

NAMS Canada Professional Certificate in Asset Management Planning

NAMS Canada Inc.

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Professional Certificate in Asset Management Planning

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.



FÉDÉRATION
CANADIENNE DES
MUNICIPALITÉS

FEDERATION
OF CANADIAN
MUNICIPALITIES



Learning Path



Customized Training



SaskWater



Professional Certificate

- Twice per year (English & French)
- 7 modules
- 8 weeks
- Final assignment (AMP for your organization)
- NAMS + tool



The key issue:

Can we reliably answer some
Fundamental Questions?



Do we have enough funding?

to

1. Operate
2. Renew
3. Maintain
4. Acquisition
5. Disposals



our infrastructure to meet the organisation's needs?

What if the answer is NO?

Does that lack of funding and resources represent a risk to your community going into the future?





Who chooses the best value plan?



Do they have full knowledge of the consequences?

What do we need to consider?





Asset Management Plans

1. Executive Summary

- Context
- What does it cost?
- What we will do?
- What we cannot do
- Managing the risks
- Confidence levels
- The next steps



Asset Management Plans

2. Introduction

2.1 Background

2.2 Goals and Objectives of AM

2.3 Core and Advanced Asset Management



Asset Management Plans

3. Levels of Service

3.1 Customer research and expectations

3.2 Strategic and corporate goals

3.3 Legislative requirements

3.4 Customer levels of service

3.5 Technical levels of service



Asset Management Plans

4. Future Demand

- 4.1 Demand drivers
- 4.2 Demand forecast
- 4.3 Demand impact on assets
- 4.4 Demand management plan
- 4.5 Asset programs to meet demand
- 4.6 Climate Change and Adaption

Asset Management Plans

5. Lifecycle Management Plan

5.1 Background data

5.2 Operations and maintenance plan

5.3 Renewal/replacement plan

5.4 Creation/acquisition/upgrade plan

5.5 Disposal

Asset Management Plans

6. Risk Management Plan

6.1 Critical assets

6.2 Risk assessment

6.3 Infrastructure Resilience approach

6.4 Service and Risk Trade offs



Asset Management Plans

7. Financial Summary

7.1 Financial statements and projections

7.2 Funding strategy

7.3 Valuation forecasts

7.4 Key assumptions made in financial forecasts

7.5 Forecast reliability and confidence



Asset Management Plans

8. Plan Improvement and Monitoring

8.1 Status of asset management practices

8.2 Improvement program

8.3 Monitoring and review procedures

8.4 Performance measures



Asset Management Plans

9. Reference

- Corporate strategic plan
- Corporate planning documents



Asset Management Plans

10. Appendices

A - Acquisition Forecast Summary

B – Operation Forecast Summary

C – Maintenance Forecast Summary

D – Renewal Forecast Summary

E – Disposal Forecast Summary

F – Budget Summary by Lifecycle Activity



Purpose of an AM Plan

- Document what service can be provided
- Show the resources required
- Show the risks and how risks are to be managed
- Highlight the consequences of limited resources
 - What cannot be done
 - Risks than cannot be adequately managed
- Provide a tools for discussion and balancing future options
 - What services do you really need?
 - What services are you prepared to do without?
 - What risks are your willing to accept?
 - What are you willing to pay?



Progress – Key Observations

- AMPs are used as budget bids to get additional funding.
- Service levels, associated costs & risks have not been established.
- Informed trade-off decisions on service levels, costs and risks are not being made.
- Key strategic planning documents are not aligned & are not telling the same story.



Benefits of an Asset Management Plan

- ✓ Improved governance and accountability
- ✓ More sustainable decisions
- ✓ Enhanced customer service
- ✓ Effective risk management
- ✓ Improved financial sustainability
- ✓ Communication of “Reality”



NAMS + Tool

The screenshot displays the NAMS+ web application interface. At the top, there is a navigation bar with a hamburger menu icon on the left, the NAMS+ logo in the center, and user information on the right including the email address NICOLE.ALLEN@NAMSCANADA.ORG, a Settings link, the date 21. Apr 2020, and a Logout link. A help icon (question mark) is also present in the top right corner. Below the navigation bar is a large banner image with a teal overlay. The banner features the NAMS+ logo in the top right corner and the text "TOOLKIT FOR ASSET MANAGEMENT PROFESSIONALS" in large white letters. Below the banner is a grid of five tool cards, each with an icon, a title, and a brief description. A left-pointing arrow is visible on the right side of the grid.

