



# Strategic Asset Management Policy

City of Brantford, Ontario





## RECORD SHEET

### REPORT STATUS – DRAFT

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<b>Asset Management Document Set</b>	<b>First Issuance</b>
Strategic Asset Management Plan	(this document)
Asset Management Plan – Overview	2021 or 2023
Asset Management Plan(s) – Public Works	July 1, 2021
Asset Management Plan(s) – Corporate Services	July 1, 2023
Asset Management Plan(s) – Health & Human Services	July 1, 2023
Asset Management Plan(s) – Community Development	July 1, 2023
Asset Management Plan(s) – Fire	July 1, 2023
Asset Management Plan(s) – Community Programs, Parks & Recreation	July 1, 2023
Asset Management Plan(s) – Police Services Board	July 1, 2023
Asset Management Plan(s) – Library Services Board	July 1, 2023
Asset Management Plan(s) – John Noble Home	July 1, 2023



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## ABBREVIATIONS

AMP	Asset Management Plan
CAO	Chief Administrative Officer
CCO	Climate Change Officer
ESL	Estimated Service Life
FCM	Federation of Canadian Municipalities
FIR	Financial Information Return
IT	Information Technology
RSL	Remaining Service Life
SAM	Strategic Asset Management
TCA	Tangible Capital Asset

## DEFINITIONS

Asset	Typically physical infrastructure that supports the provision of a service.
Asset Management	Applying management, financial, economic and engineering principles to infrastructure assets in order to provide an agreed level of service in the most cost-effective way without compromising the ability to do so in the future.
Asset Management Plan	A tactical plan for managing assets to deliver an agreed standard of service. Typically takes a system approach, assessing more than one asset type in a single plan.
Lifecycle	The full life of an asset, from when it is first identified as required, through its acquisition, operation, maintenance, upgrading and disposal.
Level of Service	A criteria set by the City, its Local Boards and the community for the quality and performance of the services provided by the organization. Levels of service typically relate to quality, quantity, reliability, responsiveness, environmental acceptability and cost.
Organization	This refers to all City commissions and its Local Boards including, but not limited to, the Police Services Board, the Library Services Board, and the John Noble Home.
Strategic Asset Management Policy	Outlines the requirements, overall intentions/principles and framework to follow when creating Asset Management Plans in order to obtain long term optimized and sustainable objectives for the management of assets.



## 1. INTRODUCTION

Brantford is a vibrant community with a population of approximately 98,000 people. The Corporation of the City of Brantford (the City) and its Local Boards are responsible for the delivery of many of the services that are central to the prosperity and quality of life of people who live and work in the Brantford community. These services rely on well-planned, well-built and well-maintained infrastructure assets. Asset management is doing the right work at the right time for the right cost.

Asset management planning asks and tries to answer the following about infrastructure assets:

- What are the assets
- Where are the assets
- What condition are the assets in
- How much would it cost to replace the assets
- What level of service are the assets expected to provide and at what cost
- How are the assets performing in service delivery
- Do the assets have any extra capacity
- What capacity is needed in the future
- When will the assets need to be replaced/repaired/upgraded
- What will the cost be to replace/repair/upgrade the assets
- Are there any solutions for this service which do not require assets
- Are there any growth or expansion requirements to meet future demand
- What work has been planned and what will it cost

