

Asset Management Readiness Scale Assessment Tool



Introduction and Instructions

FCM's Asset Management Readiness Scale (AMRS) helps municipalities measure progress on asset management in five competency areas. It can also be used to identify priority areas for a community when it comes to its asset management practices. Each of the five competencies is a building block, composed of three outcome areas. Together, the five building blocks form the practice of asset management. The AMRS is also a key tool that is used to track progress by FCM and is central to demonstrating results and successes of the Municipal Asset Management Program (MAMP).

Please note that the AMRS is meant to measure the readiness of your community by competency across all asset classes (e.g. water, wastewater, buildings, roads, bridges, storm water, etc.). It is possible that your asset management practices are very advanced in one asset class and less so in another. The overall rating should reflect the less advanced asset classes.

These instructions focus on how to use this Excel Asset Management Readiness Assessment Tool (Tool). **We strongly encourage you to read the AMRS (see link below) prior to completing this assessment and keep the document on hand as you work through this Tool, which can be found at the following link.**

[Asset Management Readiness Scale](#)

You may also find it helpful to watch the following webinar which provides additional guidance on how to use the AMRS.

[Assessing your community using FCM's Asset Management Readiness Scale](#)

The Tool is organized as follows:

1. Introduction and Instructions
2. Organization Information (OrgInfo)
3. Readiness Assessments (1 tab for each of the 5 competencies)
 - a. Policy and governance (Policy-gov)
 - b. People and leadership (People-lead)
 - c. Data and information (Data-info)
 - d. Planning and decision-making (Plan-decision)
 - e. Contribution to asset management practice (Contrib-AM)

Note that the competency tabs can be completed in any order.

Organization Information

Before starting your assessment, ensure that the Organization Information tab is complete.

Competencies

Note that the following instructions apply to each of the five competency tabs. Each competency is separate from the others and can be completed in any order.

Outcome areas – current level of achievement

Each of the competencies has three outcome areas and each outcome area has five levels. First, select the outcomes your organization has already achieved starting at level 1, by clicking on the checkboxes to the left of each statement. You must meet all the requirements of each outcome area level in order for the Tool to reflect that level of competency. It is possible that you have not met some or any of the outcome area levels - in these cases, do not click on any of the checkboxes.

Once you have completed the checkboxes for an outcome area, use the text box to provide information on current actions your organization is taking or has taken in this specific outcome area to achieve your stated level. Please note that including information in this section is required as it will provide FCM more detail on your organization's current state of asset management maturity, and better understand your project and how it is intended to help you progress along the scale.

Note: To make multiple bullet points or separate paragraphs in an Excel comment box, press Alt+Enter while typing in the comment box to start a new line.

Once you have completed the current state for an outcome area of a competency, the Tool will automatically calculate the readiness level for that outcome. Once the current states for all three outcome areas of a competency are completed, the Tool will automatically calculate an overall readiness level for the competency.

Outcome areas – future level of achievement

After you have completed the current state for all three outcome areas, you can then proceed to the expected future state assessment. For each outcome area, please select the level you expect your organization will achieve at project completion by using the dropdown box. Please only consider the change that would be a direct result of your project at the time the project is completed.

Below the dropdown box is a text box for you to provide information on how your project activities will result in your expected future level. Please note that this section is required - the information you provide is critical for FCM to fully understand your proposed project. Please make a direct link between the project activities to be undertaken and the expected future state. For those outcomes that are not affected by your project activities, please enter: "no anticipated impact".

Once you have completed the expected future state for all three outcome areas, the scale will automatically calculate the future state overall rating for the competency.

Appendix C - FCM AM Readiness Scale

This process must be repeated for each competency.

Once you have completed the form, please save and include in your application.

This Excel AMRS Tool was developed with support from the Canadian Network of Asset Managers (CNAM).



