Cobourg

ASSET MANAGEMENT

2026 Annual Review Report

Council Endorsement: June 24, 2026

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COVER & CONTEXT

Assets are things that provide value to the municipality. Asset management (AM) is the **set of planned actions** that will enable the assets to provide the desired **level of service** in a **sustainable way** while **managing risk** at the **lowest life cycle cost**.

The Town's job is to ensure that all of the assets that support the delivery of services in Cobourg are of adequate quantity (do we have enough of them to deliver the expected service) and are we maintaining them in good enough condition to affordably deliver the expected level of service with an acceptable level of risk.

Asset Management needs to be the way we do business. It's about how we work.

Purpose of the Annual Review

The annual review is a 'Reality check' that allows for an opportunity to set (or reset) expectations, continue building credibility around a transparent sound plan, or identify where the plan needs to change.

This report addresses the annual review requirement of O.Reg 588/17 and supports continuous improvement of the Town's Asset Management Plan (AMP). The annual review is a summary of the Town's asset management progress over the past year. Council approval of an annual review report is required on or before July 1st on an annual basis. The purpose of this report is to meet this requirement and address the following items:

a. Our progress in implementing our AMP;
b. Any factors impeding our ability to implement our AMP; and
c. A strategy to address the factors described in item b.

Reporting Period

July 2025 – March 31, 2026

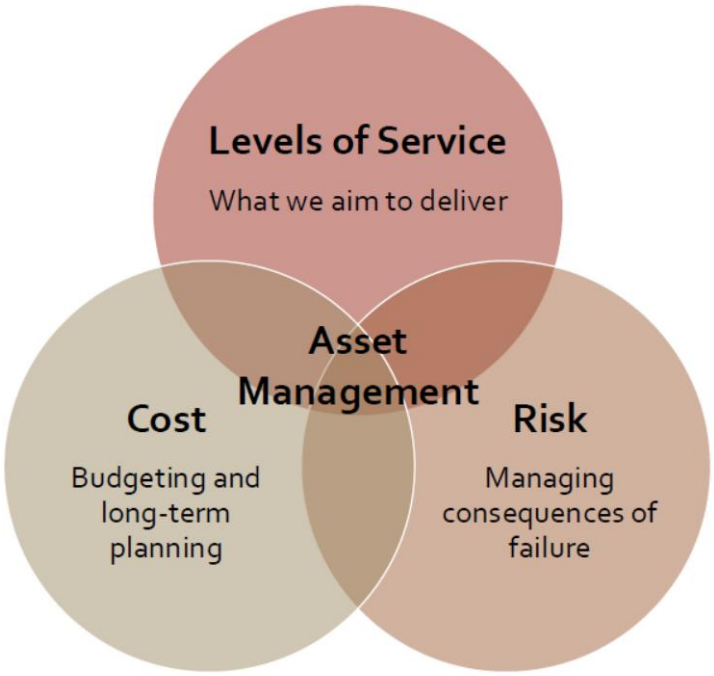
The annual reviews will cover the year in review up to the end of reporting Quarter 1.

Approved Asset Management Plan(s)

Report Title	Council Approval Date
Asset management policy (2024)	June 26, 2024
Stormwater Rate Study and Asset Management Plan (2022) as amended (2024)	June 26, 2024
Asset Management plan for non-core assets (2025)	June 25, 2025
Water and wastewater rate study and asset management plan (2025)	November 26, 2025

Compliance Statement

This annual review has been completed in accordance with the requirements of Ontario Regulation 588/17 and reflects the Town's ongoing efforts to review, update, and improve its asset management practices and assumptions.



1. EXECUTIVE SUMMARY

Capital Delivery Review

A summary of the 2025 and 2026 capital plan has been provided in Appendix A. This annual review spans the timeframe of the previous year's capital plan as well as a Q1 status update of the current year's capital plan. The next steps for capital delivery will be to develop a detailed list of upcoming projects that will be prioritized by their risk ranking. Once a priority list of projects has been established and the AMP is fully informing the budget, this annual review will report on the progress of our approved capital programs in comparison to the AMP.

Level of Service Reality Check

The LOS metrics developed to date are listed in Appendix B. The Annual Review is an opportunity to reflect on lessons learned and course correct where needed. Previous reporting metrics were too complicated and too many. Future focus will be to re-establish measurable and meaningful goals that are easy to track in our day-to day operations and are built on a foundation that has a repeatable approach for reporting. Operating budgets will work towards transitioning from budget driven frameworks to service driven frameworks.

Risk Review

The Town has completed a risk assessment for the sanitary and stormwater collection systems, water distribution system, and roads. Priorities for asset management will include risk assessments for core facilities such as the water and wastewater treatment plant components followed by non-core asset classes. A future AM goal will be to reduce the value of assets in the high-risk categories by prioritizing them over assets with lesser risk rankings.

Asset Management System & Practice Review

Historically, there has been minimal resource capacity to advance AM planning. However, the Town's data inventory is now strong and organized in a way that can be more easily utilized for planning and operational activities. Over the past year, AM resources have been increased and as a result there have been many achievements in operational programs and GIS applications including the striking of an Asset Management Steering Committee, and Internal Asset Management Hub, and a StoryMap Public Communication Initiative to name a few.

Addressing Barriers to Implementation

O. Reg 588/17 requires for municipalities to report on barriers that are encountered during their asset management planning processes as well as identify potential solutions, timelines, and support required from Council and senior leadership. Staff have identified barriers and suggested solutions for barriers that exist related to capacity, organization, technical, governance and finance.

Planned Improvements for the Coming Year

Staff have identified ten (10) recommendations for improvements to asset management before the next annual review related to Asset Management Reporting, Data Inventory, Asset Management Systems and Levels of Service.

2. CAPITAL DELIVERY REVIEW

The current Asset Management Plan(s) reports on Town owned assets that fall into the following asset classes:

- Water
- Stormwater
- Wastewater
- Roads and Bridges
- Parks and Rec
- Non-Core Facilities
- Parking
- IT
- Fleet
- Equipment

Table 1 illustrates the replacement value of all assets that fall within each condition rating.

Table 1

Overall Condition Rating	Replacement Value	Percent of Total Replacement Value
Very Good	$253,463,179.31	23%
Good	$365,100,654.94	33%
Fair	$353,980,825.01	32%
Poor	$81,530,233.42	7%
Very Poor	$60,502,510.78	5%
Unknown	$3,280,412.00	0.3%
Total	**$1,117,857,815.46**	**100%**

The Town completed the Asset Management Plan in June 2025. The initial approach for asset management is to pool all replacement and lifecycle costs associated with asset classes and show the lump sum dollar amount that is due to be budgeted/spent on those asset classes on an annual basis. This is one approach to understand the big picture, however upon operationalizing an asset management plan, the next steps will be to develop a detailed list of actual projects associated with those lump sum annual budget projections per asset class and projects will be prioritized by their risk ranking. Once a priority list of projects has been established and the AM plan is fully informing the budget, this annual review will report on the progress of our approved capital programs in comparison to the AM plan.

For example, the 2025 asset management plan projected that in 2026 there was $3,502,120 worth of vehicles to be replaced. The report itself does not list each vehicle that needs replacement in 2026 however the data inventory that informs the asset management plan has each vehicle listed with its purchase value and year, useful life, condition, replacement date and replacement value. As the Town's asset management program evolves, budget will be informed by a prioritized list of projects that are due for replacement/rehabilitation rather than lump sum dollar values per asset class.

In addition, there are many Town assets that are operating beyond their expected useful life meaning there is a substantial backlog of asset replacement/rehabilitation projects that have not been budgeted for yet.

The key aspect of the 2025 Asset Management Plan, as required by Ontario Regulation 588/17, was for the Town to establish a financial strategy to reduce the backlog while also keeping up with current replacement priorities over the next 10 years.

A summary of the 2025 and 2026 capital plan has been provided in Appendix A. This annual review spans the timeframe of the previous year's capital plan as well as a Q1 status update of the current year's capital plan.

A snapshot of statistics include:

Year	Total Projects	Completed	Not Started	In Progress	Deferred / Cancelled	AM Related*
2025	61	52%	10%	31%	8%	79%
2026	53	30%	17%	57%	6%	75%
Total	**114**	**38%**	**13%**	**43%**	**7%**	**77%**

*AM related projects include all works related to existing assets such as replacements or rehabilitation activities. Projects that are not AM related include the procurement of new assets or implementation of new non-asset related initiatives and programs.

It is important to note that not all capital projects are able to be completed within the current budget year ie. Infrastructure works typically require a minimum of one year for studies and/or designs and often multiple years of construction to complete depending on the complexity of the work.

3. LEVELS OF SERVICE (LOS)

Background

Levels of Service (LOS) describe the quality, safety, and reliability of public infrastructure as experienced by residents and as delivered by Staff. An LOS should balance what the community wants (ie. smooth roads) against what is affordable.

Think of LOS as the "report card" for how well municipal services are performing.

- Quality: Is the road smooth (high) or potholed (low)?
- Reliability: Does the water run constantly (high) or are there frequent bans (low)?
- Availability: Is the park open year-round (high) or only in summer (low)?

There are two types of measures (Community vs. Technical)

1. Community LOS (What you see): These are simple, non-technical descriptions of what residents experience.
    - *Example:* "Roads are comfortable to drive on" or "All playgrounds are safe".
2. Technical LOS (How they do it): These are the specific metrics staff use to track performance.
    - *Example:* "Roads shall have a minimum Pavement Condition Index (PCI) of 70" or "All playgrounds shall be inspected monthly to achieve Canadian Safety Authority (CSA) compliance".

Asset Management regulations require municipalities to define their current LOS (what we do now) and proposed LOS (what we should do in future) for each asset class. In order to define community and technical LOS so that they are useful in advancing our asset management programs, they must consider the following:

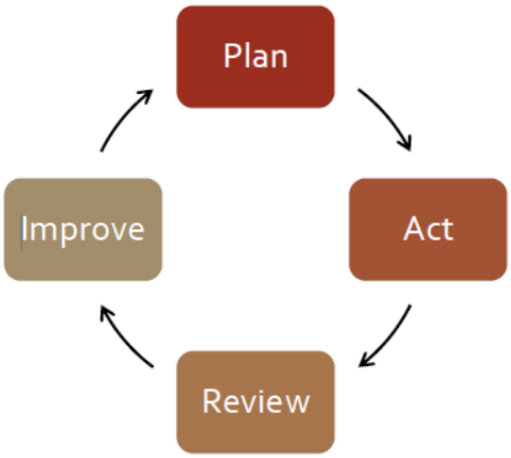
Performance must be measurable – Operations Staff need to be able to easily track progress on a regular basis. Tracking can be done by utilizing existing systems such as Cityworks or asset management software. GIS Staff do the reporting of the results of data tracking but the data has to be consistent for accurate reporting.

Targets must be meaningful – there is no sense tracking information that is not going to inform service level delivery or budgets.

O.Reg. 588/17 includes mandated technical levels of service for core assets that Municipalities are required to report on every 5 years for both current and proposed performance targets. LOS targets for non-core assets are up to each individual municipality to establish.