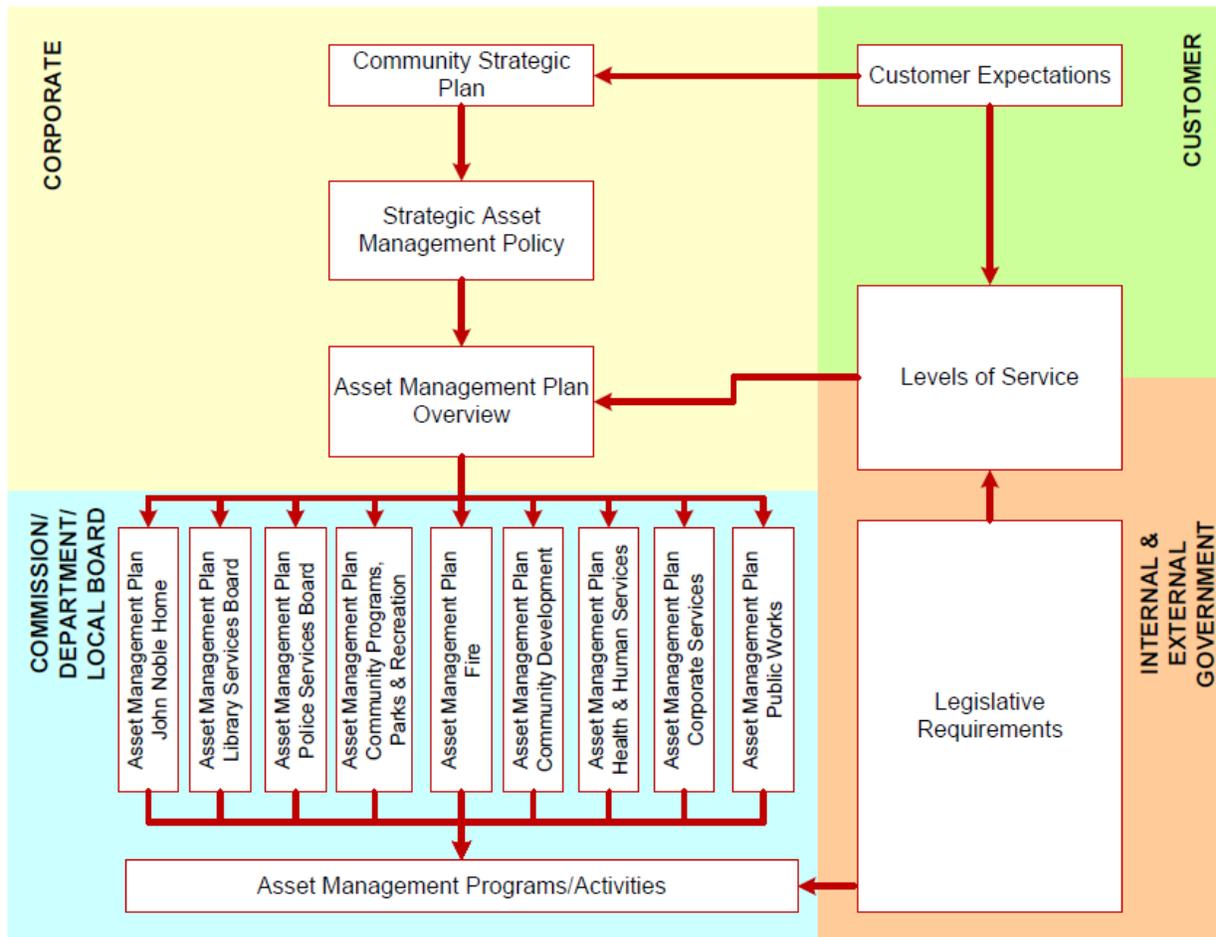
This document describes at a strategic level:

- What the City and its Local Boards (as applicable) are attempting to achieve with asset management planning ;
- How asset management planning will be aligned with other strategic documents;
- How plans will be developed and improved over the next 5 years;
- The roles and responsibilities of various stakeholders involved in the success of asset management planning; and
- How plans will be written and published.

In January 2018, Ontario Regulation 588/17 *Asset Management Planning for Municipal Infrastructure* came into effect for municipalities within the Province of Ontario. This regulation sets criteria and timelines which are to be met with respect to management of municipal infrastructure assets. This document is intended to satisfy the requirement for a Strategic Asset Management (SAM) Policy to govern the creation of Asset Management Plans for the City and the assets of its related Local Boards going forward.



The framework of asset management planning is as shown in Figure 1, at this time the exact number and asset portfolios of future Asset Management Plans is unknown and may vary from those shown. Asset management planning requires a strong understanding of customer expectations in order to be successful. Customer expectations inform both the strategic documents and the level of service targets used in the Asset Management Plans. The coloured zones in Figure 1 indicate the main group responsible for providing, and/or analyzing the information required for the area(s) of asset management planning indicated.



**Figure 1 Framework of Asset Management Planning**

The City Commissions and related Local Boards with assets which are subject to this policy are as shown in Table 1.