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Asset Management Readiness Scale Assessment Tool

Organization Information



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Name of Lead Applicant
Province/Territory (select from dropdown)
Project Title

Municipality of Arran-Elderslie

Ontario

Facility Condition Assessment

Project Number (for FCM use only)

for FCM use only

Asset Management Readiness Scale Assessment Tool

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.

Current State

Outcomes: Select the outcomes that your organization has achieved.										
Outcome areas		Level 1		Level 2		Level 3		Level 4	Level 5	
A: Policy and Objectives	<input checked="" type="checkbox"/>	Senior management is committed to formalizing an AM program.	<input checked="" type="checkbox"/>	We have drafted an AM policy.	<input checked="" type="checkbox"/>	We are starting to use our AM policy to guide our actions.	<input checked="" type="checkbox"/>	We manage assets and services in accordance with our AM policy and organizational objectives.	<input type="checkbox"/>	We continue to validate and refine our corporate, service and AM objectives based on the evolving needs of our community.
	<input checked="" type="checkbox"/>		Senior management and council have endorsed the AM policy.							
Please provide notes that describe how you have achieved your current level	The Strategic Asset Management Policy was adopted by Council on June 24th, 2019 in order to formalize the Municipality's commitment to asset management, align its actions with strategic goals and objectives, and provide direction and focus for infrastructure investment and priority setting. Management, independently, assesses the capital needs and puts forward their priorities during the capital budgeting process.									

Expected Future State

Current (from left)	Expected	
4	Select the level you expect to achieve at the end of this project	5
Please provide information about how your project activities will help you achieve your expected future state		
Identification of current levels of service and data gaps will further the completeness of the asset inventory and data elements, lending to a solid approach to our actions with regards to prioritizing the investment in infrastructure. A comprehensive asset management plan has been developed along with a formalized AM policy. Staff are now utilizing the policy to guide actions and tie into organizational objectives.		

Asset Management Readiness Scale Assessment Tool

Policy and governance



Current State

Outcomes: Select the outcomes that your organization has achieved.											
Outcome areas		Level 1		Level 2		Level 3		Level 4		Level 5	
B: Strategy and Roadmap	<input checked="" type="checkbox"/>	We have identified the benefits that we want AM to deliver, and the benefits support organizational objectives.	<input checked="" type="checkbox"/>	We have a strategy for our AM program.		We have a roadmap that details the actions for implementing our AM strategy over the next 3 to 5 years.		<input type="checkbox"/>	We are achieving our AM policy objectives. The necessary workflows, documents, and reporting tools are in place.	<input type="checkbox"/>	We follow our roadmap and continually improve our AM practices.
			<input type="checkbox"/>	We have a draft roadmap that outlines our approach for the next 1 to 3 years.	<input type="checkbox"/>		We update our roadmap to address evolving needs.	<input type="checkbox"/>	We document improvements to our AM practices.		
Please provide notes that describe how you have achieved your current level	Council and management are aware of the benefits of asset management and strive to make budget decisions that best meet the organizations needs and objectives. Currently, this is not captured in a formal program or document, other than the AM Policy.										

Expected Future State

Current (from left)	Expected	
1	Select the level you expect to achieve at the end of this project	2
Please provide information about how your project activities will help you achieve your expected future state		
The activities of this project will result in a comprehensive asset management plan that includes both core and non-core assets and an initial road map to facilitate a long term asset strategy.		

Asset Management Readiness Scale Assessment Tool

Policy and governance



Current State

Outcomes: Select the outcomes that your organization has achieved.										
Outcome areas		Level 1		Level 2		Level 3		Level 4		Level 5
C: Measurement and Monitoring	<input checked="" type="checkbox"/>	We have identified short-term actions that will demonstrate early progress on AM.	<input checked="" type="checkbox"/>	We are collecting baseline data on our current AM practices.	<input type="checkbox"/>	We have established performance measures to monitor our asset management progress, outcomes, and the benefits to our community.	<input type="checkbox"/>	We use performance measures to monitor AM progress, outcomes, and benefits.	<input type="checkbox"/>	We monitor performance and use the feedback to prioritize and make ongoing refinements and improvements to AM practices.
Please provide notes that describe how you have achieved your current level	Short-term actions include the continued enhancement of staff's knowledge of asset management and the need to work cohesively moving forward. Data has been collected to form a detailed asset inventory for core assets with review of data completeness between the AM and GIS systems.									

