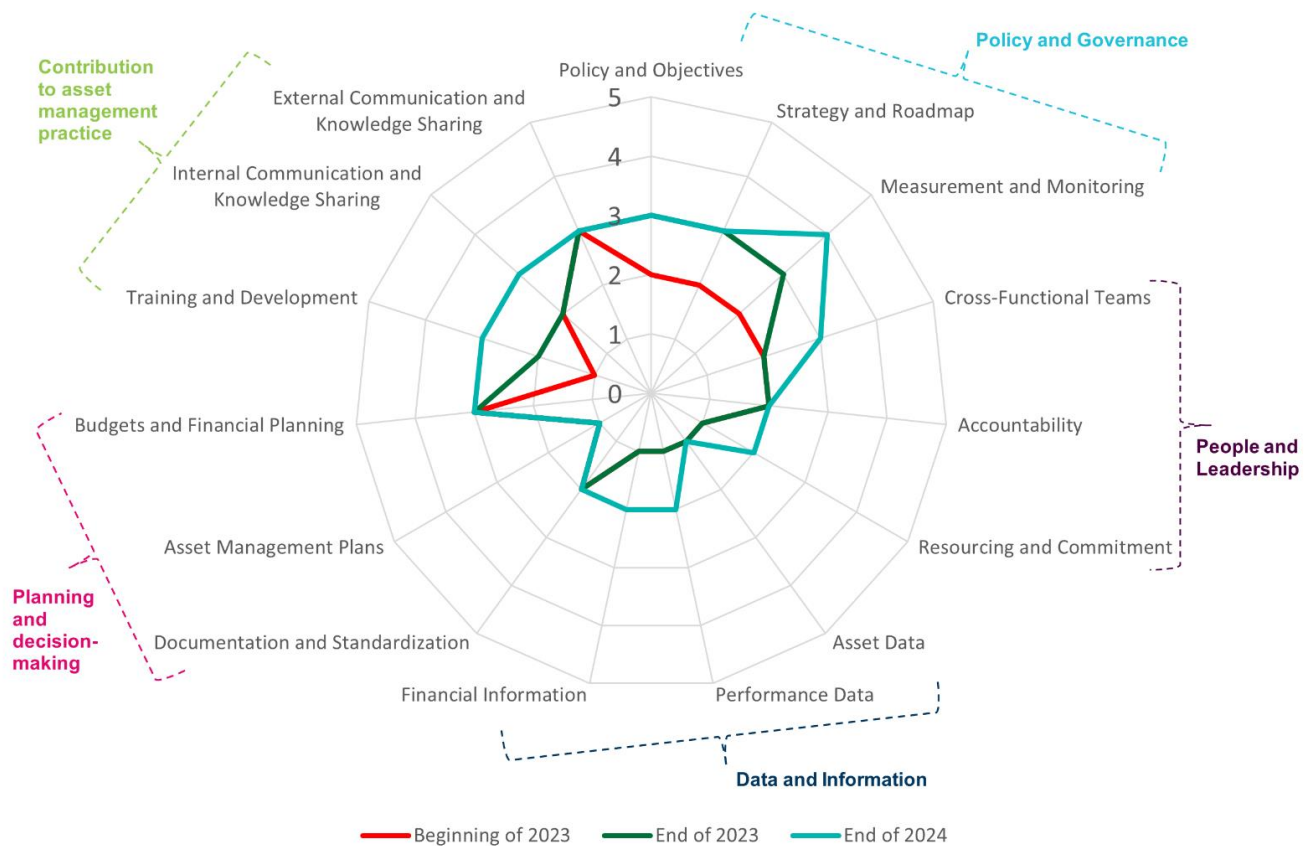


Attachment 3 – Asset Management Maturity Assessment 2024

The following chart shows the improvement in Saanich's AM maturity in 2024 based on FCM's Asset Management Readiness Scale (ARMS), which is one of the AM Program Performance Measures identified in Section 5.7 of the *AM Strategy*.

