Asset Management

**Playbook for:** (Community Name)

**Objective**

The purpose of this Playbook is to establish a framework for implementing the (Community)’s asset management program. The focus is on **doing** asset management by implementing processes that enable the whole organization to be more effective and efficient – in an iterative way.

**Decision-Making Streams**

Four decision streams have been identified for the (Community) which make up the front end of the Playbook. This is the structure from which all asset management related decision-making processes will be built. These streams are described below.

|  |  |
| --- | --- |
| **Playbook Stream** | **Description** |
| **Strategy & Planning** | The overall strategy and planning for the asset management program, including establishing **levels of service**, **capital planning**, **reporting**, **corporate annual report**, and **asset management plans**. |
| **Information** | Steps for keeping the Asset Information System up-to-date, including **quality assurance/quality control**, and **inventory management.** |
| **Financial Planning & Management** | Decision-making and reporting as part of **long term financial planning,** **TCA reconciliation,** the **annual budget**, and **audited financial statements.** |
| **Communications** | Strategies for empowering people to make decisions, building community awareness and gathering community feedback through a **succession plan, knowledge building, a communication strategy, public engagement initiatives,** and **linkages with corporate plans and strategies**. |

**Asset Management Team**

The (Community)’s asset management team is made up of key representatives from across departments and disciplines. This team is responsible for leading each aspect of the program’s delivery. The Terms of Reference for the Asset Management Team is attached. (prepare and attach using direction from the guide, or delete reference)

Lead: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Key Players:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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**Existing Resources**

The following existing resources are in place which directly or indirectly inform and support the (Community)’s asset management decision-making.

|  |  |
| --- | --- |
|  | **Key Plans & Policies** |
| **Community-Wide** | * (insert relevant documents – eg. community plan, strategy, financial plan, capital plan, area development plans, climate change adaptation plan, energy plan, annual report, asset management plan, asset management policy, levels of service) |
| **Water** | * (insert relevant documents – eg. water servicing plan, master plan, design criteria, specifications) |
| **Sewer** | * (insert relevant documents – eg. sewer servicing plan, master plan, design criteria, specifications) |
| **Roads & Drainage** | * (insert relevant documents – eg. roads and drainage servicing plan, master plan, design criteria, specifications) |
| **Buildings** | * (insert relevant documents – eg. master plan) |
| **Recreation** | * (insert relevant documents – eg. master plan, active transportation plan) |
| **Vehicles** | * (insert relevant documents – eg. maintenance strategies) |
| **Heavy Equipment** | * (insert relevant documents – eg. maintenance strategies) |

**Actions for Implementation**

The (Community)’s asset management program will involve both continued developments, as well as implementation, over time. Some of these actions will occur in parallel.

Priority initiatives for continuing to develop the (Community)’s governance framework include:

* Preparation of the Asset Management Team Terms of Reference
* Forming working groups (cross-department) around each decision stream, as a subset of the Asset Management Team (remove for smaller communities)
* Coordination and documentation of departmental roles and aaccountability relationships for key players, including responsibilities that are aligned with the (Community)’s Asset Management Policy
* Scheduling key annual meetings, milestones and deliverables
* Documenting the scope of each annual meeting, milestone and deliverable, and identifying who is responsible
* Scheduling 5 year recurring processes
* Identifying dependencies between implementation tasks (relationships illustrating how information flows in and out of each stream)

Initiatives related to the ongoing governance of the program are described in the section below.

**Recurring Annual Meetings and Deliverables**

The GANTT chart on the next page illustrates the (Community)’s the annual (and 5 year) cycle of ongoing asset management.

INSERT ANNUAL SCHEDULE