include;
  - 5 year capital and operating budget, and a
  - 10 year capital budget for all assets

Core assets include:

Roads, bridges, storm drainage, water services and sewer services.

#### 4) Use Performance Measurements and Targets to Determine Current Position and Improvements to Future Position

- Setting of Infrastructure Standards
  - Dependent upon when Province officially approves regulation
- Setting of asset valuations, methodology for inflating future values, setting methodology for asset replacement calculations
  - Dependent upon when Province officially approves regulation
  - Could be as early as February 2018

## 5) Present Annual Asset Management Planning Reports Showing Improved Financial Sustainability for Clearview

- First preliminary draft 2018
- Improved and expanded report 2019
- Further improved and expanded report 2020

## 6) Community Engagement

- Presentations at Council
- Online Survey
- Feedback from presentations
- Feedback from selected infrastructure standards
- Feedback from performance measurements and progress
- Webpage [www.clearview.ca/amp](http://www.clearview.ca/amp)
  - Basic definitions
  - Links to written resources
  - Links to Clearview YouTube channel related videos
- Resources available at Clearview Public Library (at one branch)



## 7) Continue to Improve

Efforts to review and improve all aspects yearly

Sharing of efforts with other municipalities and learning from them

# Appendix 1 – Asset Management Planning Readiness Scale

## POLICY AND GOVERNANCE

### Asset Management Planning Readiness Scale

Policy and Governance	Level 1	Level 2	Level 3	Level 4	Level 5
<b>Readiness Level</b>	✓ We have set expectations for our AM program. We have the support we need to begin work on an AM policy.	We have drafted an AM policy and strategy and have developed a framework for our AM system.	We are using our AM policy to guide our actions. We have created a roadmap and have established performance measures.	We have a fully functional AM system. We are using performance measures to track progress and outcomes.	We are continually improving the AM system. Our AM objectives and roadmap are refined based on the evolving needs of our community.
<b>Outcomes</b>					
<b>Policy and Objectives</b>	✓ Senior management has committed to formalizing an AM program.	We have drafted an AM policy. Senior management and council have endorsed the AM policy.	We are starting to use AM policy objectives to guide our actions.	We are managing assets and services in accordance with AM policy and organizational objectives.	We are validating and refining corporate, service and AM objectives based on the evolving needs of our community.
<b>Strategy and Framework</b>	✓ We have drafted a basic set of objectives that will guide the development of our AM system.	We have completed the strategy and framework for our AM system.	We have established a roadmap to guide the detailed actions surrounding our AM strategy deployment.	We are achieving our AM policy objectives through a fully functional AM system. Necessary workflows, documents and reporting tools are in place. We are updating our roadmap to address evolving needs.	We are following our roadmap in continually improving the AM system and in documenting the improvements.
<b>Measurement and Monitoring</b>	✓ We have defined the expected AM system benefits and outcomes.	We have documented our AM system plans and our objectives for the coming year.	We have established performance measures to monitor AM system progress and its outcomes and benefits to our community.	We are using performance measures to monitor progress and AM system outcomes and benefits.	We are monitoring performance and using the feedback to prioritize and make ongoing refinements and improvements.

EXISTING

October 31, 2017

February 28, 2018

November 30, 2018

November 30, 2019

# PEOPLE AND LEADERSHIP

## Asset Management Planning Readiness Scale

People and Leadership	Level 1	Level 2	Level 3	Level 4	Level 5
<b>Readiness Level</b>	✓ We have council support to establish a cross-functional AM team to explore AM needs and develop a plan for improving our AM system.	We have a clear mandate for our AM team, and council has approved funding for priority improvements to our AM system.	Our AM team has clear responsibility for improving our AM system. Council champions AM as a core business function.	Our AM team is responsible for guiding and supporting AM on an ongoing basis. AM system roles and responsibilities are operationalized.	Our council's commitment drives continuous improvement of the AM system. Roles and responsibilities evolve to meet ongoing needs.
<b>Outcomes</b>					
<b>Cross Functional Groups</b>	✓ We have appointed resources to investigate our community's AM requirements and to define and introduce an appropriate AM system.	We have formed a cross-functional AM team* to guide and oversee AM system planning and deployment.	The AM team* works within our organization to lead, communicate and support AM improvement and change management.	Our AM team* has been made permanent and tasked with guiding and supporting the AM function across the organization on an ongoing basis.	The AM team* guides and supports the ongoing improvement of the AM system within the organization.
<b>Accountability</b>	✓ Appointed resources have been mandated to investigate and assess our AM needs planning, documented by a draft terms of reference.	Our AM team* has been made accountable for guiding AM development, with a documented mandate and terms of reference.	Our AM team* has been made accountable for AM implementation and we have added AM system roles and responsibilities to staff job descriptions.	We have operationalized AM system roles and responsibilities across our organization.	We are documenting changes to AM system roles and responsibilities as needed to support our evolving requirements.
<b>Resourcing and Commitment</b>	✓ Council is aware of the resourcing and funding dedicated to exploring AM system requirements and to proposing an AM roadmap.	Council demonstrates buy-in and support for AM and has approved funding for priority improvements.	Council champions AM as a core business function and has approved funding to continue AM roadmap activities.	Council has approved funding for ongoing AM system monitoring and enhancement.	The AM team measures and monitors progress. Council is committed to ongoing improvement of the AM system.

