AMP it Up 2.0

Calvin Barrett
Project Manager

AMP Continuum

Have an AMP	AMP is complete	AMPs used to make infrastructure decisions	AM linked to other strategic, financial and land use plans

- **Asset Management Plan (AMP)** – Document
- **Asset Management (AM)** – processes surrounding creating and implementing the AMP

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Expert Consultants

New AM Resources

- SAT444
- Maturity Framework
- Strategic Asset Management Policy (SAMP) Toolkit

- (from AMP it Up 1.0 and SAMP Project)

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Where can I find this?

- www.mfoa-amp.ca

- www.mfoa.on.ca – Asset Management tab

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AMP It Up 2.0

- Funded by MOI & MFOA
- In-person expert Asset Management Plan assessment and localized action plan developed for each municipality (Municipal Action Plan)
- All municipalities under 25,000 pop'n in groups starting with under 5,000

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What you will get

- Experts will review your plan
  - Our teams have finance and engineering expertise
- Discuss the level of staff involvement with the plan
- Identify gaps
- Develop "next steps" work plan that you can manage with the resources you have

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What you will get (cont'd)

- Cost to you:
  - **$0.00** for the program
- You might have costs associated with the next steps of refining your AMP
  - Condition ratings might require the services of a consulting engineer

What we need from you

- Completed application form
- Commitment to understanding and refining your AMP
- Agree to participate in the evaluation process established by MFOA.
  - We need to know if this type of assistance is useful and if it helps advance/improve AMPs

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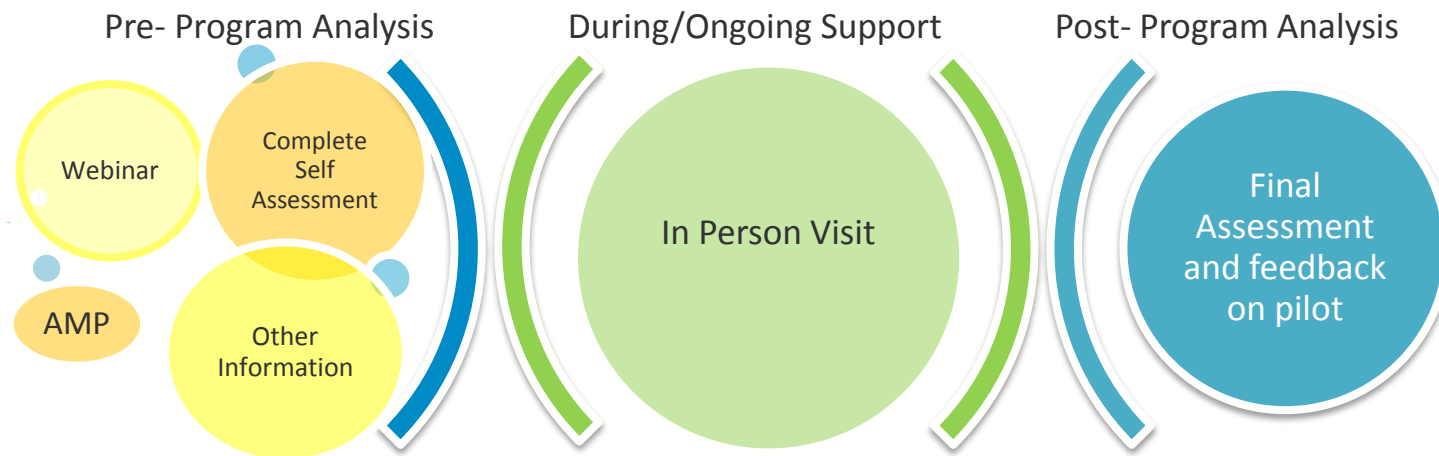OFFICERS' ASSOCIATION
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How to Apply

- Apply online
- No need to be MFOA member

- Only municipalities with population under 5,000 at this time – Group 1 has room for 80 of the 150 eligible municipalities

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After you apply, what's next

