

Staying on Track: From Compliance to Impact

KEY WORKSHOP OUTCOMES

This virtual workshop, hosted by AMONTario in November 2025, brought together municipal staff and other asset management stakeholders 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) Annual Progress Reporting
- 2) Maturity Assessment & Asset Management Roadmap

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.

EXECUTIVE SUMMARY

Part 1: Annual Progress Reporting

Ontario municipalities must complete an annual AM progress review starting July 2026. The regulation requires reporting on progress, impediments, and strategies. However, progress reporting brings value beyond just compliance and is “the bridge between planning and doing.”

Why It Matters

- Keeps AM visible and aligned across staff, leadership, and Council.
- Supports continuous improvement and informed decision-making.
- Helps connect asset condition, service levels, and financial sustainability.

What Meaningful Progress Looks Like

Participants emphasized:

- Better processes and data.
- Shifting from reactive to proactive investment.
- Integrating climate impacts.
- Demonstrating improvements in LOS, maturity, and stewardship.

Key message

Use the report as a communication tool and a way to keep the AM journey alive, not just to achieve compliance.

Part 2: Maturity Assessment & Roadmap Development

Aman Singh (SLBC Inc.) highlighted ISO 55000 and the IAM 10-box model as foundations for assessing AM capability. ISO 55000 is described as a “playbook for how an organization should manage their infrastructure.”

Roadmap Essentials

- Prioritized improvement initiatives.
- Clear implementation steps.
- Resource estimates.
- Alignment with corporate initiatives.

Municipal Lessons

Key lessons from municipal panelists included:

- Enterprise-wide assessments improve consistency.
- Third-party assessments add objectivity and credibility.
- Adequate resourcing is essential to avoid backsliding.
- Maturity results strengthen business cases and internal communication.

Challenges & Solutions

Participants identified common barriers: limited resources, AM fatigue, lack of change management, short-term thinking, and overly complex roadmaps. Common solutions included:

- **Prioritization:** Focus on high-value, high-risk actions.
- **Phased implementation:** Build momentum through manageable steps.
- **Governance & documentation:** Reduce reliance on single champions.
- **Capacity building:** Training, cross-department collaboration.
- **Demonstrating value:** Use data to show service and financial impacts.

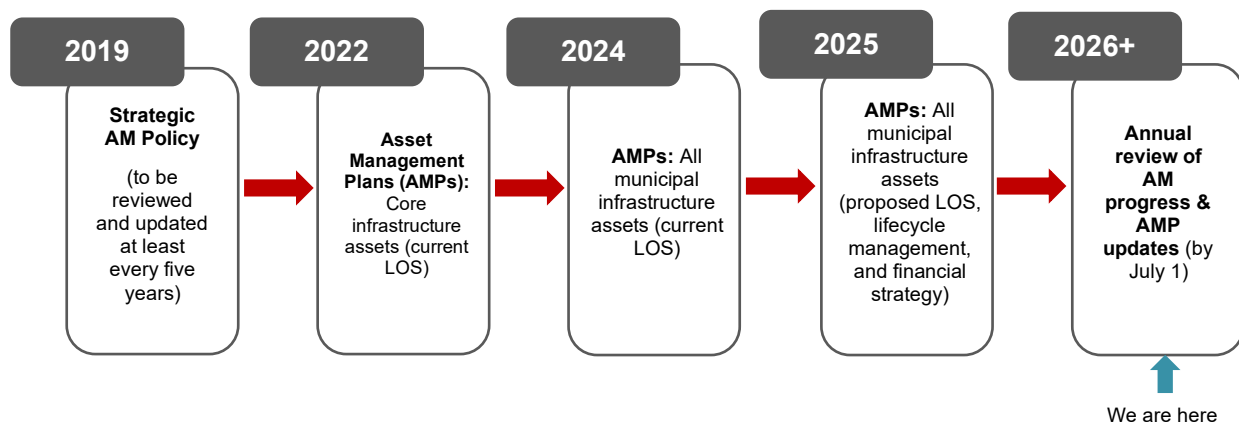
DETAILED OUTCOMES

Part 1: Annual Progress Reporting

Our workshop opened with an interactive presentation from Khaled Shahata, AMONTario Board Chair and Lead Engineer, Asset Management with the Ontario Ministry of Transportation, focused on “Keeping the Momentum: Annual Progress Reporting for Asset Management.”

Progress Reporting Requirements

Annual progress reporting is a requirement included in *Ontario Regulation 588/17: Asset Management Planning for Municipal Infrastructure* (O.Reg. 588/17). The diagram below provides a snapshot of the regulatory requirements, highlighting Ontario’s asset management journey to date.



Regarding progress reporting, the regulation states:

“9. (1) Every municipal council shall conduct an annual review of its asset management progress on or before July 1 in each year, starting the year after the municipality’s asset management plan is completed under section 6 [the July 1, 2025 requirement].

