

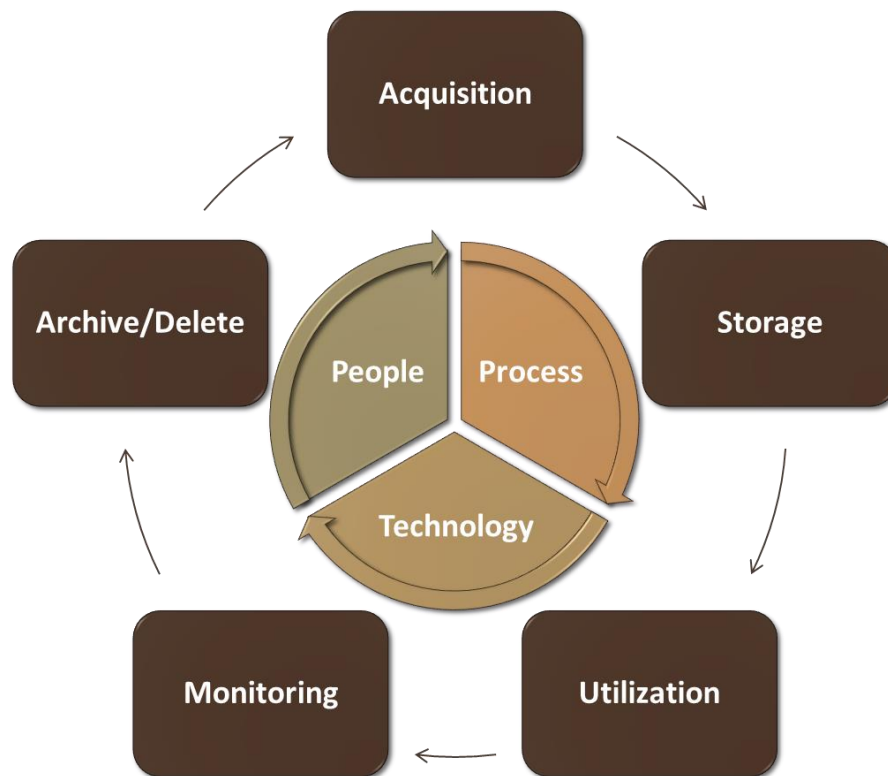
**Milestone #1 – Asset Information Planning:  
Asset Hierarchy and Gap Analysis**

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**Introduction**

Making the best, most informed asset management decisions begins with having the right asset data and information and ensuring a system of processes, people and technology to sustain the data and information around the entire life cycle. Figure 1 illustrates a fundamental relationship between asset data, people, processes and technology.

**Figure 1 – The Asset Information System and Information Life Cycle**



## Service to Asset Hierarchies and Data Management

The Milestone #1 materials and activities are intended to:

1. Organize infrastructure portfolios to improve asset management planning
2. Outline asset data and information requirements for asset management decision-making and planning
3. Identify missing asset data and information and develop data capture plans

### Activity #1 – Create Service to Asset Hierarchies

The primary purpose of Service to Asset Hierarchies is to create a ‘line of sight’ between services and the assets and asset data needed to plan and provide the services. This is important to:

- Connect desired service outcomes with asset requirements
- Understand how asset deficiencies and risks affect service outcomes
- Partition the portfolio into manageable planning units to facilitate strategic, tactical and operational planning and budgeting
- Facilitate agile and informed evidence-based decision making at every level of the organization

Materials:

1. **Hierarchy Framework Outline (Tabs 1 and 2):** Provides general descriptions for each level of the Service to Asset Hierarchy.
2. **Example Water, Wastewater, Stormwater, Roads, Fleet, and Building Hierarchies (Tabs 2a, 2b, 3, 4, 5, 6, 7):** To be used as references to assist with developing Service to Asset Hierarchies for your selected infrastructure group.
3. **Asset Hierarchy Template (Tab 9):** A blank template that can be used to complete your service to asset hierarchy. You may use one of the example templates provided and customize it instead.

Using the materials provided, organize the asset group(s) you have selected into Service to Asset Hierarchies according to what best meets your municipality’s asset management planning needs. All that is required is to enter into the template some specific examples to show how your selected infrastructure would be segmented across the different levels of the asset hierarchy or to show how your municipality’s asset hierarchy is currently designed.

## **Activity #2 – Conduct an Asset Data and Information Gap Analysis**

Materials:

- 1. Asset Data and Information Framework (Tab 10):** Provides an outline of the data and information needed for asset management planning and typical sources/storage locations for the data and information.
- 2. Asset Data and Information Gap Analysis (Tab 11):** This is a template to assess the missing data and information required for your municipality's asset management planning needs

The Asset Data and Information Framework (Tab 10) outlines the data and information needed to make asset planning decisions and determine asset and service sustainability. The first two columns of the Asset Data and Information Gap Analysis (Tab 11) mirrors the Asset Data and Information Framework and therefore, missing data and accountabilities in the gap analysis will expose gaps in the information and decision-making framework.

**Activity #2:** Complete the Asset Data and Information Gap Analysis template (Tab 11). The analysis should include whether the required data exists, where it should be sources and who is accountable for managing the data.

Note that the template has been colour coded to indicate where some data and information will be addressed in future project milestones. This will help to inform your data capture plan.

### **Additional Reference Materials**

Some additional materials are provided for information:

- 1. Information Management Audit (Tab 12):** Outlines a series of questions to explore what is the right data, information, processes, and reporting to support corporate asset management
- 2. Data Management Plan Template (Tab 13):** Provides an outline to create a specific and measurable plan for data collection and/or data improvement.
- 3. Data Management Plan Example (Tab 14):** A detailed example outlining what the contents of a data capture plan might look like

### **One-on-One Discussions**

Should you wish to schedule a one-on-one meeting for additional assistance with the activities, please do not hesitate to contact Salman Zafar to arrange a coaching session.

Please submit completed Activities #1 and #2 by Friday October 14, 2022.