### Policy and governance



**Policy and governance:** By developing this competency, your organization is putting in place policies and objectives related to asset management (AM), bringing those policies to life through a strategy and roadmap, and then measuring progress and monitoring implementation over time.

Note: To achieve each level, you must meet every requirement of each level before it.

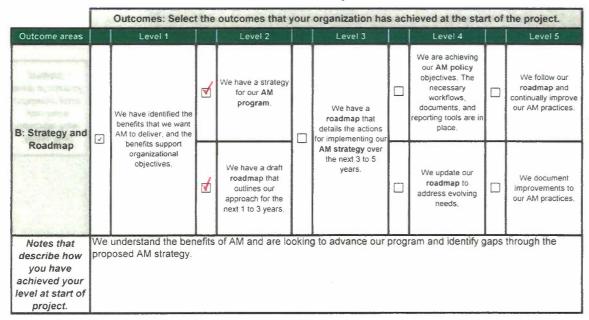
#### State at Start of Project

#### Outcomes: Select the outcomes that your organization has achieved at the start of the project. Outcome areas Level 1 Level 2 Level 4 Level 5 We have drafted an AM policy. We continue to We manage assets validate and refine and services in Senior management is We are starting to our corporate. A: Policy and committed to accordance with our use our AM policy service and AM **Objectives** formalizing an AM AM policy and objectives based on to guide our actions. program. organizational the evolving needs objectives. of our community. Senior management and council have 1 endorsed the AM policy. We implemented a strategic AM policy and it was endorsed by senior management and council. Notes that describe how you have achieved your level at start of project.

Start		
(from left)		Achieved
2	Select the level your organization has achieved at the end of this project.	No change
	ovide information about vities have helped you a current state.	-
		-
I		

### Policy and governance

#### State at Start of Project





(from left)	Exercise and the second	Achieved
1	Select the level your organization has achieved at the end of this project.	2
	ovide information about h	-
project activ	vities have helped you ac current state.	hieve your
the next 1 - 3	years	

### Policy and governance



#### State at Start of Project

#### Outcomes: Select the outcomes that your organization has achieved at the start of the project. Outcome areas Level 1 Level 2 Level 3 Level 4 Level 5 We have established We use We monitor performance performance performance and We have identified We are collecting measures to measures to use the feedback to Measurement short-term actions that baseline data on our monitor our asset monitor AM prioritize and make will demonstrate early current AM management and progress, ongoing refinements progress on AM. practices. progress, Monitoring outcomes, and and improvements outcomes, and the to AM practices. benefits. benefits to our community. We are currently working on advancing our AM program through key first activities. Notes that describe how vou have achieved your level at start of project.

Readiness level	Working on Level 1	Completed Level 1	Completed Level 2	Completed Level 3	Completed Level 4	Completed Level 5
(automatic)		Ø				

#### State at End of Project

Start	Wanter Co.	-
(from left)		Achieved
1	Select the level your organization has achieved at the end of this project.	2
	ovide information about t vities have helped you ac current state.	
Updating our practices.	AMP is helping to identify o	current AM

State Achieved Level 2

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4					
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	(41)				
	1				
	•				
	1				

# Asset Management Readiness Scale Assessment Tool People and leadership



State at End of Project

People and leadership: By developing this competency, your organization is setting up cross-functional teams with clear accountability and ensuring adequate resourcing and commitment from senior management and elected officials to advance asset management.

Note: To achieve each level, you must meet every requirement of each level before it.

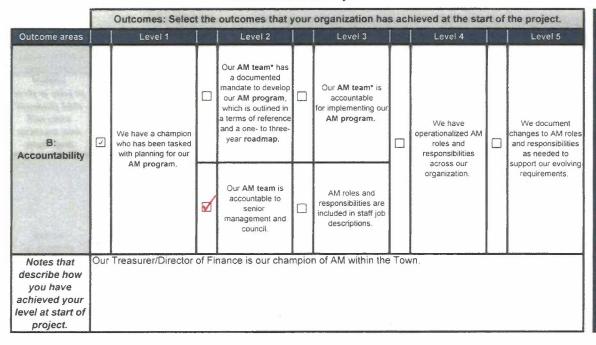
#### State at Start of Project

committee, depending on the organization. In some small communities the AM team may be as few as two people.