- Review of applications and follow-up as necessary

- Decision and advise municipalities if they are in group 1
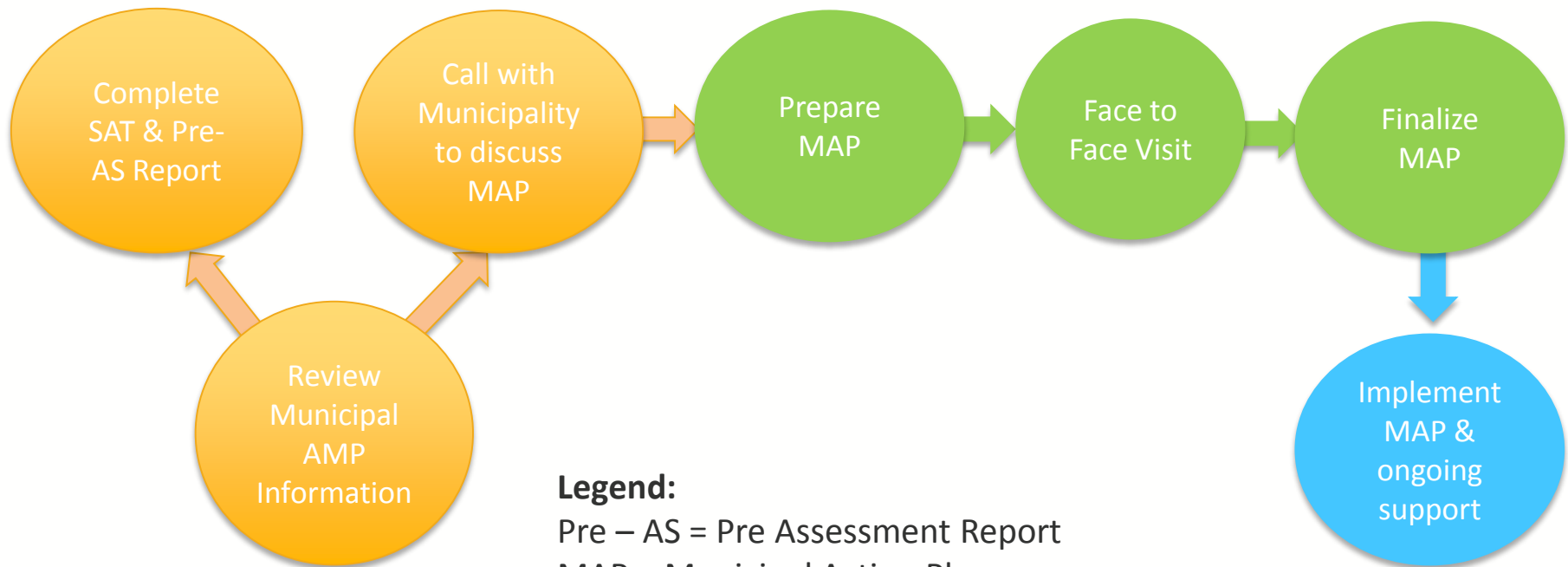
- September 30 – the program commences

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Overview of AMP it Up 2.0 – Group 1

Pre- Program Analysis

Webinar

AMP

Complete Self Assessment

Other Information

During/Ongoing Support

In Person Visit

Post- Program Analysis

Final Assessment and feedback on pilot

Sep '18 – Feb '19

March – Nov '19

Nov '19

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AMP it Up 2.0
Sequence of Events

```
Complete SAT & Pre-AS Report  →  Call with Municipality to discuss MAP  →  Prepare MAP  →  Face to Face Visit  →  Finalize MAP  →  Implement MAP & ongoing support

Review Municipal AMP Information → Complete SAT & Pre-AS Report
Review Municipal AMP Information → Call with Municipality to discuss MAP
```

Legend:
Pre – AS = Pre Assessment Report
MAP = Municipal Action Plan
Post – AS = Post Assessment Report
SAT = Self Assessment Tool