Readiness level (automatic)	Working on Level 1	Completed Level 1	Completed Level 2	Completed Level 3	Completed Level 4	Completed Level 5
		<input checked="" type="checkbox"/>				

Expected Future State

Current (from left)	Expected	
2	Select the level you expect to achieve at the end of this project.	3
Please provide information about how your project activities will help you achieve your expected future state		
There will be an increase in the data collected of non-core assets, with improvements noted within the Facility Condition Assessment. Gap analysis will improve the baseline data.		

Expected State
Level 2

Asset Management Readiness Scale Assessment Tool

People and leadership



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.

Current State

Expected Future State

Outcomes: Select the outcomes that your organization has achieved.										
Outcome areas		Level 1		Level 2		Level 3		Level 4		Level 5
A: Cross-functional Teams	<input checked="" type="checkbox"/>	We have identified the representation we need on our cross-functional AM team.	<input checked="" type="checkbox"/>	We have a cross-functional AM team* that guides the planning and implementation of our AM program .	<input type="checkbox"/>	Our AM team* works within our organization to lead, communicate, and support AM improvements and organizational changes.	<input type="checkbox"/>	Our AM team* is permanent and tasked with guiding and supporting AM across the organization on an ongoing basis.	<input type="checkbox"/>	Our AM team* guides and supports the ongoing improvement of AM within the organization
Please provide notes that describe how you have achieved your current level	As a small rural municipality, the cross-functional team consists of all department managers, who are aware and supportive of the implementation of an AM Program.									
<p><small>*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 committee, depending on the organization. In some small communities the AM team may be as few as two people.</small></p>										

Current (from left)	Expected	
2	Select the level you expect to achieve at the end of this project	3
<p>Please provide information about how your project activities will help you achieve your expected future state</p> <p>A comprehensive asset management plan and related training will provide staff with the support and education needed to maintain AM on an ongoing basis. We have a defined team to guide and support AM across the organization.</p>		

Asset Management Readiness Scale Assessment Tool

People and leadership



Current State

Expected Future State

Outcomes: Select the outcomes that your organization has achieved.						
Outcome areas	Level 1	Level 2	Level 3	Level 4	Level 5	
B: Accountability	<input checked="" type="checkbox"/> We have a champion who has been tasked with planning for our AM program.	<input type="checkbox"/> Our AM team* has a documented mandate to develop our AM program, which is outlined in a terms of reference and a one to three-year roadmap.	<input type="checkbox"/> Our AM team* is accountable for implementing our AM program.	<input type="checkbox"/> We have operationalized AM roles and responsibilities across our organization.	<input type="checkbox"/> We document changes to AM roles and responsibilities as needed to support our evolving requirements.	
		<input checked="" type="checkbox"/> Our AM team is accountable to senior management and council.	<input type="checkbox"/> AM roles and responsibilities are included in staff job descriptions.			
Please provide notes that describe how you have achieved your current level	Although the Municipality currently does not have a terms of reference for Asset Management, management is aware of the need to enhance it's existing asset database, specifically non-core assets and continue to develop an AM program. Development includes an AM Committee with formalized Terms of Reference.					

Current (from left)	Expected	
1	Select the level you expect to achieve at the end of this project	2
Please provide information about how your project activities will help you achieve your expected future state		
The comprehensive AM Plan currently includes a core assets. This project's focus us to develop non-core assets and inventory and build a roadmap for the full implementation of asset management by 2024, thus meeting the requirements of O.Reg 588/17.		