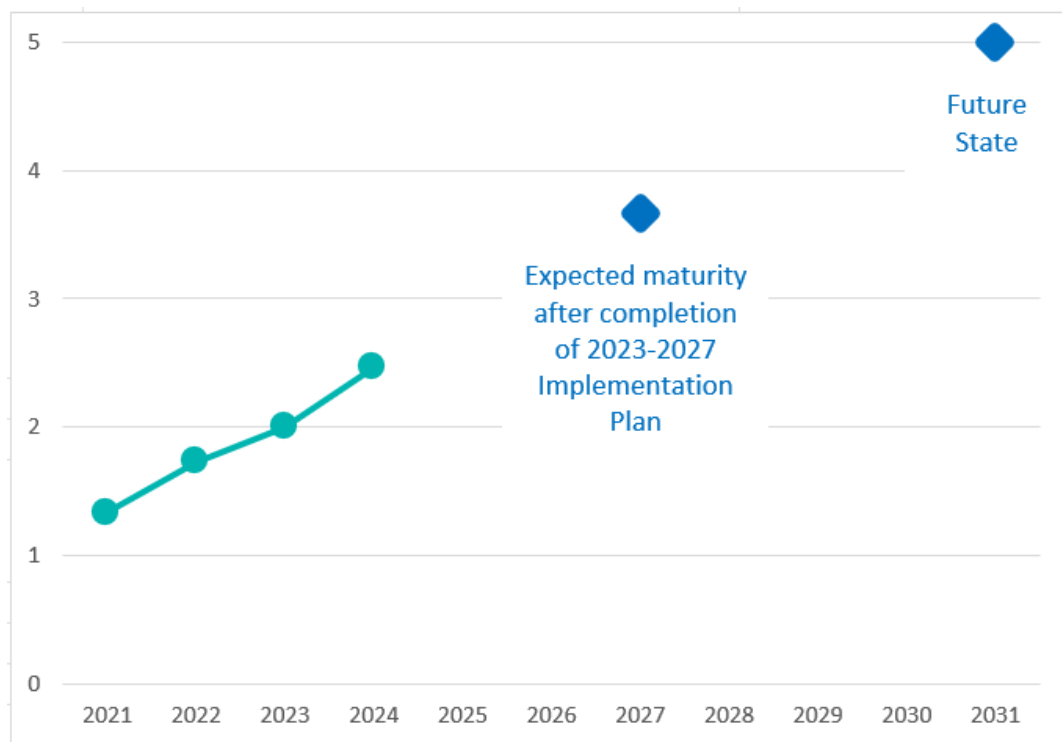
Each competency area is measured on a progressive improvement scale from Level 1 (informal) to Level 5 (advanced) as follows:

- Pre-Level 1 – Working on Level 1
- Level 1 – Initial investigation into the competency area
- Level 2 – Beginning to integrate processes and systems into daily routines
- Level 3 – Integrating processes and systems into daily routines
- Level 4 – Regular monitoring and continuous improvement; this level is roughly aligned with the requirements of the ISO 55000 standard for AM
- Level 5 – Advanced maturity beyond the requirements of the ISO 55000 standard



Saanich's AMRS average maturity assessment scores demonstrate continuous improvement over time as follows:

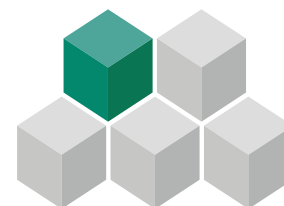
- 2021 (Pre-AM Strategy Project): Level 1.3
- 2023 (Pre-AM Strategy Approval): Level 1.7
- 2023 (End of 2023): Level 2.0
- 2024 (End of 2024): Level 2.5






The details of Saanich's District-wide maturity assessment to the end of 2024 is provided below.

Policy and governance

By developing this competency, your organization is putting in place policies and objectives related to asset management (AM), bringing those policies to life through a strategy and roadmap, and then measuring progress and monitoring implementation over time.