(2) The annual review must address,

- (a) the municipality's progress in implementing its asset management plan;
- (b) any factors impeding the municipality's ability to implement its asset management plan; and
- (c) a strategy to address the factors described in clause (b)."

However, there are benefits to reviewing and reporting to Council on progress that go beyond the regulatory requirement, and ways to make this regulatory requirement meaningful to your municipality. Progress reporting is the bridge between planning and doing.

Why Progress Reporting Matters

Beyond simply meeting the regulatory requirement, progress reporting can help to strengthen your asset management program. An annual check-in helps:

- Keep the asset management journey visible and active.
- Maintain alignment between staff, leadership, and members of Council.
- Show where progress is occurring, and where support is needed.

The progress report is an opportunity to learn, adjust, and sustain the momentum on asset management that has been built over the past five plus years, and to focus on continuous improvement. This requirement also provides an opportunity to continue to engage Council about asset management. Therefore, this report can be treated as both an opportunity for accountability and a strategic check-in.

What Does “Progress” Mean?

Progress is more than simple reporting on “we did what we said we’d do;” it is about asking:

- Where are we in the journey? (Policy, AMP, maturity, programs, continuous improvement)
- What’s working and what isn’t?
- What’s impeding us?
- What corrective or forward-looking actions are needed?

Trying to answer these questions provides an opportunity to continue to keep the conversation about asset management going with staff across the organization and makes it clear that asset management is an ongoing process, not a one-time exercise.

How to Make Progress Reporting Meaningful

Since O.Reg. 588/17 is not very prescriptive about what content needs to be included in an annual progress report, the report can be customized to your municipality’s needs. Some suggestions to make the progress report more meaningful to your municipality are:

- Tie progress to recommendations in your AMP and asset management program.
- Establish consistent metrics to tell your story.
- Include examples of decisions that led to positive outcomes.
- Use visuals to show trends, gaps, and achievements.
- Align with Council priorities and strategic plans.

Municipal Case Studies

Next, we heard from three municipal panelists who had already completed their annual progress reports; they each shared an overview of their approach and process, as well as the goals that informed them. Each municipality’s approach was different and tailored to their unique context

and needs. These perspectives show the flexibility in the progress reporting requirements, and how the requirement can be tailored to support internal objectives. The panelists were:

- Anna Hantzis, Manager, Corporate Asset Management, York Region
- Meagan Wheeler Cuddihy, Program Manager, Capital Planning and Strategic Asset Management, City of Ottawa
- Cassandra Pacey, Manager of Asset Management, City of Waterloo

Below is an overview of the respective approaches of each municipality.

York Region

York Region has a very collaborative, integrated approach to asset management, which is reflected in how it has addressed the progress reporting requirement.

York decided to go beyond the regulatory requirements and take a more fulsome approach. They looked at what information was already available, and how to support their overall program goals to decide what would make a more complete update, and decided to incorporate the following information:

- State of Infrastructure: an annual report was already going to Council, so it made sense to incorporate that information into the progress report.
- Financial updates: the budget is tabled annually, so York decided to also incorporate the 10-year outlooks included in the annual budget, meaning that the progress report will include an annual rolling update.
- Risk management: a rating of low, medium, and high was applied to each service area portfolio, and for assets in poor and very poor condition, there was an explanation about impacts on service delivery.
- Current pressures and priorities facing Council: with a focus on impacts on ability to deliver services, including any changes to LOS and performance.
- Advancing AM practices: A report on internal progress and York’s continuous improvement plan.

These elements are summarized in the slide below on the left, from York’s presentation. The result was a 15-page report, with additional supplemental appendices (resulting in a total length of 92 pages). The table of contents is included in the slide below on the right. York’s full progress report is available [here](#).



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City of Ottawa

The City of Ottawa had different goals and priorities for their annual report, which informed their process. These goals are:

- Continue to educate Council on existence of Corporate Asset Management (CAM) Policy and AM Plans for context and awareness.
- Fulfill regulatory obligation of O. Reg 588/17.
- Prepare the way for AM focused Councillor on-boarding (early 2027) and continued AM work in 2027 and beyond.

The Ottawa CAM team did not have an established reporting slot in the regular legislative agenda, so in addition to meeting the regulatory requirement, the annual report is an opportunity to re-establish communication with Council.

Ottawa also wanted to keep the process succinct and manageable for staff, so that they can focus their capacity on AM progress rather than data collection. The slide below, from Ottawa’s presentation, shows the City’s annual report template.

