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Subject LAS/MFOA Asset Management Training Road Map

***Think you're finished your asset management plan?*** For most municipalities there is still a long way to go, and we are here to help.

LAS/AMO and MFOA have developed a 'multi-year road map' that will help municipalities plan their training needs to better understand the key elements of a comprehensive asset management process, and take the next step in their asset management planning.

The goal of the LAS/MFOA 'road map' is to help municipalities develop the internal resources to make asset management more meaningful. LAS/AMO and MFOA will work with sector experts to deliver timely training for both municipal staff and elected officials, via various educational platforms, including: e-learning, webinars, and face-to-face sessions. Some content will be included as part of broader workshops or training events.

### **Check out the LAS/MFOA Road Map attached!**

This 'road map' is intended to be a living document, and your input is important to us. Please provide us your feedback after each training session so we can continue delivering the most relevant content to you!

### ***Are you still getting up-to-speed about Asset Management?***

You can view the recorded proceedings from the March 2014 LAS/MFOA Asset Management Symposium. This event educated municipal staff and elected officials about the importance of asset management, the components of successful asset management plans, key policy considerations, and municipal case studies.

The recorded presentations are available, and the purchase details are available at: <http://www.las.on.ca/Events/Asset-Management-Symposium.aspx>

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# Asset Management Course Calendar

## Course legend:

- AM - courses with 100% content targeted to the Asset Management Planning process and part of the official road map for AMP.
- LAS - courses provided by LAS with ideas and concepts relevant to asset management.
- CT - courses provided by AMO through Council Training with ideas and concepts that will help in the planning process overall.

This course calendar and the accompanying roadmap are dynamic documents and will be updated and adapted to meet the needs of municipalities as they move through the process of building, implementing, evaluating and adapting their asset management plans.

## Level 1 Courses

### General and Foundational Courses

#### **(AM100) Cover Your Assets**

Course date:

- On-demand online course offered by LAS and presented through [amo.skillbuilder.ca](http://amo.skillbuilder.ca) available August, 2014

It can be hard to know where to start. What is important? What tools or procedures are essential for building your Asset Management Plan (AMP)? Build the foundational knowledge before you delve deeper into the AMP process.

- Basic Asset Inventory  
*Definitions and terminology*
- Componentized Asset Inventory  
*The details of your assets; building the data*
- Data Management and Accessibility  
*Software and tools; managing the data*
- Building the plan  
*Next steps*

#### **(LAS100) LAS/MFOA Investment Workshops**

Course dates:

- In class sessions:
- September 11 - Brantford
- September 18 - Kingston
- October 2 - London
- October 9 - Orillia
- October 16 - Thunder Bay

Develop an understanding of the investment options available to municipalities and how to best leverage them. An overview of investment tools available to the sector; commentary and advice; training on cash flow forecasting; the Canada's Gas Tax funds investment option; and an economic update from a market expert.

Sessions will focus on investment options available to municipalities, current economic conditions, and also the need to consider asset management and your road map in all investment decision making.





### **(AM101) Best Practises in Asset Management**

Course dates:

- Free webinar offered by MFOA and available on demand May, 2014

Make optimal use of asset management plans through best practices, increase the accuracy of the plan as well as integration with other key municipal documents and processes such as the annual budget, long-term forecast, water/wastewater rate study, and development charge study.

### **(AM102) AMO Roads and Bridges Study Results**

Course dates:

- On-demand webinar offered by AMO, available Fall 2014

This on-demand webinar highlights the current state of roads and bridges in Ontario, as presented at the AMO Annual Conference in August 2014. Learn about the importance of road and bridge investments to a community's health and prosperity, how Gas Tax funding has helped, and the role asset management will play in sustaining key assets to support a community's future economic development. Findings are from a joint research project by AMO-Gas Tax and Public Sector Digest.



### **(AM103) Data and Measures**

Course dates:

- On-demand online course offered by LAS and presented through [amo.skillbuilder.ca](http://amo.skillbuilder.ca) available late 2014

You know what an asset is now learn how to build the plan.

- Measure the right things
- Evaluate the performance
- Basic life cycle costing
- How to do costing

Recommended:

- AM100: Cover Your Assets, or demonstrated knowledge of the concepts covered in the course.