Icon	Tool Name	Description
	Asset Lifecycle	The Asset Lifecycle tool forecasts lifecycle costs in comparison to the planned budget and builds an asset management plan.
	Risk Management	The Risk Management tool helps identify, analyse and treat risks and builds a risk management plan.
	Asset Management Documents	The Asset Management documents are templates for developing policy and strategy, as well as other supporting documents.
	Maturity Assessment	The Maturity Assessment tool allows assessment of current and target maturity to build an improvement plan.
	Long Term Financial Plan	The Long Term Financial Plan tool provides a template to create a long term financial plan.

NAMS + Tool

Asset Lifecycle



NAMS + Tool

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Sample-Homework
2019 - 2038
Alternate Method
V: 1

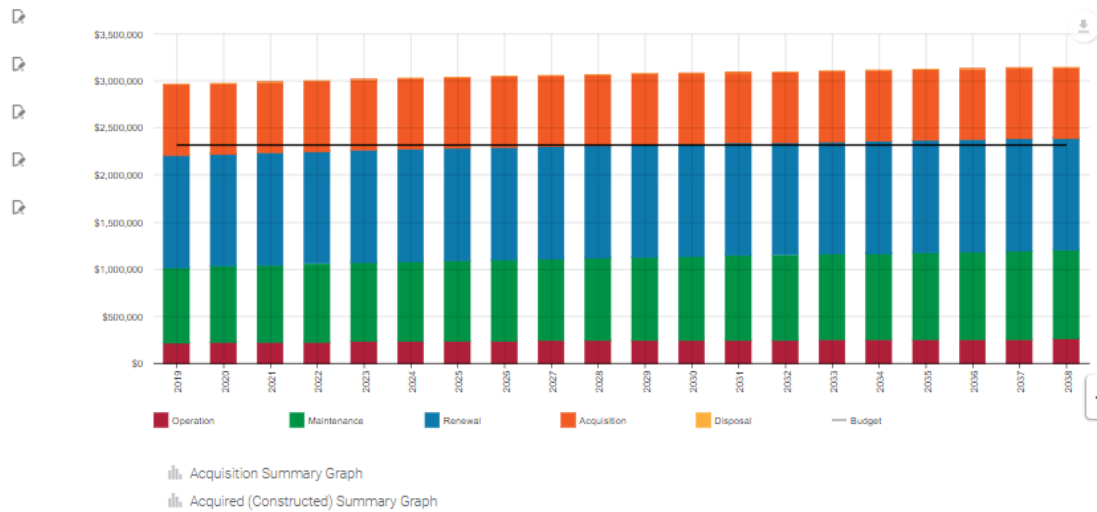
ACQUISITION
OPERATION
MAINTENANCE
RENEWAL
DISPOSAL

🧩

[LEARN MORE...](#)

- Acquisition
- Acquisition
- Acquisition - Budget
- Acquisition - Forecast
- Acquisition - Growth
- Video: Creating a Simple Lifecycle Forecast

