Asset Management Cohort Program
For Prince Edward Island Municipalities

AIM Network is pleased to announce the offering of an *Asset Management Cohort Program* to municipalities in Prince Edward Island, Fall 2018 – Fall 2019.

This initiative will be offered through the Municipal Asset Management Program (MAMP), which is delivered by the Federation of Canadian Municipalities and funded by the Government of Canada.

The Program is also endorsed and supported by The Federation of Prince Edward Island Municipalities and the Province of PEI.

AIM Network is the asset management community of practice for Atlantic Canada with a mandate to guide and support the advancement of the practice of municipal asset management. AIM is an incorporated not-for-profit organization.   Our guiding principles are:
- ✓ Align with Provincial approach and work collaboratively with other municipal associations
- ✓ Grow asset management knowledge and practice through staff engagement
- ✓ Provide easy-to-use, cost-effective methodologies and tools appropriate for smaller communities or those getting started on their asset management journey.

For more information visit our website at ***www.aimnetwork.ca***

AIM Network is an implementing partner of the FCM Municipal Asset Management Program. Phase One of this Program was focused on Awareness activities – a series of one-day workshops across each of the four Atlantic Provinces for Municipal Staff and a separate series focused on elected officials. These workshops took place in Prince Edward Island during November 2017.

> *"The next phase of FCM's Municipal Asset Management Program (MAMP) is focused on technical assistance – activities or programs offered <u>to "do" asset management with real data or information</u>. Participants apply knowledge while receiving coaching and feedback. The outcome of technical assistance activities or programs is the integration of change in asset management practices within the municipality as well as an increase in the skills of the individuals involved. Technical assistance is the priority for this RFP."* (Source: FCM MAMP RFP – Round 2)

An Asset Management Cohort Group is a group of municipalities from a region, having commonalities such as being at a similar stage in asset management or similar in size, who will participate in a series of facilitated technical assistance workshops **to learn and 'do' asset management together** in a peer-to-peer learning environment using their own data and information.

The purpose of a Cohort Program is to facilitate the integration of asset management practices by providing

resources and support to get started on the program activities. Participating municipalities then apply these templates and procedures to complete activities started in the workshops and in other aspects of their asset management program.

Each Cohort Group will consist of 6 – 8 municipalities with an average 3-5 participants from each municipality.
   MAMP Program Learning Objectives:
   - *Participants will provide evidence of their municipality's progress on **achieving at least one new outcome of one competency** on the MAMP Readiness Scale*
   - *Participants will identify **at least one skill** that they have acquired or further developed that will support an increase in AM capacity within their municipality.*
   - *Participants will identify their potential next step(s) to continue implementing better AM practices and improving AM capacity within their municipality.*

Criteria for Cohort Group formation/participation:
   1. **REQUIRED:** Target characteristics of the cohort are appropriate for the anticipated learning outcomes (e.g. Currently at a similar stage in asset management, size or type of municipality, location etc.)
   2. **REQUIRED:** Curriculum adapted to the context of adult learning (e.g. not just lectures, but practical exercise with each municipality using its own real data/information, case studies and an emphasis on sharing experience among peers in the group.
   3. **REQUIRED: Commitment to attendance at all workshops in the Program and to completion of the activities/outcomes associated with each workshop.**
   Other desired characteristics for Cohort Groups include:
   4. Regionality: Clusters of municipalities located within a region where travel between locations to attend workshops is not a barrier to participation.
   5. High level of commitment by municipal leadership (e.g. CAO/Town Manager and Council) to integration of asset management planning and practices within the municipality's operations and in being an **active and committed** working group participant.
   6. Willingness to work collaboratively with other group participants in a peer-to-peer learning and sharing environment enabling the group to move forward together.
   7. Is excited to be part of a team providing leadership in advancing asset management in their province and sharing its work with others.

The Program:
Prior to submitting the proposal to FCM, AIM Network consulted with an ad hoc advisory committee on a program suitable for PEI municipalities based on a general assessment of the state of readiness to undertake asset management and provincial direction for asset management.

The resulting recommendation was to offer the following Core Program to PEI Municipalities for up to three (3) Cohort Groups.

The **Core Program** is comprised of:
   Part One - technical assistance workshops in two areas -
   1. Organizational Capacity Building
   2. Prioritization of Infrastructure for Renewal and Replacement: Based on risk, level of service, community needs and the impact of climate change.
   Part Two: Information Sharing and Knowledge Mobilization

Detailed description of activities is shown below.