Asset Management Readiness Scale Assessment Tool

People and leadership



Current State

Outcomes: Select the outcomes that your organization has achieved.								
Outcome areas	Level 1	Level 2	Level 3	Level 4	Level 5			
C: Resourcing and Commitment	<input checked="" type="checkbox"/>	Council knows that resources must be dedicated to exploring the requirements for AM and for drafting an AM roadmap .	<input checked="" type="checkbox"/>	Council demonstrates buy-in and support for AM and allocates resources (funding or staff time) to further develop the AM program .	<input type="checkbox"/>	Council champions AM as a core business function and has approved funding to continue AM roadmap activities.	<input type="checkbox"/>	The AM team measures and monitors progress.
								Council funds ongoing AM monitoring and enhancement.
Please provide notes that describe how you have achieved your current level	Council has been in support of the activities needed to advance the municipality in asset management. Software was purchased to capture the asset inventory and detailed attributes, and for the preparation of the 2016 and 2021 Asset Management Plan. The 2022 budget provided a further commitment to Asset Management.							

Readiness level (automatic)	Working on Level 1	Completed Level 1	Completed Level 2	Completed Level 3	Completed Level 4	Completed Level 5
		<input checked="" type="checkbox"/>				

Expected Future State

Current (from left)	Expected	
2	Select the level you expect to achieve at the end of this project	3
Please provide information about how your project activities will help you achieve your expected future state		
The preparation of a road map will be presented to Council to support the activities needed for the municipality to progress its asset management plan.		

Expected State
Level 2

Asset Management Readiness Scale Assessment Tool

Data and information



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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.

Current State

Outcomes: Select the outcomes that your organization has achieved.						
Outcome areas	Level 1	Level 2	Level 3	Level 4	Level 5	
A: Asset Data	<input checked="" type="checkbox"/> We have asset inventory data , including approximate quantities of assets within most asset groups.	<input checked="" type="checkbox"/> We have a basic inventory of most critical assets , including information on general asset properties such as size, material, location and installation date.	<input checked="" type="checkbox"/> We have a consolidated, basic inventory of all assets.	<input type="checkbox"/> We have expanded inventory data for some assets.	<input type="checkbox"/> We have expanded inventory data for most assets.	
	<input checked="" type="checkbox"/> We have some anecdotal information on asset condition. Some age information exists.	<input checked="" type="checkbox"/> We are moving our data to a centralized location for use by the AM team (note: this does not require AM software).	<input checked="" type="checkbox"/> We have defined life cycle investment requirements for critical assets .	<input type="checkbox"/> We have defined condition rating systems defined for most asset groups.	<input type="checkbox"/> We have evaluated the life cycle investment requirements associated with critical assets .	
		<input checked="" type="checkbox"/> We have defined critical assets and have some information on asset condition for these assets.	<input checked="" type="checkbox"/> We have standardized condition rating systems defined for most asset groups.	<input type="checkbox"/> We have evaluated the life cycle investment requirements associated with critical assets .	<input type="checkbox"/> We have evaluated the life cycle investment requirements associated with most assets.	
		<input checked="" type="checkbox"/> We have defined critical assets and have some information on asset condition for these assets.	<input checked="" type="checkbox"/> We have asset condition information on all critical assets .	<input checked="" type="checkbox"/> We update data according to cycles defined in our AM plans or strategy .		
Please provide notes that describe how you have achieved your current level	All of the municipality's major assets have been inputted into Citywide including the asset's condition and age. The software is continually being updated to capture asset additions and replacements according to budget allocation and priority requirements. Municipal staff are also working with a GIS system and are working towards the linking of data between the two systems to ensure completeness and accuracy of data. As new information becomes available, such as the Facility Condition Assessment, the data systems will be updated.					