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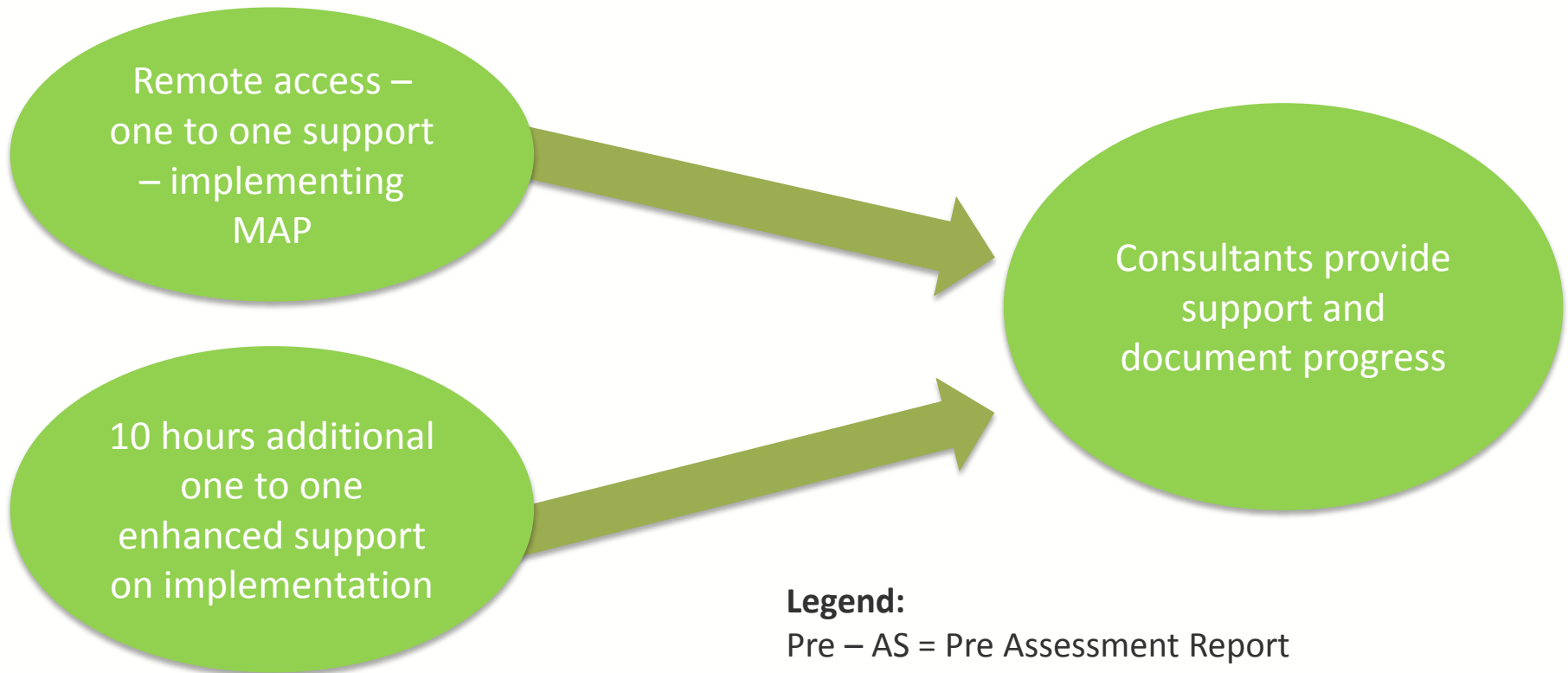OFFICERS' ASSOCIATION
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Who does what?

Municipalities will need to:
- Provide AMP
- Complete Self Assessment Tool (**beginning end of September)**
- Provide additional information to expert, if needed
- Review Pre – AS
- Agree with expert's MAP

Expert will:
- Review application
- Review existing AMP to determine gaps
- Complete on-line SAT
- May have follow up questions/request for more info
- Complete Pre- AS
- Prepare MAP incorporating municipality's comments

Ongoing support and Enhanced support

Remote access – one to one support – implementing MAP

10 hours additional one to one enhanced support on implementation

Consultants provide support and document progress

Enhanced support

Legend:
Pre – AS = Pre Assessment Report
MAP = Municipal Action Plan
Post – AS = Post Assessment Report
SAT = Self Assessment Tool

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During Ongoing Support

Municipalities committed to :

- Working towards implementing MAP
- Participate in phone calls, skype, etc.

Expert will:

- Provide advice, encouragement & record progress
- Set up phone calls, skype, etc.

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Enhanced Support*

*Only available to some municipalities

- Based on the assessment and the Municipal Action Plan,

- Enhanced Support will be offered to start to implement some of the recommendations in the Municipal Action Plan