The LOS metrics developed to date are listed in Appendix B.

Level of Service Reality Check



The Annual Review is an opportunity to reflect on lessons learned and course correct where needed. Previous reporting metrics were too complicated and too many. Future focus will be to re-establish measurable and meaningful goals that are easy to track in our day-to day operations and are built on a foundation that has a repeatable approach for reporting.

Challenge 1. How do we really know the cost of our current levels of service?

Service outcomes are what residents see and feel but knowing what it costs and exactly the equipment, materials and labour involved to deliver the services is a challenge to fully quantity in a dollar figure. What are the maintenance requirements (lifecycle activities) to meet the expected service outcome? How often do those lifecycle activities need to occur?

As our asset management systems evolve with defining lifecycle activities and procedures for tracking the costs associated with those lifecycle activities, confidence levels will increase for current levels of service costs. Reporting on trends annually will assist with understanding of how to continue with current LOS and how to achieve target performance measures.

Challenge 2: How long should an asset last?

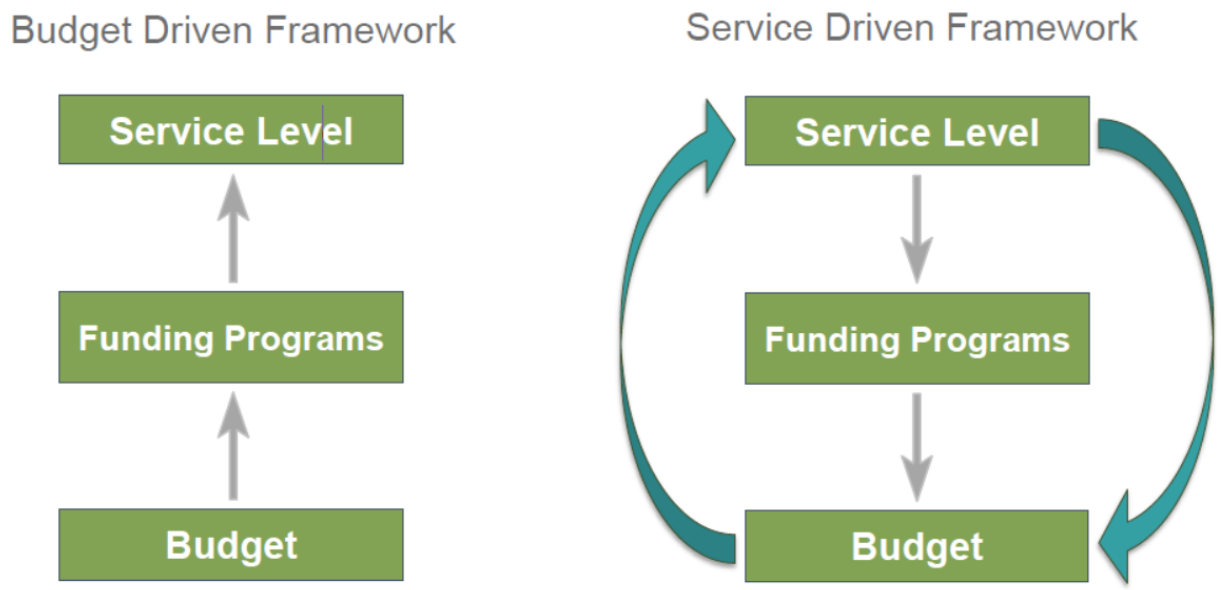
What lifecycle activities are required to extend the useful life of the asset enough to make it affordable for the community while still meeting service expectations? Similar to Challenge 1, understanding how to balance cost and service level expectations with the timing for replacement of assets will become more clear as we develop better systems for tracking costs and defining lifecycle activities.

Challenge 3. Setting performance targets without knowing the implications

In order to make an informed decision to increase or decrease a LOS, first we have to know what the current LOS costs. This way we know all of the metrics involved that will equal the expected service outcome and we will then understand how to change the service outcome by adjusting one or more of the variables. First we need to solve the equation to understand how all the variables are related, then we can start adjusting variables until we meet the target LOS.

Municipal operating budgets have historically followed a budget driven framework where service outcomes are strictly a result of whatever is available in the operating budget. Asset management is redefining how budgets are allocated using a service driven framework:

1. Determining what the expected service level outcome is for residents
2. Determining what lifecycle activities are required to deliver the expected service level
3. Determining what the lifecycle activities will cost (ie. Labour, equipment, materials)
4. Informing the budget to meet service level expectations.



4. RISK REVIEW

The Town has completed a risk assessment for core assets as follows:

- Sanitary collection
- Stormwater collection
- Water distribution
- Roads

Table 2 shows the value of core assets that fall into each of the risk rankings. A future AM goal will be to reduce the value of assets in the high risk categories by prioritizing them over assets with lesser risk rankings.

Table 2:

Risk Ranking	Replacement Value	Percent of Total Replacement Value
Very Low	$103,359,894.63	15%
Low	$172,427,497.42	25%
Medium	$226,216,066.57	32%
High	$136,515,494.22	19%
Very High	$62,608,499.12	9%
Total	**$701,127,451.96**	**100%**

Risk = Probability of Failure x Consequence of Failure

Probability of Failure (POF) is typically based on the age or condition of the asset. The more the asset ages and/or approaches poor or very poor condition it is more likely to fail.

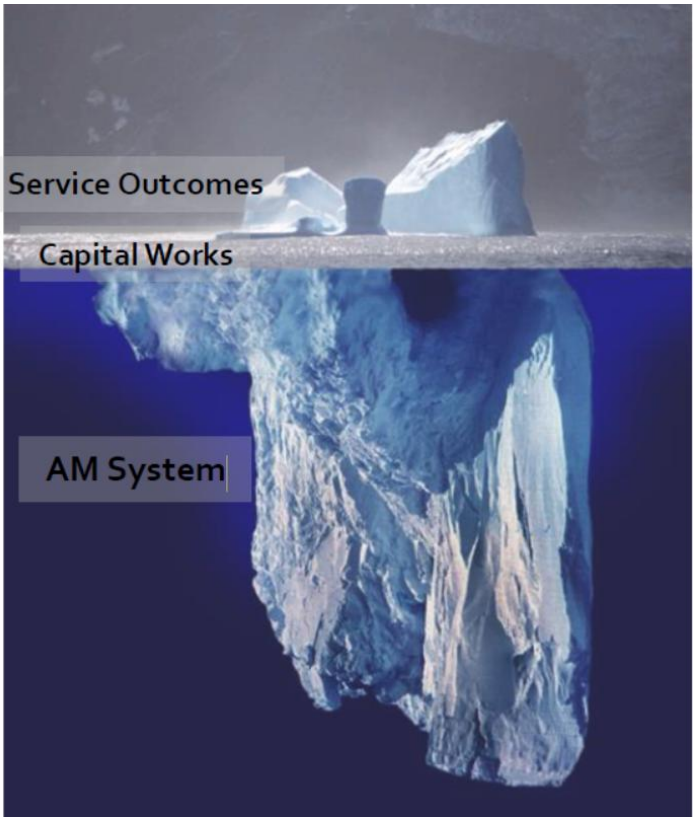
Consequence of Failure (COF) is based on factors such as environmental impact (ie. proximity to waterbody), number of customers impacted (ie. Pipe size), type of people impacted (ie. zoning).

Cobourg is not required to conduct a risk assessment for asset management as O.Reg 588 does not require it for municipalities under a population of 25,000. Cobourg is going above and beyond to include risk in our asset management planning as it is a critical decision making factor in determining priorities for capital budget planning.

Priorities for asset management will include risk assessments for core asset facilities such as the water and wastewater treatment plant components followed by non-core asset classes.

5. ASSET MANAGEMENT SYSTEM AND PRACTICE REVIEW

The Town completed the requirements of Ontario Regulation 588/17 by the stipulated deadlines. Now Staff can focus on growing our AM systems and practices to implement AM initiatives corporate wide. Our internal systems are what will inform capital programming and will ultimately deliver service outcomes to the public.



Past Practice Review

Historically, AM progress has been led by the Director, Public Works and Engineering alongside the GIS Coordinator for assistance with data management. A private consultant (Watson & Associates) has been retained to guide the process, analyze the asset data provided by Staff, and consolidate a report on the required deliverables.

To date, there has not been a dedicated team of Staff to assist with AM planning.

The Town's data inventory is now strong and organized in a way that can be more easily utilized for planning and operational activities. The implementation of AM in all Departments who support or deliver asset-related services is an important step towards realizing the benefits of AM practices. This typically includes education, research & development, and change management. The pace of AM implementation has been limited by the capacity of individual departments to engage in new AM activities, as they must balance AM improvements with regular duties and other Council/strategic priorities. Therefore, changes and improvements take time to complete. Implementation of AM among departments will continue to progress but potential benefits of AM may not be realized until capacity and knowledge increases on both a Staff and Council level.

New Asset Management Systems

The Town has made great advances in AM systems over the past year as summarized here within.

Resources:

1. New Asset Management Coordinator Position:

Council approved a new GIS position that would predominantly be focused on AM work while also providing assistance to and coverage for the GIS Coordinator. This position was filled in April 2025 and has made a big impact on the advancement of GIS systems.

2. Northumberland County Shared Services for GIS Funding

Council approved operating budget to have County GIS staff work with Town GIS staff one day per week in order to advance AM and other corporate GIS systems. The knowledge transfer and information sharing has greatly improved collaboration on AM planning initiatives, data management, and new GIS operational applications.

Operational Programs:

3. Storm Sewer Flushing and CCTV Inspection Program

In accordance with the stormwater rate study and asset management plan (2024), Staff have initiated a new maintenance program for storm sewers involving flushing/cleaning as well as camera inspections that will determine the existing condition of sewers and maintenance holes. To date, condition ratings have been based on the pipe material and pipe age as there is no other data to provide more accurate condition scores.

The program is anticipated to be completed in 3-4 years with approximately 20kms of sewers being cleaned and inspected annually. Since the sewers have not yet been cleaned or inspected, the first time is expected to take much longer than annual maintenance programs thereafter.

Following completion of this initial program, it is anticipated that the Roads and Sewers Department will resume annual flushing and camera inspections of the storm sewers on a 10 year cycle.

4. Artificial Intelligence Software Utilization for Sewer Condition

Staff are currently investigating the use of AI for evaluating the condition of sanitary and storm sewer condition ratings and repair recommendations. Currently, Roads and Sewers Staff are able to score the sanitary pipe condition and a consultant is retained to review the videos and condition reports to prepare a tender document for repairs and replacements. Utilizing AI is an exceedingly faster process and may negate the need for Staff to score the sewers (speeds up inspections) and the need for a consultant, provided that Engineering has sufficient staffing resources to review and consolidate the results of the AI reports into a tender document.

5. Asset Management Steering Committee

The AM Steering Committee is a group of Town Staff who will develop and guide the implementation of AM practices across the corporation and coordinate AM within their service areas. This includes managing the pace of change to align with staff capacity and integrating AM with other initiatives. The inaugural Steering Committee meeting will occur on May 28th, 2026 and a schedule will be developed to meet regularly with action items to complete before each meeting within the member service areas. The meetings may require additional staff to attend on occasion depending on the working topic.