**Table 1 City Commissions and Local Boards with assets subject to the Strategic Asset Management Policy**

City Commissions with Assets	Local Boards with Assets
Communications & Community Engagement Fire Community Development Community Programs, Parks and Recreation Corporate Services Health & Human Services Public Works	Brantford Municipal Non-Profit Housing Corporation Brantford Public Library Board John Noble Home Local Housing Corporation Brantford Police Services Board



## **2. POLICY STATEMENT**

Good asset management is essential to being able to provide services in a safe, reliable and efficient manner while sustaining a growing community. The City's vision for asset management is to meet the service delivery expectations of our community, in both existing and future growth areas, through a series of processes, policies and actions applied consistently and responsibly across all City commissions and related Local Board assets. This will be accomplished by knowing the assets for which the City and its Local Boards are responsible, knowing the condition of these assets, knowing how to maintain the assets to maximize useful life, and budgeting appropriately so assets can be replaced once they have expired or are not able to consistently provide the expected level of service. The City's Commissions and Local Boards (as applicable) will work together to make evidence based decisions to manage the City's assets through the planning, acquisition, operation, maintenance, rehabilitation, replacement and disposal phases of the asset lifecycle.

The goals of the Strategic Asset Management Policy are as follows:

- a) To ensure that the assets of the City and its Local Boards are managed in a responsible manner which maximizes their value in providing City and Local Board services;
- b) To increase accountability, transparency and knowledge of the City's and related Local Boards' assets, their condition and how they support the provision of City and Local Board services;
- c) To achieve and maintain compliance with the requirements of O.Reg. 588/17 – Asset Management Planning for Municipal Infrastructure;
- d) To outline how community feedback will be sought and implemented into the Asset Management Plan(s) of the City and related Local Boards' assets;
- e) To align the City's and related Local Boards' budget and purchasing processes with full lifecycle considerations of the City's asset inventory and the information contained within the Asset Management Plan(s);
- f) To identify processes, policies and plans required to work together to support asset management throughout the organization;
- g) To ensure that the Asset Management Plan(s) include sufficient information to allow for the prioritization of capital needs (asset replacement, rehabilitation, disposal, etc.) and operating budgets (maintenance, labour, energy costs, etc.) across the organization;
- h) To ensure that the policy is measurable, achievable and maintainable throughout the organization and across all City and Local Board services;
- i) To ensure that Council, City Staff and the Community fully understand and support good asset management principles and decision making across the City and related Local Boards assets.



### 3. STRATEGIC ALIGNMENT

To successfully and repeatedly achieve the City's mission of responsible leadership through sound fiscal management and the delivery of quality programs and services<sup>1</sup> in partnership with our community requires that multiple strategic initiatives be underway across the City and related Local Boards at any given time. This requires alignment and coordination effort to make sure that the actions of the City and its Local Boards, now and in the future, support one another to effectively and efficiently meet the service expectations of our community.

An integrated approach will be followed to ensure that asset management planning is aligned with the goals, plans and policies of the City and related Local Boards as much as possible. This means that information contained within the detailed Asset Management Plans will be used to support decision making in other plans and other plans will influence what information needs to be contained with the Asset Management Plans.

The various procedures, policies, plans and strategy documents used by the City are categorized based on general intent, as follows:

- Growth/Future Planning
- Current Planning & Operations
- Financial Planning & Operations

Many of these documents are currently connected within their main category and possibly to one or two other categories; however, they do not currently have a common uniting document which aligns them consistently with one another. Figure 2 outlines these three categories and provides examples of current documents which fall into them. Figure 2 predominately reflects the budget process for City commissions, while the Local Boards follow a similar process, the exact documents for some of their financial planning and operation documents may vary slightly. This policy should support, not supersede, meeting other regulatory requirements for asset management such as criteria for capital asset purchasing, disposal, etc. outlined in the Long Term Care Homes Act, 2007.

The Strategic Asset Management (SAM) Policy and its associated Asset Management Plans are meant to be living documents and will change over time as more mature asset inventories and asset management procedures are developed across all of the City's commissions and related Local Boards (as applicable).

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<sup>1</sup> City of Brantford, *Community Strategic Plan – Shaping Our Future 2014-2018*, 2015.