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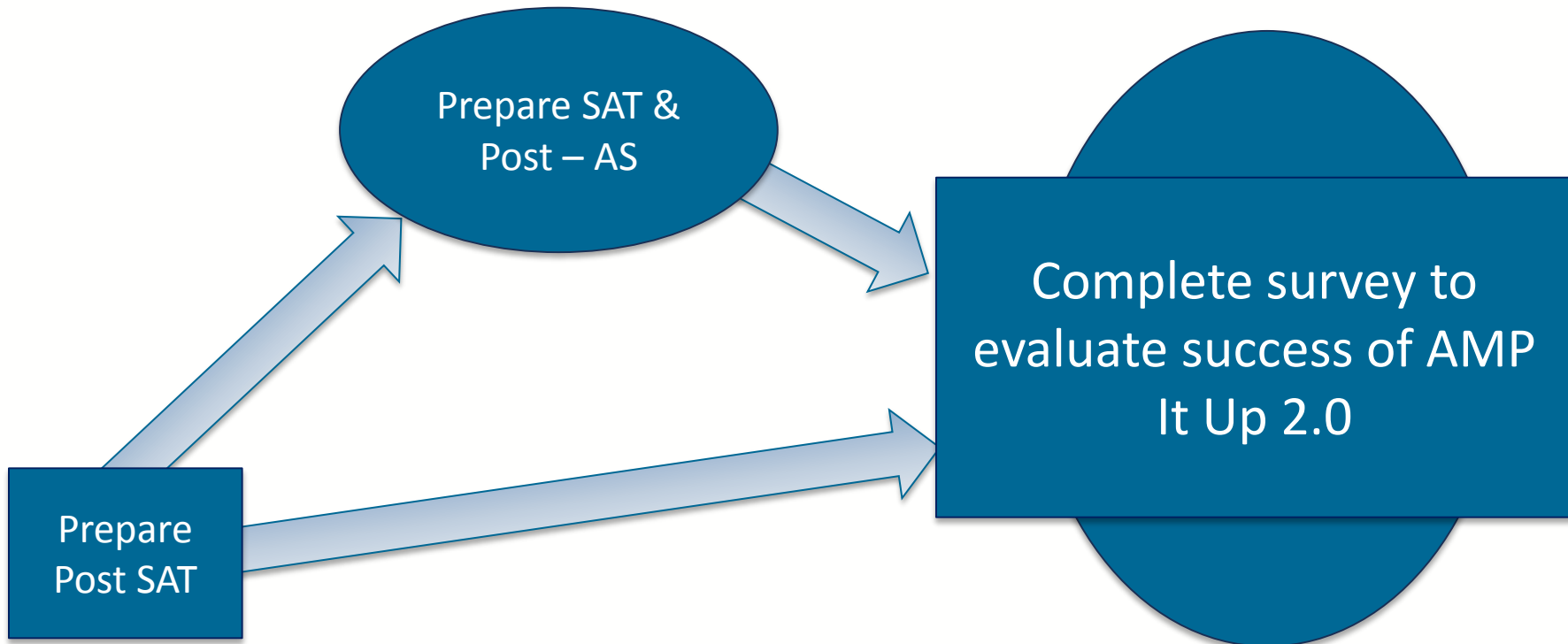OFFICERS' ASSOCIATION
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Enhanced Support*

Expert will spend 10 additional hours helping municipality with:

- Current levels of service, or

- Creation of an asset inventory, or

- Conducting condition assessments on assets, or

- Determining the lifecycle activities and costs that would be required in order to maintain current levels of service for 10 years, or

- Other activities appropriate for the municipality

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Post-Program Analysis

Consultants

Prepare SAT &
Post – AS

Complete survey to
evaluate success of AMP
It Up 2.0

Prepare
Post SAT

Municipalities

Legend:
Pre – AS = Pre Assessment Report
MAP = Municipal Action Plan
Post – AS = Post Assessment Report
SAT = Self Assessment Tool

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Deliverables

- Pre-Assessment Report (based on SAT)
- Municipal Action Plan
- Post-Assessment Report (based on SAT)
- Input into success of program
- Progression along AM continuum

| Have an AMP | AMP is complete | AMPs used to make infrastructure decisions | AMPs linked to other strategic, financial and land use plans |

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Self Assessment Tool (SAT)

- Build for entire municipal sector
- Reinforces that AM is complex, challenging and ongoing/building process
- It's **a process NOT** just a document

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Objectives of SAT

- Provide objective assessments for municipalities

- Measure progression over time of AM

- Educate the municipalities about the complexity of AM and their progress on the continuum

- Integrated Guide AM

Overview of SAT

- To be completed by municipalities and consultants

- Beginning and end of AMP it Up 2.0

- "Comments" box at end of each section

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Accessing SAT AM

- Web based tool

- www.mfoa-amp.ca

Logging In

- Key Contact from application form – will receive an email with the Login & Password

- Key Contact can assign separate Login & password for different staff to access sections of SAT
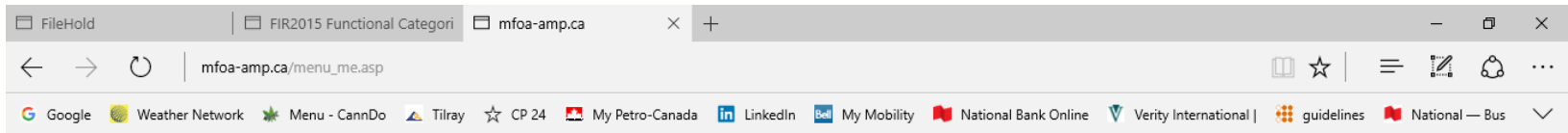
Municipality   **Consultant**

Login:

Password:

Next

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Start and Continuing SAT & Resources

Welcome MFOA - General.

