

Getting across the Finish Line: Asset Management Compliance in 2025

KEY OUTCOMES

This virtual workshop, hosted by AMONTario in May 2025, brought together municipal and conservation authority staff from communities across Ontario for a half-day of presentations, discussions, and interactive breakout sessions. The workshop was focused on two key asset management (AM) topics:

- 1) Tips, Techniques, and Tools for Presenting to Council and the Public
- 2) Putting Asset Management into Action: Budget Integration

This document summarizes key outcomes and take aways for each topic, including content from the expert presenters, as well as examples and lessons learned shared by participants.

1) Tips, Techniques, & Tools for Presenting to Council and the Public

Our workshop opened with an interactive presentation from Dan Wilson, AMONTario Board member and CAO of the Township of Centre Wellington focused on how to present your asset management plan (Plan) to Council and how to communicate with the public about your Plan.

Why Engage Council

It is important to understand why you are engaging council about your asset management plan. There are two main drivers:

- **Legislative Requirement:** Ontario Regulation 588/17 requires various reporting requirements, including updating the Strategic Asset Management Policy and Asset Management Plan every 5 years, and annual progress reporting.
- **Beyond Required Reporting:** More frequent reporting to Council can help with buy-in of the asset management process and stress its importance.

Reporting Objectives

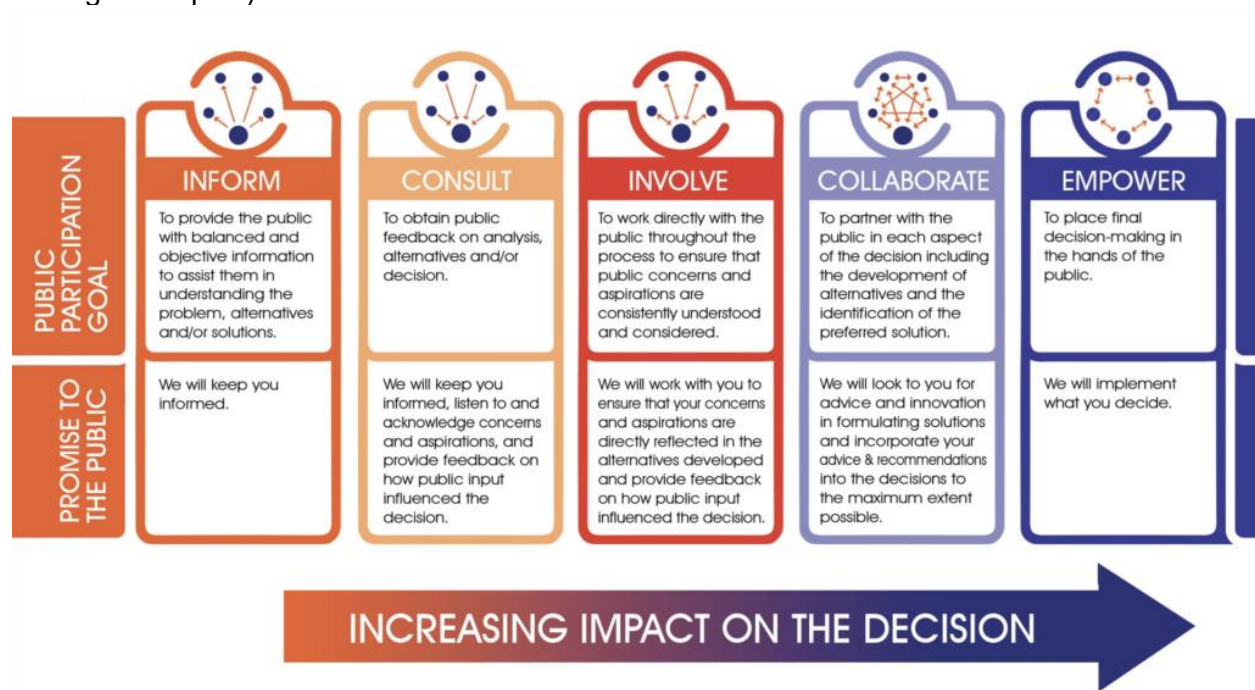
It is also important to understand what you want to communicate. The following is a list of key reporting objectives:

- Regulation compliance
- Stress importance of asset management planning
- Understand what assets are owned
- Increase asset investment
- Increased asset management buy-in
- Promote informed decision making
- Mitigate “squeaky wheel” or council pet projects
- Tie to day-to-day decisions/reports
- Understand level of service
- Enforce climate mitigation strategies
- Understand impact of growth