**EXISTING**

October 31, 2017

February 28, 2018

November 30, 2018

November 30, 2019

# DATA AND INFORMATION

## Asset Management Planning Readiness Scale

Data and Information	Level 1	Level 2	Level 3	Level 4	Level 5
<b>Readiness Level</b>	✓ We have inventory data and financial data, aligned with minimum reporting requirements for tangible capital assets.	✓ We have basic inventory data for major assets, including some condition and performance data. We have detailed financial data for some of our assets.	We have basic inventory data for all our assets, with some level of service information and standardized condition ratings. We have linked AM and financial information for our major assets.	We have expanded inventory data on major assets, including condition and performance information. We have basic forecasts and risk assessments for some assets. We have a long-term community financial plan in place.	We have expanded inventory data on all assets. We have performance forecasts and risk assessments in place for most assets.
<b>Outcomes</b>					
<b>Asset Data</b>	✓ We have pooled inventory data, including approximate quantities of assets within most asset groups.	✓ We have basic inventory data for most major assets, including information on general asset properties such as size, material, location and installation date.	✓ We have basic inventory data for all assets. We have defined life cycle investment requirements for some assets.	We have expanded inventory data, and have evaluated the relative risks and life cycle investment requirements associated with major assets.	We have expanded inventory data and have evaluated the relative risks and life cycle investment requirements associated with most assets.
<b>Performance Data</b>	✓ We have informal or anecdotal approaches for measuring asset condition or performance. Some age information exists.	✓ We have some information on asset condition and performance for major assets, collected from a variety of sources.	We use standardized condition rating systems for most asset groups. Some level of service measures have been defined and data has been captured.	We have defined and measured levels of service for most assets. We have introduced basic needs forecasting and risk management strategies for most assets.	We have completed needs forecasts and risk management strategies for most assets.
<b>Financial Data</b>	✓ We have financial data on our assets, supporting minimum PS-3150 reporting requirements.	✓ We have captured capital and operating expenditure data for some assets. We have developed a strategy to link AM and financial information.	We have captured capital and operating expenditure data for most assets. We have linked AM and financial information for all major assets.	We have calculated the cost of service delivery for all major assets. We have developed a long-term (at least 10-year) financial plan.	We understand the trade-offs between investment and the quality of the front-line services we deliver and we use this to refine our financial plans.