AMPs Annual Review Template

Section	Description
1. Background	List the current AMPs and notes the provincial regulatory requirement for an annual review.
2. Progress Review	This section covers the provincial requirement to address the municipality's progress in implementing its asset management plan.
2.1 Financial Review	Compares the 2025 AMPs projected funding to the City's latest funding forecast.
2.2 Service Area Updates	Summarizes major changes over the past year that would affect AMPs. Includes: LRF Updates, TRIP Updates, OGI by Area Update, Relevant Auditor General reports, Service area master plans, External (e.g., new provincial legislation). Also references reporting provided by service areas, such as:
2.3 AM Initiatives	Summarizes AMS initiatives completed/underway, such as: CAM Steering Committee meetings, Councillor on-boarding package, AM Strategy, Audit responses/actions.
2.4 AM Summary	Summarizes AMs in Council reports over the past year.
3. Impediments to Progress and Mitigation Strategy	This section covers the provincial requirement to address any factors impeding the municipality's ability to implement its asset management plan and a strategy to address the factors.
3.1 Summary Table	Summarizes significant challenges and strategies to address them.

Asset Management Implications	Number of Reports (June 2025 - June 2026)
None	250
Low impact	100
Medium impact	25
High impact	10

At a high-level, the categories that Ottawa plans to focus on in their report are well aligned to the O.Reg. 588/17 requirements:

- Progress implementing AMPs (changes over the past year impacting AMP findings).
- Factors impeding implementation.
- Strategies to address impediments.

Through ongoing communication with Council, the Ottawa CAM team is hoping to make the connection between service expectations and policy actions or changes, and how this can impact the demand for or availability of resources, and how this is all a part of ongoing asset management planning at the City.

City of Waterloo

The City of Waterloo’s approach falls between that of York Region and City of Ottawa in terms of level of detail. Waterloo has a history of annual reporting; they have been sharing report cards with Council every December since 2020. Typically, these reports would include updates and improvements by service area. In 2025, Waterloo also introduced a story about the assets to make the assets more relevant and relatable to Council and residents. The slide below provides

a snapshot of these report cards, and the content that has typically been included in reports to Council.

Detailed Review

- Developed the report cards in 2020
 - Shares updated information on the funding gap, strategy, asset performance, LOS metrics
 - A featured story (*new in 2025*) to help explain our assets in a way that bridges the technical with the activities the assets support
- Results shared with Council every December.

<https://www.waterloo.ca/en/government/asset-management.aspx>

2

For the annual July 1 reporting requirement starting in 2026, the Waterloo team decided to build on these report cards and incorporate some additional updates. The report focused on the O.Reg. 588/17 requirements, with some additional content based on internal needs and discussions:

- General AM updates: timing of key AM documents.
- Successful implementation: areas of successful implementation and how performance is measured.
- Factors impeding process: consistent areas identified through subject matter expert (SME) meetings. (e.g., insufficient rehabilitation and replacement funding, deliverability, staff capacity)
- Strategies to address impediments.

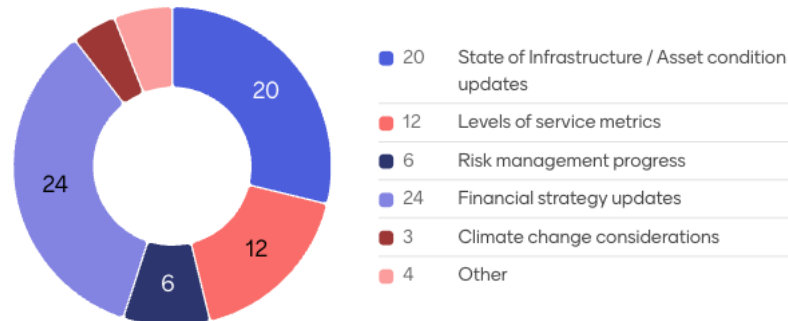
Waterloo decided to use the annual progress reporting requirement as an opportunity for additional internal engagement and ongoing communication with Council to increase awareness about AM priorities and challenges.

We also asked participants to share their own perspectives throughout the workshop. The following section summarizes the results of the participant engagement.

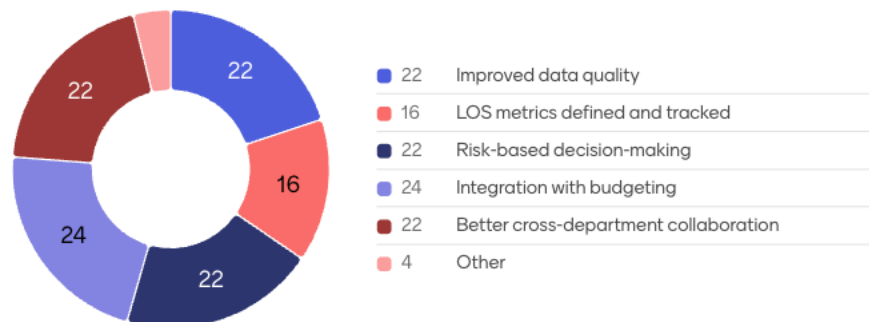
What We Heard – Progress Reporting

Using Mentimeter, the participant engagement started with questions about what should be included in the annual progress report and what meaningful progress looks like for their municipality, as shown in the figures below.

What should go into your annual progress report?



What does meaningful progress look like for your organization?