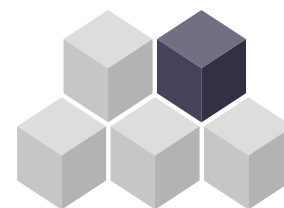


Outcomes: Select the outcomes that your organization has achieved.					
Outcome areas	Level 1	Level 2	Level 3	Level 4	Level 5
 Policy and objectives	<input checked="" type="checkbox"/> Senior management is committed to formalizing an AM program .	<input checked="" type="checkbox"/> We have drafted an AM policy . <input checked="" type="checkbox"/> Senior management and council have endorsed the AM policy .	<input checked="" type="checkbox"/> We are starting to use our AM policy to guide our actions.	<input type="checkbox"/> We manage assets and services in accordance with our AM policy and organizational objectives.	<input type="checkbox"/> We continue to validate and refine our corporate, service and AM objectives based on the evolving needs of our community.
 Strategy and roadmap	<input checked="" type="checkbox"/> We have identified the benefits that we want AM to deliver, and the benefits support organizational objectives.	<input checked="" type="checkbox"/> We have a strategy for our AM program . <input checked="" type="checkbox"/> We have a draft roadmap that outlines our approach for the next 1 to 3 years.	<input checked="" type="checkbox"/> We have a roadmap that details the actions for implementing our AM strategy over the next 3 to 5 years.	<input type="checkbox"/> We are achieving our AM policy objectives. The necessary workflows, documents, and reporting tools are in place. <input type="checkbox"/> We update our roadmap to address evolving needs.	<input type="checkbox"/> We follow our roadmap and continually improve our AM practices. <input type="checkbox"/> We document improvements to our AM practices.
 Measurement and monitoring	<input checked="" type="checkbox"/> We have identified short-term actions that will demonstrate early progress on AM.	<input checked="" type="checkbox"/> We are collecting baseline data on our current AM practices.	<input checked="" type="checkbox"/> We have established performance measures to monitor our asset management progress, outcomes, and the benefits to our community.	<input checked="" type="checkbox"/> We use performance measures to monitor AM progress, outcomes, and benefits.	<input type="checkbox"/> We monitor performance and use the feedback to prioritize and make ongoing refinements and improvements to AM practices.




Readiness level: You have achieved a readiness scale level when your organization can demonstrate achievement of all outcomes for that level.

Readiness level	Working on Level 1	Completed Level 1	Completed Level 2	Completed Level 3	Completed Level 4	Completed Level 5
	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Saanich District-wide People and leadership Assessment End of 2024



By developing this competency, your organization is setting up cross-functional teams with clear accountability and ensuring adequate resourcing and commitment from senior management and elected officials to advance asset management.

Outcomes: Select the outcomes that your organization has achieved.					
Outcome areas	Level 1	Level 2	Level 3	Level 4	Level 5
 Cross-functional teams	<input checked="" type="checkbox"/> We have identified the representation we need on our cross-functional AM team .	<input checked="" type="checkbox"/> We have a cross-functional AM team* that guides the planning and implementation of our AM program .	<input checked="" type="checkbox"/> Our AM team* works within our organization to lead, communicate, and support AM improvements and organizational changes.	<input type="checkbox"/> Our AM team* is permanent and tasked with guiding and supporting AM across the organization on an ongoing basis.	<input type="checkbox"/> Our AM team* guides and supports the ongoing improvement of AM within the organization.
 Accountability	<input checked="" type="checkbox"/> We have a champion who has been tasked with planning for our AM program .	<input checked="" type="checkbox"/> Our AM team* has a documented mandate to develop our AM program , which is outlined in a terms of reference and a one- to three-year roadmap . <input checked="" type="checkbox"/> Our AM team is accountable to senior management and council.	<input checked="" type="checkbox"/> Our AM team* is accountable for implementing our AM program . <input type="checkbox"/> AM roles and responsibilities are included in staff job descriptions.	<input type="checkbox"/> We have operationalized AM roles and responsibilities across our organization.	<input type="checkbox"/> We document changes to AM roles and responsibilities as needed to support our evolving requirements.
 Resourcing and commitment	<input checked="" type="checkbox"/> Council knows that resources must be dedicated to exploring the requirements for AM and for drafting an AM roadmap .	<input checked="" type="checkbox"/> Council demonstrates buy-in and support for AM and allocates resources (funding or staff time) to further develop the AM program .	<input type="checkbox"/> Council champions AM as a core business function and has approved funding to continue AM roadmap activities.	<input type="checkbox"/> Council funds ongoing AM monitoring and enhancement.	<input type="checkbox"/> The AM team measures and monitors progress. <input type="checkbox"/> Council demonstrates commitment to ongoing improvement of AM practices.