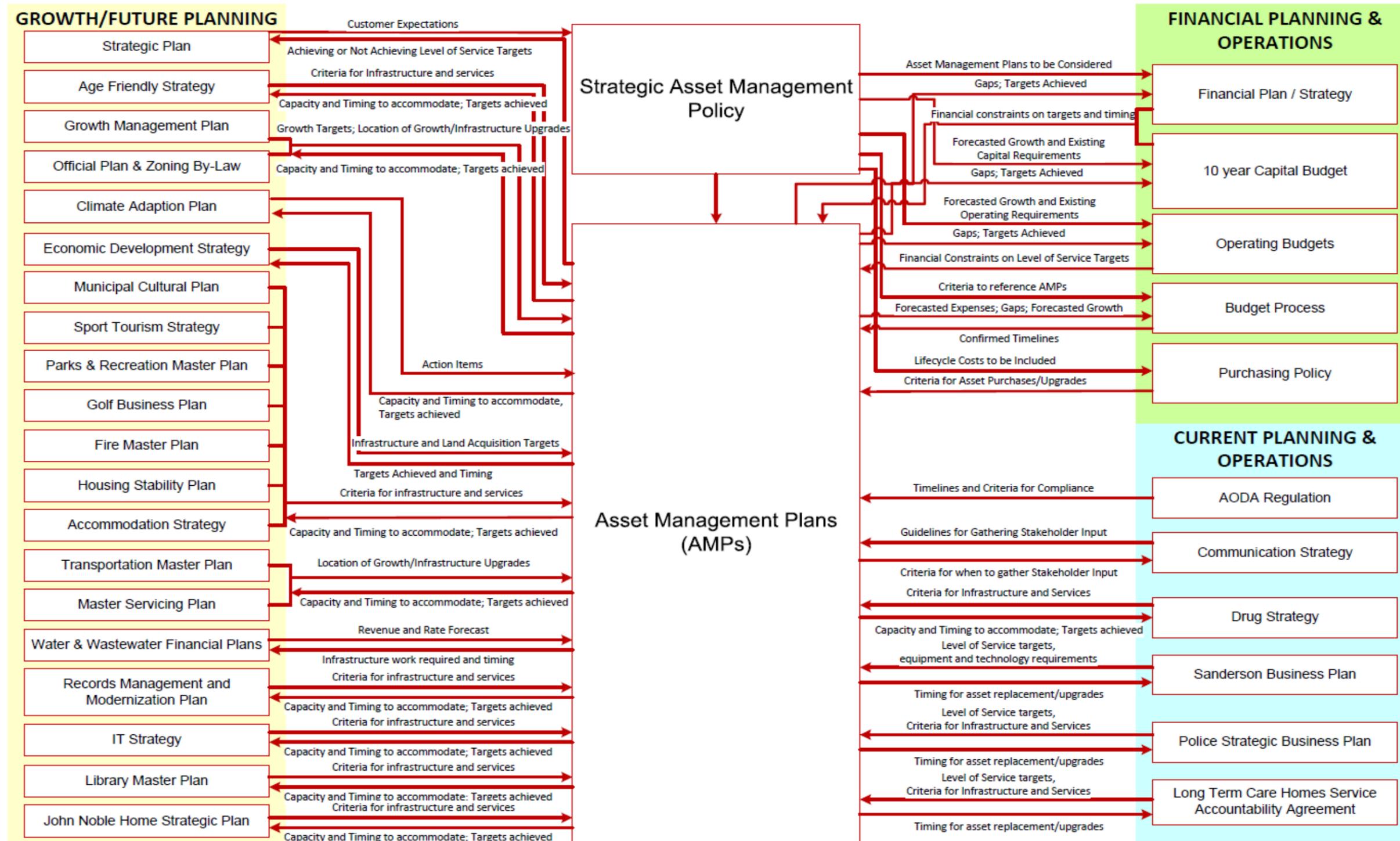


Figure 2 Strategic Alignment



## 4. GUIDING PRINCIPLES

The City and related Local Boards (as applicable) will use the following guiding principles when developing Asset Management Plans:

### 1. **Be Consistent and Clear**

- a. Infrastructure priorities will be clearly identified and applied consistently across assets owned by all City commissions and Local Boards;
- b. Prioritization will include, but not be limited to: health and safety impacts, legislative requirements, environmental impacts and value of built-heritage;
- c. Alignment with any applicable City or Local Board (as applicable) budgets or fiscal plans such as fiscal plans released under the *Fiscal Transparency and Accountability Act* (2004) or budgets adopted under Part VII of the *Municipal Act* (2001);
- d. Decisions will be based on balancing service levels, risks and costs across assets owned by all Commissions and Local Boards.