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EXISTING

June 30, 2018

November 30, 2018

November 30, 2019

# PLANNING AND DECISION-MAKING

## Asset Management Planning Readiness Scale

Planning and Decision-Making	Level 1	Level 2	Level 3	Level 4	Level 5
<b>Readiness Level</b>	✓ Our asset investment plans address basic needs and respond to known problems. We evaluate priorities based on experience, council and management input and available information.	Our asset investment plans address observed short-term issues. We evaluate each need individually, and teams set priorities independently of each other, based on objectives and criteria representing the needs of their departments.	Our asset investment plans manage short-term risks and service impacts. We set priorities based on common organizational goals and objectives. We have drafted preliminary AM plans.	Our asset investment plans balance short-term service objectives (our desired level of service) with longer-term goals and risks. Planning is carried out using our AM system and kept up to date via normal business.	Our asset investment plans are integrated to address risks to both service and business goals. We have detailed AM plans for all services. We are continually improving our approach.
<b>Outcomes</b>					
<b>Documentation and Standardization</b>	✓ Our approach to asset investment planning varies across the organization.	✓ Our departments follow a similar but informal asset investment planning approach. We evaluate investment needs and priorities based on a mix of structured and ad-hoc practices and criteria.	We have developed a structured asset investment planning approach but application is inconsistent. We set priorities using similar criteria based on organizational goals and objectives.	We employ our structured asset investment planning approach across our core services. We set priorities using criteria which are fully aligned with our organizational goals and objectives.	We employ our structured asset investment planning approach across all services. We adapt our planning approach and criteria to align with evolving organizational goals and objectives.
<b>Asset Investment Plans</b>	✓ Our asset investment plans are typically reactive and focus on addressing basic needs (e.g. growth, regulations and known problems).	✓ Our asset investment plans are largely based on short-term asset, organizational and environmental issues. We do not have an AM plan.	✓ Our asset investment plans are based on short-term issues and priorities. We have drafted preliminary AM plans for priority services.	Our asset investment plans are based on both short- and long-term issues and priorities. We have developed detailed AM plans for core services.	We have integrated and optimized asset investment plans. We have developed detailed AM plans for all services.
<b>Budgets</b>	✓ We prepare annual capital and operating budgets which are based on historical values. We deal with new needs reactively, as they occur.	We prepare annual capital and operating budgets which are based on a mix of historical values and new priorities.	We prepare an annual capital budget which is based on a fresh reassessment of current needs. Our operating budget is based on a mix of historical values and new priorities.	We prepare annual needs-based capital and operating budgets which are based on a fresh reassessment of risks and current needs.	We prepare multi-year needs-based capital and operating budgets which are based on our short and mid-term needs. We take a structured approach to addressing in-cycle changes. Asset

EXISTING

EXISTING

June 30, 2018

November 30, 2018

November 30, 2019

# CONTRIBUTION TO ASSET MANAGEMENT PRACTICE

## Asset Management Planning Readiness Scale

Contribution to Asset Management Practice	Level 1	Level 2	Level 3	Level 4	Level 5
<b>Readiness Level</b>	✓ AM development is informal and largely driven by the personal initiative of team members.	✓ Our organization has membership in one or more AM organizations and selected staff are trained on basic AM concepts.	Our organization is an active participant in industry events. All staff receive basic AM awareness training.	Our organization contributes to industry events and shares experience with peers. An AM training plan is in place for all positions.	Our organization is viewed as a thought leader and coach. Select staff are trained as internal AM experts.
<b>Outcomes</b>					
<b>Training and Development</b>	✓ Our AM training and development approach is informal and largely driven by the personal initiative of staff. Some staff conduct targeted research, seeking out basic information on AM concepts and techniques.	Our AM training and development requirements are defined by management based on short-term needs. Selected staff are trained on basic AM concepts.	We provide all our staff with basic AM awareness training. Some staff undergo training on advanced AM concepts specific to their roles and responsibilities.	We have defined AM knowledge and skill requirements, and a training plan is in place for all positions. Management and staff receive role-appropriate AM training to establish needed capacity across the organization.	We train select staff members as internal experts to support the ongoing development of organizational capacity. Proactive, role-based training serves as a support for career development and succession planning.
<b>Knowledge Sharing - Internal</b>	✓ We are mitigating the risk of losing information held in the minds of long-term staff, through improved record keeping.	✓ We have mitigated the risk of losing information held in the minds of long-term staff, through improved record keeping.	A culture of knowledge sharing is taking root internally, supported by official initiatives. Our organization maintains AM knowledge resources (e.g. manuals, training, software). We communicate the benefits of AM internally.	There is a culture of knowledge sharing supported by official and informal initiatives. We maintain and disseminate AM knowledge resources (e.g. manuals, training, software).	Knowledge is captured and flows freely throughout the organization. Staff are leveraging internal and industry knowledge and leading practice resources.
<b>Knowledge Sharing - External</b>	✓ We are in the process of investigating industry groups and resources.	Staff or elected officials have attended AM related events.	✓ We are members of one or more AM organizations and actively participate in industry events.	We are actively involved in AM organizations and present at industry events. We have shared information with our peers on our experience, innovations and lessons learned.	We are a thought leader within the industry. We are active in coaching others to improve the overall body of knowledge. We communicate the benefits of our AM program to the public.

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EXISTING

June 30, 2018

November 30, 2018

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