Program Materials
Overview of AMP and AM

Self Assessment Tool
Description of Asset Categories
Instructions for SAT
Enter Self Assessment Tool - Program Start (In Progress)

Disclaimer

- Read a brief disclaimer and click on "I Agree"

Disclaimer / Privacy Statement

This Self Assessment Tool (SAT) is to assist municipalities in progressing through the ASSET MANAGEMENT continuum. The SAT is an integral part of the **AMP It Up** Program A and Program B. The completed SAT will be shared with your expert consultant to enable them to evaluate your AMP document and ASSET MANAGEMENT process.

MFOA or your expert consultant(s) may use the SAT results for group analysis. All information or reports based on the SAT will be provided at a summary level with no municipalities individually identified.

MFOA is committed to ensuring that your information is secure. In order to prevent unauthorized access or disclosure, we have put in place suitable physical, electronic and managerial procedures to safeguard and secure the information we collect online.

I Do Not Agree   I Agree (continue to survey)

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Select Assets

- Indicate ALL assets which apply to your municipality

Configuration

The self assessment tool will be configured specifically to the requirements of your municipality. Please indicate which assets should be included, then click "Table of Contents" to continue:

☑ Roads
☑ Bridges and Culverts
☑ Water
☑ Wastewater
☐ Stormwater
☐ Solid Waste
☐ Facilities
☐ Vehicles and Equipment
☐ Improvement to Land
☑ Other

Return to Disclaimer   Table of Contents

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Navigating with Table of Contents

Table of Contents

This is your municipality's self assessment tool table of contents. Use the links to jump to a specific section. Use the buttons to return to the configuration page, print all of the questions to complete offline. Once all sections have been completed, click the Mark as Completed button to submit them to your consultant for analysis.

1. **Introduction (completed)**
2. **Asset Management Policies & Procedures (completed)**
3. **State of Local Infrastructure**
   - Roads (in progress)
   - Bridges and Culverts (in progress)
   - Water (in progress)
   - Wastewater (in progress)
   - Other (in progress)
4. **Levels of Service (LOS)**
   - Roads (in progress)
   - Bridges and Culverts (in progress)
   - Water (in progress)

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Table of Contents

Located at Bottom – Table of Contents Page

Roads (in progress)
Bridges and Culverts (in progress)
Water (in progress)
Wastewater (in progress)
Other (in progress)

6. Financing Strategy

Roads (in progress)
Bridges and Culverts (in progress)
Water (in progress)
Wastewater (in progress)
Other (in progress)

7. **Making Assett Management Operational (in progress)**

8. **Continuous Improvements and Updates (not started)**

9. **Asset Management Tools (not started)**

10. **Internal Governance and Ownership (not started)**

11. **Council Approval and Support (not started)**

12. **Public Engagement and Communication (not started)**

Return to Configuration | Print All Questions | Mark as Completed

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SAT Framework

- Based on Province's 2012 Building Together – Guide for Municipal Asset Management Plans

- General Questions

- Asset Specific Questions

1. Introduction
2. AM Policies and Procedures
3. State of Local Infrastructure
4. Levels of Service
5. AM Strategy
6. Financing Strategy
7. Making AM Operational
8. Continuous Improvements and Updates
9. AM Tools
10. Internal Governance and Ownership
11. Council Approval and Support
12. Public Engagement and Communication

