



2020 Corporate Strategic Asset Management Plan

Appendix J CSAMP Implementation Plan

CVRD CORPORATE STRATEGIC ASSET MANAGEMENT PLAN – IMPLEMENTATION PLAN

Asset management is a complex subject. It has been defined as the set of coordinated activities that an organization uses to realize value from assets, in the delivery of its services. Long term realization of value requires the achievement of a balance of costs, risks and benefits. It is also an interdisciplinary planning process that requires inputs from all CVRD Departments and experts from the disciplines of Finance, Engineering, Planning and GIS. It also includes feed back from operational staff who are the ones tasked with managing our assets on a daily basis.

Essentially Asset Management is a data driven business process that ensures transparency in operations and financial planning. The data required includes infrastructure information related to its history, condition, replacement value and renewal requirements. Levels of Service for infrastructure is defined to ensure there is a common understanding of CVRD's obligations and the communities' willingness to pay for services. Future demands must also be identified, which can include population projections, changes to standards/regulations, disruptive technologies and climate change impacts. Critical infrastructure must also be identified and Risk Assessments completed to minimize services disruptions.

The other crucial component to successful Asset Management Implementation is the people. CVRD staff have been effectively managing assets for years without a strategic approach. They have

done a tremendous job considering the competing priorities, limited resources, and the challenging administrative structure of a regional district. Asset Management will ensure that the right resources are applied to the right infrastructure at the right time. This means that staff will have the training and support required to implement Asset Management principles in their daily work activities.

The Corporate Strategic Asset Management Plan (SAMP) details the requirements to establish Asset Management as a business process throughout the organization. The Corporate SAMP identifies the Life Cycle Management and Financial Strategies that will need to be further applied at the Asset System level Sustainable Service Delivery Plan. The Corporate SAMP - Action Plan further identifies roles, responsibilities, timelines and budgets required for successful Asset Management implementation.

Implementing Asset Management at the CVRD is a huge challenge, it will require a commitment from the Board, Senior Management and Staff to be successful. Linkages between asset management and other CVRD Strategic documents and policies must also be established. Developing a culture of asset management will require dedicated resources and thoughtful planning as it will take years for the CVRD to establish a fully mature Asset Management Program.

The purpose of Asset Management is to ensure sustainable service delivery through a systematic application of management strategies that will maximise the useful life of assets, ensure responsible financial investments and reduce risks to both the organisation and to its customers.

Action Items

Action items are the tasks required to develop a fully mature Asset Management Program at the CVRD. Successful implementation will require resources dedicated to completing the identified action items. Identifies roles, responsibilities, timelines and budgets required for successful Asset Management implementation

Action Items have been categorized into the Following categories

1. Governance Action Items

The CVRD asset management governance structure that guided the AM planning process and the creation of the Corporate SAMP may need to be restructured for effective implementation.

2. Key Strategic Documents Action Items

The Key Strategic Documents have been identified and will need to be updated by staff and presented on a predetermined schedule.

3. Capacity Building Action Items

Capacity Building Action Items are the tasks required to standardize asset management procedures and policies throughout the organisation and to collect the appropriate information required for informed decisions

Each Action Item is attributed to achieving one of the following goals:

1. **Asset Management Culture** – Adopting a culture of asset management will take time but will lead to a more efficient and effective organisation that will improve customer service
2. **Informed Decision-Making** - Recognizing that data is also a valuable asset, and that good decisions require good data and sophisticated analysis. Additionally infrastructure investment decisions should be linked to service outcomes or sustainability objectives;
3. **Long Term Planning** – Applying both Life-cycle Management and Financial Strategies at the operational level will reduce life cycle costs while maintaining appropriate levels of service. Risk Assessments that include Climate change projections will be included in planning processes.
4. **Transparency** - Improving communications and accountability with clearly defined Levels of Service and stakeholder communications expectations.

Each Action Item is assigned a frequency for implementation, a responsible division, start date and a budget estimate based on previous work preparing the Corporate SAMP. “In House” budget estimates will require staff time commitments and work plans may have to be adjusted accordingly.

The Following principles will be incorporated in the completion of Action Items.