#### Outcomes: Select the outcomes that your organization has achieved at the start of the project Start Achieved Level 4 Level 5 (from left) Outcome areas Level 1 Level 2 Level 3 Select the level your organization has 2 No change achieved at the end of this project Our AM team\* Our AM team\* is Please provide information about how your Our AM team\* We have a crossworks within our permanent and We have identified the functional AM quides and supports project activities have helped you achieve your organization to lead, A: Crosstasked with guiding representation we team\* that guides communicate, and the ongoing current state and supporting AM functional need on our crossthe planning and support AM improvement of AM across the Teams improvements and within the functional AM team. implementation of organization on an organizational organization our AM program. ongoing basis. changes. We do not have a formal team structure, however, we have several members of the organization involved in Notes that our ongoing AM program development. Our Treasurer/Director of Finance is our AM champion and is describe how supported by Public Works, Facilities and the CAO/Clerk. you have achieved your level at start of project \*Note: Larger organizations may have both an AM team responsible for implementation and an AM steering committee to provide direction and oversee the work. Smaller organizations may group these functions together. This outcome may be better suited to an AM team or an AM steering

### People and leadership

### State at Start of Project





	Select the level your			
	organization has achieved at the end of this project.	2		
Please provide information about how your project activities have helped you achieve your current state.  The project developed our one- to three-year roadmap. Staff will be accountable to senior				
management and Council as we move forward with AM.				

## **Asset Management Readiness Scale Assessment Tool** People and leadership



#### State at Start of Project

#### Outcomes: Select the outcomes that your organization has achieved at the start of the project. Outcome areas Level 2 Level 4 Level 5 The AM team measures and Council Council champions monitors progress. demonstrates buy-in Council knows that AM as a core resources must be and support for AM Council funds C: Resourcing business function dedicated to exploring and allocates ongoing AM and and has approved resources (funding the requirements for Council monitoring and funding to continue Commitment AM and for drafting an or staff time) to enhancement. demonstrates AM roadmap AM roadmap. further develop the commitment to activities. AM program. ongoing improvement of AM practices. Council is supportive of AM and understand the necessary funding and resources for ongoing program Notes that development. describe how you have achieved your level at start of project.

	Si	tate at End of Projec	:t			
	Start					
	(from left)	THE RESERVED	Achieved			
ALL THE STATE OF T	1	Select the level your organization has achieved at the end of this project.	2			
	1 '	Please provide information about how your project activities have helped you achieve your current state.				
THE REAL PROPERTY.	additional fund	nstrated support by alloca ds over and above the FC velop our AMP, our AM S Framework.	M grant to			

Readiness level	Working on Level 1	Completed Level 1	Completed Level 2	Completed Level 3	Completed Level 4	Completed Level 5
(automatic)		Ø				

State Achieved Level 2

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### Data and information



**Data and information:** By developing this competency, your organization is collecting and using asset data, performance data and financial information to support effective asset management planning and decision-making.

Note: To achieve each level, you must meet every requirement of each level before it.