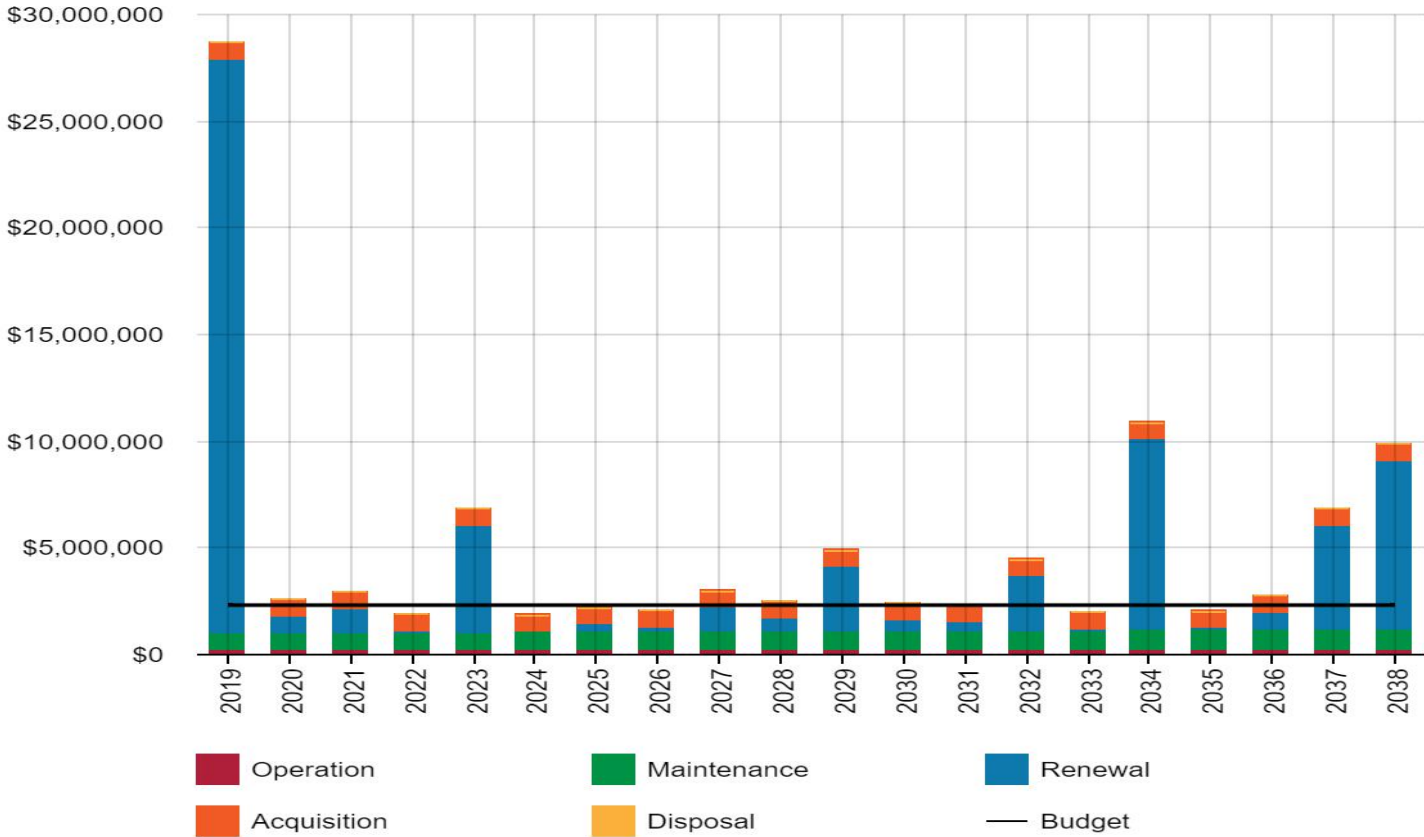
Lifecycle Summary



NAMS + Tool

2 Methods

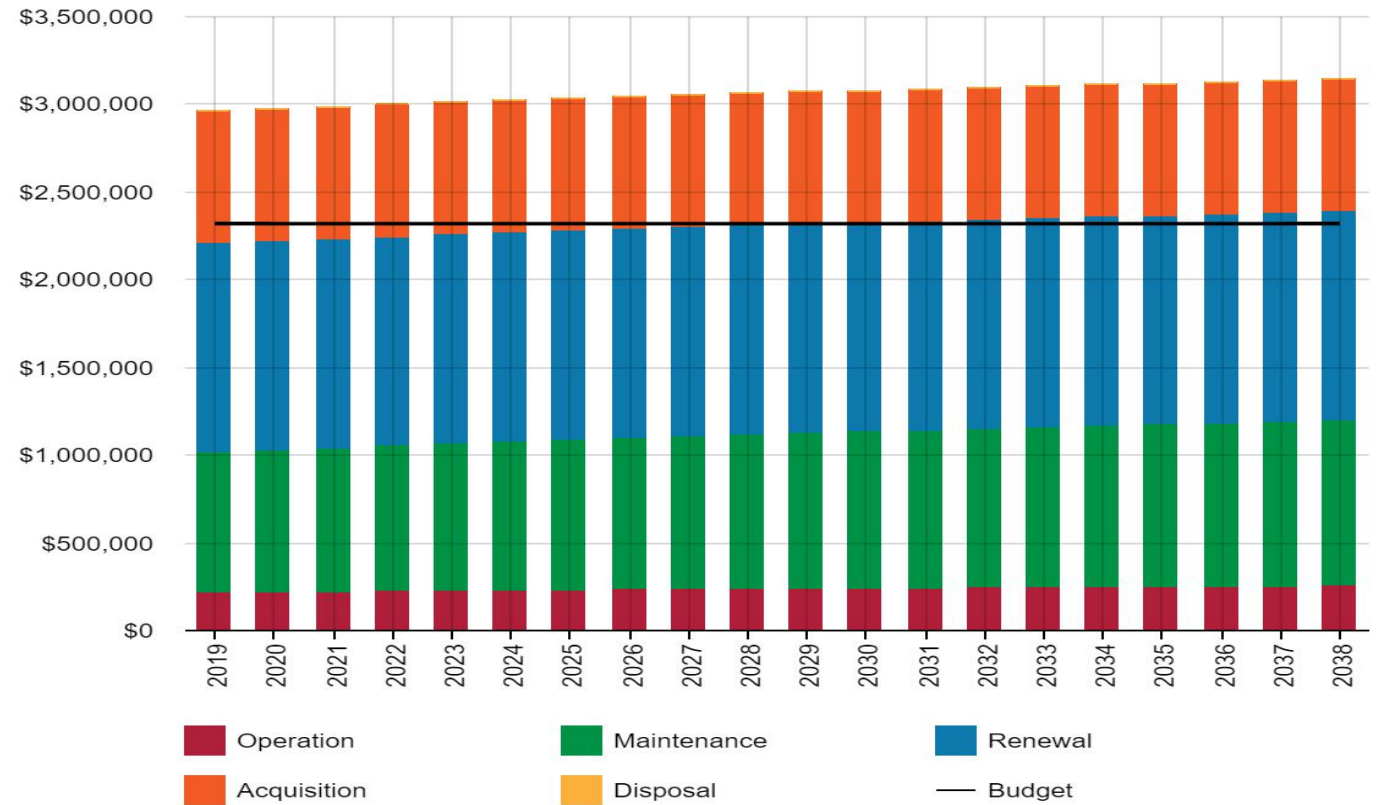
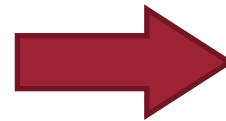
#1 Asset Register



NAMS + Tool

#2 Alternate

- Condition Modelling e.g. Pavement Management System
- Average Network Renewals Estimate

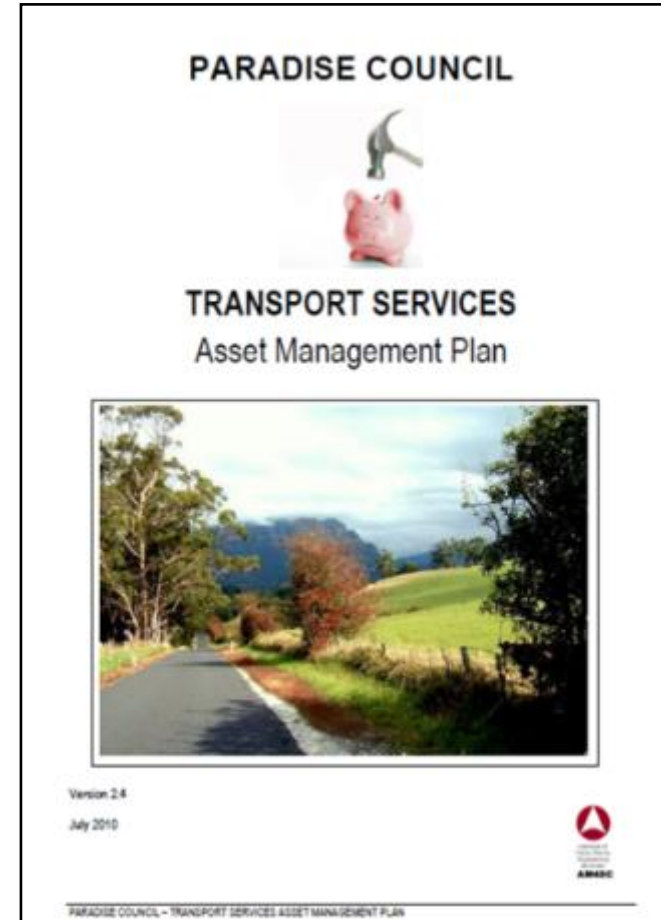


Asset Management Plan

Documented information that specifies:

What is required:

- to achieve the objectives of the organization
- explain the consequences of current budget allocations
- provide information/options to support informed decisions



Goal of Asset Management

To meet an agreed level of service:

- cost effective
- lifecycle approach (acquisition, maintenance, operation, renewal and disposal of assets)
- communication for better informed decision making



Asset Management – The new “normal”

Asset Management involves

- balancing of costs, opportunities and risks
- against desired performance of assets
- to achieve corporate objectives

Ref: ISO 55000, Sec 2.4, p 3.