The participants who selected “other” when asked about meaningful progress provided the following responses:

- Including climate mitigation and adaptation.
- Less emergency or unplanned investments in assets. Shift to proactive.
- Meaningful progress represents how AM as a system is improving alongside better processes, data quality, and decisions.
- Maturity assessment results, improvement strategies, and progress on implementing them to demonstrate that your organization increases AM capabilities and capacities.
- Embrace infrastructure deficit and focus on identifying and optimizing priorities. There will always be limited financial resources.
- Focus on sound asset investments by making the right investments at the right time rather than taking the worst-first approach.

We also asked participants how the report might demonstrate value, and not just list activities. Responses fell into the following five categories:

- **Align with corporate and growth objectives** (showing how AM supports Council’s broader goals)
 - a. Link progress to corporate objectives
 - b. Align progress with growth objectives and financial sustainability

- c. Use it to drive communication and alignment
 - d. Include an AM improvement roadmap and demonstrate progress along it
- **Connect asset management to the budget and long-term financial plan** (connecting AM to dollars and long-term affordability)
 - a. Link AM outcomes to annual budget process and decision making
 - b. Ensure the funding gap is visible
 - c. Link service decisions and willingness to pay
 - d. Understand delivery and what is possible with available funding
 - e. Project performance over 10+ years
- **Translate asset data into service impacts and risk** (translating asset data into meaningful service outcomes)
 - a. Directly link assets (condition, funding, etc.) to services Councillors and residents care about
 - b. Show the impact of Council decisions on long-term sustainability
 - c. Educate and increase awareness of connections between decisions and outcomes
 - d. Understand risks and impacts to service delivery
- **Demonstrate measurable progress and stewardship** (showing advancement, not just listing continuous improvement items)
 - a. Demonstrate progress and improvement in AM practices
 - b. Apply actions and outcomes taken from previous reports
 - c. Show achievements not just needs
 - d. Benchmark progress with similar municipalities
 - e. Demonstrate stewardship of public assets
- **Support informed decision-making and trade-offs** (helping Council navigate difficult decisions)
 - a. Promote continuing discussions about tough choices
 - b. Identify value vs. effort
 - c. Talk about other ways to reduce the gap (e.g., decommission assets)
 - d. Promote awareness of connection between capital investments and future operating costs
 - e. Ask for more asset management resources

Finally, when asked about how they will show progress based on specific recommendations in their AMP, participants shared the following examples:

- Provide updates on specific recommendations
- Report on data quality improvements
- Demonstrate improved LOS documentation and metrics (specifically technical LOS)
- Show new infrastructure, services, and programs integrated into AM planning
- Demonstrate overall asset condition improvement
- Itemize actions to reduce the funding gap through non-financial strategies
- Incorporate climate change financial impacts
- Share success stories for each service area
- Progress on maturity related improvement strategies
- Emphasize the importance of preventative maintenance (on a level playing-field with replacements)

Annual Progress Reporting: Key Messages

To summarize the results of the presentation from Khaled, the panel discussion, and the participant feedback, the following key messages can guide other municipalities as they work on their own Annual Progress Report:

- **Not just compliance:** use the regulation to strengthen your AM program.
- **Communication tool:** use the report to drive conversations about AM, both with staff and with Council.
- **Keep it simple:** communicate a few key messages in a way that will resonate with Council; build on what you are already doing and reporting.
- **Keep the AM journey alive:** align teams on service, risk, investment, sustainability; focus on continuous improvement and AM as a journey, not a destination.

Part 2: Maturity Assessment & Asset Management Roadmap

Part 2 of the workshop opened with a presentation by Aman Singh, Senior Partner with SLBC Inc, which focused on the development of a maturity assessment and asset management roadmap.

Development of a Maturity Assessment & Asset Management Roadmap

SLBC's presentation addressed the following topics:

- Key asset management standards (ISO 55000 and the IAM 10 box model)
- Asset management maturity assessment methodology, and
- Considerations and benefits of an AM improvement roadmap