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Navigating the SAT

Options:
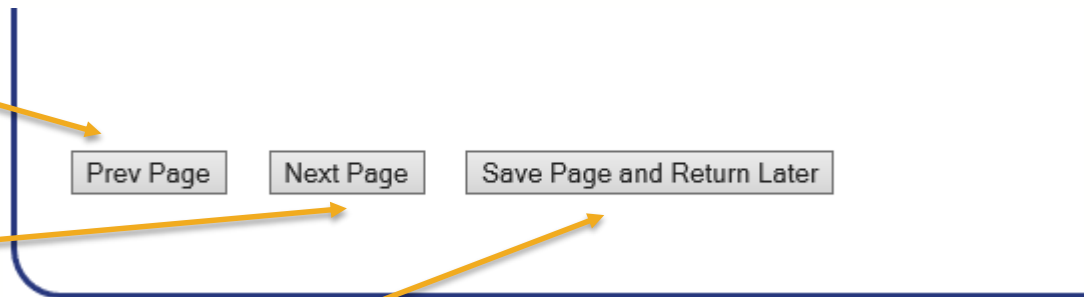
Available at the bottom of each page – after Page 1

- Return to previous page

- Move to the next page

- Save SAT and return later

| Prev Page | Next Page | Save Page and Return Later |

Highly recommend using the Table of Contents to navigate tool

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Integrated AM Guide

- Additional information on AM improvements

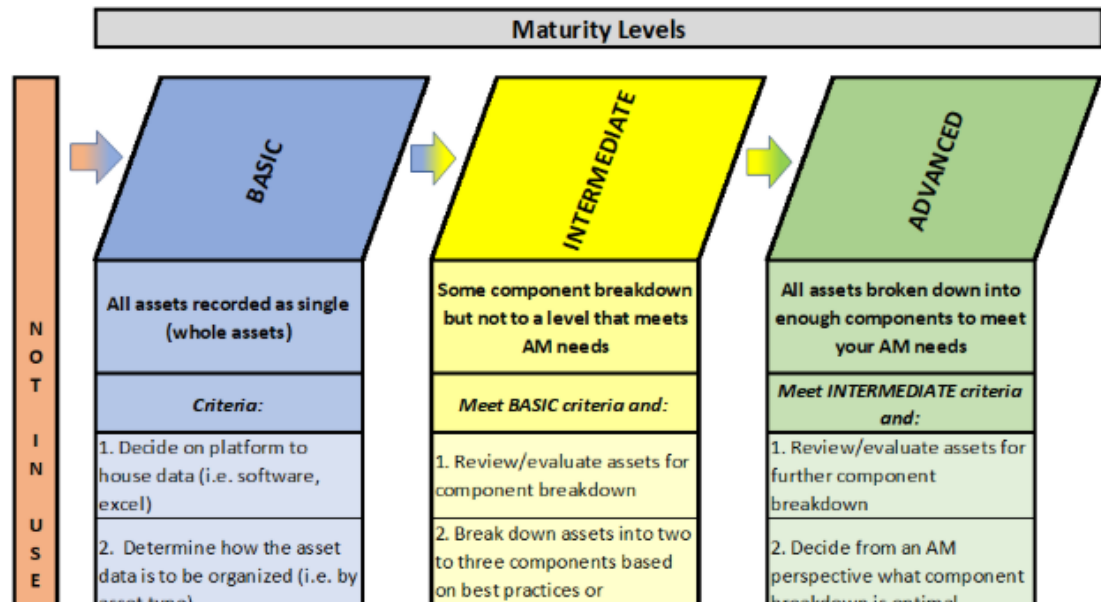**4. How are your assets broken down into components?** ℹ️

Road

- ○ All complex assets recorded as single (whole assets)
- ○ Minimal component breakdown
- ○ Moderate component breakdown
- ● Componentization used in complex asset categories, but not to a level that meets your AM needs
- ○ All assets broken down into enough components to meet your AM needs

Integrated AM Guide

- Additional information on AM improvements

Levels of Maturity – Asset Components

How are your assets broken down into components?

	Maturity Levels		
N O T I N U S E	**BASIC** All assets recorded as single (whole assets)	**INTERMEDIATE** Some component breakdown but not to a level that meets AM needs	**ADVANCED** All assets broken down into enough components to meet your AM needs
	Criteria:	*Meet BASIC criteria and:*	*Meet INTERMEDIATE criteria and:*
	1. Decide on platform to house data (i.e. software, excel)	1. Review/evaluate assets for component breakdown	1. Review/evaluate assets for further component breakdown
	2. Determine how the asset data is to be organized (i.e. by asset type)	2. Break down assets into two to three components based on best practices or	2. Decide from an AM perspective what component breakdown is optimal

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Assistance with SAT Tool

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What's Next

- Complete Application Form by September 24

- Send your latest AMP to Calvin

- Have a consultant assigned

- Start completing your SAT

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Questions?

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