### **(AM104) Asset Inventory: PSAB 3150 vs. Asset Management**

Course dates:

- Course offered by MFOA
- Live session: July 17, 2014, 12:00 – 1:30 pm
- Webinar on demand available: August 2014

Assets for accounting purposes and assets for asset management - should you treat them the same? How and when do you bring assets into an asset management plan? Is the asset inventory you have for Tangible Capital Asset accounting adequate for budgeting and forecasting? Learn processes, procedures and policies for dealing with assets for accounting vs assets in an asset management plan.



## **(CT105) Connecting the Dots**

Course dates:

- In class 1/2 day sessions offered by AMO start Spring 2015

Asset Management Elected Officials. This leadership course will examine how members of council can be a champion in their municipality for asset management planning. It will provide tools and techniques that will assist with improving the financial sustainability of councils through better ways of doing business; good practice case studies in a variety of areas including service planning; strengthening leadership and influence in order to deliver real results and details on how and why Council must be Asset Management Champions.

## **(CT106) Bridging Communications Channels**

Course dates:

- In class 1/2 day sessions offered by AMO start Spring 2015

Want to deliver effective and efficient services to your citizens? Selling your asset management plan is important to ensure buy-in and implementation. Learn how to communicate internally and externally to:

- Increase understanding of internal communications tools
- Build communications competencies
- How to recognize, understand and communicate to different audiences (the whole generational thing)
- Challenges of cross departmental communication
- How to build cooperation, efficiency and feedback between departments
- Effective team building techniques



## **(AM105) The Basics of Service Delivery Levels**

Course dates:

- Live/on-demand webinars offered by MFOA will be available November/December 2014

Learn how to develop an understanding of the level of service and considerations required, from both finance and engineering perspectives, including:

- Definitions
- Legislative requirements
- Roles and establishing desired levels of service
- Costs of levels of service
- Existing versus desired levels of service
- Linkages between assets and levels of service

## **(AM106) Refining Your Costs, Valuation and Condition**

Course dates:

- 2-part course offered by MFOA, Nov 5 and 19 12-1 pm
- On-demand webinars available August, 2014

Existing PS 3150 inventories are the most likely place to start building an Asset Management Plan. Using this as your jumping point, this course will focus on the financial roots of an AMP from both finance and engineering perspectives.

- How to adjust your aged-based cost forecast
- Is condition enough?
- Condition by asset class – when, what, who?
- Risk overview
- Useful life
- Replacement costs
- Betterments
- What assets are going to get refined, how to refine them





### **(AM 107) Asset Management Interactive Panel Discussion - 1**

Course dates:

- Live webinar offered by MFOA August 20, 2014  
12 - 1:30 pm
- On demand available August 2014

Join this interactive session with a panel of experts and your colleagues to discuss and pose questions regarding your journey, both successes and challenges, in the asset management process.

Discussion Topics will focus on Best Practices in Asset Management and PSAB 3150 vs. Asset Management.

Expert Panel Includes: Dan Wilson, Watson & Associates and Craig Binning, Hemson Consulting.

### **(AM108) AM Strategy: Risk & Identifying Priorities**

Course dates:

- Live and on demand sessions offered by MFOA  
Fall 2015

This session will provide an introduction to risk management and look at cost/risk analysis to identify priorities and will show how to maintain expectations with reliability management techniques (ie: status quo, risk levels etc.)

- Criteria for priority decision making
- Actuaries and chance of failing

### **(AM 109) Asset Management Interactive Panel Discussion - 2**

Course dates:

- Live webinar offered by MFOA available  
December 3, 2014 12-1:30 pm
- On demand available January 2015

Join this interactive session with a panel of experts and your colleagues to discuss and pose questions regarding your journey, both successes and challenges, in the asset management process.

Discussion Topics will focus on Refining Your Costs, Valuation and Condition and Level of Service.

Expert Panel Includes: Dan Wilson, Watson & Associates and Craig Binning, Hemson Consulting and R.J. Burnside & Associates.