**It's not a new concept, just the process
has become made more “structured”**



Activities, Resources and Timescales

Activities - Lifecycle Requirements

- Operations
- Maintenance
- Capital renewal
- Acquisition
- Disposal

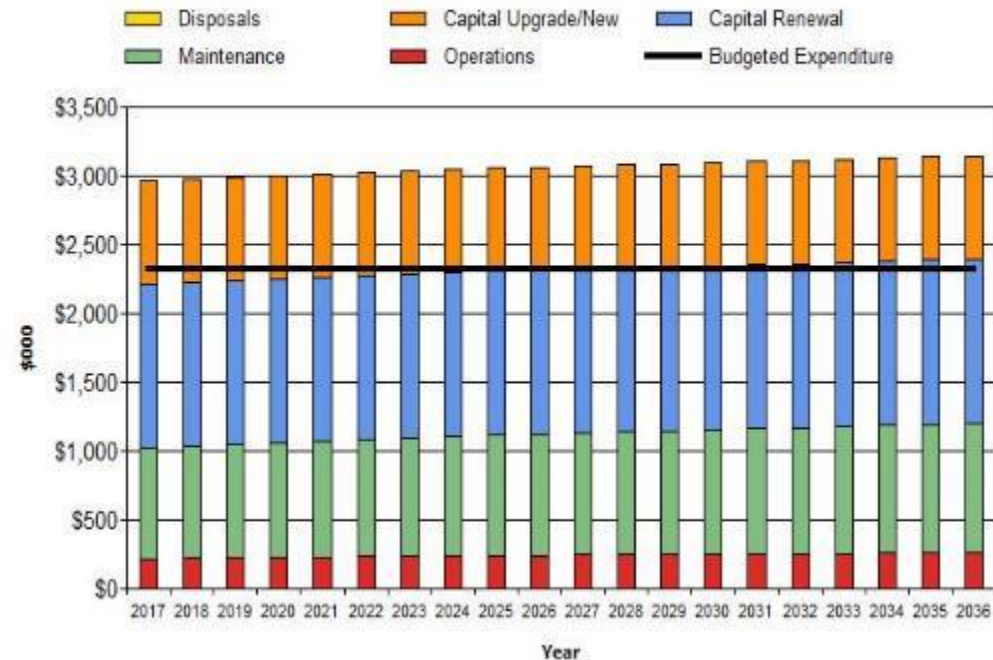
Resources

- Financing and staffing

Timescales

- Programs

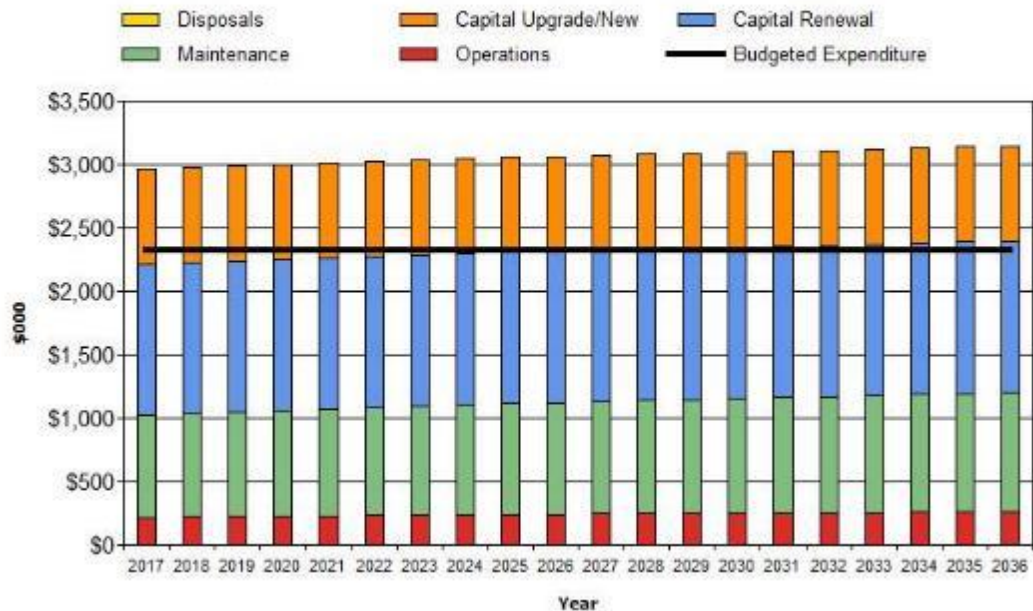
Sample Council - Projected Operating and Capital Expenditure (Cahoot_Sample_S2_V1)