<i>Principle</i>	<i>Definition</i>
1. Customer Focused	The CVRD will have clearly defined levels of service and apply asset management practices to maintain the confidence of customers in how CVRD assets are managed.
2. Forward Looking	The CVRD will make the appropriate decisions to ensure assets will meet future challenges, including changing demographics/population, customer expectations, legislative requirements, technology, fuel sources and environmental factors.
3. Service Focused	The CVRD will consider all the assets in a service context and consider their interrelationships as opposed to optimizing individual assets in isolation.
4. Risk- Based	The CVRD will manage the asset risk associated with attaining the agreed levels of service by focusing resources, expenditures and priorities based upon risk assessments and the corresponding cost-benefit analysis, recognizing that the public safety is the priority.
5. Value- Based/Affordable	The CVRD will choose practices, interventions and operations that aim at reducing the life cycle cost of asset ownership, while satisfying agreed levels of service. Decisions are based on balancing service levels, risks and cost.
6. Holistic	The CVRD will take a comprehensive approach that looks at the big picture and consider the combined impact of managing all aspects of the asset life cycle.
7. Sustainability	The CVRD will consider social, environmental and economic factors, and implications when making and implementing asset management decisions. The needs of current and future community members will be balanced with the functionality, capacity and quality of the physical and natural assets required to provide the expected level of service over the whole of life of the asset.
8. Climate Change	The impacts of climate change and other environmental changes are understood, and adaptation, mitigation and compensation strategies will form part of the approach to evaluating actions and alternatives



1.0 Asset Management Culture Action Items

Adopting a culture of asset management will take time but will lead to a more efficient and effective organisation that will improve customer service

Action Item	Category	Description	Frequency for Review/Reporting	Responsibility	Other Divisions	Start Date	Goal
Virtual Asset Management Office	Governance	Determine Governance structure for Implementation Phase, including the roles of the Ex-Steering Committee, Steering Committee and Asset Coordinator.	Every 4 years	Ex-Steering Committee	Steering Committee	2019	AM Culture
Ex-Steering Committee	Governance	Establish Terms of Reference for Ex-Steering Committee Implementation Phase (i.e. Frequency of meetings, roles and responsibilities).	Every 4 years	Ex-Steering Committee	Steering Committee	2019	AM Culture
Steering Committee	Governance	Establish Terms of Reference for Steering Committee Implementation Phase (i.e.. Frequency of meetings, roles and responsibilities).	Every 4 years	Ex-Steering Committee	Steering Committee	2019	AM Culture
Function 571 - Asset Management	Governance	Establish sustainable funding source, and confirm roles and responsibilities for Implementation.	Every 4 years	Ex-Steering Committee	Steering Committee	2019	AM Culture
Condition Assessment Program	Capacity Building	Establish condition assessment inspection frequency, confirm methodologies and roles and responsibilities. Include critical infrastructure and functionality assessments in future inspections .	Every 4 years	Asset Coordinator	Asset System Owners	In Progress	AM Culture
Strategic Alignment	Capacity Building	Link strategic documents to the Corporate SAMP (ex. Cowichan 2050, Official Community Plans, Climate Action Plan, Business Continuity, South Sector Liquid Waste Management Plan, Financial Policies etc.).	Annually	Senior Management Team	Steering Committee	In Progress	AM Culture
Staff Capability Improvement Plan	Capacity Building	Develop internal and external training requirements for CVRD staff involved with AM activities. Provide funding for training.	Every 4 years	Human Resources/Asset Coordinator	Steering Committee	2020	AM Culture