Expected Future State

Current (from left)	Expected	
3	Select the level you expect to achieve at the end of this project	4
<p>Please provide information about how your project activities will help you achieve your expected future state</p> <p>Detailed information has been captured for the core assets and has been included in the 2021 AMP. The preparation of an AM Strategy will ensure that data is captured to successfully meet Level 3 Requirements - included life cycle investment, condition rating and asset condition information.</p>		

Asset Management Readiness Scale Assessment Tool

Data and information



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Current State

Outcomes: Select the outcomes that your organization has achieved.										
Outcome areas		Level 1		Level 2		Level 3		Level 4		Level 5
B: Performance Data	<input checked="" type="checkbox"/>	We have informal or anecdotal approaches for measuring asset or service performance.	<input checked="" type="checkbox"/>	We have some information on performance of critical assets , collected from a variety of sources.	<input checked="" type="checkbox"/>	We have defined level of service measurements for some service areas.	<input checked="" type="checkbox"/>	We have defined level of service measurements for critical service areas.	<input type="checkbox"/>	We have defined level of service measurements for most or all service areas.
	<input checked="" type="checkbox"/>		We have captured data on current level of service performance for some service areas.		<input checked="" type="checkbox"/>	We communicate the results from our level of service measurement program to staff and council regularly.	<input type="checkbox"/>	We continually improve how we collect data on level of service performance.		
	<input checked="" type="checkbox"/>		We have reviewed service levels and asset performance with council.							
Please provide notes that describe how you have achieved your current level	Management independently manages the assets and their performance, within each of their portfolios.									

Expected Future State

Current (from left)	Expected	
4	Select the level you expect to achieve at the end of this project	No anticipated change
Please provide information about how your project activities will help you achieve your expected future state		
<p>The premise for this project is to complete a comprehensive assessment of municipal facilities and their internal components to assist the Municipality in meeting the requirements of July 2024 with current levels of service for non-core municipal infrastructure assets. These results will be communicated to council and staff, with regular follow up and review.</p>		

Asset Management Readiness Scale Assessment Tool

Data and information



Current State

Expected Future State

Outcomes: Select the outcomes that your organization has achieved.							
Outcome areas	Level 1	Level 2	Level 3	Level 4	Level 5		
C: Financial Information	<input checked="" type="checkbox"/> We have financial information on our assets, supporting minimum PS-3150 reporting requirements.*	<input checked="" type="checkbox"/> We have major capital renewal and operating & maintenance (O&M) expenditure data for some assets.	<input type="checkbox"/> We have capital (new and renewal) and O&M expenditure data for most assets.	<input type="checkbox"/> We understand the cost of sustaining current levels of service for all critical assets	<input type="checkbox"/> We understand the trade-offs between investment and the level of service we deliver and use this to optimize our financial plans.		
		<input type="checkbox"/> We have linked AM and financial information for all critical assets .	<input type="checkbox"/> We have a strategy to link AM and financial information .				<input type="checkbox"/> We can demonstrate the gaps between forecasted infrastructure needs and current spending levels.
Please provide notes that describe how you have achieved your current level	Citywide AM Software is used to ensure compliance with PS-3150, with annual updating of major capital renewal. O&M data is managed departmentally for significant assets.						
*PS-3150 is the Public Sector Accounting Board's standard guiding the treatment of tangible capital assets.							

Current (from left)	Expected	
2	Select the level you expect to achieve at the end of this project	3
Please provide information about how your project activities will help you achieve your expected future state		
The assessment of current level of service, lifecycle analysis, risk analysis and financial strategy, will enable us to meet the requirements of Level 3 - with expenditure data and a financial link to AM. We will be able to identify the gaps between current spending and the forecasted infrastructure needs.		

Readiness level (automatic)	Working on Level 1	Completed Level 1	Completed Level 2	Completed Level 3	Completed Level 4	Completed Level 5
		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			

Expected State
Level 3

Asset Management Readiness Scale Assessment Tool

Planning and decision-making



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.