Asset Management Standards and Framework

ISO 55000

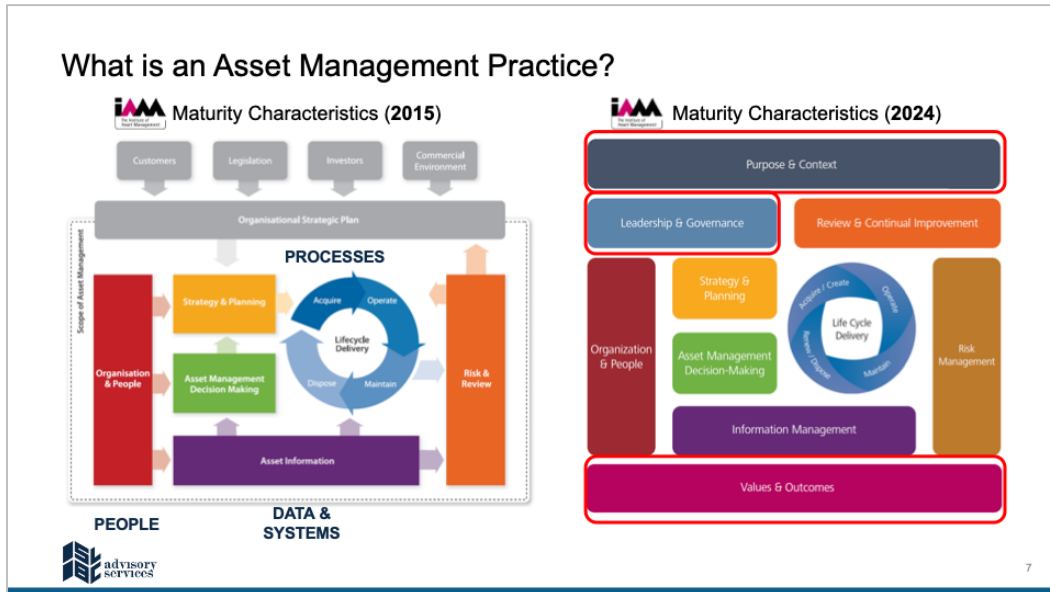
Aman provided an overview of the ISO 55000 standard, since this standard can form the foundation for developing a maturity assessment; ISO 55000 provides a starting point for an organization before conducting a maturity assessment or building a roadmap. Aman suggested that municipalities “think of it as a playbook for how an organization should manage their infrastructure in a coordinated and sustainable way.” The standard can be helpful to municipalities of all sizes. For smaller municipalities, it can provide a starting point and a structure when resources are stretched thin. For larger municipalities, it can provide consistency and alignment to ensure that everyone is working towards the same goal.

There have been recent updates to the Standard that reflect the evolution of asset management practice. In particular, the latest version of the standard has a more practical focus, with a shift to focus on what “value” means to the community (beyond just balancing cost, risk, and performance) with a clear connection to the services that are being provided, and prioritizing outcomes. Furthermore, the updated Standard has a stronger emphasis on leadership and governance and making connections across departments and services areas.

So overall, the updated Standard gives municipalities of all sizes a clearer blueprint for improving asset management in a meaningful way to the people who pay taxes and user fees for services.

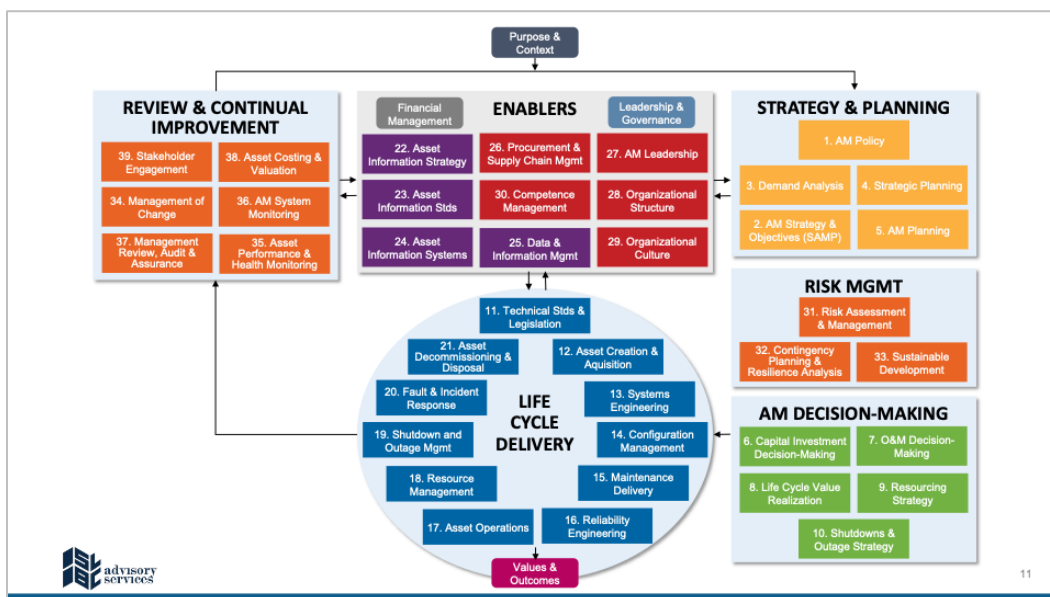
IAM Capabilities Model

Aman also provided an overview of the changes from the IAM 6-box model to the 10-box model. These changes are circled in red on the slide below.



This model identifies the capabilities that must be in place for an asset management system to succeed. IAM has further mapped the key subjects of asset management as defined by the Global Forum on Maintenance and Asset Management (GFMAM) against the 10 capabilities, for a list of 39 individual elements.