GIS Applications:

6. Storm Sewer CCTV Inspection Field Map

As part of storm sewer inspection contract, the condition of the maintenance holes will also be evaluated and data will be entered directly into our GIS system utilizing a GIS field map that has been custom developed by Staff for the contractor to fill in on-site while inspecting the maintenance holes. The field map will also show Staff the contractor's progress of inspections (what pipes have been completed and are left to inspect) as well as flag areas that need follow up.

7. Minimum Maintenance Standard Road Patrol App & Sidewalk Inspections

The Town can comply with O.Reg 239/02 *Minimum Maintenance Standards (MMS)* to reduce or eliminate liability should elements within the municipal road allowance meet criteria that considers them to be in a state of repair. Two aspects of MMS compliance is the scheduled patrolling of roads and inspection of sidewalks where deficiencies are identified for repairs. The Cobourg Road Patrol Quick Capture application provides voice control data capture via an iPad mounted in the inspector's truck to track all road patrol activity and deficiencies. The subsequent Road Patrol Manager Web Experience allows staff to monitor outstanding deficiencies, review patrol coverage, and manage non-MMS To Do items efficiently and in and compliance with O. Reg. 239/02 from their desktop. The same concept has been applied to both roads and sidewalks. Staff have begun trialing the applications and have come back with minor alterations and are well on their way to managing this data as their primary record.

8. Internal Asset Management Hub

The Cobourg Asset Management Hub has been developed to provide a single link resource to Asset Management Plans, Policy and platforms. It has the added benefit of using the FCM's Readiness Scale to drive asset management efforts forward at the Steering Committee level. The resource links helpful material to understand how documenting the asset management activity that the Town already does benefits the whole organization and residents. It also links to GIS applications to edit asset information and analyze existing GIS data. The Hub tools are highly customizable (by our GIS team) depending on how Staff want to see and use their data. With the addition of an Asset Management Steering Committee and the AM Hub tools, greater symmetry will develop between divisions with access to similar tools and language to help guide the AM journey forward.

9. Fleet Consolidation and Data Collection Activity

Since the 2025 asset management plan was completed, Staff have created a fleet inventory within the GIS and consolidated the Town's insurance and licensing information in the same database. Inspections are being planned to add missing data to the table and capture imagery of each vehicle for easy reference within the inventory.

10. In-House Decision Support Computer Programming

In 2018, the Town retained ESRI Canada to custom design a decision support tool utilizing the Town's core infrastructure data to forecast project priorities for road reconstructions utilizing lifecyle and risk considerations (ie. Road replacement, storm and sanitary sewers and watermains). This tool has been instrumental in consolidating all infrastructure priorities per section of road (intersection to intersection). However, if a parameter in the analysis ever needs to be changed or the tool is not working as it should, there can be delays and expenses related to outsourcing the maintenance of this software program. The Town's Asset Management Coordinator is currently working on converting this tool into a software program that can be managed in house so that any changes or updates can be done quickly and without additional expense.

11. Capital Backlog Identification and Tracking

As identified in the 2025 asset management plan, all municipalities have a backlog of assets that are operating beyond their useful life, creating a gap in infrastructure funding between what is being spent and what should be being spent. The Town's infrastructure funding gap is illustrated in Appendix C. The 10 year financial strategy incorporated how the Town could 'catch up' with the backlog of work and close the infrastructure funding gap. Staff are currently working on a consolidated list of asset replacements / rehabilitations that are backlogged which can also be prioritized for consideration during budget deliberation.

12. StoryMap Public Communication Initiative

As part of the Town's ongoing commitment to advancing asset management practices, a public-facing StoryMap is being developed to support communication, transparency, and organizational understanding. The StoryMap is designed to translate complex asset management concepts into a more accessible and relatable narrative by connecting infrastructure systems to everyday life within the community. Through the use of maps, data visualizations, photography, drone imagery, case studies, and narrative storytelling, the StoryMap will demonstrate how municipal infrastructure supports daily operations, public safety, and quality of life.

The initiative also aims to strengthen a key and previously underdeveloped component of asset management: the dissemination and communication of asset information. While the Town has developed extensive asset datasets and lifecycle planning tools over many years, improving

how this information is shared, understood, and operationalized across the organization remains an important area of growth.

The StoryMap will:

- Communicate the purpose and value of asset management in a clear and engaging way
- Highlight real-world examples of infrastructure renewal and operational risk
- Provide system-level statistics and condition summaries
- Clarify that Asset Management Plans represent strategic snapshots built from continuously evolving operational data
- Support greater awareness and integration of asset management into decision-making processes

This work complements other communication and knowledge-sharing efforts, including internal presentations, Council reporting, and the Town's internal Asset Management Hub, helping to establish communication and shared understanding as a foundational pillar of the Town's asset management program.

The Town's progress in asset management systems over the past year has been excellent as is evidenced in the above noted achievements and on-going initiatives. From a national perspective, progress is commonly measured using and asset management maturity framework such as the Federation for Canadian Municipalities (FCM) Readiness Scale. The Town's current status on the FCM Readiness Scale is included as Appendix D.

6. ADDRESSING BARRIERS TO IMPLEMENTATION

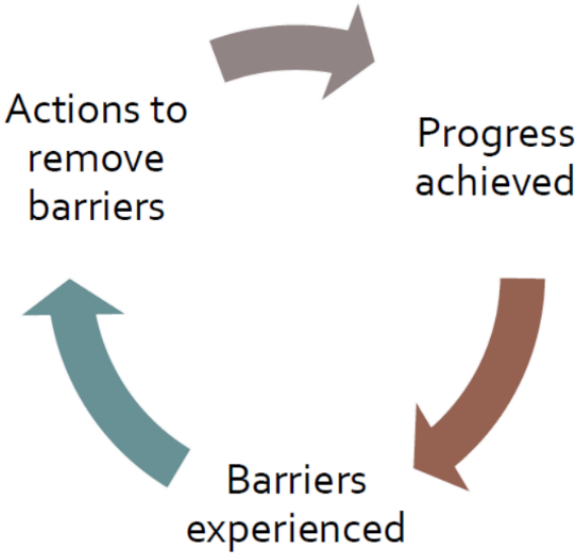
Turning barriers into opportunities

Every barrier points to a system adjustment:

The annual review is an opportunity to make these visible.

Impeding Factor	Description	Strategy to Address Impeding Factors
Capacity	Lack of dedicated AM lead	Fill Manager, Infrastructure Planning position (vacant)
	Staff overwhelmed with competing priorities	AM Steering Committee strike up to distribute manageable tasks for each service area to improve efficiencies in operations
Organization	Processes not established or consistent	AM Steering Committee to develop the necessary procedures to consistently deliver AM
	Silos - Departments all have different practices / separate physical locations	Regular meetings with AM Steering Committee to distribute consistent corporate wide AM messaging and understanding
Technical	Data validation	AM practices to be developed to complete data inventory and to regularly validate accuracy
	Unmanageable levels of service performance measures and reporting	AM Team to re-evaluate technical LOS performance measures
Governance	No defined risk tolerance yet approved by Council	Risk assessments to be conducted for all asset classes to prioritize needs and define service levels for Council approval
	No defined level of service expectations yet approved by Council	AM Steering Committee to develop with public consultation for Council approval
	AM knowledge gap between Staff and Council	Training opportunities to be provided to members of Council and annual review to

		include an overview of AM accomplishments, performance, and requests for Council direction.
Finance	Budget does not align with AM plan	AM system to be developed for Department Heads to inform budget decisions for Council endorsement



7. PLANNED IMPROVEMENTS FOR THE COMING YEAR

In relation to the barriers and strategies noted in Section 6, the following is a detailed plan for improvements in Asset Management for the 2027 reporting year.

Category	Recommendations	Status / Required Action	Due Date
Asset Management Reporting	1. Update the AMP every 5 years per O. Reg 588/17	• AMP adopted by Council in 2025 • Consultant to be procured in fall 2029	July 1, 2030
	2. Report annually on progress for capital programs, AM system improvements, LOS trends, and barriers	• Finance quarterly updates utilized to inform AM progress • AM Team to meet regularly to continue to improve how to operationalize AM and improve on reporting capabilities	July 1 annually
Data Inventory	3. Develop a comprehensive equipment inventory	• GIS to develop data collection template, AM Team to gather and input accurate data	Sept 30, 2026
	4. Define facilities to undergo formal condition assessments	• AM Team to establish priority list and distribute to responsible Department Heads for budgeting in 2027	Sept 30, 2026
	5. Complete risk ratings for all asset classes	• AM Team to define preliminary risk criteria • Department Heads to assign rating to each asset	March 31, 2027
	6. Apply data confidence levels	• Establish a data confidence scale and assign a level of confidence to each asset class	March 31, 2027
Asset Management Systems	7. Capital budget must align with AM capital plan	• GIS developing templates to deliver to department heads in advance of budget planning indicating what assets are coming due for replacement • Department heads responsible for planning a 3 year capital program based on specific project related AMP priorities	Sept 30, 2026
	8. Establish corporate AM procedures	• AM Team to develop AM procedures which will ensure that asset information is accounted for by the applicable Department Head and accurately updated in the asset inventory on a regular operational basis	March 31, 2027
	9. Summarize backlog and track assets that are past due for replacement or rehabilitation	• GIS to create an automated tool to generate a current list of assets beyond their useful life to assist Staff during budget planning	Sept 30, 2026
Level of Service	10. Redefine meaningful and relevant LOS per service area	• AM Team to establish performance tracking methodology for defined LOS that are sustainable for each service area	March 31, 2027

1. *Update the AMP every 5 years per O. Reg 588/17*

As required per Ontario Regulation 588/17, the Town will submit an updated asset management plan every 5 years with the next submission being July 1, 2030. If required, a consultant may be retained to assist with the compilation of the financial strategy as a budget item in 2029.

2. *Report annually on progress for capital programs, AM system improvements, LOS trends, and barriers*

As required per Ontario Regulation 588/17, Staff will prepare an Annual Review report for Council that highlights AM progress. It is anticipated that the AM Steering Committee will provide input on the report based on their experience over the previous year and their goals for the upcoming year, identifying any barriers they may be experiencing or anticipating and how they intend to overcome those barriers. Annual reviews are required to be completed by July 1 every year.

3. *Develop a comprehensive equipment inventory*

The 2025 AMP included an inventory of major equipment as well as detailed inventory for several departments. This inventory requires more detailed efforts to identify what equipment is to be included based on value and how it is to be included (pooled assets of lesser value). The equipment inventory will be set up to look the same as the fleet inventory and the AM Steering Committee will work towards collecting equipment data in time for 2027 budget considerations.

