



Small Community Challenges with Building Asset Management Data & Plan

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Asset Management



An interactive discussion on the struggles small communities face with the implementation and maintenance of an Asset Management Plan.



Agenda

- Introduction
- How the Town of Cochrane manages its assets
- How do we reach our goal?
- Challenges
- Questions or Comments



Introduction

- In a perfect world, how would you manage your assets?
 - One centralized program
 - Gets updated on a timely basis
 - Is readily accessible
 - Has accurate data
 - Assets rated and prioritized
 - Access to user friendly reports
 - Results are relevant and useful
 - Pre-populated reports for i.e. Insurance, Council, FIR, Ministries, etc.



How the Town of Cochrane Manages its Assets

- **Administrative Department**

- Tracking assets with Excel and continual reconciliation to GL
- Land, Buildings & Vehicles – Tracked for insurance purposes and proper accounting

- **Infrastructure Department** – Would need to merge all info into software

- Roads – Road Needs Study
- Signs – Barcodes placed on regulatory signs (rated through reflectivity) / GPS marked and updated to CGIS
- Manholes, Catch Basins, Culverts – GPS marked and updated to CGIS

- **Fire/By-Law Department**

- No plan in place – Perform monthly and annual inspections as per legislation (detailed listing would be available for software)

- **Recreation Department**

- No plan in place – Need physical inventory listing of critical assets i.e. very expensive parts for pools, arena (icer), etc.
- Daycare – no plan in place

- **Polar Bear Habitat** – No plan in place



Goal



1. Purchase a software that is right for you
2. Provide data for your software
3. Receive training
4. Figure out the logistics
 - Who is updating the data?
 - Who is reviewing the data?
 - How are we exporting to main program?
 - How do we merge all our data?
5. Maintain and set new goals for improvement – How detailed?

Town of Cochrane

1. Selected Public Sector Digest (based on RFP and review of options)
2. Took over 6 months to review and combine all data up to Dec 31, 2017 into PSD's excel templates
3. Training will be provided once data is balanced – End of Sept 2018
4. After training, staff involved will need to have meetings to establish our roles – Likely Oct 2018
5. Data will need to be reviewed and updated to include 2018 capital, and review for completeness of changes since 2013 on infrastructure side

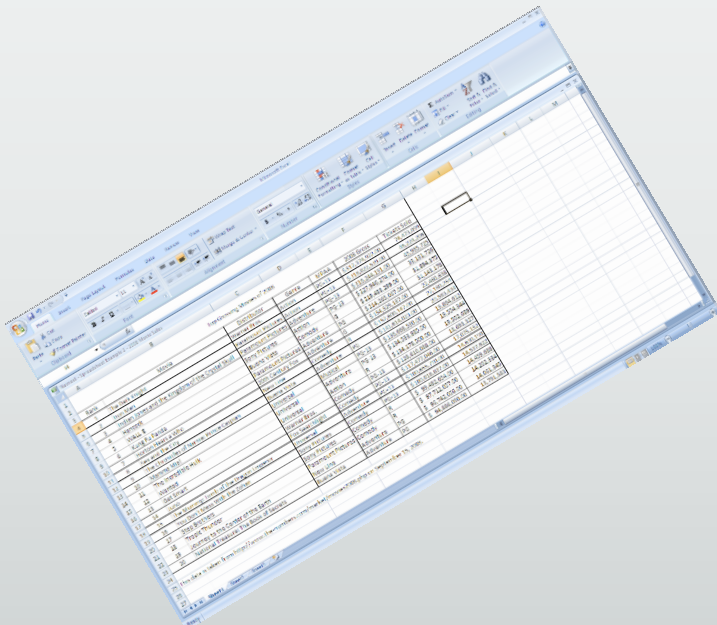
What challenges are you facing?



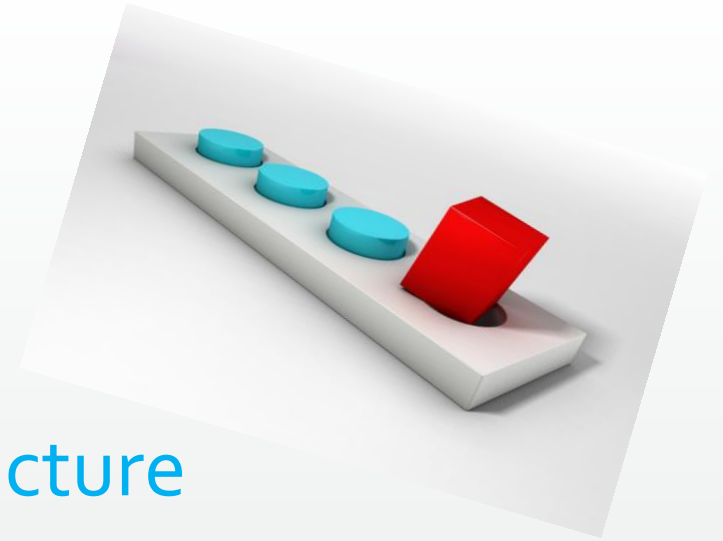
Challengesthe usual.....

- Limited resources

- Employees/people
 - existing people with time
 - new people dedicated to this role
- Systems/Tools
 - excel
 - software
 - sticky notes ☺



Challengesat the onset.