### 2. **Minimize Service Disruption**

- a. The City and its Local Boards (as applicable) will consider the impact to service delivery when prioritizing assets and make every reasonable effort to minimize service disruption;
- b. Assets will be considered in a service context and take into account their interrelationships and will not optimize individual assets in isolation;
- c. The City and its Local Boards (as applicable) will support the continued provision of core public services, such as transportation and safe drinking water.

### 3. **Support Reasonable Expectations**

- a. The City and its Local Boards (as applicable) will protect the health and safety of workers involved in the construction, operation and maintenance of infrastructure assets;
- b. Subject to any prohibitions under an Act, or otherwise by law, on the collection, use and disclosure of information, the City and its Local Boards (as applicable) will make decisions for their infrastructure assets based on information which is publicly available or made available to the public;
- c. Establish current and future level of service targets for all asset groups included in the Asset Management Plans;
- d. Select practices, interventions and operations with the goal of reducing lifecycle costs of asset ownership while meeting the community, Council and Local Board (as applicable) agreed upon level of service targets;
- e. Promote accessibility for persons with disabilities as part of infrastructure projects.



#### **4. Support Innovation and Development**

- a. The City and its Local Boards (as applicable) will take a forward looking, long term view for asset planning, while considering demographic and economic trends in the region;
- b. The City and its Local Boards (as applicable) will create opportunities to make use of innovative technologies, techniques and practices, particularly when they have been developed locally in Ontario;
- c. The City and its Local Boards (as applicable) will promote economic competitiveness, productivity, job creation and training opportunities;
- d. The City and its Local Boards (as applicable) will promote community benefits from infrastructure projects such as local job creation and training opportunities (including apprentices, within the meaning of section 9 of the Infrastructure for Jobs and Prosperity Act, 2015).

#### **5. Support the Environment**

The City and its Local Boards (as applicable) will work to do the following when making decisions regarding its assets and service delivery:

- a. Respect and help maintain ecological and biological diversity;
- b. Augment their resilience to the effects of climate change;
- c. Make use of acceptable recycled aggregates where safe and appropriate to do so.

#### **6. Seek and Incorporate Feedback from the Community and other governments and agencies**

Where relevant and appropriate the City and its Local Boards (as applicable) will:

- a. Consider the principles and content of non-binding provincial or neighbouring municipal plans and strategies established under a Provincial or Federal Act or otherwise in planning and making decisions for infrastructure which supports them;
- b. Share information, subject to any legal or privacy restrictions, with infrastructure asset implications with other levels of Government and broader public sector entities;
- c. Where relevant and appropriate, improve public space within the community when completing infrastructure projects.



## 5. CAPITALIZATION THRESHOLDS

The Asset Management Plans for City's and related Local Board assets will take a forward looking view to assess the cost of owning an asset group over the service life of the assets for both short and long-term financial planning. Assets will be included in the Asset Management Plans based on the professional judgement and knowledge of the asset owners. As a general rule, to be included in the plan(s) assets should:

1. Support the delivery of a service;
2. Require active management including inspection, maintenance and repair work;
3. Meet at least one of the following criteria

Assets have:

- High individual capital value (minimum \$5,000)
- Low value alone but high value together (e.g. street trees)
- High operating cost  
(at discretion of asset owner, to be revised in future version of policy)
- High maintenance cost  
(at discretion of asset owner, to be revised in future version of policy)
- High influence on energy consumption  
(at discretion of asset owner, to be revised in future version of policy)
- Low capital value but are critical to the safe and reliable operation of the infrastructure or supply of service  
(e.g. smoke alarms, personal protective equipment for fire or police)

If assets have one of the following two criteria, then the asset owner is encouraged to exclude the asset group in their Asset Management Plan(s).

Assets are:

1. Captured under a different asset category (e.g. doors captured under facility interior fixtures)
2. Consumed during the course of 1 to 2 years (e.g. chemicals used at treatment plants)

Assets will not be included in the Asset Management Plans based solely on the Tangible Capital Asset (TCA) registry maintained by the City's Finance department. The inclusion of an asset to the TCA registry is based on the original purchase price of an asset and is used for financial reporting purposes to track the depreciating value of the assets over time. The TCA is governed by the City's *Public Sector Accounting Board 3150 – Accounting for Tangible Capital Assets* policy (May 2008). The City's TCA 2008 policy requires a minimum threshold of \$5,000 for a single asset or \$25,000 for a pooled asset with a minimum of two assets in the pool in order for an asset or asset group to be included in the TCA registry.