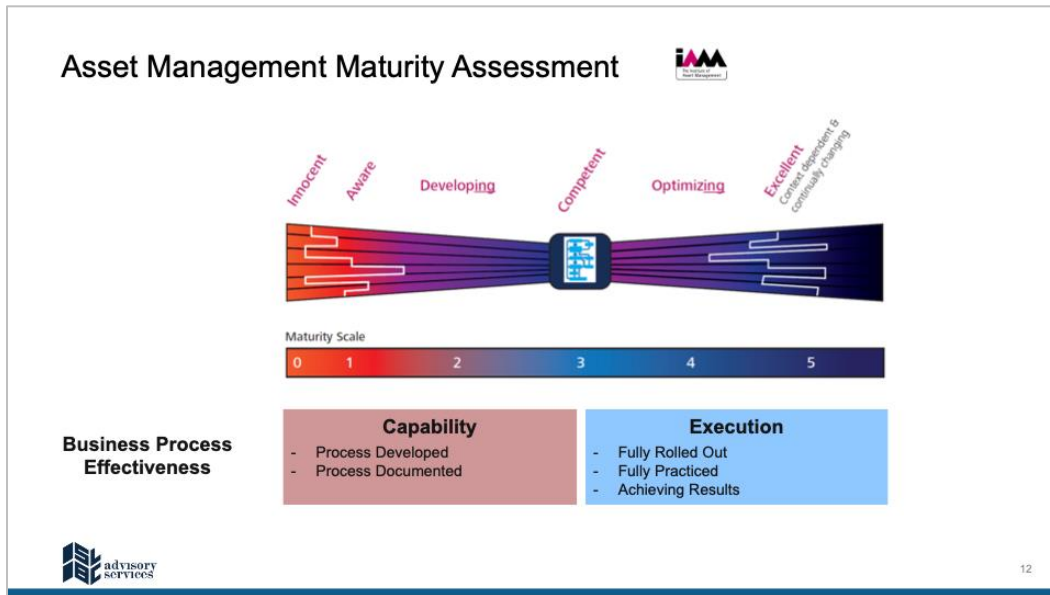
The slide below shows where these asset management elements fit within an asset management program and can help municipal staff identify where these activities map to in their organizations and where gaps may exist.



An organization can then analyze their maturity against each of these elements, to understand the organization’s ability to actually execute their strategy and deliver their AM program with sufficient resources.

Maturity Assessment

To conduct a robust maturity assessment, benchmarking against each of these 39 elements, municipalities can use the continuum on the slide below.



This analysis will give a much more detailed view of capability, where processes exist, where they’re inconsistent or informal, and where improvement is needed. Most organizations start to see a very clear view of where their problem areas are and where investments are needed, using this level of assessment.

Considerations and Benefits of an Asset Management Improvement Roadmap

The maturity assessment will show strengths, gaps, and opportunities for improvement, as well as identifying areas that are most important to the organization. Your Roadmap will then lay out a prioritized set of initiatives, organized across a time horizon (typically five years), to action these improvement opportunities. The key elements of an improvement roadmap are as follows:

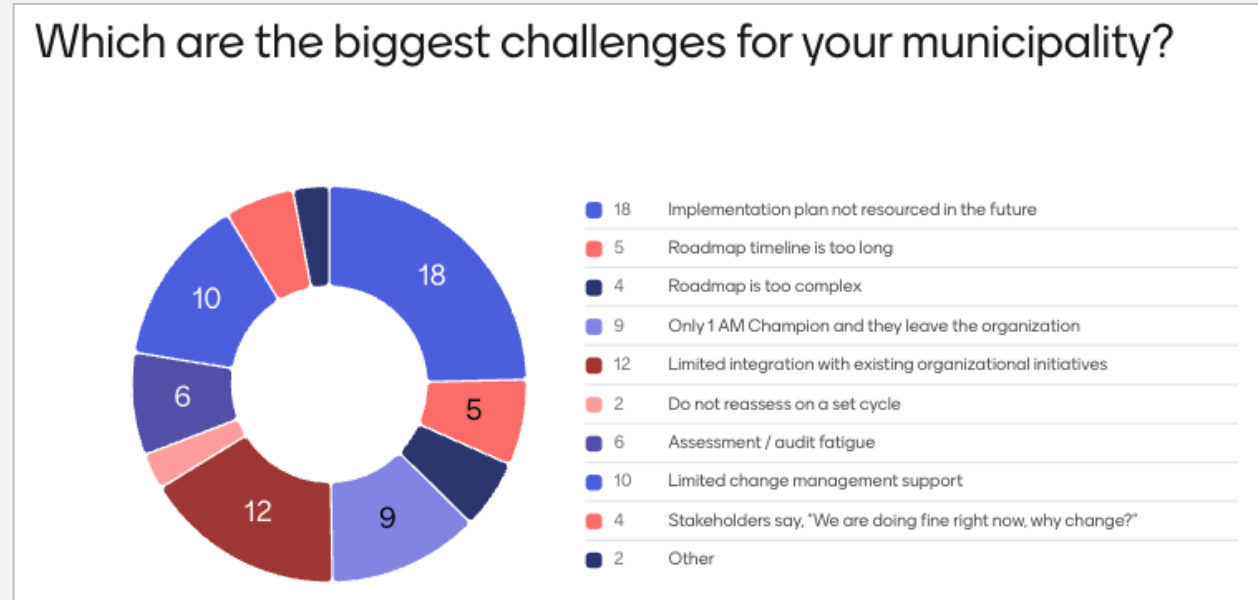
- List of improvement initiatives as a result of the maturity assessment.
- Steps for what the organization should do to implement and sustain the initiative.
- Estimated resourcing (internal staff and external costs) for implementing each initiative.
- Clear coordination with other ongoing projects/strategies across the organization.