Public Participation Spectrum

The IAP2 Public Participation Spectrum provides the types of public engagement available for initiatives like asset management planning. The level of participation defines the role you want the public to play in different components of the process. For example, “informing” the public is simply providing the public with information, however “empowering” involves placing the final decision in the hands of the public. This spectrum can be used for something specific (like

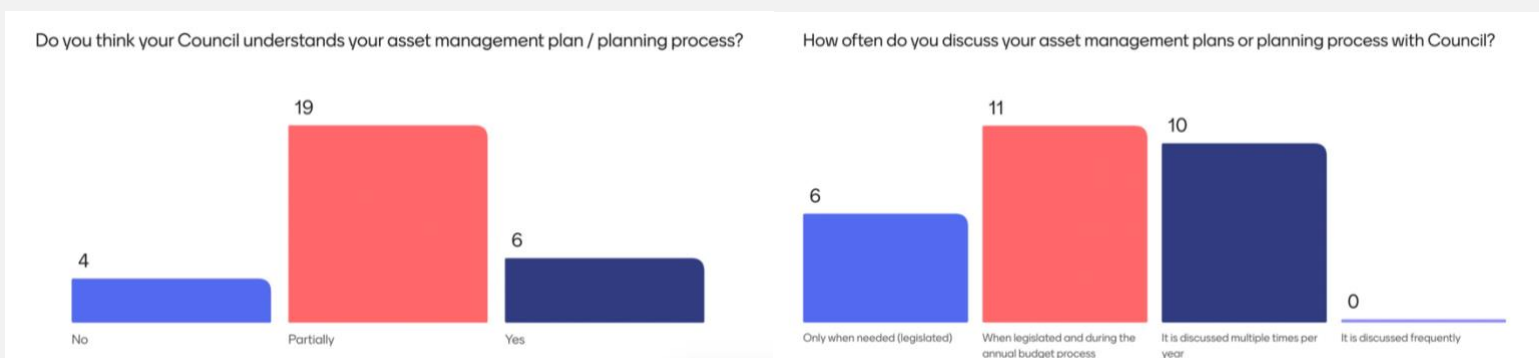
defining levels of serve) to something more overarching (like presenting the overall asset management plan).



(Image source: IAP2)

What We Heard – Goals

We asked participants to share their own perspectives throughout the workshop, starting with a question about how well Council understands their asset management plan / planning process, and how often they discuss their plans with Council.



These results make it clear that more clear, effective communication with Council's is necessary, in order to ensure that members of Council are sufficiently informed about both the details of their municipality's asset management plan, as well as about the ongoing asset management planning process.

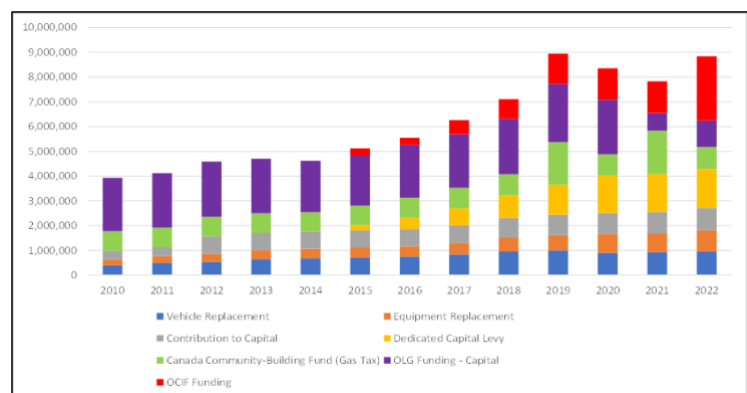
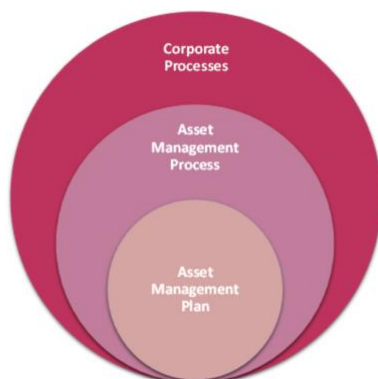
We asked participants about their objectives when presenting to Council or the public, and these were their responses:

- Endorse infrastructure funding
- Transparency
- Buy-in
- Education of AM concepts
- AM progress
- Highlighting funding gaps
- Be informative
- Preparing for budget
- Demonstrate long-term affordability
- Inform decision-making
- Emphasizing the investment in our assets
- Approval, funding, O. Reg compliance
- Alignment
- Minimize surprises
- Support rate setting
- Encourage planning and minimize overall life cycle costs
- Funding gap issues
- Understanding of full lifecycle costing of infrastructure
- Reflecting reality
- Future state condition, service levels
- Understanding and buy-in
- Budget tie-in
- Develop greater understanding
- Long-term focus
- Support infrastructure funding

Tips & Techniques

To communicate effectively about your asset management plan, AMONTario's experts shared the following tips:

- **Clear, Concise, & Confident Delivery:**
 - Tell a story;
 - Balance visuals/text/punchlines;
 - Include details in appendices, not in the body of the plan;
 - Stress importance of the asset management recommendations; and
 - Keep it simple
- **Engaging Visuals:**
 - Make the visuals tell a story
 - Draw the reader to specific areas and punchlines
 - Examples:



- **Clear & Attainable Recommendations:**
 - Avoid confusion and not getting Plan approval by having clear/attainable recommendations. This approach helps to have the Plan taken seriously.

- **Performance Measurement:**
 - Showing progress/success can assist with council commitment to the Plan recommendations. Plan recommendations and level of service progress.
- **Continuous Improvement:**
 - Commitment through the Strategic Asset Management Policy.
 - Beyond compliance, how can asset management planning help your municipality?
 - Asset management is a journey not a destination.

What We Heard – Successful Strategies

Through a series of interactive breakout groups, we asked participants to share their own successes in presenting to Council and engaging the public about their asset management plans. Participants had experienced success with many of the strategies recommended by our experts and also had many tips of their own to share. The following are examples of successful communication strategies shared by workshop participants.

Successful Strategies:

- Use simple plain language (and repeat key messages!)
- Make connections to Council's strategic priorities (and your Strategic Plan) whenever possible (Council will see AM as supporting their priorities)
- Visuals/graphics for clarity and engagement (use real photos of local municipal assets whenever possible)
- Provide scenarios to support decision-making and public engagement
- Report back to residents when you have requested input (bring all decisions back)
- Use PowerPoint to provide high-level summaries (but keep slides minimal and keep content simple)
- Provide background context
- Engage with Council regularly, not just when looking for approval for your Plan
 - Provide opportunities for education (e.g., during onboarding)
- Make clear links between AM and the budget process (and present these to Council)
- Share relevant examples from other municipalities

2) Putting Asset Management into Action: Budget Integration

In the second part of our workshop, Margaret Karpenko, AMONTario Board member, and Chief Financial Officer/Treasurer for the City of North Bay emphasized why it is important to integrate AM into the budget process, and then facilitated a panel discussion focusing on local approaches to AM/budget integration. The panelists were:

- Dan Wilson, Township of Centre Wellington
- Leanne Brannigan, Region of Peel
- Vineet Bhatia, Regional Municipality of Muskoka

The following are recommendations from these municipal experts.

Why it is Important to Integrate Asset Management into the Budget Process

- To drive better financial planning and resource allocation

- To create line of sight between asset management with capital and operating budgets, thereby reducing the confusion
- To create a practice and culture of fact-based decision-making and timely investments
- To create efficiencies and synergies, and to optimize resource allocation

Considerations

- Budget integration with asset management involves aligning asset management strategies with budgeting processes to ensure that financial planning supports asset-related decisions.
- Funding strategies ensure the right funding source is aligned with the required investments.

Tips & Techniques

- Multi-year outlook of upcoming asset investments allows for expansion of the capital budget to 10-year outlook.
- Standardized project planning process with adding asset management condition and risk reports
- Enhanced business processes to create robust, defensible capital plans.
 - Capital plans may include life cycle strategy graphs or heat maps for asset category
 - Capital plans are supported by condition assessments and detailed operating costs
- Create projects that cross over asset types
 - Coordinating pipe replacements with road rebuilds
- Align funding sources and timing of available 3rd party grants
 - Sometimes this can be a challenge when application-based grants push or pull with the findings in the Plan
- Create a culture that removes data silos, improves stakeholder engagement, and considers technological barriers or improvements.