Over time it is expected that the Asset Management Plans and the TCA registry will be brought into alignment. A variance will remain in the valuation of the assets due to different regulatory requirements and the omission of some low capital value assets from the TCA registry.

## 6. BUDGETING

The City will integrate outputs from the commission and Local Board Asset Management Plans into its long-term financial planning and budgeting process.

The Asset Management Plan(s) (AMP) will be referenced by their respective commissions or Local Boards (as applicable) in the preparation of annual budget submissions to assist with:

1. Identifying all forecasted revenues and expenses (including operating, maintenance, replacement and decommissioning) associated with upcoming infrastructure asset decisions;
2. Verify progress made on the Asset Management Plan(s) to identify potential gaps;
3. Prioritize spending needs across existing infrastructure, particularly any gaps identified in the AMPs, and growth infrastructure identified for future projects and developments for the years to be budgeted for;
4. Evaluate the validity and need of each significant new capital asset, including considering the impact on future operating, maintenance and energy costs; and
5. Incorporating new revenue tools and alternative funding strategies where possible.

The budgets prepared in this manner for each commission and Local Board (as applicable) will then be processed in accordance with the broader municipal budgeting process.

Financial services staff will be involved in asset management planning to facilitate the bridge between:

- The financial strategy developed in the Asset Management Plan(s);
- The budget submission of each commission or Local Board (as applicable); and
- The overall budgets process they ultimately oversee.

Financial services and Public Works will work together to align the financial strategy developed in the Asset Management Plan with the financial plans related to the City's water and wastewater assets including any financial plans prepared under the *Safe Drinking Water Act, 2002*. The alignment will stem from a multi-disciplinary team, common analytical methods followed and common data sources being used.



## **7. ALIGNMENT WITH ONTARIO'S LAND-USE PLANNING FRAMEWORK**

Asset management planning will be aligned with the City's Official Plan, Ontario's land-use planning framework, any provincial plans as defined in the *Planning Act*, as well as other municipal documents including the Transportation Master Plan, the Master Servicing Plan and other plans outlined in the Strategic Alignment section of this policy. The Asset Management Plans will reflect how the community is projected to change and the related asset impacts. The City will achieve this with the following:

- The Commissions and Local Boards responsible for managing services impacted by development will:
  - Be consulted through the review of development applications which directly impact City infrastructure and other assets and through ongoing involvement in the preparation of the City's Official Plan;
  - Provide input to the analysis of future servicing costs; and
  - Provide an assessment regarding the financial viability of development as it pertains to the service(s) they manage.
- Those responsible for reviewing and providing recommendations to Council in regard to development applications will:
  - Consult with those responsible for managing services and assets impacted by development;
  - Develop and maintain a process to receive a Financial Impact Study (FIS) for Plans of Subdivision and development applications over a size/value to be determined; and
  - Include a summary of the FIS analysis and its implications in reports to Council on applications for Plans of Subdivision and developments meeting the criteria for financial evaluation and impact on the existing and future assets of the City.

Methods, assumptions, and data used in the selection of development or redevelopment initiatives documented in the Official Plan will be available in support of the production of Asset Management Plans.



## 8. CLIMATE CHANGE

As part of asset management planning, the City and related Local Boards (as applicable) will work to increase resilience to the negative impacts of Climate Change while striking a balance with their organizational capacity, financial constraints and stakeholder support. This will include consideration of:

- The anticipated actions to reduce, adapt to and/or mitigate the impacts of climate change to municipal infrastructure assets and their associated capital investments, operations, maintenance, levels of service and lifecycle management;
- The estimated costs of not taking actions to reduce and/or mitigate the impacts of climate change to municipal infrastructure assets;
- Greenhouse gas emission reduction goals and targets;
- Energy usage reduction goals and targets; and
- Disaster response planning and contingency funding.