The improvement roadmap provides a targeted plan to build your asset management program to bring all departments onto the same page, and make effective, targeted investments. The benefits are as follows:

- Evidence-based prioritization
- Structured progression
- Targeted capacity building

What We Heard – Maturity Assessment: Challenges

Participants were asked to reflect on their most significant challenges in conducting maturity assessments and developing asset management roadmaps. The responses are summarized in the slide below.



Those who responded "other" were asked to provide more details:

- Council and staff are constantly jumping from one "fire" to the next, never having bandwidth for long-term/strategic thinking.
- Leadership/ decision makers directly influencing AM improvements not aligned, AM not a priority.
- Council thinks only of their four-year term
- Other "noise" - economic, political, stability and change fatigue challenges

Municipal Examples

Next, the following municipal representatives shared their experiences with maturity assessments and asset management roadmaps, highlighting successes, challenges, and lessons learned:

- Region of Waterloo (Tim Walton; Manager, Asset Management)
- Town of Oakville (Shawn Boast; Manager, Asset Management)
- Region of Peel (Leanne Brannigan; Senior Manager, Enterprise Asset Management)

The key messages from these presentations were as follows:

- When assessing maturity, it's beneficial to use a recognized industry standard model to ensure consistent metrics that you can use to track progress over time.
- The presenters all saw the benefits of taking an enterprise approach to their maturity assessment, to ensure consistency and transparency in approaches across all departments / service areas.

- There were benefits to having a third-party conduct the maturity assessment. This approach provided objectivity and honest reflection, and gave the assessment more weight with senior leadership and Council.
- Appropriate resourcing for the improvement roadmap is necessary to ensure that maturity advances and does not backslide.

Benefits of conducting a maturity assessment included:

- Reliable, objective understanding of maturity across the organization, and across departments/service areas.
- Improved communication about asset management within the organization (across teams) and with leadership and Council.
- Better ability to prioritize by understanding where progress is necessary or where lesser maturity might be warranted/acceptable.
- Objective analysis to support the development of business cases and to understand program needs (which can support resourcing requests).

What We Heard – Maturity Assessment: Overcoming Barriers

Finally, participants were assigned to breakout rooms and asked to discuss potential solutions and/or actions to take to address the challenges that were identified earlier in the workshop. Potential solutions have been organized into key themes.

CHALLENGE: Implementation plan not resourced in the future

SOLUTIONS:

1. Prioritization & Focus
 - Emphasis on doing fewer things better
 - Focus on high-risk, high-value, and strategic actions
 - Acceptance that not everything can be accomplished
2. Phased & Adaptive Implementation
 - Phased, incremental approach to build momentum
 - Flexibility to adjust plans as conditions change
 - Regular roadmap updates and annual reviews
3. Resourcing & Funding
 - Need to clearly identify and align resources (staff, budget, skills)
 - Importance of securing funding (internal + external)
 - Use of outsourcing and external support when needed
4. Alignment & Integration
 - Integrating AM with broader organizational initiatives
 - Leveraging existing projects, data, and systems
 - Cross-departmental collaboration and shared resources
5. Demonstrating Value & Building Buy-In
 - Using quick wins to show impact
 - Linking AM to service levels and outcomes
 - Strengthening cases through reporting, risk, and maturity assessments
 - Keeping AM visible with leadership and Council
6. Governance & Continuous Improvement
 - Establishing teams, champions, and ownership across departments
 - Ongoing monitoring, reporting, and roadmap refinement
 - Maintaining structured processes (e.g., parking lot, succession planning)

CHALLENGE: Only One AM Champion and they leave the organization

SOLUTIONS:

1. Knowledge Management & Documentation
 - Strong emphasis on documenting processes, data, and decisions
 - Centralizing information to ensure accessibility and continuity
 - Reducing reliance on individual knowledge holders
2. Training & Capacity Building
 - Formal and informal training programs
 - Cross-functional and external learning opportunities
 - Use of competency frameworks to assess and build skills
3. Succession Planning & Risk Mitigation
 - Preparing for staff turnover through knowledge transfer
 - Avoiding single points of failure by sharing responsibilities
 - Embedding AM practices into roles rather than individuals
4. Organizational Culture & Awareness
 - Promoting AM as a shared responsibility across the organization
 - Advocacy and awareness-building across departments
 - Reinforcing that AM is not just a specialized function
5. Collaboration & Integration
 - Encouraging cross-departmental collaboration and knowledge sharing
 - Integrating AM into broader plans and strategies
 - Learning from both internal and external best practices
6. Governance & Continuity
 - Establishing SOPs and structured processes
 - Regular check-ins and checkpoints to maintain progress
 - Creating systems that ensure continuity even during change