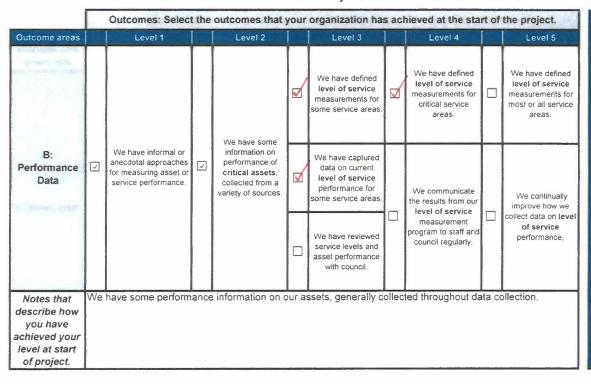
#### State at Start of Project

#### Outcomes: Select the outcomes that your organization has achieved at the start of the project. Level 4 Level 2 Level 3 Level 5 Outcome areas Level 1 We have a basic We have a inventory of most consolidated, basic We have asset critical assets, inventory of all inventory data, including assets. We have expanded We have expanded including approximate information on 1 inventory data for inventory data for quantities of assets general asset some assets. most assets. within most asset properties such as We have defined size, material, life cycle investment groups. location and requirements for installation date critical assets. We are moving our We have A: Asset Data data to a centralized We have evaluated the life location for use by standardized cycle investment condition rating the AM team (note: requirements systems defined for We have evaluated this does not associated with We have some most asset groups the life cycle require AM critical assets. anecdotal information investment software). on asset condition. requirements Some age information associated with We have defined exists most assets. We have asset We update data critical assets and condition information according to cycles have some on all critical defined in our AM nformation on asset condition for these assets. plans or strategy. We have a basic inventory of our assets with some age and assessed condition, housed in our AM software Notes that tool. We have general information included such as size, material, location, etc. describe how you have achieved your level at start of project.

	OF THE RESERVOIS	Achieved
2	Select the level your organization has achieved at the end of this project.	
	ovide information about vities have helped you a current state.	
oroject acti		chieve you

### Data and information

#### State at Start of Project





Start	Salara Liverage	
(from left)		Achieved
2	Select the level your organization has achieved at the end of this project.	
	ovide information about vities have helped you ad current state.	

### Data and information



(from left)

Achieved

### State at Start of Project

#### Outcomes: Select the outcomes that your organization has achieved at the start of the project. Outcome areas Level 1 Level 2 Level 4 We have capital (new and renewal) We have major and O&M capital renewal and expenditure data for operating & most assets. maintenance (O&M expenditure data for some assets. We understand the We have linked AM We have financial We understand the trade-offs between and financial information on our cost of sustaining investment and the C: Financial information for all assets, supporting current levels of level of service we Information minimum PS-3150 critical assets. service for all deliver and use this reporting critical assets to optimize our requirements.\* financial plans. We have a strategy We can to link AM and demonstrate the financial gaps between information. forecasted infrastructure needs and current spending levels. We mostly have capital financial information that supports PSAB reporting. We are currently using our AM Notes that software to link our financial and asset information. describe how you have achieved your level at start of project. \*PS-3150 is the Public Sector Accounting Board's standard guiding the treatment of tangible capital assets.

1	organization has achieved at the end of this project.	No change
	rovide information abou ivities have helped you a current state.	- 1
		1

State at End of Project

Readiness level	Working on Level 1	Completed Level 1	Completed Level 2	Completed Level 3	Completed Level 4	Completed Level 5
(automatic)		Ø				

State Achieved Working on Level 1

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1				
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1				

### Planning and decision-making



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**Planning and decision-making:** By developing this competency, your organization is documenting and standardizing how the organization sets asset management priorities, conducts capital and operations and maintenance (O&M) planning, and decides on budgets.

Note: To achieve each level, you must meet every requirement of each level before it.