Current State

Outcomes: Select the outcomes that your organization has achieved.										
Outcome areas		Level 1		Level 2		Level 3		Level 4		Level 5
A: Documentation and Standardization	<input checked="" type="checkbox"/>	Our asset planning approaches vary across the organization.	<input checked="" type="checkbox"/>	Our departments follow a similar but informal asset planning approach.	<input checked="" type="checkbox"/>	We have a structured asset planning approach, but application is inconsistent.	<input type="checkbox"/>	We employ a consistent structured asset planning approach for each of our critical services.	<input type="checkbox"/>	We employ a consistent structured asset planning approach for all services.
	<input checked="" type="checkbox"/>		We evaluate investment needs and priorities based on a mix of structured and ad-hoc practices and criteria.	<input checked="" type="checkbox"/>	We set priorities using criteria based on organizational goals and objectives.	<input checked="" type="checkbox"/>	We set priorities using criteria that are fully aligned with our organizational goals and objectives.	<input type="checkbox"/>	We adapt our planning approach and criteria to align with evolving organizational goals and objectives.	
Please provide notes that describe how you have achieved your current level	The management team currently works together through the capital budget process with the identification of priorities and recommendations to Council, with the overall strategy of managing the risk of failure of any asset, while minimizing the tax impact to its community. The current process is not formalized in writing.									

Expected Future State

Current (from left)	Expected	
3	Select the level you expect to achieve at the end of this project	4
Please provide information about how your project activities will help you achieve your expected future state The various aspects of this project, from risk assessment, to life cycles and service levels, all lend to the compilation of a structured asset planning approach and establishing priorities to meet goals and objectives.		

Asset Management Readiness Scale Assessment Tool

Planning and decision-making

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Current State

Expected Future State

Outcomes: Select the outcomes that your organization has achieved.										
Outcome areas		Level 1		Level 2		Level 3		Level 4		Level 5
B: Asset Management Plans	<input checked="" type="checkbox"/>	Our approach to asset renewal focuses on reacting to basic needs (e.g. growth, regulation and known problems).	<input checked="" type="checkbox"/>	We have draft AM plans for some asset classes, with forecasted financial needs based on estimated data.	<input checked="" type="checkbox"/>	We have AM plans for critical services , based on a mix of estimated and actual data.	<input type="checkbox"/>	We have AM plans for most services based on actual data.	<input type="checkbox"/>	We have AM plans for all services based on actual data.
	<input checked="" type="checkbox"/>	We evaluate priorities based on available information, staff experience, and input from council and management.	<input checked="" type="checkbox"/>		Our AM plans include available information about level of service (current and target) and risk management.	<input checked="" type="checkbox"/>	Our AM plans include basic needs forecasting and risk management strategies for critical assets .	<input type="checkbox"/>	Our individual AM plans are integrated across services.	
	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		Our AM plans identify short-term issues and priorities.	<input checked="" type="checkbox"/>	Our AM plans are based on both short- and long-term issues and priorities. They balance short-term service objectives with longer-term goals and risks .	<input type="checkbox"/>	Our AM plans include needs forecasts and risk management strategies for most assets. Plans address risks to both service and business goals.	
Please provide notes that describe how you have achieved your current level	The Municipality's AMP has been formally adopted by Council in December 2021. The plan has a direct correlation to the asset planning process, and is resource tool for the respective managers, as they prepare and submit their annual capital requests.									

Current (from left)	Expected	
3	Select the level you expect to achieve at the end of this project	4
Please provide information about how your project activities will help you achieve your expected future state		
The Asset Management Plan is becoming an essential tool for forecasting and risk management strategies for the critical assets. With continued training, staff continue to develop their skills and increase their knowledge to keep the plans current and work towards long-term goals and priority setting.		