Roles and Responsibilities:
AIM Network will:
- develop the program resources,
- guide and facilitate municipalities in doing asset management activities in a workshop environment,
- provide help-desk support following workshops to facilitate completion of activities.

Cohort Group participants will be responsible for the completion of activities (deliverables) for each workshop. Participants may also contribute to awareness activities related to the Awareness and Knowledge Mobilization component of the Core Program to share their experience and showcase their outcomes.

Other Information:
Program Planning Implementation Notes:
- Cohort Groups identified by July 31, 2018.
- Technical Assistance workshops in the Organizational Capacity Building component of the Core Program are expected to take place November – December Fall 2018.
- Prioritization of Infrastructure Renewal and Replacement workshops are expected to begin in January 2019.
- Workshops will take place in the Cohort Group's region of the Province.
- Dates of workshop will be decided considering factors such as time between workshops to complete activities, availability of participants and facilitators, etc.
- Participants will be advised in advance of information or material they should bring from their own municipality in preparation for each workshop.

Program Registration Fees:

Core Program: The FCM Municipal Asset Management Program provides partial funding for this Program. The unfunded portion is $3000. per municipality. To offset this cost, the Province of PEI will provide a subsidy for selected municipalities as follows:

$1,000 for municipalities **with populations of 1,000 or greater**. (i.e. Cost to municipality = $2000)
$1,500 for municipalities **with populations of fewer than 999.** (i.e. Cost to municipality = $1500)
The Registration fee includes the following:
- Five Technical Assistance Workshops in the region for each Cohort Group presented by professional facilitators.
- Templates, procedural guidelines, and/or training materials as appropriate to support implementation of workshop activities by the individual participating municipality.
- Help-desk support by workshop facilitators and/or other technical assistants between sessions to assist participants with implementation or completion of the activities associated with each workshop.
- Workshop facilities, food and audio-visual.
- Opportunity for Cohort Group participants to showcase process and progress of their program activities through AIM Network's Program awareness activities such as newsletters and webinars.

For further information, please contact Daisy Foster, AIM Network Managing Director, (902) 412-3328 or email
dfoster@aimnetwork.ca

NS ASSET MANAGEMENT COHORT PROGRAM
CORE PROGRAM DESCRIPTION

Part One:

       Organizational Capacity Building – 2 one-day workshop
       Prioritization of Asset Renewal and Replacement – 3 one-day workshops

Organizational Capacity Building Workshops:

Participants: The ideal group would consist of 3 individuals from each municipality including the CAO/Town Manager and One Council Member. Additional staff persons or elected official may be included as deemed appropriate by the municipality.

Workshop One (Two Activities):

- **Activity One: Self-Assessment**. Participants will assess their individual municipality's current state of preparedness to implement asset management practices, identify gaps, specific actions required and next steps.   The assessment will include areas such as infrastructure data, financial information, their people and overall organizational capacity.

  Deliverable: Each municipality will
  - prepare a short term workplan (e.g. 12 – 18 mo.) to support integration of asset management planning and practices. A municipality may also
  - Identify an asset management team to guide and oversee implementation of the workplan.
  FCM Readiness Scale Outcomes addressed: People & Leadership: Level 1
- **Activity Two: Asset Management Policy.**   Participating municipalities will be provided guidance and a template to draft an asset management policy for Council endorsement to confirm the commitment of their municipality to asset management planning, accountability to the principles and formation of a culture that values asset management and makes it a priority.
  Deliverable: A draft Asset Management Policy for Council adoption.
  FCM Readiness Scale Outcomes addressed: Policy & Governance: Level (1 and 2).

Workshop Two:

- **Services and Levels of Service.** Participants will be provided with procedures, guidelines and templates for documenting the services provided by their municipality, the current scope or existing level of each service, and the target service levels where there is a demand for change. Major infrastructure relied on to deliver the service will be linked to each service along with actual or estimated cost to provide the service.
  This activity will enable staff to begin the process of linking services, levels of service and costs. It will also enable staff and council to identify gaps between existing and expected levels of service and develop a plan to address them.
  FCM Readiness Scale Outcomes addressed: Data and Information: (Performance data Level)

Prioritization of Asset Renewal and Replacement Workshops:

Participants: The ideal group would consist of 3-5 individuals from each municipality including at minimum the CAO/Town Manager. In a smaller municipality it may include a Council member and public works/operations person. In a mid-sized municipality, other members of the management team should include those having responsibility for Finance, Engineering, Public Works, etc.

This Activity will be comprised of **three (3)** technical assistance workshops. One-on-one technical support or help-desk support between workshops will be provided.