4. *Define facilities to undergo formal condition assessments*

The Town owns a number of buildings that are managed by several departments. Some buildings are considered to be ‘core’ buildings such as the wastewater treatment plants and water treatment plant as they relate to core infrastructure. Core and major administrative or public buildings should undergo a more formal facility condition assessment conducted by an engineering consultant who are professionals in the fields of building related systems such as electrical, mechanical, structural, architectural, instrumentation, process equipment, and civil site components. Formal condition assessments are typically conducted on a 10 year repeating cycle and will be budgeted as such. For other buildings of lesser value and purpose, it is acceptable for knowledgeable Staff to assess the condition of the building components for the intended purpose of having a general idea of when building components may need a professional opinion or are becoming a higher risk for users. The AM Steering Committee will review all buildings and define which are to undergo a formal facility condition assessment and will determine a priority schedule for those that are due for an assessment.

5. *Complete risk ratings for all asset classes*

The Town has completed a risk assessment for the sanitary and stormwater collection systems, water distribution system, and roads. The Asset Management Steering Committee will work together to define risk criteria for each asset class and complete risk assessments within their service areas. A weighted risk rank will also be considered in favour of critical and essential assets to ensure a higher priority ranking. A future AM goal will be to reduce the value of assets in the high-risk categories by prioritizing them over assets with lesser risk rankings.

6. *Apply data confidence levels*

The Town's AMP is new and has freshly collected data. The benefit of a new plan is that data is more likely to be correct based on how recently it was collected. However, there are limitations to how accurate data can be depending upon factors such as the type of asset, the age of the asset, or the historical knowledge or records that are available.

Typically core infrastructure has a regulated or standard approach to rating the condition of the assets including OSIM, PCI, NASSCO, etc. Other assets of lesser value and consequence of failure do not have formalized methods for evaluating condition in which case a knowledgeable Staff member can conduct an evaluation or we can rely on the asset's age or material to dictate its condition.

A data confidence scale will be helpful for Staff and Council to understand the level of accuracy that applies to assets that are being considered for investment. For example, if the next asset on a capital replacement list shows a low level of accuracy in data, Staff will know to investigate the condition of the asset more thoroughly before proposing that Council invest any funds into the replacement or rehabilitation of the asset.

Applying data confidence levels will more clearly illustrate to Staff where efforts are required to collect more data, strengthen Council's confidence in decision making during budget deliberations, and increase the AMP's credibility and transparency with the public. Changes in data confidence levels will be easily reportable during annual reviews.

7. Capital budget must align with AM capital plan

As noted in Section 2, capital planning for the Town should align asset management priorities with the annual capital budget. Currently the data inventory can forecast which assets are due for replacement in any given year however how we prioritize those projects is still a work in progress. Risk rankings have been completed for core infrastructure (other than core facilities) and a decision support software tool is available to prioritize works such as road reconstructions.

Once risk rankings have been completed for all asset classes, the goal will be for all departments to have a 3 year capital budget forecast listing all priority projects in order. Ideally, the Town can move to a 3 year capital approval process so that studies and design work as well as construction contracts can move ahead without having to be approved in pieces on an annual basis. The long term goal for asset management will be to have a 10 year forecast of projects.

8. Establish corporate AM procedures

Asset management planning can be overwhelming in consideration of the wealth of information that is now available and still to be collected. Integrating AM into daily operations across the Corporation will require structured procedures that are easy to understand and conduct. The AM Steering Committee will be responsible for creating the processes and procedures for ensuring

asset data is updated accurately and in a timely manner once it becomes known that an asset's information has changed, an asset has been added, or an asset has been disposed of.

9. Summarize backlog and track assets that are past due for replacement or rehabilitation

Asset Management requires that our inventory of assets include data such as when they were acquired, how long they will last, and replacement cost so that financial forecasting can be conducted to project long term annual budgetary needs for asset replacements. The Town's AMP currently reports the total value of assets that are due or past due for replacement. Staff are currently working on a consolidated list of all individual assets that are operating beyond their useful life to better inform budget decisions and priorities.

10. Redefine meaningful and relevant LOS per service area

As noted in Section 3, previous reporting metrics were too complicated and too many. The Asset Management Steering Committee will re-establish measurable and meaningful goals that are easy to track in our day-to day operations and are built on a foundation that has a repeatable approach for reporting.

APPENDIX A

Service Area		Percent Complete (%)		Status
		2025 Q4 Result	2026 Q1 Status	
Corporate Services				
Information Technology				
2512013	Computer Replacements	100%		Completed
2512023	HRIS System		100%	Completed
2612013	Computer Replacements		25%	In Progress
Victoria Hall				
2514013	Concert hall plaster work			Deferred
2514023	Electric panel upgrade - 2nd east		10%	In Progress
2514033	Victoria Hall elevator upgrades		100%	Completed
2514043	Victoria hall security camera upgrades		100%	Completed
2514053	West roof deck repairs		100%	Completed
2514063	Clock tower and exterior brickwork			Not Started
2514073	Chiller Replacement		90%	In Progress
2514083	Water bottle fill stations			Not Started
2514093	Council Chambers Microphone Replacement			Not Started
2614013	Bandroom accessible audit and insurance/ security upgrades		50%	In Progress
2614023	Phase 2 - Victoria Hall safety updates			Not Started
2614033	Victoria Hall elevator upgrades - 2 units		100%	Completed
2614043	Clocktower, Masonry woodwork and plaster restoration - Plan		5%	In Progress
Other Town Buildings				
2514103	Fire hall Theatre boiler replacements			Deferred
2514113	Cobourg library building automation system (BAS) upgrades		100%	Completed
2614053	Archives Renovations - Gordon King Centre			Not Started
2614063	Library window replacement - Phase 1			Not Started
2614073	Library Roof			Not Started
2614083	Replacement of Fleet Vehicle			Not Started
2614093	Dressler House security cameras		20%	In Progress
Protection Services				
Fire				
2520013	Purchase of a pick up truck - replacement	100%		Completed
2520023	Purchase a direct capture diesel exhaust system	100%		Completed
2520033	Purchase of self-contained breathing apparatus	100%		Completed
2520043	Fire hose	100%		Completed
2520053	Bunker gear	100%		Completed
2520063	Roof repair and remediation	100%		Completed
2620013	Bunker gear		100%	Completed
2620023	Fire hose		100%	Completed
2620033	Purchase of a new pick up truck		100%	Completed
2620043	Purchase of a portable fire extinguisher training prop		100%	Completed
2620053	Purchase replacement of five (5) portable radios		100%	Completed
Public Works and Engineering				
Engineering				
2530013	2025 Traffic Signal Improvements	10%	15%	In Progress
2530023	Bi-Annual Sidewalk Replacement	10%		In Progress
2530033	Cobourg East Trunk Sanitary and Watermain			In Progress
2530103	Bi-Annual Sanitary Replacement (John St)	10%		In Progress
2530113	Anne Street Reconstruction	5%		Deferred
2530123	Cobourg East Community Secondary Plan Study			In Progress
2531013	Walton Street and Munroe Street Reconstruction			Deferred
2531033	King Street West Culvert Replacement	90%	90%	In Progress
2630013	Midtown Creek Culvert Realignment			In Progress
2630023	Kerr Street East and Willmott Street Environmental Assessment			In Progress
2630053	Brook, Nagle, Danforth, Elgin Environmental Assessment			In Progress
2631013	Burnham Street Stormwater Management Pond Cleanout			Deferred
2631023	Clergy Lane Drainage Improvements		5%	In Progress
2630043	Perry St and Green Street Reconstruction			Deferred
2631033	Drainage Channel Repair at Culvert Outlet No. 001		1%	In Progress
Roads and Sewers				
2530053	One Ton Truck Replacement - Unit 12-16	100%		Completed
2530063	Replace Sidewalk Machine - Unit 20-13	100%		Completed
2530073	Replace Camera Truck - #18-03	100%		Completed
2530083	Traffic Signal Intersection Upgrade	30%		In Progress
2530093	Annual Street Light Replacement Program	100%		Completed
2630063	1/2 Ton Truck Replacement			In Progress
2630073	Loader Replacement			In Progress
2630083	Skidsteer Attachments			In Progress
2630093	Annual Streelight Replacement Program			In Progress
2630103	Bi-Annual Road Resurfacing			Deferred
Transit				
2538013	Replacement of Rolling Stock	100%		Completed
2538023	Transit Stop Improvements			Not Started

2638013	Transit Vehicle Fare Payment Hardware			In Progress
Environmental Services				
2540013	Automatic Chlorine Analyzers	100%		Completed
2540023	Automatic Titrators	100%		Completed
2540033	Autosampler	100%		Completed
2540043	Headworks Screen ByPass Shute			In Progress
2540053	WPCP#1 Headworks Overhead Crane	100%		Completed
2540063	Thickener Tank Repairs	10%		In Progress
2540073	Brook Road Pump Station Piping	100%		Completed
2640013	Truck Replacement	80%		In Progress
2640023	Plant #1 Disinfection Upgrades		100%	Completed
2640033	Plant #2 Disinfection Upgrades		100%	Completed
2640043	Plant #1 Electrical Upgrades		35%	In Progress
2640053	Plant #2 Electrical Upgrades		10%	In Progress
2640063	Plant #1 Instrumentation		60%	In Progress
Community Services				
Parks and Recreation				
2572013	Monks Cove and Harbour Seawall Repair			Not Started
2572023	YMCA - Build CCC Campus Proj.#20			In Progress
2572033	Historical Society - Wall of Fame		25%	In Progress
2572043	Tribute Central Park	100%		Completed
2572053	Therrien Turf Vac		60%	In Progress
2672013	Pickup truck 49-08 replacement		100%	Completed
2672023	Pickup truck 29-00		90%	In Progress
2672033	Pickup truck 33-03		90%	In Progress
2672043	Tribute Part 2 Central Park Project		60%	In Progress
2672053	McMurdo Playground			Not Started
2672063	Coverdale Tennis Court Windscreen Replacement		90%	In Progress
2672073	Butterfly Wing Replacement		90%	In Progress
2672083	Tillson - Frei Staircase Design			Not Started
2672093	Lucas Point Staircase Design			Not Started
2672103	Pickup truck 50-11		20%	In Progress
2672113	Pickup truck 28-16		100%	Completed
2672123	Concrete barriers			Not Started
Waterfront Operations				
2673013	Marine Workshop Roof		100%	Completed
2673023	New E-Dock			In Progress
Community Centre				
2574013	Chairs and Tables	100%		Completed
2574023	Refrigeration Compressor Replacement	100%		Completed
2574033	Stadium Seating Replacement	100%		Completed
2574043	Generator Design/Options	100%		In Progress
2574053	Vending Machine Replacement	80%		In Progress
2574063	CCC Detailed Condition Assessment			Not Started
2574073	LED Light Upgrades	100%		Completed
2574083	LED Sign Repair	100%		Completed
2574093	Cooling Tower Fill (Media)	50%		In Progress
2574103	AODA Upgrades	100%		Completed
2574113	Event Stage and Event Equipment Replacement	90%		In Progress
2674013	Ice Resurfacer Replacement		50%	In Progress
2674023	Replace Snow Pit Coil		50%	In Progress
2674033	Cleaning Cart		50%	In Progress
2674043	Upper Bowl Spectator Seating		50%	In Progress
Culture and Community				
2575013	Concert Hall Lighting	100%		Completed
2589213	Tourism Wayfinding			In Progress
2589223	Tourism Kiosk/Albert Street Activation			In Progress
Development				
Economic Development				
2589013	Venture13's VentureZone workstation expansion	100%		Completed
2589023	New Gateway Signage for Lucas Point Industrial Park			Cancelled