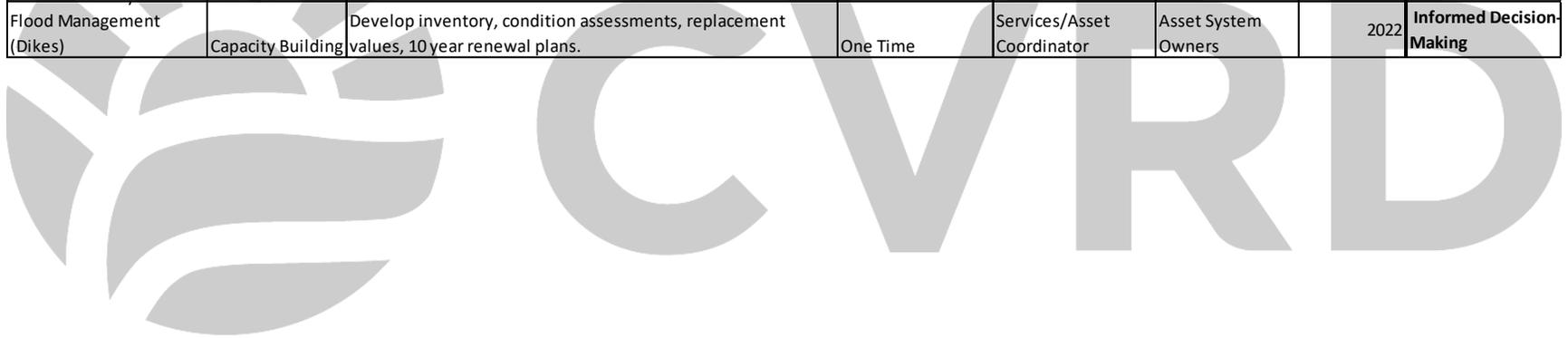
2.0 Informed Decision-Making Action Items

Informed decision making recognizes that data is also a valuable asset, and that good decisions require good data and sophisticated analysis. Additionally infrastructure investment decisions should be linked to service outcomes or sustainability objectives.

Action Item	Category	Description	Frequency for Review/Reporting	Responsibility	Other Divisions	Start Date	Goal
Data Management Framework	Capacity Building	Develop data management processes, procedures and responsibilities	One time - review every 4 years	GIS/Asset Coordinator	Steering Committee	2019	Informed Decision-Making
Establish Project Management Handbook	Capacity Building	Develop a CVRD Project Management Handbook to ensure AM principals are considered when projects are developed.	One time - review every 4 years	Asset Coordinator	Steering Committee	In Progress	Informed Decision-Making
Decision Making/Project Prioritisation Framework	Capacity Building	Develop criteria and process for decision making and project prioritization.	One time - review every 4 years	Asset Coordinator	Steering Committee	2020	Informed Decision-Making
Complete Asset Inventory Data Collection	Capacity Building	Complete asset inventory and condition assessments for Asset Portfolio (replacement values, 10 year renewal plan etc.).	One time	Asset Coordinator	Asset System Owners	In Progress	Informed Decision-Making
Refresh Procurement Procedures	Capacity Building	Refresh Procurement Procedures to ensure AM principals are included in procurement process.	Every 4 years	Finance	Steering Committee	2019	Informed Decision-Making
Future demand projections	Capacity Building	Confirm demand projection scenarios (ex. Population, climate impacts, changes in standards/technology, etc.).	Annually	Planning/Asset Coordinator	Asset System Owners	In Progress	Informed Decision-Making
AM software Implementation	Capacity Building	Establish software requirements, procure software, implement and train staff. A 3 year phased approach has been recommended. Year 5 is just licencing and training fees. Does not include Fleet, IT, Drainage, Natural Capital	Annually	GIS/Asset Coordinator	Steering Committee	2020	Informed Decision-Making
Corporate Risk Management Framework	Capacity Building	Develop a Corporate risk management Framework. Consultant to run workshops and prepare document.	One time - review every 4 years	Finance/Asset Coordinator	Steering Committee	2020	Informed Decision-Making
Risk Assessments	Capacity Building	Conduct Risk Assessments of CVRD infrastructure.	2 Asset Systems per year	Asset Coordinator	Asset System Owners	2020	Informed Decision-Making
Include Asset System - Fleet	Capacity Building	Develop inventory, condition assessments, replacement values, 10 year renewal plans, LoS, Risk Assessments.	One Time	Asset Coordinator	Asset System Owners	2020	Informed Decision-Making
Include Asset System - IT infrastructure	Capacity Building	Develop inventory, condition assessments, replacement values, 10 year renewal plans.	Annually	IT/Asset Coordinator	Asset System Owners	2020	Informed Decision-Making

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Include Asset System - Drainage	Capacity Building	Develop inventory, condition assessments, replacement values, 10 year renewal plans	Annually	Environmental Services/Asset Coordinator	Asset System Owners	2020	Informed Decision-Making
Include Asset System - Dams	Capacity Building	Develop inventory, condition assessments, replacement values, 10 year renewal plans	One Time	Environmental Services/Asset Coordinator	Asset System Owners	2021	Informed Decision-Making
Include Asset System - Natural Capital	Capacity Building	Confirm methodology and scope. Develop inventory, condition assessments, replacement values, 10 year renewal plans.	One Time	Environmental Services/Asset Coordinator	Asset System Owners	TBD	Informed Decision-Making
Flood Management (Dikes)	Capacity Building	Develop inventory, condition assessments, replacement values, 10 year renewal plans.	One Time	Services/Asset Coordinator	Asset System Owners	2022	Informed Decision-Making