Readiness level: You have achieved a readiness scale level when your organization can demonstrate achievement of all outcomes for that level.

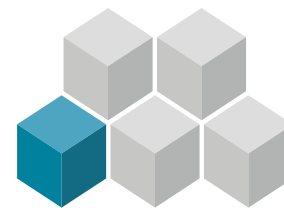
Readiness level	Working on Level 1	Completed Level 1	Completed Level 2	Completed Level 3	Completed Level 4	Completed Level 5
	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



* Note: Larger organizations may have both an AM team responsible for implementation and an AM steering committee to provide direction and oversee the work. Smaller organizations may group these functions together. This outcome may be better suited to an AM team or an AM steering committee, depending on the organization. In some small communities the AM team may be as few as two people.

Data and information


Saanich District-wide Assessment End of 2024

By developing this competency, your organization is collecting and using asset data, performance data and financial information to support effective asset management planning and decision-making.



Outcomes: Select the outcomes that your organization has achieved.					
Outcome areas	Level 1	Level 2	Level 3	Level 4	Level 5
 Asset data	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> We have asset inventory data, including approximate quantities of assets within most asset groups. <input checked="" type="checkbox"/> We have some anecdotal information on asset condition. Some age information exists. 	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> We have a basic inventory of most critical assets, including information on general asset properties such as size, material, location and installation date. <input checked="" type="checkbox"/> We are moving our data to a centralized location for use by the AM team (note: this does not require AM software). <input type="checkbox"/> We have defined critical assets and have some information on asset condition for these assets. 	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> We have a consolidated, basic inventory of all assets. <input type="checkbox"/> We have defined life cycle investment requirements for critical assets. <input type="checkbox"/> We have standardized condition rating systems defined for most asset groups. <input type="checkbox"/> We have asset condition information on all critical assets. 	<ul style="list-style-type: none"> <input type="checkbox"/> We have expanded inventory data for some assets <input type="checkbox"/> We have evaluated the life cycle investment requirements associated with critical assets. <input type="checkbox"/> We update data according to cycles defined in our AM plans or strategy. 	<ul style="list-style-type: none"> <input type="checkbox"/> We have expanded inventory data for most assets. <input type="checkbox"/> We have evaluated the life cycle investment requirements associated with most assets.
 Performance data	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> We have informal or anecdotal approaches for measuring asset or service performance. 	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> We have some information on performance of critical assets, collected from a variety of sources. 	<ul style="list-style-type: none"> <input type="checkbox"/> We have defined level of service measurements for some service areas. <input type="checkbox"/> We have captured data on current level of service performance for some service areas. <input type="checkbox"/> We have reviewed service levels and asset performance with council. 	<ul style="list-style-type: none"> <input type="checkbox"/> We have defined level of service measurements for critical service areas. <input type="checkbox"/> We communicate the results from our level of service measurement program to staff and council regularly. 	<ul style="list-style-type: none"> <input type="checkbox"/> We have defined level of service measurements for most or all service areas. <input type="checkbox"/> We continually improve how we collect data on level of service performance.

Saanich District-wide Assessment End of 2024

Outcomes: Select the outcomes that your organization has achieved.					
Outcome areas	Level 1	Level 2	Level 3	Level 4	Level 5
 Financial information	<input checked="" type="checkbox"/> We have financial information on our assets, supporting minimum PS-3150 reporting requirements.*	<input checked="" type="checkbox"/> We have major capital renewal and operating & maintenance (O&M) expenditure data for some assets. <input checked="" type="checkbox"/> We have a strategy to link AM and financial information .	<input type="checkbox"/> We have capital (new and renewal) and O&M expenditure data for most assets. <input type="checkbox"/> We have linked AM and financial information for all critical assets . <input type="checkbox"/> We can demonstrate the gaps between forecasted infrastructure needs and current spending levels.	<input type="checkbox"/> We understand the cost of sustaining current levels of service for all critical assets .	<input type="checkbox"/> We understand the trade-offs between investment and the level of service we deliver and use this to optimize our financial plans.