Achieving the Organization's AM Objectives and Financial Sustainability

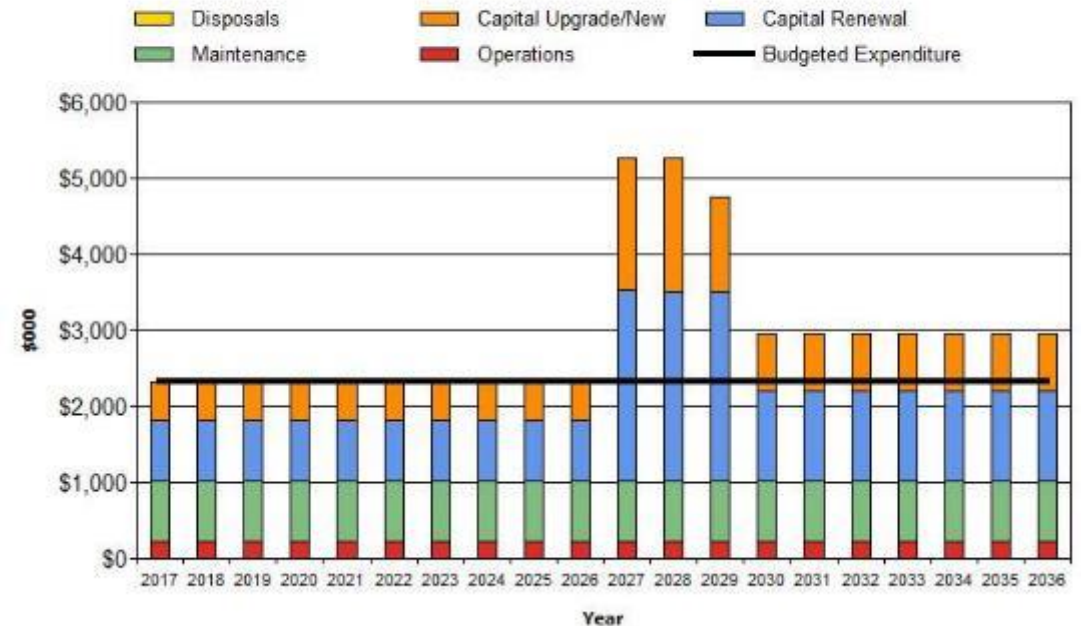
While balancing costs, risks, opportunities and performance

Sample Council - Projected Operating and Capital Expenditure (Cahoot_Sample_S2_V1)



Projections based on current requirements

Sample Council - Projected Operating and Capital Expenditure (Cahoot_Sample_S3_V1)