- GAPS in DATA - between finance and infrastructure
- DIFFERENCES in DATA FORMAT and LEVEL OF DETAIL - between finance and infrastructure
- Differences in LANGUAGE used- between finance and infrastructure
- Differences in PRIORITIES - between finance and infrastructure

Challengesat the onset2

- Other depts aren't necessarily detail oriented
- AMP, Road Needs Study and TCA Schedule are broken out differently
- Errors found
- Some assets were actually disposed of long ago
- Locations unknown



Challengesat the onset.

- Conversion to Software
 - ❖ Department level challenge - keeping the project front and centre – amidst day to day work needs
 - ❖ Overall project challenge - managing schedules of key departments and consultant/provider

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What challenges are you facing?



- Lack of in-house technical knowledge (need consultants)
 - Bounce questions off experts
 - Best practices advice
 - Relevant to scale and adaptable to info that we have, or don't have
 - Advice on how best to manage gaps

Challenges.....moving forward

CHANGES TO THE PLAN!

1. **Political**

- Council “wants” hijacking the “plan”

2. **No \$\$\$\$ ☹️**

- SOME PROJECTS CONTINGENT ON SPECIAL FUNDING – THAT MAY NOT MATERIALIZE

3. **No resources to get it done**

- Internal resources not available, lack of interest or availability of external resources

4. **Asset assessment changes**

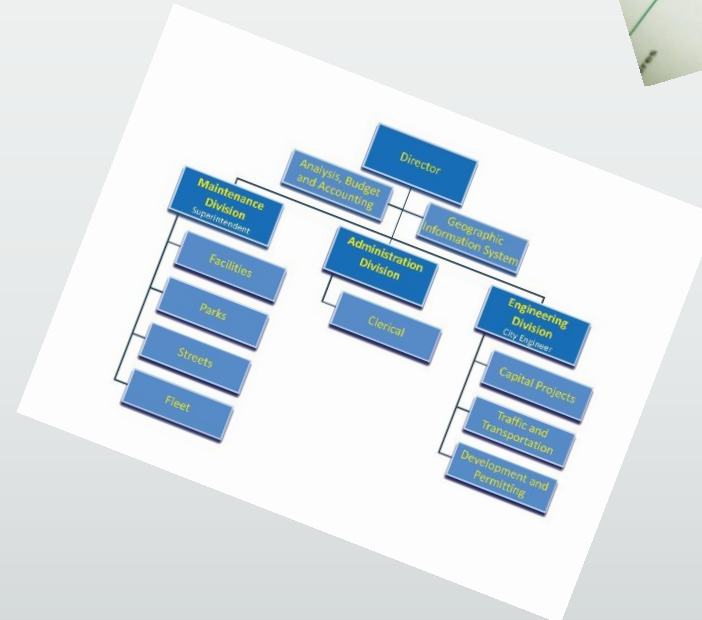
- Conditions change

RESULT =

DEFERRED
OF
CRITICAL
PROJECTS

Challenges Moving forward

- Develop and Implement Process for updating and maintaining the data
 - How often?
 - Who?
 - Finance and Infrastructure
- Which department is best to be lead?
 - Finance or Infrastructure



Challenges..... Moving forward

▪ KEY DECISIONS TO MAKE



➤ What to update and when?????

1) The Obvious

- current year capital works – new additions, deletions
- current year PM – preventative maintenance
- current year study results

2) But what about.....

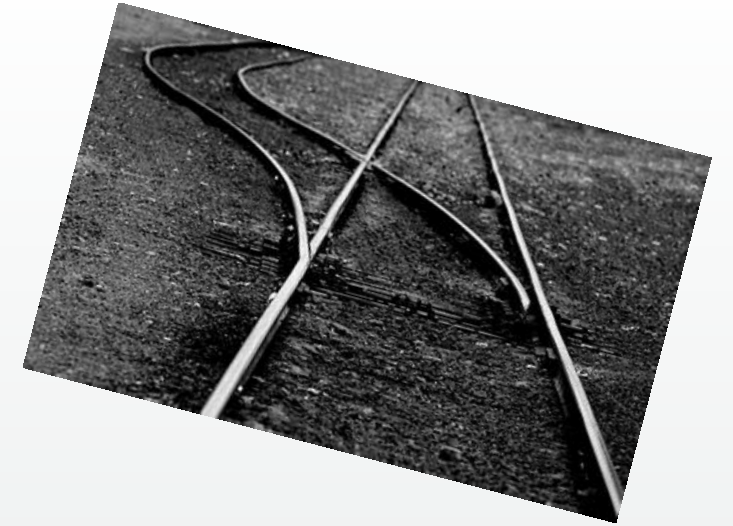
- Conditions Assessment for infrastructure not being targeted that year. Do we review and update annually?
- Estimate useful lives?
- forecast costs

KEY TAKEAWAYS

✓ KEEP YOUR EYE ON THE PRIZE



✓ MAKE SURE YOUR TEAM UNDERSTANDS THE ULTIMATE GOAL



✓ DON'T TRY TO GET IT PERFECT RIGHT AWAY– DETAIL CAN BE ADDED LATER

✓ HAVE PERIODIC TEAM MEETINGS TO KEEP IT ON TRACK



✓ COMMUNICATE EXPECTATIONS FOR YOUR TEAM - BOTH DURING A CONVERSION AND AS PART OF THE AMP MAINTENANCE PLAN

KEY TAKEAWAYS



Questions or Comments