Asset Management Readiness Scale Assessment Tool

Planning and decision-making

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Current State

Expected Future State

Outcomes: Select the outcomes that your organization has achieved.										
Outcome areas		Level 1		Level 2		Level 3		Level 4		Level 5
C: Budgets and Financial Planning	<input checked="" type="checkbox"/>	We prepare annual capital and operating budgets based on historical values			<input checked="" type="checkbox"/>	We prepare an annual capital budget based on an annual assessment of current needs.	<input type="checkbox"/>	We prepare annual needs-based capital and operating budgets that are based on an annual assessment of risks and current needs.	<input type="checkbox"/>	We prepare multi-year needs-based capital and operating budgets that are based on our short- and mid-term needs.
	<input checked="" type="checkbox"/>	We deal with new needs reactively, as they occur.	<input checked="" type="checkbox"/>	We prepare annual capital and operating budgets based on a mix of historical values and new priorities.	<input type="checkbox"/>	We have a 3-year capital plan that addresses short-term issues and priorities.	<input type="checkbox"/>	We have a 5-year capital plan* and update it annually.	<input type="checkbox"/>	We take a structured approach to address in-cycle changes.
Please provide notes that describe how you have achieved your current level	The current budgeting process is managed annually with each respective manager submitting their recommendations for the upcoming budget year, each ensuring that high risk priorities are brought forward for Council review and consideration.									
*Communities may benefit from long-term capital plans that extend beyond five years to ten years or more.										

Current (from left)	Expected	
2	Select the level you expect to achieve at the end of this project	3
Please provide information about how your project activities will help you achieve your expected future state		
The development of a comprehensive financial plan will identify the financial resources required to sustain asset management based on existing asset inventories, desires levels of service and projected growth requirements. A financial strategy will be developed to forecast expenditures and revenue for a 3-year infrastructure and general capital budget. This will provide us with the building blocks to expand to a 5 and 10 year plan.		

Readiness level (automatic)	Working on Level 1	Completed Level 1	Completed Level 2	Completed Level 3	Completed Level 4	Completed Level 5
		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			

Expected State
Level 3

Asset Management Readiness Scale Assessment Tool

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.

Current State

Expected Future State

Outcomes: Select the outcomes that your organization has achieved.										
Outcome areas		Level 1		Level 2		Level 3		Level 4	Level 5	
A: Training and Development	<input checked="" type="checkbox"/>	Our AM training and development approach is informal and largely driven by the personal initiative of staff.	<input checked="" type="checkbox"/>	Our AM training and development requirements are defined by management based on short-term needs.	<input type="checkbox"/>	We provide all staff with basic AM awareness training.	<input type="checkbox"/>	We define AM knowledge and skill requirements. A training plan is in place for all positions.	<input type="checkbox"/>	We train select staff members as internal experts to support the ongoing development of organizational capacity.
	<input checked="" type="checkbox"/>	Some staff conduct targeted research, seeking out basic information on AM concepts and techniques.	<input checked="" type="checkbox"/>	Selected staff are trained on basic AM concepts.	<input checked="" type="checkbox"/>	Some staff undergo training on advanced AM concepts specific to their roles and responsibilities.	<input type="checkbox"/>	Council, management and staff receive role-appropriate AM training to establish needed capacity across the organization	<input type="checkbox"/>	Proactive, role-based training serves as a support for career development and succession planning.
			<input checked="" type="checkbox"/>	Council has opportunities to increase their understanding of AM concepts.	<input checked="" type="checkbox"/>	Staff and council are able to communicate the value of AM in their own words.				
Please provide notes that describe how you have achieved your current level	At an administrative level, staff discuss asset management strategies and participate in in-house training. Staff have also reached out to retired staff to ensure knowledge is not lost through time. Municipal representatives also attend County GIS meetings to share information and best practices.									

Current (from left)	Expected	
2	Select the level you expect to achieve at the end of this project	3
Please provide information about how your project activities will help you achieve your expected future state The use of on-line training tools, such as: Gastaxatwork.ca Asset Management Webinar Series - Fundamentals; MFOA Asset Management Webinars. The project also provides for training of staff. After completion of training we will be able to assess the future training needs of staff and Council, and develop a training plan.		