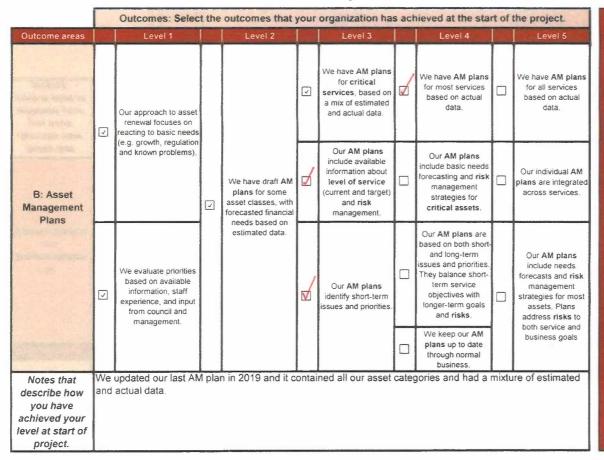
#### State at Start of Project

	Outcomes: Select the outcomes that your organization has achieved at the start of the project.										
Outcome areas		Level 1		Level 2	711	Level 3		Level 4		Level 5	
A: Documentation	N.	Our asset planning approaches vary	$\overline{\mathbf{Q}}$	Our departments follow a similar but informal asset planning approach.	<b>V</b>	We have a structured asset planning approach, but application is inconsistent.		We employ a consistent structured asset planning approach for each of our critical services.		We employ a consistent structured asset planning approach for all services.	
and Standardization		across the orgnization.	V	We evaluate investment needs and priorities based on a mix of structured and adhoc practices and criteria.		We set priorities using criteria based on organizational goals and objectives.		We set priorities using criteria that are fully aligned with our organizational goals and objectives.		We adapt our planning approach and criteria to align with evolving organizational goals and objectives.	
Notes that describe how you have achieved your level at start of project.	Notes that escribe how you have their excited at start of								ur software and		

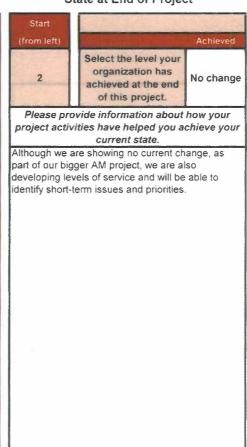
1			ALCONOMIC CONTRACTOR
	Start (from left)	EAL NEW TOWN	Achieved
	2	Select the level your organization has achieved at the end of this project.	No change
		ovide information about vities have helped you a current state.	-

### Planning and decision-making

### State at Start of Project







## Planning and decision-making





### State at End of Project

		Outcomes: Selec	t the	outcomes that	your	organization has	s aci	nieved at the sta	rt of	the project.	St	tart		described.
Outcome areas		Level 1		Level 2		Level 3	1	Level 4		Level 5	(from	n left)		Achieved
	V	We prepare annual capital and operating budgets based on			Į	We prepare an annual capital budget based on an annual assessment	<b>1</b>	We prepare annual needs-based capital and operating budgets that are based on an annual		We prepare multi- year needs-based capital and operating budgets that are based on		2	Select the level your organization has achieved at the end of this project.	No change
		historical values				of current needs.		assessment of risks		our short- and mid-	1		vide information about	-
								and current needs.		term needs.	proje	ect activi	ties have helped you ad	chieve your
C: Budgets and			ł	We prepare annual capital and			-		-		No ch	ange hov	current state.	No porpore
Financial Planning	>	We deal with new needs reactively, as they occur.		operating budgets based on a mix of historical values and new priorities.	₹	We have a 3-year capital plan that addresses short- term issues and priorities.		We have a 5-year capital plan* and update it annually.  We update our long term financial plan (at least 10-year) annually and understand the risks associated with our investment gap.		We take a structured approach to address in-cycle changes.	an an asses identi as we	o change however we can check off "We perpar annual capital budget based on annual sessment of current needs". We do also try to entify as many capital projects for the next 5 yea we can and update this annually when the pital budget is prepared.		
Notes that describe how you have achieved your level at start of project.		prepare our annua							and	new priorities.				
describe how you have achieved your level at start of project.	We	they occur.			budç	term issues and priorities.	nix of	(at least 10-year) annually and understand the risks associated with our investment gap.		to address in-cycle changes	capita	al budget	is prepared.	

Readiness level	Working on Level 1	Completed Level 1	Completed Level 2	Completed Level 3	Completed Level 4	Completed Level 5
(automatic)		☑	Ø			

State Achieved Working on Level 1

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## Contribution to asset management practice



Contribution to asset management practice: By developing this competency, your organization is supporting staff in asset management training, sharing knowledge internally to communicate the benefits of asset management, and participating in external knowledge sharing.

Note: To achieve each level, you must meet every requirement of each level before it.