APPENDIX B

Core Service Area Levels of Service Performance Trends					
TRANSPORTATION					
Community LOS					
Service Attribute					
Scope	The Town's transportation assets enable the movement of people and goods within the Town and provide connectivity to regional roads. The Town's transportation assets are used by pedestrians, cyclists, passenger vehicles, commercial truck traffic, and emergency vehicles.				
Scope	The scope of the Town's road network is illustrated by Map 2-1 (2025 AMP). This map shows the geographical distribution of the Town's roads.				
Quality	To aid in interpreting condition states, photos of roads, bridges, and structural culverts in different condition states are provided in Table 2-3 and Table 2-5 (2025 AMP). A general description of how each condition state may affect the use of these assets is also provided in these tables.				
Technical LOS					
Service Attribute	**Performance Measure**	**2022**	**2025**	**Trend**	**Target Performance (2035)**
Scope	*Number of lane-kilometres of arterial roads as a proportion of square kilometres of land area of the Town.	1.660 lane-km/km²	1.246 lane-km/km²	N/A	N/A
Scope	*Number of lane-kilometres of collector roads as a proportion of square kilometres of land area of the Town.	1.902 lane-km/km²	1.803 lane-km/km²	N/A	N/A
Scope	*Number of lane-kilometres of local roads as a proportion of square kilometres of land area of the Town.	7.143 lane-km/km²	7.468 lane-km/km²	N/A	N/A
Scope	*Percentage of bridges in the Town with loading or dimensional restrictions.	15.4%	15.4%	⟷	0%
Quality	*For paved roads in the Town, the average pavement condition index value for arterial and collector roads.	71.9	77.5	↑	70.0
Quality	*For paved roads in the Town, the average pavement condition index value for local roads.				70.0
Quality	*For unpaved roads in the Town, the average surface condition.	N/A	N/A	N/A	N/A
Quality	*For bridges in the Town, the average bridge condition index value.	72	72	⟷	70
Quality	*For structural culverts in the Town, the average bridge condition index value.	54	49	↓	70
Quality	For pedestrian bridges in the Town, the average bridge condition index value.	N/A	77.9	N/A	70
WATER					
Community LOS					
Scope	Water service is provided to customers in most areas of the Town, as illustrated in Map 2-2 (2022 AMP). All areas that are connected to the water system have fire flow available.				
Scope	To ensure safe drinking water, the Town's drinking water system is operated under a Quality Management System as legislated under the Safe Drinking Water Act, 2002, and regulated by the Ontario Ministry of the Environment and Climate Change. Water quality is tested regularly, as required, and the results of this testing are reported annually.				
Reliability	Boil water advisories can be caused by adverse water quality test results or problems in the water treatment and distribution system. Service interruptions can occur as a result of routine water system maintenance or asset failure. Both boil water advisories and service interruptions are handled in accordance with the Town's Quality Management System Operational Plan.				
Technical LOS					
Service Attribute	**Performance Measure**	**2022**	**2025**	**Trend**	**Target Performance (2035)**
Scope	*Percentage of properties connected to the Town water system.	98%	98%	⟷	N/A
Scope	*Percentage of properties where fire flow is available.	98%	98%	⟷	N/A
Reliability	*The number of connection-days per year where a boil water advisory notice is in place compared to the total number of properties connected to the Town water system.	0 connection days / connection	0 connection days / 12,000 connection	⟷	0 connection days / connection
	*The number of connection-days per year lost due to water main breaks compared to the total number of properties connected to the Town water system.	0.0002 connection days / connection	3.5 connection days / 12,000 connections	↑	Decrease

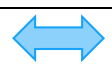
*Shaded performance measures are regulated.

WASTEWATER					
Community LOS					
Scope	Wastewater service is provided to customers in most areas of the Town, as illustrated in Map 2-3 (2022 AMP).				
Reliability	The Town does not have combined sewers (sewers designed to carry both sanitary and storm water in a single pipe). Despite this, stormwater can enter the wastewater system through numerous sources (e.g., openings on maintenance hole covers, cracks, holes, failed joints, and incorrect or faulty connections). Sewers are designed to handle flows significantly higher than average daily flows to help address peak flows resulting from inflow and infiltration during wet weather events. There are also several initiatives underway to reduce inflow and infiltration. The Town has a program underway to replace all sanitary maintenance lids in floodplain areas with watertight lids. Furthermore, the Town also has a program underway to inspect sewers, identify stormwater connections, and reline/replace sanitary sewers with high infiltration rates in floodplain areas.				
Reliability	The Town's facilities are operated in accordance with Environmental Compliance Approvals (E.C.A.) as issued by the Ministry of Environment, Conservation and Parks. A description of the effluent that is discharged from each wastewater treatment facility is provided in the respective E.C.A.: • Wastewater Treatment Plant No. 1: 6436-B5TLN5 • Wastewater Treatment Plant No. 2: 2602-9QDN8Y				
Service Attribute	**Performance Measure**	**2022**	**2025**	**Trend**	**Target Performance (2035)**
Scope	*Percentage of eligible properties connected to the Town wastewater system.	98.0%	98.0%	⟺	100%
Reliaility	*The number of connection-days per year lost due to wastewater backups compared to the total number of properties connected to the Town wastewater system.	0.0002[A] connection days / connection	0.00025 (12 back ups at 6 hours each per 12,000 connections)	⟺	0%
Reliability	*The number of effluent violations per year due to wastewater discharge compared to the total number of properties connected to the Town wastewater system.	0.0002 violations / connection	0.0002 violations / connection	⟺	0%
STORMWATER					
Community LOS					
Scope	The stormwater management system provides for the collection of stormwater in order to protect properties and roads from flooding, to effectively remove contaminants from stormwater runoff, and to manage the discharge rate of stormwater back into the natural environment.				
Scope	The scope of the Town's stormwater system is illustrated in Map 2-1 (2022 STM AMP). The map shows the geographical distribution of municipal stormwater mains and locations of stormwater management facilities (ponds) and pump stations.				
Reliability	The stormwater management system is resilient to five-year storms and ensures most properties in serviced areas are resilient to 100-year storms.				
Reliability	The Town inspects and maintains the stormwater system to ensure that it functions as intended.				
Technical LOS					
Service Attribute	**Performance Measure**	**2021**	**2025**	**Trend**	**Target Performance (2035)**
Scope	*Percentage of properties in the municipality resilient to a 100-year storm.	94.5%	94.5%	⟺	94.5%
Scope	*Percentage of the municipal stormwater management system resilient to a five-year storm.	100%	100%	⟺	100%
Reliability	Percentage of catch basins cleaned at least once within the past five years.	100%	100%	⟺	100%
Reliability	Percentage of the stormwater linear network inspected (CCTV) within the past 10 years.	1%	1%	⟺	100%
Reliability	Percentage of the stormwater linear network flushed within the past 10 years.	1%	1%	⟺	100%
Reliability	Percentage of oil/grit separators inspected within the past year.	0%	0%	⟺	100%
Reliability	Percentage of stormwater management facilities comprehensively inspected (including sediment depth monitoring) within the past five years.	100%	100%	⟺	100%
Reliability	Percentage of pump stations where condition assessments have been completed within the past 10 years.	0%	100%	↑	100%

*Shaded performance measures are regulated.

Non-Core Service Area Levels of Service Performance Trends					
INFORMATION TECHNOLOGY					
Community LOS					
Quality	Information Technology assets are kept in a good state of repair.				
Safety	Information Technology assets are safe and secure.				
Technical LOS					
Service Attribute	**Performance Measure**	**2024**	**2025**	**Trend**	**Target Performance (2035)**
Quality	Percentage of infrastructure and systems within optimal service life.	45%	45%	⟺	100%
Quality	Percentage of equipment within optimal service life.	84%	84%	⟺	100%
PARKING					
Community LOS					
Quality	Parking equipment is kept in a state of good repair				
Capacity	Parking spaces are adequately available				
Accessibility	Accessible parking spaces are adequately available				
Technical LOS					
Service Attribute	**Performance Measure**	**2024**	**2025**	**Trend**	**Target Performance (2035)**
Quality	Percentage of equipment within optimum service life	100%	97%	↓	100%
Capacity	Number of available parking spaces (on-street and in municipal lots)	1,337	1337	⟺	1,377 (min)
Accessibility	Number of parking spaces that are accessible	53	53	⟺	N/A
FLEET					
Community LOS					
Quality	Fleet assets are kept in a state of good repair				
Capacity	Transit has enough buses to deliver consistent service				
Accessibility	Transit buses are accessible				
Environmental Resiliency and Stewardship	Town vehicles minimize natural impacts				
Safety	Emergency response vehicles can respond reliably to emergencies				
Technical LOS					
Service Attribute	**Performance Measure**	**2024**	**2025**	**Trend**	**Target Performance (2035)**
Quality / Reliability	Percentage of corporate fleet assets within optimum service life (excluding essential and critical fleet)	37%	32%	↓	100%
Capacity	Percentage of required transit fleet owned by Town	50%	100%	↑	100%
Accessibility	Percentage of transit fleet complying with AODA requirements	100%	100%	⟺	100%
Environmental Resiliency and Stewardship	Percentage of eligible vehicles that are electric or hybrid	N/A	32%	N/A	100%
Safety	Percentage of critical and essential fleet operating within optimum service life	N/A	43%	N/A	100%

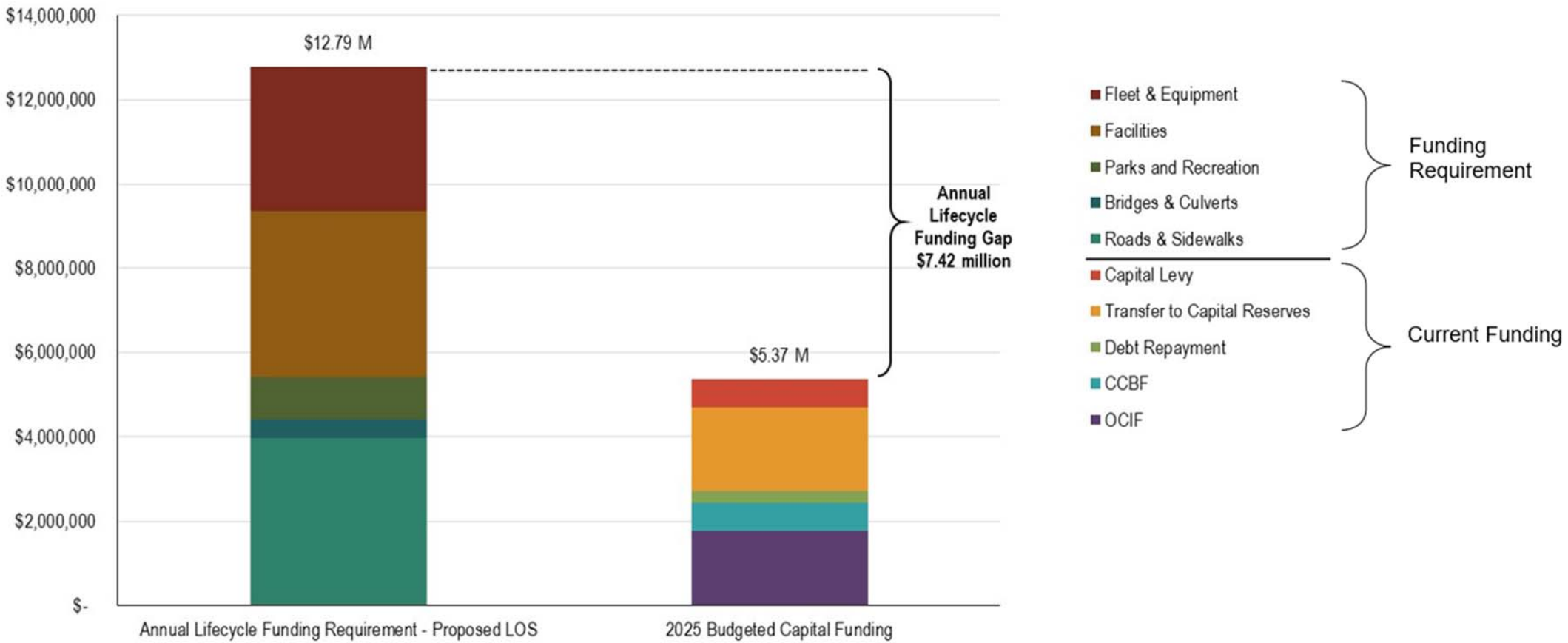
*Shaded performance measures are regulated.

