



Operationalizing Asset Management: Policy to Capital Planning

Monday, November 29, 2021

Target Audience: CAOs, Town Managers, Public Works, Finance Department, Municipal Decision Makers

Purpose: Recognize asset management as a system of decision processes instead of a static plan. Participants will learn the decision process by working through building a capital plan based on a sample infrastructure data set, level of service targets, policy objectives and imposed budgetary constraints.

Objective: Attendees will gain an understanding of:

- The essential components of the Asset Management Process, their role and where they fit.
- A systematic approach to asset management decision making from policy to capital plan.
- Critical elements in the decision-making process and how they affect service delivery.
- How to relate policy objectives to risk and level of service.
- How to communicate decisions and justify capital planning based on risk and level of service.
- How data is important to the decision-making process, both in preparing to decide and evaluating the outcome after a decision.
- Where operations and maintenance activities overlap with capital planning. How decisions making can enhance the transition from capital project to operational readiness.

Benefits: The process of active discussion, the use of case studies, and from the sharing of your real-world decision-making experiences will enable attendees to:

- evaluate their own municipal frameworks.
- know what is needed for evidence-based decision making.
- have confidence in knowing decisions being made are grounded in your reality.

Course Facilitators:

Matt Delorme, P.Eng. – Matt is a municipal engineer with over 20 years' experience in engineering design and management. As a consultant he managed projects developing the asset management framework for the provinces of Nova Scotia and Newfoundland and Labrador and has assisted dozens of municipalities in Atlantic Canada get started on their asset management journey in partnership with AIM Network. Matt currently serves as AIM Network's technical program manager for a variety of programs in Atlantic Canada.

Jeff Matthews –

Jeff is an Executive Advisor and Canadian Asst Management Lead within GHD and has over 26 years' experience in the asset management and sustainability disciplines. He provides pragmatic advice to clients across Canada and North America to satisfy asset management needs, regulatory, process and sustainability goals. Mr. Matthews is adept in the development of advanced asset management systems, strategic asset management plans, natural asset management systems, ISO management systems, and the auditing of business processes. Jeff has worked as a project consultant around the world for public sector (Local, Provincial and Federal) and industrial (including water utility, oil and gas, chemicals, transportation, waste management, agricultural, military, and mining and minerals) clients.



TIME	Topic	Content
9:00 – 9:15	Introduction	
9:15 – 9:45	What is Asset Management Terminology Matters	<ul style="list-style-type: none"> • How does asset management change the way we work? • Definition of Key Asset Management terms
9:45 – 10:15	Benefits of a Systematic Approach	<ul style="list-style-type: none"> • Difference between systems and plans. Why one works and one doesn't. • Plan, Do, Check, Act • Introduction to the AIM Solution
10:15 – 11:00	Essential Elements of a Systematic Approach	<ul style="list-style-type: none"> • Elements of the ISO 55001 Standard • Aligning with this standard
11:00 – 11:15	BREAK	
11:15 – 12:00	Welcome to Your New Home	<ul style="list-style-type: none"> • Anatomy of Asset Management • Introduction to the policy, risk framework, climate considerations and level of service framework of a sample municipality.
12:00 – 1:00	LUNCH	
1:00 – 2:00	Breakout Session / Discussion	<ul style="list-style-type: none"> • Group work: Using the System • Risk Assessment • Level of Service Assessment
2:00 – 3:00	Build an Asset Management Program	<ul style="list-style-type: none"> • Compile the Asset Program • Develop Capital Investment Program • Continuous Improvements and Updates • Plan, Do, Check, Act Revisited
3:00 – 4:00	Presenting Findings	<ul style="list-style-type: none"> • Taking Plans to Council, Answering the Hard Questions
4:00 – 4:30	Reflections	<ul style="list-style-type: none"> • Open discussion on the Process