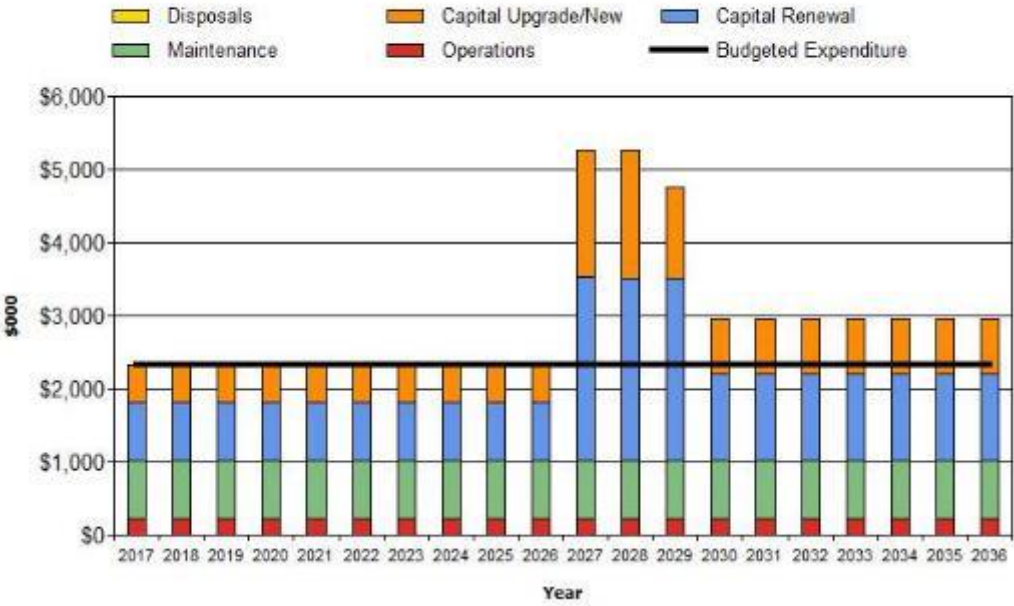
Projections based on planned budgets



Achieving the Organization's AM Objectives and Service Affordability

While balancing costs, risks, opportunities and performance

Sample Council - Projected Operating and Capital Expenditure (Cahoot_Sample_S3_V1)



Projections based on projected requirements and budgets



Deferral of activities and programs



Likely reduction in service level performance

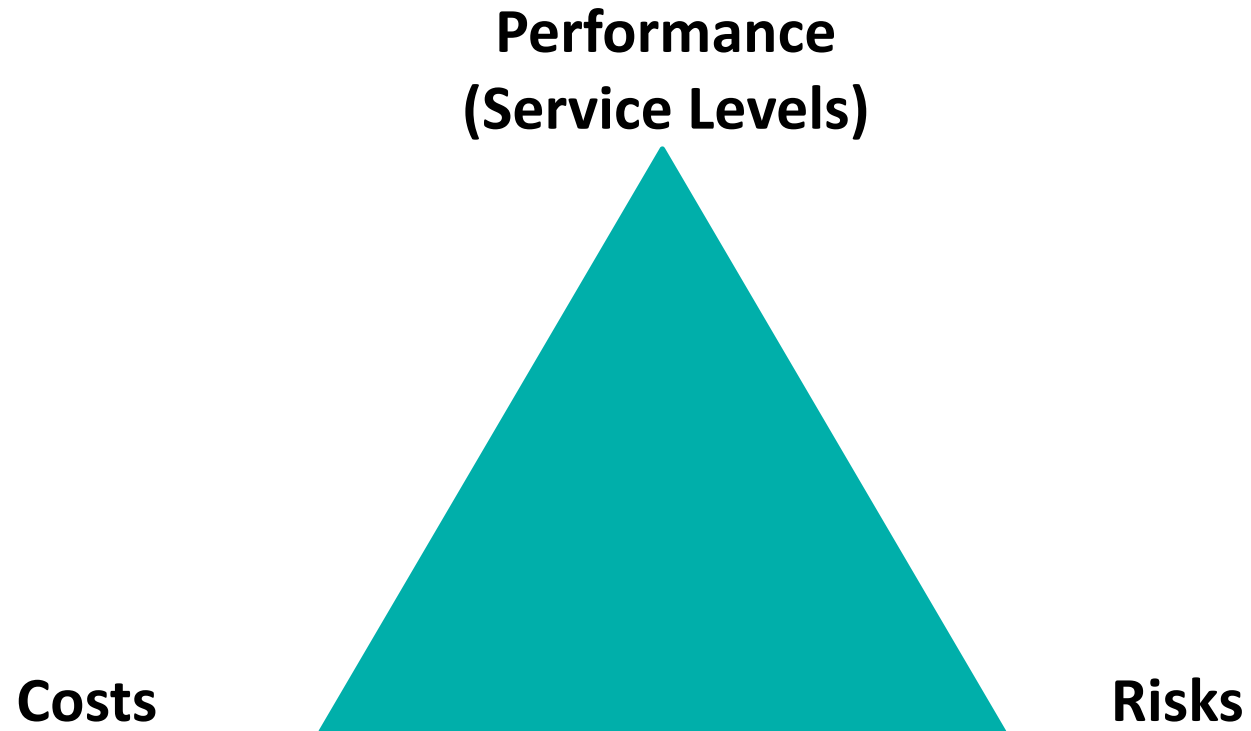


Generation of additional service risks



Asset Management gives Informed Asset Investment Decisions

balancing costs, managing risks, and delivering performance



Questions??

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