EQUIPMENT					
Community LOS					
Quality	Town equipment is kept in a state of good repair				
Safety	Protection Services equipment is reliable and safe				
Accessibility	Transit stops are accessible				
Technical LOS					
Service Attribute	**Performance Measure**	**2024**	**2025**	**Trend**	**Target Performance (2035)**
Quality	Percentage of equipment within optimum service life	39%	68%		100%
Safety	Percentage of fire/police/by-law equipment asset classes meeting required standards	84%	58%		100%
Accessibility	Percentage of transit stops that are accessible	88%	88%		100%
NON-CORE BUILDINGS					
Community LOS					
Quality	Facilities are kept in a state of good repair				
Environmental Resiliency and Stewardship	Facilities are managed to support energy conservation and efficiency improvements				
Accessibility	Public facilities are Accessible				
Technical LOS					
Service Attribute	**Performance Measure**	**2024**	**2025**	**Trend**	**Target Performance (2035)**
Quality	Percentage of assets are in fair or better condition	92%	92%		100%
Environmental Resiliency and Stewardship	Percentage of eligible facilities with electric vehicle charging stations	0%	40%		100%
Environmental Resiliency and Stewardship	Annual natural gas consumption per square foot	N/A	N/A	N/A	Minimize
Environmental Resiliency and Stewardship	Annual electric energy consumption per square foot	N/A	N/A	N/A	Minimize
Environmental Resiliency and Stewardship	Annual water consumption per square foot	N/A	N/A	N/A	Minimize
Accessibility	Percentage of facilities that have had an accessibility audit	N/A	N/A	N/A	100%
PARKS AND RECREATION					
Community LOS					
Quality	Waterfront Infrastructure, park amenities, and recreational amenities are kept in a state of good repair				
Capacity	Park amenities meet the needs of their neighbourhoods				
Environmental Resiliency and Stewardship	Parklands are sufficiently available for use				
Safety	Ensuring that Parks are safe for visitors				
Technical LOS					
Service Attribute	**Performance Measure**	**2024**	**2025**	**Trend**	**Target Performance (2035)**
Quality	Percentage of waterfront infrastructure that is in fair or better condition	12%	11%		100%
Quality	Percentage of park amenities in fair or better condition	91%	75%		100%
Quality	Percentage of recreational amenities in fair or better condition	98%	97%		100%
Capacity	Percentage of parks with over 75% of primary facility requirement targets met	38%	27%		Maintain
Environmental Resiliency and Stewardship	Total parkland (ha) per 1,000 residents	6.25%	7.35	N/A	7.35
	Nature parks (ha) per 1,000 residents	N/A	2.73	N/A	2.2
	Athletic parks (ha) per 1,000 residents	N/A	1.81	N/A	1.4
	Leisure parks (ha) per 1,000 residents	N/A	0.89	N/A	1.2
	Cultural parks (ha) per 1,000 residents	N/A	0.63	N/A	0.6
	Landmark parks (ha) per 1,000 residents	N/A	0.47	N/A	0.6
Safety	Percentage playgrounds achieving CSA compliance based on monthly inspections	100%	100%		100%

*Shaded performance measures are regulated.

APPENDIX C

Lifecycle Funding Gap Assessment



APPENDIX D

Asset Management Readiness Scale Assessment Tool

FEDERATION OF CANADIAN MUNICIPALITIES
FÉDÉRATION CANADIENNE MUNICIPALITÉ

Introduction and Instructions

FCM's Asset Management Readiness Scale (AMRS) helps municipalities measure progress on asset management in five competency areas. It can also be used to identify priority areas for a community when it comes to its asset management practices. Each of the five competencies is a building block, composed of three outcome areas. Together, the five building blocks form the practice of asset management. The AMRS is also a key tool that is used to track progress by FCM and is central to demonstrating results and successes of the Municipal Asset Management Program (MAMP).
Please note that the AMRS is meant to measure the readiness of your community by competency across all asset classes (e.g. water, wastewater, buildings, roads, bridges, storm water, etc.). It is possible that your asset management practices are very advanced in one asset class and less so in another. The overall rating should reflect the less advanced asset classes.

These instructions focus on how to use this Excel Asset Management Readiness Assessment Tool (Tool). **We strongly encourage you to read the AMRS (see link below) prior to completing this assessment and keep the document on hand as you work through this Tool, which can be found at the following link.**

Asset Management Readiness Scale

You may also find it helpful to watch the following webinar which provides additional guidance on how to use the AMRS.

Assessing your community using FCM's Asset Management Readiness Scale

The Tool is organized as follows:

1. Introduction and Instructions
2. Organization Information (OrgInfo)
3. Readiness Assessments (1 tab for each of the 5 competencies)
    a. Policy and governance (Policy-gov)
    b. People and leadership (People-lead)
    c. Data and information (Data-info)
    d. Planning and decision-making (Plan-decision)
    e. Contribution to asset management practice (Contrib-AM)

Note that the competency tabs can be completed in any order.

Organization Information

Before starting your assessment, ensure that the Organization Information tab is complete.

Competencies

Note that the following instructions apply to each of the five competency tabs. Each competency is separate from the others and can be completed in any order.

Outcome areas – current level of achievement

Each of the competencies has three outcome areas and each outcome area has five levels. First, select the outcomes your organization has already achieved starting at level 1, by clicking on the checkboxes to the left of each statement. You must meet all the requirements of each outcome area level in order for the Tool to reflect that level of competency. It is possible that you have not met some or any of the outcome area levels - in these cases, do not click on any of the checkboxes.

Once you have completed the checkboxes for an outcome area, use the text box to provide information on current actions your organization is taking or has taken in this specific outcome area to achieve your stated level. Please note that including information in this section is required as it will provide FCM more detail on your organization's current state of asset management maturity, and better understand your project and how it is intended to help you progress along the scale.

Note: To make multiple bullet points or separate paragraphs in an Excel comment box, press Alt+Enter while typing in the comment box to start a new line.

Once you have completed the current state for an outcome area of a competency, the Tool will automatically calculate the readiness level for that outcome. Once the current states for all three outcome areas of a competency are completed, the Tool will automatically calculate an overall readiness level for the competency.

Outcome areas – future level of achievement

After you have completed the current state for all three outcome areas, you can then proceed to the expected future state assessment. For each outcome area, please select the level you expect your organization will achieve at project completion by using the dropdown box. Please only consider the change that would be a direct result of your project at the time the project is completed.

Below the dropdown box is a text box for you to provide information on how your project activities will result in your expected future level. Please note that this section is required - the information you provide is critical for FCM to fully understand your proposed project. Please make a direct link between the project activities to be undertaken and the expected future state. For those outcomes that are not affected by your project activities, please enter: “no anticipated impact".

Once you have completed the expected future state for all three outcome areas, the scale will automatically calculate the future state overall rating for the competency.

This process must be repeated for each competency.

Once you have completed the form, please save and include in your application.

This Excel AMRS Tool was developed with support from the Canadian Network of Asset Managers (CNAM).

Asset Management Readiness Scale Assessment Tool

Organization Information

Name of Lead Applicant	Town of Cobourg
Province/Territory (select form dropdown)	Ontario
Project Title	Asset Management Software and Facility Condition Assessments
Project Number (for FCM use only)	for FCM use only

Asset Management Readiness Scale Assessment Tool

Policy and governance

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.

Note: To achieve each level, you must meet every requirement of each level before it.

Current State

Outcome areas	Outcomes: Select the outcomes that your organization has achieved.									
		Level 1		Level 2		Level 3		Level 4		Level 5
A: Policy and Objectives	☑	Senior management is committed to formalizing an **AM program**.	☑	We have drafted an **AM policy**.	☑	We are starting to use our **AM policy** to guide our actions.	☐	We manage assets and services in accordance with our **AM policy** and organizational objectives.	☐	We continue to validate and refine our corporate, service and AM objectives based on the evolving needs of our community.
			☑	Senior management and council have endorsed the **AM policy**.						
Please provide notes that describe how you have achieved your current level	The Town's asset management policy was approved in July 2019 and updated in July 2024. The policy includes but is not limited to developing an asset management plan, maintain and manage assets at defined levels in a sustainable way, establish infrastructure replacement strategies, and provide stable long term funding to replace/renew infrastructure assets.									

Expected Future State

Current (from left)		Expected
3	1	**Select the level you expect to achieve at the end of this project**	4

Please provide information about how your project activities will help you achieve your expected future state

In order to develop an asset management plan, we are first to collect a comprehensive inventory of all assets. The Town is utilizing GIS software to establish a database and utilize for record keeping, projections, and reporting. The software will help us to document lifecycle activities, establish replacement strategies, and will project budget estimates for long term planning, ie. rate studies, funding, etc.

Asset Management Readiness Scale Assessment Tool

Policy and governance

Current State

	Outcomes: Select the outcomes that your organization has achieved.									
Outcome areas		**Level 1**		**Level 2**		**Level 3**		**Level 4**		**Level 5**
B: Strategy and Roadmap	☑	We have identified the benefits that we want AM to deliver, and the benefits support organizational objectives.	☑	We have a strategy for our **AM program**.	❑	We have a **roadmap** that details the actions for implementing our **AM strategy** over the next 3 to 5 years.	❑	We are achieving our **AM policy** objectives. The necessary workflows, documents, and reporting tools are in place.	❑	We follow our **roadmap** and continually improve our AM practices.
			❑	We have a draft **roadmap** that outlines our approach for the next 1 to 3 years.			❑	We update our **roadmap** to address evolving needs.	❑	We document improvements to our AM practices.
Please provide notes that describe how you have achieved your current level	The Town's asset management policy identifies the benefits that we want AM to deliver such as maintaining assets at defined levels to support safety, is sustainable, utilizes full life cycle costing principles, establishes and monitors standards and service levels, budgeted appropriately to extend useful life, provides long term funding plans, and prioritizes resources and expenditures at an acceptable level of risk.									