In 2019 the City hired a Climate Change Officer (CCO) with the assistance of grant funding from the *Federation of Canadian Municipalities' (FCM) Climate Change Staff Grants* initiative. The CCO will help increase the City's capacity to adapt to the effects of climate change and reduce greenhouse gas emissions. The CCO will also develop and implement the City's Climate Adaption Plan which will involve operational changes leading to operational savings and reduced vulnerabilities to climate change impacts. The Climate Adaption Plan will inform the development of the Asset Management Plans while aligning with the Strategic Asset Management Policy.



## **9. STAKEHOLDER ENGAGEMENT**

The City and its related Local Boards strive to efficiently provide its various stakeholders with the municipal services they need within the bounds of regulatory requirements, the built environment and the natural environment. In order to achieve this goal, it is necessary that the City and related Local Boards (as applicable) understand the needs of their current stakeholders, consider the needs of future generations and incorporate these needs into the Asset Management Plans. The City and related Local Boards (as applicable) recognize that their stakeholders are an integral part of a successful asset management approach.

Accordingly, the City and its related Local Boards (as applicable) will:

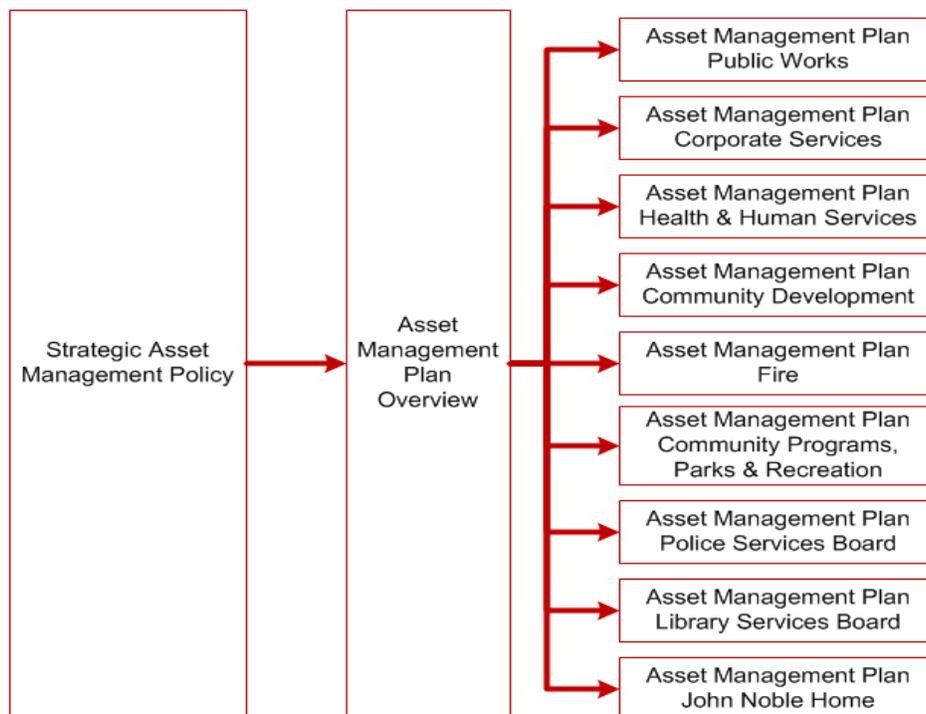
- Provide opportunities for residents and other stakeholders served by the City and Local Boards to participate in asset management planning, in accordance with the City's Corporate Policy 037 – *Community Involvement Policy*; and
- Coordinate asset management planning with other infrastructure asset owning agencies such as other municipal bodies and regulated utilities.



## 10. GOVERNANCE AND CONTINUOUS IMPROVEMENT

The City is planning to produce an overarching Asset Management Plan Overview (Overview) document in addition to Commission and Local Board specific detailed Asset Management Plans. The Overview will provide a summary of the key messages and highlight significant issues from the detailed Asset Management Plans. The detailed Asset Management Plans will provide specifics of asset condition, levels of service, lifecycle requirements, risks and future funding needs for their respective asset portfolios. In addition they will also outline any required improvements in existing processes, policies or programs to address gaps in asset management knowledge and/or gaps in asset lifecycle activities. The governance structure of these three documents is as shown in Figure 3. At this time the exact number and asset portfolio of future Asset Management Plans is unknown and may vary from those shown in Figure 3.