What We Heard – Municipal Approaches

Through another series of interactive breakout groups, participants were asked to share their own approaches to integrating asset management into the budget process, with a focus on one of the following topics:

- 1) Policy & Governance
- 2) Processes
- 3) Tools & Systems

Each discussion was guided by a series of questions. The highlights are summarized below.

1) Policy & Governance

How has your municipality integrated (or is planning to integrate) asset management planning into corporate finance policies or strategic plans?

- It is crucial to mention asset management in your Strategic Plan—this stresses the importance of AM at the corporate level
- Coordinate timing: ideally your Plan will be approved prior to the budget year to support the budget process (and help make the case for specific budget items)

How do you ensure cross-departmental accountability and ownership of the AM Plan?

- Create a multi-department AM committee
 - All department heads have a role to play in the AM team
- Ensure that department heads understand what AM is and why it is important
- Work closely with subject matter experts to ensure accuracy of information
- AM team engages with other departments during project costing discussions

What challenges did you face in gaining council or senior leadership buy-in, and how did you overcome them?

While many participants were fortunate to not have experienced buy-in challenges. A few common challenges did emerge:

- Lack of AM knowledge
- Balancing Council “pet projects” with priorities identified through AM process

The solution to both of these challenges was additional training and information about AM to build understanding and confidence in the process.

2) Processes

What are the key steps/milestones in your annual AM planning process?

Some key milestones identified by participants, thinking specifically about integration with the budget process were as follows:

- Updates to asset data
 - What work has happened, changes to condition and risk
 - Review of available data, identifying gaps
- Review/develop/finalize levels of service (LOS) and proposed LOS (to meeting July 1, 2025 requirements for O.Reg. 588/17)
- Update the capital budget with increases or decreases necessary for state of good repair (SOGR)
- Lifecycle analysis of assets (& update changes based on progress made from maintenance and/or rehabilitation of assets)
- Update the operational budget based on needs from SOGR/Strategic Plan, etc.

How have you integrated specific AM planning elements (e.g., LOS, lifecycle analysis, risk) into the annual financial budgeting process?

One participant shared a robust example of how they manage this process.

- Their AM team leads the process around capital budget planning.
- Each project, and its business case, is presented by the SME to the AM team
- Each project needs to be supported by the asset management plan
- Each project is then scored by each member of the team

How are you leveraging data within the AM planning process to drive evidence informed budget decisions?

- Developing different scenarios using risk assessments
 - Using these scenarios to show how changes to short-term and long-term asset needs in different scenarios
- Using a risk matrix in decision-making, and ensuring that it has appropriate strategic weight

3) Tools & Systems

What tools or software are you using to support asset management planning and the integration with finance/budgeting software?

The most common software mentioned were:

- Excel (and other Microsoft products)
- GIS
- PSD CityWide
 - FMW Budgeting (now Citywide Budgeting)
- Predictor
- Questica
- FME
- Specific service area software

How have you approached selecting or customizing asset management tools /software for your organization's needs?

- Start with a good understanding of your needs (across departments)
- Involvement of all users and stakeholders
- Understand how software will integrate with other software used by the municipality

How do you ensure data quality and consistency across your tools?

- Data governance
 - Standard operating procedures (SOPs)
- Regular review
- Engagement of all key stakeholders

Resources

The following resources were recommended during the workshop to support the integration of asset management into the budget process.

- AMONTario excel-based AM templates:
 - Toolkits and tips sheets (focused on Asset Hierarchy & Data Gaps, Levels of Service, Risk Assessment (including Climate Vulnerability Assessment), and Financial Strategy/Lifecycle Costing), are available [here](#)
 - *New* Simplified LOS Toolkits are available at the links below:
 - [Simple LOS Toolkit for General Assets](#)
 - [Simple LOS Toolkit for Facility Assets](#)
 - [AMONTario Simplified LOS Toolkit User Manual](#)
- **The Joy of Governing** – Government of Yukon
<https://yukon.ca/sites/default/files/cs/cs-the-joy-of-governing.pdf>
- **Credit Valley Conservation Lifecycle Costing Tool** (planned update in 2025)
<https://cvc.ca/document/life-cycle-costing-of-restoration-and-environmental-management-costing-natural-assets-in-peel-region/>
- **FCM: Questions to Ask Before Your Municipality Considers Asset Management Software**
<https://data.fcm.ca/documents/resources/mamp/questions-to-ask-before-your-municipality-considers-asset-management-software-mamp.pdf>