Expected Future State

Current (from left)		**Expected**
1	**1**	**Select the level you expect to achieve at the end of this project**	**2**

Please provide information about how your project activities will help you achieve your expected future state

It is anticipated that GIS software will serve as a comprehensive database of assets that Staff will utilize to build a roadmap for implementation of a 3-5 year planning and budget strategy. Understanding the remaining life of all assets will determing the actions necessary to sustain a defined level of service.

Asset Management Readiness Scale Assessment Tool

Policy and governance

Current State

Outcome areas		Level 1		Level 2		Level 3		Level 4		Level 5
		Outcomes: Select the outcomes that your organization has achieved.								
C: Measurement and Monitoring	☑	We have identified short-term actions that will demonstrate early progress on AM.	☑	We are collecting baseline data on our current AM practices.	☑	We have established performance measures to monitor our asset management progress, outcomes, and the benefits to our community.	☐	We use performance measures to monitor AM progress, outcomes, and benefits.	☐	We monitor performance and use the feedback to prioritize and make ongoing refinements and improvements to AM practices.
Please provide notes that describe how you have achieved your current level	The Town has a substantial inventory of existing assets including their condition, age, remaining useful life, replacement value, and lifecycle activities. There are service areas that require addidional inventory collection and we intend to build the inventory continually. Our 2025 AMP has established performance measures to monitor progress and report on outcomes.									

Readiness level (automatic)	Working on Level 1	Completed Level 1	Completed Level 2	Completed Level 3	Completed Level 4	Completed Level 5
		☑				

Expected Future State

Current (from left)		Expected
3	**Select the level you expect to achieve at the end of this project.**	4

Please provide information about how your project activities will help you achieve your expected future state

Continual monitoring and updating of the asset inventory will ensure realtime accuracy of the data. The Town's Asset Management Team will be reviewing performance measures and developing an implementation plan for annual measuring and reporting.

Expected State
Level 2

Asset Management Readiness Scale Assessment Tool

People and leadership

People and leadership: 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.

Note: To achieve each level, you must meet every requirement of each level before it.

Current State

	Outcomes: Select the outcomes that your organization has achieved.									
Outcome areas		**Level 1**		**Level 2**		**Level 3**		**Level 4**		**Level 5**
A: Cross-functional Teams	☑	We have identified the representation we need on our cross-functional **AM team.**	☐	We have a cross-functional **AM team*** that guides the planning and implementation of our **AM program.**	☐	Our **AM team*** works within our organization to lead, communicate, and support AM improvements and organizational changes.	☐	Our **AM team*** is permanent and tasked with guiding and supporting AM across the organization on an ongoing basis.	☐	Our **AM team*** guides and supports the ongoing improvement of AM within the organization
Please provide notes that describe how you have achieved your current level	The Town currently has one dedicated full-time staff member in Engineering supporting Asset Management and a vacant Manager position who will champion Asset Management corporate wide upon hire. Additional contributions from staff across several departments has assisted with the collection of the asset inventory.									

***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.**

Expected Future State

Current (from left)		**Expected**
1	**1**	**2**
	Select the level you expect to achieve at the end of this project	

Please provide information about how your project activities will help you achieve your expected future state

With the establishment of an Asset Management Team, the Town will develop a corporate wide understanding of the importance of AM and be able to integrate it more fully into core roles and responsibilities. The Team will consist of key staff members who are responsible for the maintenance of assets that support service delivery. The Team will guide the planning and implementation of the Town's AM program.

Asset Management Readiness Scale Assessment Tool

People and leadership

Current State

Outcome areas		Level 1		Level 2		Level 3		Level 4		Level 5
	Outcomes: Select the outcomes that your organization has achieved.									
B: Accountability	☑	We have a champion who has been tasked with planning for our **AM program.**	☐	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.**	☐	Our **AM team*** is accountable for implementing our **AM program.**	☐	We have operationalized AM roles and responsibilities across our organization.	☐	We document changes to AM roles and responsibilities as needed to support our evolving requirements.
			☐	Our **AM team** is accountable to senior management and council.	☑	AM roles and responsibilities are included in staff job descriptions.				
Please provide notes that describe how you have achieved your current level	The Director of Public Works and Engineering is currently leading the planning and advancement of the asset management program. A new position (Asset Management Coordinator) has been onboarded to champion data collection, inventory management and data reporting. The Town if currently recruiting for a Manager, Infrastructure Planning who will take the reigns as AM Champion upon hire. AM roles and responsibilities are included in both job descriptions.									

Expected Future State

Current (from left)		Expected
1	1	**Select the level you expect to achieve at the end of this project**	1

Please provide information about how your project activities will help you achieve your expected future state

The Town is establishing an Asset Management Team to commence in 2026. The Team willl help ensure the AM program is well-supported with the necessary resources in all service areas and have clear direction and sufficient time to achieve its goals.

Asset Management Readiness Scale Assessment Tool

People and leadership

FCM FEDERATION OF CANADIAN MUNICIPALITIES | FÉDÉRATION CANADIENNE DES MUNICIPALITÉS

Current State

	Outcomes: Select the outcomes that your organization has achieved.									
Outcome areas		**Level 1**		**Level 2**		**Level 3**		**Level 4**		**Level 5**
C: Resourcing and Commitment	☑	Council knows that resources must be dedicated to exploring the requirements for **AM** and for drafting an **AM roadmap.**	☑	Council demonstrates buy-in and support for AM and allocates resources (funding or staff time) to further develop the **AM program.**	☐	Council champions AM as a core business function and has approved funding to continue **AM roadmap** activities.	☐	Council funds ongoing AM monitoring and enhancement.	☐	The **AM team** measures and monitors progress.
									☐	Council demonstrates commitment to ongoing improvement of AM practices.
Please provide notes that describe how you have achieved your current level	Through the development and approval process of the Town's asset management policy and plans, Council has been well informed of the Town's reporting requirements and has been supportive of funding additional staff resources for asset management.									

Readiness level (automatic)	**Working on Level 1**	**Completed Level 1**	**Completed Level 2**	**Completed Level 3**	**Completed Level 4**	**Completed Level 5**
		☑				

Expected Future State

Current (from left)			**Expected**
2	**1**	**Select the level you expect to achieve at the end of this project**	**3**

Please provide information about how your project activities will help you achieve your expected future state

As the program transitions from planning to implementation, there is an opportunity to further connect Council with the underlying processes and progress through annual reporting from our Asset Management Team. Strengthening this alignment will help support informed decision-making and reinforce the successful move from plan to practice.

Expected State
Level 1

Asset Management Readiness Scale Assessment Tool

Data and information

Data and information: 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.

Note: To achieve each level, you must meet every requirement of each level before it.

Current State

Outcome areas	Outcomes: Select the outcomes that your organization has achieved.									
		Level 1		Level 2		Level 3		Level 4		Level 5
A: Asset Data	☑	We have **asset inventory data,** including approximate quantities of assets within most asset groups.	☑	We have a **basic inventory** of most **critical assets**, including information on general asset properties such as size, material, location and installation date.	☑	We have a consolidated, **basic inventory** of all assets.	☑	We have expanded **inventory** data for some assets.	☐	We have expanded **inventory data** for most assets.
					☑	We have defined life cycle investment requirements for **critical assets**.				
	☑	We have some anecdotal information on asset condition. Some age information exists.	☑	We are moving our data to a centralized location for use by the **AM team** (note: this does not require AM software).	☑	We have standardized condition rating systems defined for most asset groups.	☑	We have evaluated the life cycle investment requirements associated with **critical assets.**	☐	We have evaluated the life cycle investment requirements associated with most assets.
			☑	We have defined **critical assets** and have some information on asset condition for these assets.	☑	We have asset condition information on all **critical assets.**	☐	We update data according to cycles defined in our **AM plans** or **strategy.**		
Please provide notes that describe how you have achieved your current level	The Town has a comprehensive inventory of all core and non-core assets. Some service areas have more expanded inventory data than others.									

Expected Future State

Current (from left)		Expected
3	1	**Select the level you expect to achieve at the end of this project** 4

Please provide information about how your project activities will help you achieve your expected future state

The Town's AM systems are being developed to implement annual and on-going data management procedures. Focus will be on service areas requiring additional data inventory collection, condition assessment accuracy, and lifecycle activity considerations.

Asset Management Readiness Scale Assessment Tool

Data and information

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Current State

	Outcomes: Select the outcomes that your organization has achieved.									
Outcome areas		**Level 1**		**Level 2**		**Level 3**		**Level 4**		**Level 5**
B: Performance Data	☑	We have informal or anecdotal approaches for measuring asset or service performance.	☑	We have some information on performance of **critical assets**, collected from a variety of sources.	☑	We have defined **level of service** measurements for some service areas.	☑	We have defined **level of service** measurements for critical service areas.	☑	We have defined **level of service** measurements for most or all service areas.
					☑	We have captured data on current **level of service** performance for some service areas.	☐	We communicate the results from our **level of service** measurement program to staff and council regularly.	☐	We continually improve how we collect data on **level of service** performance.
					☑	We have reviewed service levels and asset performance with council.				
Please provide notes that describe how you have achieved your current level	The Town's 2025 AMP defined levels of service for core and non-core service areas as required by O.Reg 588/17. Levls of service and asset performance were presented to Council prior to July 1, 2025.									

Expected Future State

Current (from left)		**Expected**
3	**Select the level you expect to achieve at the end of this project**	**4**

Please provide information about how your project activities will help you achieve your expected future state

The Asset Management Team will review LOS and performance measures regularly and make adjustments as necessary to ensure results can be accurately collected and reported to Staff and Council as part of the Annual Review.

Asset Management Readiness Scale Assessment Tool

Data and information

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Current State

Outcomes: Select the outcomes that your organization has achieved.

Outcome areas		Level 1		Level 2		Level 3		Level 4		Level 5
C: Financial Information	☑	We have **financial information** on our assets, supporting minimum PS-3150 reporting requirements.*	☑	We have major capital renewal and operating & maintenance (O&M) expenditure data for some assets.	☑	We have capital (new and renewal) and O&M expenditure data for most assets.	☐	We understand the cost of sustaining current **levels of service** for all **critical assets**	☐	We understand the trade-offs between investment and the **level of service** we deliver and use this to optimize our financial plans.
			☑	We have a strategy to link AM and **financial information**.	☑	We have linked AM and **financial information** for all **critical assets**.				
					☑	We can demonstrate the gaps between forecasted infrastructure needs and current spending levels.				
Please provide notes that describe how you have achieved your current level	The Town's 2025 AMP includes high level O&M expenditure data for all assets and more detailed data for core assets. The AMP links AM and financial information for all assets and identifies the funding gap between forecasted infrastructure needs and current spending levels. Out strategy to link AM and financial information is through the establishment of the Asset Management Team who will each guide their service areas to implement AM practices in the operational plans and utilize AM forecasting for capital and operational budget forecasting.									