#### State at Start of Project

		Outcomes: Select the outcomes that your organization has achieved at the start of the project.										
Outcome areas		Level 1		Level 2		Level 3		Level 4		Level 5		
A: Training and Development	Ŋ	Our AM training and development approach is informal and largely driven by the personal initiative of staff.	V	Our AM training and development requirements are defined by management based on short-term needs.		We provide all staff with basic AM awareness training.		We define AM knowledge and skill requirements. A training plan is in place for all positions.		We train select staf members as interna experts to support the ongoing development of organizational capacity.		
		Some staff conduct targeted research, seeking out basic	<b>\</b>	Selected staff are trained on basic AM concepts.		Some staff undergo training on advanced AM concepts specific to their roles and responsibilities.		Council, management and staff receive role- appropriate AM		Proactive, role- based training serves as a suppor		
	V	information on AM concepts and techniques.	✓	Council has opportunities to increase their understanding of AM concepts.	Ø	Staff and council are able to communicate the value of AM in their own words.		training to establish needed capacity across the organization		for career development and succession planning.		
Notes that describe how you have achieved your level at start of project.		ff have attended sor erally defined by se			io, e	ngineering semin	ars, v	webinars, confere	nces	s, etc.), which is		

Start		-						
(from left)		Achieved						
1	Select the level your organization has achieved at the end of this project.	2						
Please pr	ovide information about	how your						
project acti	project activities have helped you achieve your							
	current state.							
increase their	understanding of AM cor	ncepts.						

# Asset Management Readiness Scale Assessment Tool Contribution to asset management practice



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#### State at Start of Project

#### Outcomes: Select the outcomes that your organization has achieved at the start of the project. A culture of A culture of We capture AM knowledge sharing knowledge sharing knowledge and it exists and is is emerging flows freely supported by a mix internally, supported throughout the of formal and by official initiatives. organization. informal initiatives. We are aware of the We mitigate the risk B: Internal need to mitigate the of losing information Communication We collect and held in the minds of risk of losing maintain AM information held in the long-term staff, and Knowledge knowledge minds of long-term through improved Sharing record keeping. resources. staff. Staff leverage We disseminate AM nternal and industry knowledge resources within the knowledge and We communicate leading practice organization. the benefits of AM resources. internally to staff and council. We are using our AM software to better document our asset information, mitigating the risk of losing Notes that information held in the minds of long-term staff. describe how you have achieved your level at start of project.

Start		MANAGE S
(from left)		Achieved
2	Select the level your organization has achieved at the end of this project.	No change
	ovide information about rities have helped you a current state.	

### **Asset Management Readiness Scale Assessment Tool** Contribution to asset management practice



#### State at Start of Project

#### Outcomes: Select the outcomes that your organization has achieved at the start of the project. Outcome areas We are actively We are a thought involved in AM leader on AM within organizations and the municipal present at AM sector. We are members of events. Staff or elected one or more AM officials attend AMorganizations and We share We are active in related events. actively share our C: information with our coaching other AM experience. We are investigating peers on our organizations to External AM-related experience, improve the overall Communication 2 innovations and body of AM organizations and and Knowledge lessons learned. knowledge. resources. Sharing We share basic We share basic We rely on the data information on our information on from our AM We communicate assets, the services current capital program to explain the benefits of AM we provide, and projects with the decisions to the to the public. future needs with public. public. the public. Staff have attended training sessions, seminars and conferences. Our AM policy and our budgets are posted Notes that on the website. Further, we will post about upcoming capital projects. describe how you have achieved your level at start of project.

S. S. Training	Achieved							
Select the level your organization has achieved at the end of this project.	No change							
Please provide information about how your project activities have helped you achieve your current state.								
	organization has achieved at the end of this project. rovide information about ivities have helped you a							

Readiness level	Working on Level 1	Completed Level 1	Completed Level 2	Completed Level 3	Completed Level 4	Completed Level 5
(automatic)		Ø				

State Achieved	
Level 2	

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