Readiness level: You have achieved a readiness scale level when your organization can demonstrate achievement of all outcomes for that level.

Readiness level	Working on Level 1	Completed Level 1	Completed Level 2	Completed Level 3	Completed Level 4	Completed Level 5
	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



* PS-3150 is the Public Sector Accounting Board's standard guiding the treatment of tangible capital assets.

Saanich District-wide Assessment End of 2024


Planning and decision-making



By developing this competency, your organization is documenting and standardizing how the organization sets asset management priorities, conducts capital and operations and maintenance (O&M) planning, and decides on budgets.

Outcomes: Select the outcomes that your organization has achieved.					
Outcome areas	Level 1	Level 2	Level 3	Level 4	Level 5
 Documentation and standardization	<input checked="" type="checkbox"/> Our asset planning approaches vary across the organization.	<input checked="" type="checkbox"/> Our departments follow a similar but informal asset planning approach. <input checked="" type="checkbox"/> We evaluate investment needs and priorities based on a mix of structured and ad-hoc practices and criteria.	<input type="checkbox"/> We have a structured asset planning approach, but application is inconsistent. <input type="checkbox"/> We set priorities using criteria based on organizational goals and objectives.	<input type="checkbox"/> We employ a consistent structured asset planning approach for each of our critical services . <input type="checkbox"/> We set priorities using criteria that are fully aligned with our organizational goals and objectives.	<input type="checkbox"/> We employ a consistent structured asset planning approach for all services. <input type="checkbox"/> We adapt our planning approach and criteria to align with evolving organizational goals and objectives.
 Asset management plans	<input checked="" type="checkbox"/> Our approach to asset renewal focuses on reacting to basic needs (e.g. growth, regulations and known problems). <input checked="" type="checkbox"/> We evaluate priorities based on available information, staff experience, and input from council and management.	<input type="checkbox"/> We have draft AM plans for some asset classes, with forecasted financial needs based on estimated data.	<input type="checkbox"/> We have AM plans for critical services , based on a mix of estimated and actual data. <input type="checkbox"/> Our AM plans include available information about level of service (current and target) and risk management. <input type="checkbox"/> Our AM plans identify short-term issues and priorities.	<input type="checkbox"/> We have AM plans for most services based on actual data. <input type="checkbox"/> Our AM plans include basic needs forecasting and risk management strategies for critical assets . <input type="checkbox"/> Our AM plans are based on both short- and long-term issues and priorities. They balance short-term service objectives with longer-term goals and risks . <input type="checkbox"/> We keep our AM plans up to date through normal business.	<input type="checkbox"/> We have AM plans for all services based on actual data. <input type="checkbox"/> Our individual AM plans are integrated across services. <input type="checkbox"/> Our AM plans include needs forecasts and risk management strategies for most assets. Plans address risks to both service and business goals.

Saanich District-wide Assessment End of 2024

Outcomes: Select the outcomes that your organization has achieved.					
Outcome areas	Level 1	Level 2	Level 3	Level 4	Level 5
 Budgets and financial planning	<input checked="" type="checkbox"/> We prepare annual capital and operating budgets based on historical values. <input checked="" type="checkbox"/> We deal with new needs reactively, as they occur.	<input checked="" type="checkbox"/> We prepare annual capital and operating budgets based on a mix of historical values and new priorities.	<input checked="" type="checkbox"/> We prepare an annual capital budget based on an annual assessment of current needs. <input checked="" type="checkbox"/> We have a 3-year capital plan that addresses short-term issues and priorities.	<input type="checkbox"/> We prepare annual needs-based capital and operating budgets that are based on an annual assessment of risks and current needs. <input checked="" type="checkbox"/> We have a 5-year capital plan* and update it annually. <input type="checkbox"/> We update our long-term financial plan (at least 10-year) annually and understand the risks associated with our investment gap.	<input type="checkbox"/> We prepare multi-year needs-based capital and operating budgets that are based on our short- and mid-term needs. <input type="checkbox"/> We take a structured approach to address in-cycle changes.