CHALLENGE: Asset management / audit fatigue

SOLUTIONS:

1. Audit Fatigue Reduction
 - Fewer, smarter, more targeted audits
 - Better framing and use of existing information
2. Efficiency & Coordination
 - Planning, staggering, and sharing workload across teams
 - Choosing the right scale for assessments
3. Focus & Prioritization
 - Narrowing scope to key capabilities or asset groups
 - Avoiding overextension
4. Change Management & Engagement
 - Early structure for managing change
 - Ongoing education and demonstrating value
5. Continuous Improvement & Data Management
 - Using results to improve systems
 - Maintaining up-to-date, continuous data practices

CHALLENGE: Limited change management support

SOLUTIONS:

1. Change Management Capacity
 - Need for dedicated resources (internal or external)
 - Building internal capability over time
2. Leadership & Governance Support
 - Importance of management buy-in
 - Role of steering committees and oversight
3. Engagement & Communication
 - Continuous stakeholder involvement
 - Clear, organization-wide communication of changes
4. Culture & Buy-In
 - Champions within departments
 - Bringing people along and demonstrating success
5. Structured & Informed Implementation
 - Understanding impacts of changes
 - Using structured engagement (e.g., meetings, info gathering)

CHALLENGE: Stakeholders say "we are doing fine right now, why change?"

SOLUTIONS:

1. Making the Case with Data
 - Using forecasts, condition data, and cost relationships
 - Demonstrating consequences of inaction
2. Financial & Service Impacts
 - Linking AM to cost efficiency and service outcomes
 - Showing trade-offs between capital and operating decisions
3. Awareness & Understanding
 - Building knowledge through training
 - Helping stakeholders understand the value of AM
4. Culture & Mindset Shift
 - Moving from short-term to long-term thinking
 - Encouraging collaboration and shared understanding

CHALLENGE: Limited integration with existing organizational initiatives

SOLUTIONS:

1. Strategic Alignment
 - Connecting AM to corporate plans, priorities, and external commitments
2. Governance & Coordination
 - Role of committees and structured oversight
 - Creating forums to integrate AM across departments
3. Financial & Service Integration
 - Linking AM to cost-to-serve and service level discussions
 - Reinforcing long-term affordability and sustainability

CHALLENGE: Roadmap is too complex

SOLUTIONS:

1. Simplification & Focus
 - Reducing complexity and narrowing scope
 - Prioritizing what matters most
2. Phased & Practical Implementation
 - Breaking work into manageable pieces
 - Delivering achievable items each year
3. Alignment & Integration
 - Connecting roadmap to corporate and departmental priorities
 - Ensuring funding and planning alignment
4. Clarity & Accountability
 - Clear ownership and responsibilities
 - Simple tools and communication
5. Communication & Understanding
 - Making the roadmap accessible and easy to understand
 - Helping staff see the bigger picture

CHALLENGE: Do not reassess on a set cycle

SOLUTIONS:

1. Right-Sized Reassessment Cycles
 - Moving away from rigid or overly frequent cycles
 - Designing cycles that match capacity and needs
2. Phased & Flexible Approach
 - Breaking work into smaller pieces
 - Allowing timelines to shift as needed
3. Efficiency & Focus
 - Prioritizing key metrics and higher-level reviews
 - Staggering work to reduce burden
4. Continuous Monitoring vs. Full Reassessment
 - Using check-ins instead of full resets
 - Reassessing when it adds value (e.g., tied to results or funding cycles)
5. Collaboration & Capacity
 - Leveraging internal expertise across departments
 - Supporting staff with training and additional resources

CHALLENGE: Roadmap timeline is too long

SOLUTIONS:

1. Prioritization & Risk-Based Focus
 - Emphasis on high-impact, high-risk areas
 - Use of maturity and risk to guide decisions
2. Phased & Structured Delivery
 - Breaking long timelines into short-, medium-, and long-term horizons
 - Creating manageable, trackable work packages
3. Iterative & Practical Approach
 - Continuous reassessment and adjustment

- Focus on progress over perfection
- 4. Resourcing & Capacity
 - Aligning work with available resources
 - Expanding capacity through staffing, champions, and collaboration
- 5. Efficiency & Integration
 - Streamlining processes and aligning with other initiatives
 - Reducing duplication and bottlenecks
- 6. Governance & Communication
 - Clear roles, staff education, and regular coordination
 - Using the roadmap to communicate scale and need