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

Readiness level (automatic)	Working on Level 1	Completed Level 1	Completed Level 2	Completed Level 3	Completed Level 4	Completed Level 5
		☑	☑	☑		

Expected Future State

Current (from left)		Expected
3	Select the level you expect to achieve at the end of this project	4

Please provide information about how your project activities will help you achieve your expected future state

The AM Team will work to develop a strategy to link AM and budget forecasting to inform the Town's financial plan. The cost of sustaining current LOS and implementing future LOS are generally understood and as AM develops as a daily operational tool, more data tracking will further inform the operational component of lifecycle activities and renewal costs that are required to deliver the expected service level.

Expected State
Level 4

Asset Management Readiness Scale Assessment Tool

Planning and decision-making

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.

Note: To achieve each level, you must meet every requirement of each level before it.

Current State

	Outcomes: Select the outcomes that your organization has achieved.									
Outcome areas		**Level 1**		**Level 2**		**Level 3**		**Level 4**		**Level 5**
A: Documentation and Standardization	☑	Our asset planning approaches vary across the orgnization.	☐	Our departments follow a similar but informal asset planning approach.	☐	We have a structured asset planning approach, but application is inconsistent.	☐	We employ a consistent structured asset planning approach for each of our **critical services.**	☐	We employ a consistent structured asset planning approach for all services.
			☐	We evaluate investment needs and priorities based on a mix of structured and ad-hoc practices and criteria.	☐	We set priorities using criteria based on organizational goals and objectives.	☐	We set priorities using criteria that are fully aligned with our organizational goals and objectives.	☐	We adapt our planning approach and criteria to align with evolving organizational goals and objectives.
Please provide notes that describe how you have achieved your current level	The Town's AM planning approach is being established by Staff in Public Works and is consistantly applied across the organization however AM planning is not yet entrenched in each service area's operations.									

Expected Future State

Current (from left)		**Expected**
1	**1**	**Select the level you expect to achieve at the end of this project** — **3**

Please provide information about how your project activities will help you achieve your expected future state

The mandate of the AM Team is to develop a structured approach to AM planning and to broaden the adoption of these AM practices within each individual service area to ensure a consistant and uniform approach corporate wide.

Asset Management Readiness Scale Assessment Tool

Planning and decision-making

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Current State

Outcomes: Select the outcomes that your organization has achieved.

Outcome areas	Level 1	Level 2	Level 3	Level 4	Level 5
B: Asset Management Plans	☑ Our approach to asset renewal focuses on reacting to basic needs (e.g. growth, regulation and known problems).	☑ We have draft **AM plans** for some asset classes, with forecasted financial needs based on estimated data.	☑ We have **AM plans** for **critical services**, based on a mix of estimated and actual data.	☑ We have **AM plans** for most services based on actual data.	☐ We have **AM plans** for all services based on actual data.
			☑ Our **AM plans** include available information about **level of service** (current and target) and **risk** management.	☐ Our **AM plans** include basic needs forecasting and **risk** management strategies for **critical assets.**	☐ Our individual **AM plans** are integrated across services.
	☑ We evaluate priorities based on available information, staff experience, and input from council and management.		☑ Our **AM plans** identify short-term issues and priorities.	☐ 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**.	☐ Our **AM plans** include needs forecasts and **risk** management strategies for most assets. Plans address **risks** to both service and business goals
				☐ We keep our **AM plans** up to date through normal business.	
Please provide notes that describe how you have achieved your current level	The Town has established risk assessments for our core infrastructure using our asset management datamodels. Levels of Service have been established for all service areas. Our data is of good reliability and accuracy for core infrastructure and non-core service areas rely more on experienced staff knowledge.				

Expected Future State

Current (from left)		Expected
3	1	**Select the level you expect to achieve at the end of this project**

4

Please provide information about how your project activities will help you achieve your expected future state

The AM Team will be focusing on risk assessment criteria establishment for non-core assets and conducting risk ranking of assets in their service areas in 2026.

Asset Management Readiness Scale Assessment Tool

Planning and decision-making

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Current State

Outcomes: Select the outcomes that your organization has achieved.

Outcome areas		Level 1		Level 2		Level 3		Level 4		Level 5
C: Budgets and Financial Planning	☑	We prepare annual capital and operating budgets based on historical values	☑	We prepare annual capital and operating budgets based on a mix of historical values and new priorities.	☐	We prepare an annual capital budget based on an annual assessment of current needs.	☐	We prepare annual needs-based capital and operating budgets that are based on an annual assessment of **risks** and current needs.	☐	We prepare multi-year needs-based capital and operating budgets that are based on our short- and mid-term needs.
	☑	We deal with new needs reactively, as they occur.			☐	We have a 3-year **capital plan** that addresses short-term issues and priorities.	☐	We have a 5-year **capital plan*** and update it annually.	☐	We take a structured approach to address in-cycle changes.
							☐	We update our **long-term financial plan** (at least 10-year) annually and understand the risks associated with our investment gap.		

Please provide notes that describe how you have achieved your current level

The Town's current capital budget is based on a mix of new priorities, historical values and current needs identified in the AMP. The AMP data can comprehensively forecast a 10 year capital plan for all assets however there is not yet a link between the AMP and the budget planning process.

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

Readiness level (automatic)	Working on Level 1	Completed Level 1	Completed Level 2	Completed Level 3	Completed Level 4	Completed Level 5
		☑				

Expected Future State

Current (from left)		Expected
2	1 **Select the level you expect to achieve at the end of this project**	3

Please provide information about how your project activities will help you achieve your expected future state

The AM Team will develop a process for delivering a 3 year capital forecast to each service area for budget planning. This short term approach to capital planning will evolve to a 5 year capital plan as AM systems grow and data confidence is improved.

Expected State
Level 3

Asset Management Readiness Scale Assessment Tool

Contribution to asset management practice

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.

Note: To achieve each level, you must meet every requirement of each level before it.

Current State

Outcome areas	Outcomes: Select the outcomes that your organization has achieved.									
		Level 1		Level 2		Level 3		Level 4		Level 5
A: Training and Development	☑	Our AM training and development approach is informal and largely driven by the personal initiative of staff.	☐	Our AM training and development requirements are defined by management based on short-term needs.	☐	We provide all staff with basic AM awareness training.	☐	We define AM knowledge and skill requirements. A training plan is in place for all positions.	☐	We train select staff members as internal experts to support the ongoing development of organizational capacity.
	☑	Some staff conduct targeted research, seeking out basic information on AM concepts and techniques.	☑	Selected staff are trained on basic AM concepts.	☑	Some staff undergo training on advanced AM concepts specific to their roles and responsibilities.	☐	Council, management and staff receive role-appropriate AM training to establish needed capacity across the organization	☐	Proactive, role-based training serves as a support for career development and succession planning.
			☑	Council has opportunities to increase their understanding of AM concepts.	☐	Staff and council are able to communicate the value of AM in their own words.				
Please provide notes that describe how you have achieved your current level	The Town's Management Team will be presented with a basic AM awareness training. Specific Staff are continually investing in training and participating in conferences/seminars/webinars regarding AM and select staff AM responsibilities have undertaken more comprehensive training on AM concepts. As training opportunities arise, Management are made aware and select staff attend in certain service areas dependent upon the topic.									

Expected Future State

Current (from left)		Expected
1	1	**Select the level you expect to achieve at the end of this project**	3

Please provide information about how your project activities will help you achieve your expected future state

The AM Team will develop a basic AM awareness training for each of their service areas to be updated as AM systems evolve. The AM Team will present regularly to Management Team and prepare reports and presentations for Council on an annual basis. AM awareness training may also be incorporated into the CAO Town Hall meetings as a topic of interest.
Training opportunities for Town officials will also be reviewed and recommended.

Asset Management Readiness Scale Assessment Tool

Contribution to asset management practice

Current State

Outcome areas	Outcomes: Select the outcomes that your organization has achieved.									
		Level 1		Level 2		Level 3		Level 4		Level 5
B: Internal Communication and Knowledge Sharing	☑	We are aware of the need to mitigate the risk of losing information held in the minds of long-term staff.	☑	We mitigate the risk of losing information held in the minds of long-term staff, through improved record keeping.	☑	A culture of knowledge sharing is emerging internally, supported by official initiatives.	☐	A culture of knowledge sharing exists and is supported by a mix of formal and informal initiatives.	☐	We capture AM knowledge and it flows freely throughout the organization.
					☑	We collect and maintain AM knowledge resources.	☐	We disseminate AM knowledge resources within the organization.	☐	Staff leverage internal and industry knowledge and leading practice resources.
					☑	We communicate the benefits of AM internally to staff and council.				
Please provide notes that describe how you have achieved your current level	Our AM inventory for assets has become very comprehensive whereby we do not rely on the knowledge of long-term staff for historical information. The past year of completing the 2025 AM Regulatory requirements assisted with the establishment of a culture of knowledge sharing.									

Expected Future State

Current (from left)		Expected
3	1	**Select the level you expect to achieve at the end of this project**	4

Please provide information about how your project activities will help you achieve your expected future state

The AM Team will establish the formal initiatives for knowledge sharing through AM systems and the GIS asset inventory. The goal for AM is for information to flow freely throughout the operations of the organization and inform capital budget planning in a transparent and accountable way.

Asset Management Readiness Scale Assessment Tool

Contribution to asset management practice

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Current State

Outcomes: Select the outcomes that your organization has achieved.

Outcome areas		Level 1		Level 2		Level 3		Level 4		Level 5
C: External Communication and Knowledge Sharing	☑	We are investigating AM-related organizations and resources.	☑	Staff or elected officials attend AM-related events.	☑	We are members of one or more AM organizations and actively share our AM experience.	☐	We are actively involved in AM organizations and present at AM events.	☐	We are a thought leader on AM within the municipal sector.
							☐	We share information with our peers on our experience, innovations and lessons learned.	☐	We are active in coaching other organizations to improve the overall body of AM knowledge.
			☑	We share basic information on current capital projects with the public.	☑	We share basic information on our assets, the services we provide, and future needs with the public.	☐	We rely on the data from our **AM program** to explain decisions to the public.	☐	We communicate the benefits of AM to the public.
Please provide notes that describe how you have achieved your current level	Staff attend AM seminars and training opportunities to share AM experiences and learn from others. Through our budget deliberations, Staff provide justification reports to Council for prioritized capital works based on the AM work completed to date. Staff and Council members attend AM related events on occasion such as AMO. The Town now has an open data GIS Hub that is available to the public showing core asset related information.									

Readiness level (automatic)	Working on Level 1	Completed Level 1	Completed Level 2	Completed Level 3	Completed Level 4	Completed Level 5
		☑				

Expected Future State

Current (from left)		Expected
3	1	**Select the level you expect to achieve at the end of this project** 4

Please provide information about how your project activities will help you achieve your expected future state

The AM Team will further develop the public GIS AM hub to make data more accessible and communicate information regarding AM systems that are informing the Town's long term financial plan and annual capital budgets.

Expected State
Level 3