Readiness level: You have achieved a readiness scale level when your organization can demonstrate achievement of all outcomes for that level.



Readiness level	Working on Level 1	Completed Level 1	Completed Level 2	Completed Level 3	Completed Level 4	Completed Level 5
	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

* Communities may benefit from long-term capital plans that extend beyond five years to ten years or more.


Contribution to asset management practice

By developing this competency, your organization is supporting staff in asset management training, sharing knowledge internally to communicate the benefits of asset management, and participating in external knowledge sharing.



Outcomes: Select the outcomes that your organization has achieved.					
Outcome areas	Level 1	Level 2	Level 3	Level 4	Level 5
 Training and development	<input checked="" type="checkbox"/> Our AM training and development approach is informal and largely driven by the personal initiative of staff. <input checked="" type="checkbox"/> Some staff conduct targeted research, seeking out basic information on AM concepts and techniques.	<input checked="" type="checkbox"/> Our AM training and development requirements are defined by management based on short-term needs. <input checked="" type="checkbox"/> Selected staff are trained on basic AM concepts. <input checked="" type="checkbox"/> Council has opportunities to increase their understanding of AM concepts.	<input checked="" type="checkbox"/> We provide all staff with basic AM awareness training. <input checked="" type="checkbox"/> Some staff undergo training on advanced AM concepts specific to their roles and responsibilities. <input checked="" type="checkbox"/> Staff and council are able to communicate the value of AM in their own words.	<input type="checkbox"/> We define AM knowledge and skill requirements. A training plan is in place for all positions. <input type="checkbox"/> Council, management and staff receive role-appropriate AM training to establish needed capacity across the organization.	<input type="checkbox"/> We train select staff members as internal experts to support the ongoing development of organizational capacity. <input type="checkbox"/> Proactive, role-based training serves as a support for career development and succession planning.
 Internal communication and knowledge sharing	<input checked="" type="checkbox"/> We are aware of the need to mitigate the risk of losing information held in the minds of long-term staff.	<input checked="" type="checkbox"/> We mitigate the risk of losing information held in the minds of long-term staff, through improved record keeping.	<input checked="" type="checkbox"/> A culture of knowledge sharing is emerging internally, supported by official initiatives. <input checked="" type="checkbox"/> We collect and maintain AM knowledge resources. <input checked="" type="checkbox"/> We communicate the benefits of AM internally to staff and council.	<input type="checkbox"/> A culture of knowledge sharing exists and is supported by a mix of formal and informal initiatives. <input type="checkbox"/> We disseminate AM knowledge resources within the organization.	<input type="checkbox"/> We capture AM knowledge and it flows freely throughout the organization. <input type="checkbox"/> Staff leverage internal and industry knowledge and leading practice resources.

Saanich District-wide Assessment End of 2024

Outcomes: Select the outcomes that your organization has achieved.					
Outcome areas	Level 1	Level 2	Level 3	Level 4	Level 5
 External communication and knowledge sharing	<input checked="" type="checkbox"/> We are investigating AM-related organizations and resources.	<input checked="" type="checkbox"/> Staff or elected officials attend AM-related events. <input checked="" type="checkbox"/> We share basic information on current capital projects with the public.	<input checked="" type="checkbox"/> We are members of one or more AM organizations and actively share our AM experience. <input checked="" type="checkbox"/> We share basic information on our assets, the services we provide, and future needs with the public.	<input checked="" type="checkbox"/> We are actively involved in AM organizations and present at AM events. <input checked="" type="checkbox"/> We share information with our peers on our experience, innovations and lessons learned. <input type="checkbox"/> We rely on the data from our AM program to explain decisions to the public.	<input type="checkbox"/> We are a thought leader on AM within the municipal sector. <input type="checkbox"/> We are active in coaching others to improve the overall body of AM knowledge. <input type="checkbox"/> We communicate the benefits of AM to the public.

Readiness level: You have achieved a readiness scale level when your organization can demonstrate achievement of all outcomes for that level.

Readiness level	Working on Level 1	Completed Level 1	Completed Level 2	Completed Level 3	Completed Level 4	Completed Level 5
	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