- **Workshop One:** Participants will be introduced to methods of prioritizing renewal and replacement of assets based on risk as well as the level of service, community needs and the impact of climate change. Participants will apply these methodologies by working through a real-life example.
  At the end of this workshop, the Cohort Group will agree on one asset group (e.g. Roads or Water) they will work on together in Workshop Two. Participants will prepare for Workshop Two by collating data and information to support Workshop Two activity.

- **Workshop Two:** Each participant will use their own municipality's infrastructure data along with templates and procedures provided by AIM Network during Workshop One of this Series to identify priorities for infrastructure replacement within this asset group.
  To complete this activity, help desk or one-on-one technical support will be provided in between workshops.

- **Workshop Three**: Group presentation and discussion on results, lessons learned and opportunities to work together on other asset groups. Templates and procedures will be provided and work will begin on a second asset group.

  Deliverable: After completion of this workshop series, participants will have prioritised the renewal/replacement of infrastructure in at least one asset group and will have produced **Refined** State of Infrastructure Reports as per **AIMnet** Phase 2 in the diagram below. While the Preliminary SOIRs were based on basic information available at the time (such as age of the infrastructure), the **Refined** State of Infrastructure reports factor in additional considerations such as the level of service, community needs and the impact of climate change to produce more accurate medium-term (5yr) projections. Reports generated will include refined condition, renewal/replacement costs and life expectancy tables, maps and graphs.   Related heat maps will also be generated in GIS to display priorities for renewal and replacement of assets.

  Note: This workshop series is suitable for municipalities having an asset inventory completed (or close to completion) for at least one core asset groups (e.g. water, sewer, roads or stormwater) by late Fall 2018.

Asset Management Information Maturity
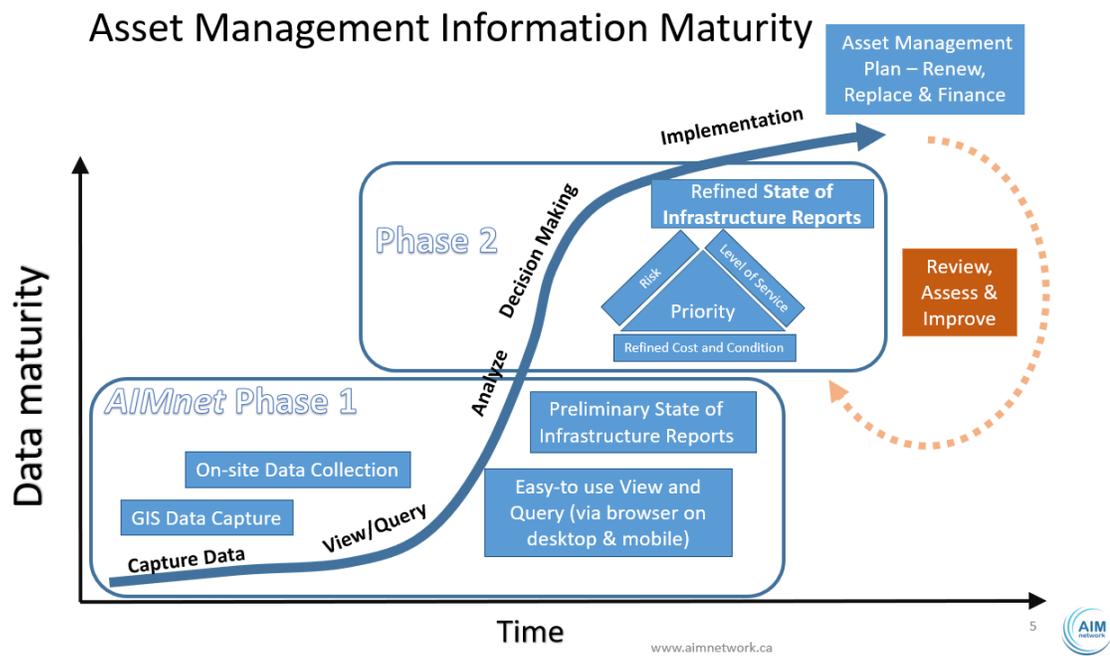
The FCM Readiness Scale Outcomes addressed in this workshop series are "Planning & Decision-Making: Asset Investment Plans" – Level 2.

Part Two: Awareness and Knowledge Mobilization

- Communications initiatives by AIM Network (e.g. Newsletters, webinars, etc.) to share process and progress. Cohort Group participants will have an opportunity to share their experiences with others through these communications.

The FCM Readiness Scale Outcomes addressed in this workshop series are "Contribution to Asset Management Practice: Knowledge Sharing External.