The Strategic Asset Management Policy, Asset Management Plan Overview and Asset Management Plans (once completed) will be updated a minimum of every 5 years. These ongoing updates will include a review of all sections to determine what is working well, and what areas require improvement(s).



**Figure 3 Governance Structure of Asset Management documents**



The City will ensure that an Asset Management Plan for the core municipal infrastructure assets, meeting the requirements of O.Reg. 588/17 will be prepared by July 1, 2021. The City and its Local Boards (as applicable) will ensure that Asset Management Plans for the remaining municipal infrastructure assets, meeting the requirements of O.Reg. 588/17 will be prepared by July 1, 2023. The City and its Local Boards (as applicable) will ensure that every Asset Management Plan will be re-issued, as required, with the inclusion of proposed level of service targets for its infrastructure assets by July 1, 2024.

Annual reviews of plan implementation progress will occur on or before July 1 of every year, starting July 1, 2022. Responsibilities for the various stakeholder groups are as per Table 2.

Table 2 uses the RACI method to define and document governance roles and responsibilities for Asset Management at the City and its related Local Boards (as applicable). The four levels of responsibility are defined as follows:

- **Responsible:** The people or groups who will do the work. They must complete the task or objective or make the decision.
- **Accountable:** The people or stakeholders who must sign off or approve when the task, objective or decision is complete.
- **Consulted:** The people or stakeholders who need to give input before the work can be completed and approved.
- **Informed:** The people or stakeholders who need to receive updates on progress or decisions but do not need to contribute directly to the task or decision.

“Working Group” in Table 2 refers to a Corporate Working Group made up by representatives from all City Commissions and Local Boards with an emphasis on representation from the departments which own and/or maintain infrastructure assets as well as representatives from Finance, Planning and Communications. The group is led by the Chief Administrative Officer or their designated representative. Local Boards in Table 2 would be applicable to Local Boards that adopt the Strategic Asset Management Policy.

**Table 2 Governance Roles and Responsibilities**

Item	Responsible	Accountable	Consulted	Informed	Priority Level (1 = high to 3 = low)	Frequency
Comply with AM Policy and Ontario Regulation 588/17	CAO ELT/Local Boards	Council	Asset Owners Working Group	Customer	1	Ongoing
Development of Strategic Asset Management Policy	ELT/Local Boards Working Group	Council CAO	Asset Owners	Customer Province	1	5 year cycle
Support ongoing efforts to improve and implement Strategy and Plans	Working Group Asset Owners	CAO ELT/Local Boards	Council	Customer	1	Ongoing
Strategic Alignment with other City and Local Boards' documents and plans	Working Group Asset Owners	CAO ELT/Local Boards	Council Finance Planning Communications Asset Owners	Customer	2	Ongoing
Communicate Asset Management Vision	CAO ELT/Local Boards	Council	Working Group Asset Owners	Customer	2	Ongoing
Policies and practices for a uniform approach across the organization	Working Group Finance Planning Communications	CAO ELT/Local Boards	Council Asset Owners	Customer	1	As required
Development of Asset Management Plans	ELT/Local Boards Asset Owners	Council CAO	Finance Planning Communications Customer Working Group	Province	1	5 year cycle
Development of Asset Inventory Listing	ELT/Local Boards Asset Owners	CAO	Finance Working Group	Council Customer	2	Ongoing
Development of Levels of Service targets	ELT/Local Boards Asset Owners	Council CAO	Customer Communications Finance Working Group	Province	1	5 year cycle
Annual Progress Reviews for Level of Service targets	ELT/Local Boards Working Group Asset Owners	Council CAO	Communications Finance	Customer Province	1	Every year prior to July 1



## **11. COMPLIANCE**

### **PROVINCIAL GOVERNMENT**

The Strategic Asset Management Policy and Asset Management Plans of the City of Brantford and its Local Boards will be assessed for compliance with the requirements of Ontario Regulation 588/17 – Asset Management Planning for Municipal Infrastructure.

### **FEDERAL GOVERNMENT**

The Strategic Asset Management Policy and Asset Management Plans of the City of Brantford and its Local Boards will be assessed for compliance with the key criteria from the *Infrastructure for Jobs and Prosperity Act, 2015*.

### **REGULATORY COMPLIANCE**

The City of Brantford and its Local Boards (as applicable) are committed to compliance with all relevant legislation with regard to managing their infrastructure assets.