Level 2 Courses  
Intermediate Level Courses

### **(CT200) Strategic Planning and Service Delivery Primer**

Course dates:

- In class sessions offered by AMO and available Spring 2015

Building measurable objectives over the long-term and across departments can be difficult at the municipal level. Yet in today's landscape of transparency and accountability it is quickly becoming an essential part of councils' planning process. Looking at the "how to" fundamentals this course will answer what is strategy? How to formulate a successful, measurable strategic plan?

### **(AM200) Debt and Infrastructure Planning**

Course dates:

- Course offered by MFOA in 2015

Infrastructure requires financing that allows for the maintenance of and expansion of services in all municipalities. What are the key policies and strategies for financing infrastructure in Ontario? How can municipalities effectively use reserves and debt to manage needs? What are the risks, strategies and policies that are needed for debt management in the short and long-term?



### **(AM201) AM Strategy: Adjusting Your Forecast & Forecast Analysis**

Course dates:

- Course offered by MFOA - Live session available Winter 2015
- On demand available Spring 2015

This session will build on the learning outcomes of AM106 and will include a 'deeper dive' into each of them. It will also include bringing forecasts together into a comprehensive budget process and building on forecast cost reduction, from both finance and engineering perspectives.

- Technology
- Procurement, Shared Services, ASD, Service Migration
- How to account for an asset in 10 years' time that you can't afford
- Strategies for closing the gap on expenditure forecast
- Effective policies for uses of debt to manage short and long term needs



## **(AM202) Financing Strategy: Creating Funding Scenarios and Lifecycle Costing**

Course dates:

- Live and on demand sessions offered by MFOA and available Fall 2015

This session will build on revenue generating strategies as part of the budget process and will discuss risk and prioritizing priorities, outline the benefits and challenges with each of the main revenue options: user fees, new fees, dedicated levies, build reserves, and Gas Tax funding.

This session will pair the important role of Life Cycle Costing (LCC) as a factor in optimal long-term decision making. Develop a better understanding of the LCC primer in the Ministry of Infrastructure (MOI) toolkit, and learn how to build this into multi-year budgets.

## **(AM203) Levels of Service - Advanced**

Course dates:

- Webinar series offered by MFOA starting Spring 2015
- On demand available on demand

Each of these 90-minute webinars will build on the learnings of AM107 and provide specific metrics and considerations for each of the major asset classes:

1. Roads, Bridges and Fleet
2. Water, Wastewater, Stormwater and Sewage
3. Facilities and Indoor/Outdoor Recreation

Each webinar is a stand alone.

Recommended:

- AM105: The Basics of Levels of Service



## **(AM204) Long Term Financial Planning**

Course dates:

- Three-day course offered by MFOA in 2016

Gaining buy-in for a long-term financial plan can be difficult but building the plan is necessary. Looking at Long Term Financial Planning (LFTP) from a municipal perspective learn to analyze the financial and economic environment to produce a quality forecast and good financial strategies. Learn how to gather, analyze, and present information on economic, social and technological trends that allows your municipality to be better prepared financially for the future.





## Level 3 Courses Advanced Level Courses

### **(CT300) Influencer**

Course dates:

- Course offered by AMO in Spring 2016

Learn why influence is one of the most powerful and important capacities you possess. Learn how to find and identify vital behaviours; diagnose why change seems impossible; understand abilities and motivations and develop your personal plan using the influencer model.

Registration for trainings included in this calendar can be found at [www.las.on.ca](http://www.las.on.ca) and [www.mfoa.on.ca](http://www.mfoa.on.ca)

Additional resources will be made available through both sites

### **(AM302) Building the Plan and Keeping Momentum**

Course dates:

- On-demand online course offered by LAS through [amo.skillbuilder.ca](http://amo.skillbuilder.ca) available in 2015
  - Integration and implementation of all the data and reports and budgets;
  - Change planning, transition management and organizational re-structuring
  - Preparing your mission, vision, values and metrics in your plan
  - Asset whole life plan
  - Software and resources to put it all together
  - Refining investment priorities
  - Forecast adjustments
  - Policy impact
  - Performance metrics
  - Benchmarks

Recommended:

- AM courses at the 2-level and 3-level are recommended to be taken prior to this course; and/or a completed Asset Management Plan