Asset Management Readiness Scale Assessment Tool

Contribution to asset management practice



Current State

Expected Future State

Outcomes: Select the outcomes that your organization has achieved.										
Outcome areas		Level 1		Level 2		Level 3		Level 4	Level 5	
B: Internal Communication and Knowledge Sharing	<input checked="" type="checkbox"/>	We are aware of the need to mitigate the risk of losing information held in the minds of long-term staff.	<input checked="" type="checkbox"/>	We mitigate the risk of losing information held in the minds of long-term staff, through improved record keeping.	<input checked="" type="checkbox"/>	A culture of knowledge sharing is emerging internally, supported by official initiatives.	<input type="checkbox"/>	A culture of knowledge sharing exists and is supported by a mix of formal and informal initiatives.	<input type="checkbox"/>	We capture AM knowledge and it flows freely throughout the organization.
					<input checked="" type="checkbox"/>	We collect and maintain AM knowledge resources.	<input type="checkbox"/>	We disseminate AM knowledge resources within the organization.	<input type="checkbox"/>	Staff leverage internal and industry knowledge and leading practice resources.
					<input checked="" type="checkbox"/>	We communicate the benefits of AM internally to staff and council.				
Please provide notes that describe how you have achieved your current level	The adoption of Ontario Regulation 588/17 in 2017 led to staff reports presented to Council and staff to provide the background to the regulation and the upcoming requirements. Staff have continued to bring reports to Council as needed to advise on Asset Management. The Asset Management Policy, as adopted in June 2019 provided another opportunity to keep staff up-to-date on asset management. The municipality uses TOMRM's to improve record keeping on a shared directory and mitigate loss of data held in personal directories.									

Current (from left)	Expected	
3	Select the level you expect to achieve at the end of this project	4
Please provide information about how your project activities will help you achieve your expected future state		
The collaborative efforts of management during this project will establish a culture of knowledge sharing and development of policies and processes within the organization to enable ongoing and future knowledge transfer.		

Asset Management Readiness Scale Assessment Tool

Contribution to asset management practice



Current State

Expected Future State

Outcomes: Select the outcomes that your organization has achieved.										
Outcome areas		Level 1		Level 2		Level 3		Level 4	Level 5	
C: External Communication and Knowledge Sharing	<input checked="" type="checkbox"/>	We are investigating AM-related organizations and resources.	<input checked="" type="checkbox"/>	Staff or elected officials attend AM-related events.	<input checked="" type="checkbox"/>	We are members of one or more AM organizations and actively share our AM experience.	<input type="checkbox"/>	We are actively involved in AM organizations and present at AM events.	<input type="checkbox"/>	We are a thought leader on AM within the municipal sector.
			<input type="checkbox"/>	We share information with our peers on our experience, innovations and lessons learned.	<input type="checkbox"/>	We are active in coaching other organizations to improve the overall body of AM knowledge.				
			<input checked="" type="checkbox"/>	We share basic information on current capital projects with the public.	<input checked="" type="checkbox"/>	We share basic information on our assets, the services we provide, and future needs with the public.	<input type="checkbox"/>	We rely on the data from our AM program to explain decisions to the public.	<input type="checkbox"/>	We communicate the benefits of AM to the public.
Please provide notes that describe how you have achieved your current level	The capital budget is presented to Council and is available on the municipal website for public access. In 2021, a budget highlight document was prepared and included capital projects planned for 2022. The updated 2021 Asset Management Plan was approved by Council in December 2021 and will be posted to the Municipal website once the accessible version becomes available. The Plan is available to any member of the public who requests it.									

Current (from left)	Expected	
3	Select the level you expect to achieve at the end of this project	4
Please provide information about how your project activities will help you achieve your expected future state		
An outcome of this project will be looking at the opportunity for external communication, but is not a focus at this time.		

Readiness level (automatic)	Working on Level 1	Completed Level 1	Completed Level 2	Completed Level 3	Completed Level 4	Completed Level 5
		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			

Expected State
Level 3