3.0 Long Term Planning Action Items

Applying both Life-cycle Management and Financial Strategies at the operational level will reduce life cycle costs while maintaining appropriate levels of service. Risk Assessments that include climate change projections will be included in planning processes.

Action Item	Category	Description	Frequency for Review/Reporting	Responsibility	Other Divisions	Start Date	Goal
Corporate Strategic Asset Management Plan	Key Strategic Document	Defines the organization's commitment and approach to achieving the Board's approved policy.	Every 4 years	Asset Coordinator	Steering Committee	2024	Long-term Planning
Division Level Sustainable Service Delivery Plans	Key Strategic Document	Documents tactical approach to Asset Management at the Asset system level (i.e.. Divisional). Reporting requirements include Asset Inventory, Condition Assessments, Levels of Service, KPIs, Risk Assessments, O&M strategies, Financial Strategies, and AM maturity. Templates to be developed.	Annually	Responsible Division	Asset System Owners	2020	Long-term Planning
Corporate Level Sustainable Service Delivery Plans	Key Strategic Document	Cumulative reporting of Sustainable Service Delivery Plans for a corporate analysis, including AM maturity and Implementation Progress. Template to be developed.	Annually	Asset Coordinator	Asset System Owners	2021	Long-term Planning
Long Term O&M Plans	Capacity Building	Define Life-cycle Management Strategies, and Establish 5-10-25 year O&M Plans for each asset system.	Annually	Finance/Asset Coordinator	Asset System Owners	2021	Long-term Planning
Long Term Capital Plans	Capacity Building	Define Financial Strategies and establish 5-10-25 year Capital Plans for each asset system.	Annually	Finance/Asset Coordinator	Asset System Owners	2020	Long-term Planning
Risk Mitigation	Capacity Building	Implement Risk Mitigation activities as identified through Risk Assessments.	TBD	Asset System Owners	Asset Coordinator	2020	Long-term Planning

4.0 Transparency

Improving communications and accountability with clearly defined Levels of Service and stakeholder communication expectations.

Action Item	Category	Description	Frequency for Review/Reporting	Responsibility	Other Divisions	Start Date	Goal
Asset Management Policy	Key Strategic Document	Establishes the Board's expectations around the management of the CVRD's assets and infrastructure.	Every 4 years	Asset Coordinator	Steering Committee	2023	Transparency
Levels of Service	Key Strategic Document	Defines the levels to which assets are to be maintained to achieve defined levels of service. Budget is for Fleet, IT Infrastructure, and Drainage/Flood Management Asset Systems.	2- 4 years	Asset Coordinator	Steering Committee	2022/24	Transparency
State of the Infrastructure Report	Key Strategic Document	Provides information on the state of the CVRD's physical assets, which can be referenced when making infrastructure asset investment decisions as part of the annual budget and long-range financial planning processes.	2-4 years	Asset Coordinator	Asset System Owners	2022/24	Transparency
Communications Strategy	Key Strategic Document	Defines what information, should be presented to which stakeholders, in which format and how often. Will include general AM information, and engagement strategies for LoS.	Annually	Communications Manager/ Asset Coordinator	Asset System Owners	2020	Transparency
Communications Strategy - Levels of Service	Capacity Building	Engage stakeholders for LoS feedback, customer satisfaction, and willingness to pay discussions. Could be packaged with other Community Surveys.	Every 4 years	Communications Manager/Asset Coordinator	Asset System Owners	2020	Transparency
Define Business Processes and Procedures	Capacity Building	Establish documented business processes for each Asset System and other CVRD support services.	Annually	IT/Asset Coordinator	All	2020	Transparency
Communications Strategy - General	Capacity Building	Implement Communications Strategy. Develop internal and external communications material and provide support to Divisions.	Annually	Communications Manager/Asset Coordinator	Asset System Owners	2020	Transparency